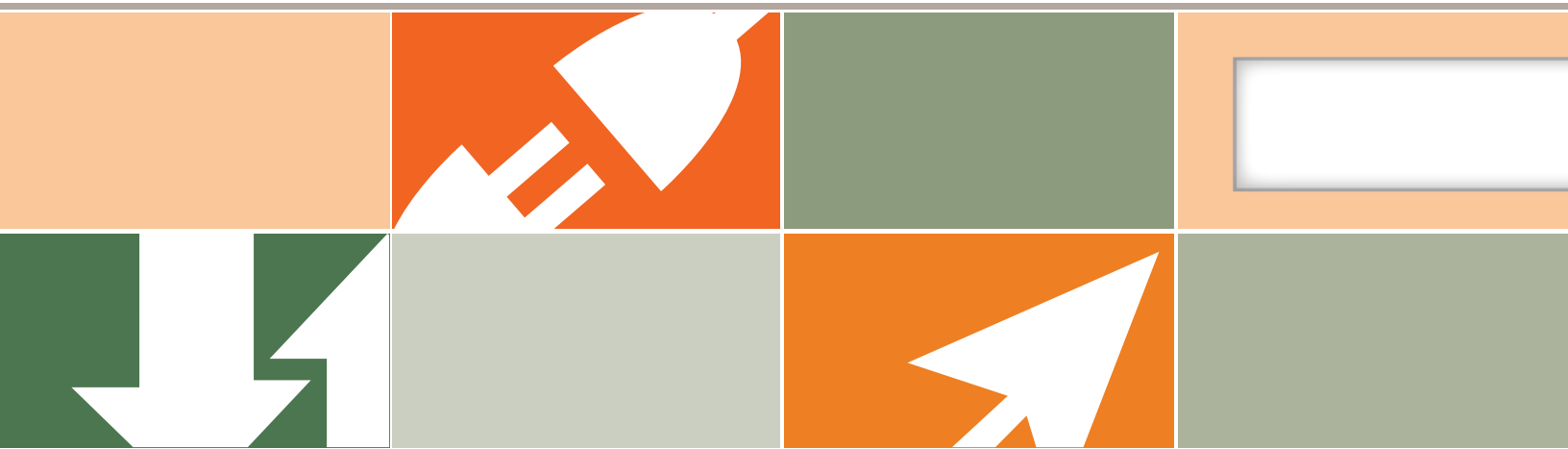




## STREAMLINING ONLINE GRANT APPLICATIONS: A REVIEW OF VENDORS ADDENDUM



Commissioned by  
the Technology  
Affinity Group.  
Based on Project  
Streamline review  
criteria.

November 2010



**Technology Affinity Group**  
Promoting technology in philanthropy

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## ABOUT THE TECHNOLOGY AFFINITY GROUP

TAG is a membership organization of foundations that promotes the understanding of how information and communications technology can help its members further their philanthropic goals. TAG provides members with valuable educational and information-sharing opportunities as well as a forum for learning from each other about best practices. TAG members can learn from peers; take advantage of the real value of being able to email or call on a peer about a particular issue; participate in TAG's annual conference; and benefit from a number of free seminars and resources.

## ABOUT PROJECT STREAMLINE

Project Streamline is an effort of funders and nonprofits to improve grant application, monitoring and reporting practices. It is a collaborative initiative of the Grants Managers Network, in partnership with the Association of Fundraising Professionals, the Association of Small Foundations, the Council on Foundations, the Forum of Regional Associations of Grantmakers, the Foundation Center, Grantmakers for Effective Organizations, and the National Council of Nonprofits. For more information, go to [www.projectstreamline.org](http://www.projectstreamline.org).

## ABOUT IDEALWARE

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched and impartial resources about software to help nonprofits make smart software decisions. By synthesizing vast amounts of original research and information into credible and approachable resources, Idealware helps nonprofits make the most of their time and financial resources. For more information, go to [www.idealware.org](http://www.idealware.org).

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# INTRODUCTION

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Online grant applications can be a bane or a blessing to grantseekers and grantmakers alike. The right system implemented properly can save time and effort. An ineffective one can become just another series of obstacles standing in the way of a successful grant process.

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With the support of the Technology Affinity Group (TAG), we were able to review two additional tools that provide significant value in the online application marketplace.

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Project Streamline's *Online Applications and Reporting Guide* encourages grantmakers to consider the features of the systems from the perspective of the user. They commissioned Idealware to research and write a guide to help organizations do just that.

Published in April 2010, *Streamlining Online Grant Applications: A Review of Vendors* evaluated seven different vendors against a set of Essential and Gold Standard features for online systems established in the *Online Applications and Reporting Guide*. We chose the

grants management tools targeted at a wide market, and with a fair number of clients—EasyGrants by Altum, eGrants.net by Bromelkamp, WebGrants by Dulles Technology Partners, Grant Lifecycle Manager by Foundant Technologies and IGAM by MicroEdge. We also included two products—PhilanTrack and Common Grant Application—specifically intended to help streamline grant processes.

But those aren't the only tools in the market. With the support of the Technology Affinity Group (TAG), we were able to review two additional tools that provide significant value in the online application marketplace. We've created this addendum to review them and compare them to the seven systems reviewed in our original report.

We're not aiming to cover every piece of functionality offered by these systems—many include robust capabilities around review committees, email communications, payment tracking, reporting and much more—but to focus on the features that can best help reduce the administrative burden of both grantseekers and grantmakers.

For more information, refer to the original *Streamlining Online Grant Applications: A Review of Vendors* report. TAG members can find that report on the TAG website; others can view it at <http://www.idealware.org/reports/streamlining-online-grant-applications-review-vendors>.

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# THE CRITERIA FOR COMPARISON

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To most usefully be able to compare these seven systems, we've divided the list of features into a set of high-level categories. Each of these categories summarizes an important group of Essential and Gold Standard features that allows us to compare the systems on an apples-to-apples basis. In the full review text beginning on page 10, we've marked the Gold Standard criteria with the following icon.

**Gold  
Standard**

Below, we simply describe the categories and the main bullet points measured by the standards—a full description of the guidelines from the Project Streamline report can be found in *Streamlining Online Grant Applications: A Review of Vendors*.

## Getting Started: Ease for Applicants

Most applicants start a grant writing process by reviewing the information that will be required of them and making a plan for how they will write or acquire it. A system that makes it easy to register and see the application questions—ideally, complete with character length limits and required fields—eases that process considerably.

This category includes the guidelines:

**Essential Standard 1.** Simple account creation with lost password functionality.

**Essential Standard 2.** Ability to preview and print a full application before starting and at any point before submission.

## Getting Started: Reuse of Information

It doesn't make sense for an organizations to re-enter its mailing address on every new application. Systems can provide for this, and even better, allow organizations

to reuse other applicable documents, find and reuse whole questions from prior applications, or even copy an entire application.

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**Most applicants start a grant writing process by reviewing the information that will be required of them, and making a plan for how they will write or acquire it.**

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This category includes the guidelines:

**Essential Standard 3.** Storage and retrieval of past data.

**Essential Standard 4.** Duplicate Controls.

**Gold Standard 1.** Access to previously submitted applications.

## Overall Applicant Ease of Use

Simple features can make a big difference in applicants' ability to quickly and effectively enter data into the form. Is it clear what's expected of them, or what they've done wrong when there's an error? Can they paste in text from a Word document? How easy is it to save—or to lose—work?

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## Simple features can make a big difference in applicants' ability to quickly and effectively enter data into the form.

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This category includes the guidelines:

**Essential Standard 5.** Ability for an applicant to save work and return to it later.

**Essential Standard 6.** Clear and widespread opportunities to save work.

**Essential Standard 7.** Ability to copy and paste text from word-processed documents into Web forms.

**Essential Standard 8.** Required fields.

**Essential Standard 9.** Error notices.

**Essential Standard 10.** Word or character counter.

**Essential Standard 11.** File attachments.

**Essential Standard 12.** Acknowledgement of receipt of submission.

### Good Form Design: Self-Service Creation

Many grantmakers' programs and evaluation criteria change over time. For these organizations, it's very useful to have a user-friendly set of tools to help create and edit application and status report forms. This category includes the guideline:

**Essential Standard 14.** Online forms editing

### Good Form Design: Flexibility of Forms

Some systems make it easy to create polished forms or categories? Can you ask a set of questions of only a particular set of applicants?

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## Some systems make it easy to create polished forms that are easy to parse and fill out.

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This category includes the guidelines:

**Essential Standard 13.** Good design

**Essential Standard 15.** Drop-down lists, check boxes and radio buttons

**Gold Standard 2.** Branch logic

**Gold Standard 3.** Advanced design capabilities

### Support for Multiple Stages

Many grantmakers require more than one online form. Eligibility quizzes, Letters of Intent (LOIs), proposals and status reports are all important parts of many grantmaking processes.

This category includes the guidelines:

**Essential Standard 16.** Support for eligibility quizzes.

**Essential Standard 17.** Online reporting.

**Gold Standard 4.** Multiple-stage applications.

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Grantseekers should be able to easily convert an LOI-stage application into a full proposal online form without having to reenter their information.

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### Information Sharing: Collaboration

Ideally, a grantmaking process should be a collaboration between a grantmaker and a grantseeker, with information shared in both directions.

This category includes the guidelines:

**Gold Standard 5.** Application editing and collaboration.

**Gold Standard 6.** Extranet capabilities.

### Information Sharing: Data Export and Access

Online applications, progress reports and even entire grant management systems don't exist in isolation. It's important to be able to export the data from the system or, ideally, to allow programmers to access the database through their own software.

This category includes the guideline:

**Gold Standard 7.** Software should allow data to be written to and from third-party systems.

## Product Background

Last but not least, we took a look at the history of the product. How long has the product been around? How many clients are using it? Using a product that is newer and has fewer clients increases the risk that the vendor will go out of business.

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It's important to be able to export the data from the system or, ideally, to allow programmers to access the database through their own software.

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# VENDOR SUMMARIES AND COMPARISONS

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Full, detailed reviews of each of the seven vendors included in the original report can be found in *Streamlining Online Grant Applications: A Review of Vendors*. Here we offer brief summaries of the two systems reviewed for this addendum, along with a few comments about how they compare to the original seven systems. We've also included a chart that compares all nine vendors' systems based on the criteria explained in the last section.

## Foundation Grant Manager by NPower

NPower's FGM, built on top of the Salesforce.com platform, provides a robust and quite customizable system for collecting online applications and status reports. Forms look polished and reasonably usable, though a few usability enhancements would go a long way—for example, the ability to know that an answer is too long for a particular field's character limit before submitting the entire application. Grantmakers can set up complex and powerful forms on their own, though altering existing forms beyond simple tweaks requires a substantial learning curve. All data can be exported manually or programmatically through Salesforce's extremely robust API.

## GrantedGE by FusionLabs

For those organizations using Raisers' Edge for fundraising, like community foundations, GrantedGE provides an interesting option for integrated grant management and online applications. The system has fairly advanced usability in some areas (like a character counter that tells applicants how much room is left in a field) but has holes in others—for example, if users enter text into a numeric field, the system reverts the field to a default number without notifying them. Grantmakers can set up custom forms through a reasonable, but somewhat redundant, process, and if they know HTML they can

completely customize forms to their requirements. The data from online forms can be reported on, and is accessible through an open data model and a set of APIs.

NPower's toolset offers a robust, customizable option for a mid-level price. GrantedGE is likely to be of interest particularly to larger community foundations or others who rely on Blackbaud's Raisers Edge for fundraising. Both systems offer compelling options, and they're comparable to the well-reviewed tools from among the seven we looked at in the initial report. The following chart details how they compare.

## Detailed Reviews

As we did in our original report, here we've reviewed the two systems in detail based on the Gold and Essential Standards defined in Project Streamline's *Online Applications and Reporting Guide*. For more information about our review process or how these ratings were determined, please see Appendix A of *Streamlining Online Grant Applications: A Review of Vendors*.

# HOW DO THE VENDORS COMPARE?

All of these systems had some strong abilities to streamline the grantseeking and grantmaking process—but of course, the strengths and weaknesses varied across the systems.

For information on exactly how these ratings were determined see **Appendix A: How We Determined the Ratings.**

Most of the rest of the report is devoted to detailed reviews of each of these systems, but before we dive in, let's take a summary look at each.

	As of 3/2010 Report							As of 10/2010	
	EasyGrants by Altum	eGrants.net by Bromelkamp	WebGrants by Dulles	Grant Lifecycle Manager by Foundant	IGAM by MicroEdge	Common Grant Application by Ocean Peak	PhilanTrack by Philantech	Foundation Grant Manager by NPower	GrantedGE by FusionLabs
Getting Started: Ease for Applicants	●	●	●	○	○	○	○	○	●
Getting Started: Reuse of Information	●	○	○	○	○	●	●	○	○
Overall Applicant Ease of Use	●	○	○	●	○	○	○	○	○
Good Form Design: Self Service Creation	○	•	●	●	○	•	○	●	○
Good Form Design: Flexibility of Forms	●	●	●	○	●	○	●	●	●
Support for Multiple Stages	●	○	●	○	●	○	●	●	○
Information Sharing: Collaboration	●	●	●	○	○	○	○	○	○
Information Sharing: Data Export and Access	●	●	●	○	●	○	•	●	●
Product Background	○	○	○	●	●	○	○	○	○

• None ○ Fair ○ Solid ● Excellent

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# FOUNDATION GRANT MANAGER BY NPOWER

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**URL:** <http://www.npower.org/services/foundation-grant-manager>

**Summary:** NPower's FGM, built on top of the Salesforce.com platform, provides a robust and quite customizable system for collecting online applications and status reports. Forms look polished and reasonably usable, though a few usability enhancements would go a long way—for example, the ability to know that an answer is too long for a particular field's character limit before submitting the entire application. Grantmakers can set up complex and powerful forms on their own, though altering existing forms beyond simple tweaks requires a substantial learning curve. All data can be exported manually or programmatically through Salesforce's extremely robust API.

**Technical Setup:** Software as a Service

**Cost:** There is a one-time licensing and setup cost of \$25,000 for the entire grants management system, and then a \$5,000 annual fee. The system is built on top of Salesforce.com, and the foundation must also have licenses for Salesforce. However, the Salesforce foundation offers up to 10 licenses for free to 501(c)(3) organizations, and then a discounted fee of \$360 per user per year for additional full-user licenses. Those who only need read-only access or a subset of data might be able to use one of several options for less-expensive licenses between \$12 and \$120 per user per year.

## Getting Started: Ease for Applicant

**Simple Account creation with lost password functionality:** System registration follows standard best practices—applicants enter their user IDs and passwords and complete a set of customizable additional fields. If applicants forget their passwords, they can enter user IDs to receive their password by email. If they forget their user IDs, they must call the grantmaker or vendor to retrieve them; staff members can look up their email addresses or passwords or reset passwords, depending on their security privileges.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview packet includes links to all uploaded documents (though not the full text of the documents), but not which fields are required. If the grantmaker includes information about word limits in the description for a field, this information is also shown in the print version.

**Storage and retrieval of past data:** The system retains contact information for individual applicants and organizations so returning applicants do not have to re-enter it with each new application. However, it does not let grantees easily reuse more complex organizational information, like a list of board members or file attachments, except by copying and pasting.

**Duplicate controls:** The system checks the user name of each new registrant to make sure it doesn't already exist in the system. It does not check the organization's name or EIN number against existing records. If an applicant creates two accounts by accident, the grantmaker could manually copy and paste the information from one account to another and then delete one, but can't map the two accounts easily.

**Gold Standard**

**Access to previously submitted applications:** Applicants can easily see submitted applications. They cannot copy an entire existing application to use as a template for a new one, but they can copy and paste the answers to individual questions. Alternatively, the grantmaker can create a copy of an existing application which the applicant could then update.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application. If multiple people from the same organization want to collaborate on an application, they can use the same login or ask the grantmaker to set up multiple logins for the same organization.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. Applications are saved when applicants move from page to page. If they remain on a page without activity for two hours, the system will automatically save their work before timing out.

**Ability to copy and paste text from word-processed documents into Web forms:** Applicants can easily copy and paste text from Microsoft Word. Some formatting is lost, including bullet points and some line breaks, but text remains intact and usable.

**Required fields:** Grantmakers can easily define which fields are required. Required fields are designated fairly clearly with a red bar.

**Error notices:** If applicants try to submit applications with required fields left empty, or with an invalid value like a character in a number field, the system warns them as to which fields are invalid with red text at the top of the submission page.

**Word or character counter:** Grantmakers can define character limits for each field, and information about character limits can be included in the field descriptions shown to applicants. There is no character or word counter to show applicants how much space they've used as they fill out applications, and the field does not limit the amount of text that can be put in it. Instead, when applicants try to submit the application, they are told that one or multiple fields are too long.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can include instructions in the question text regarding desired file types, but the system will not validate file format. Each uploaded file must be smaller than 5MB. There is no virus scanning on uploaded files.

**Acknowledgment of receipt of submission:** When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the admin interface.

## Good Form Design: Self Service Creation

**Online forms editing:** Grantmakers can create or edit application forms through a somewhat complex, powerful online interface. Adding, removing or rearranging existing fields on an application is fairly straightforward; adding new fields will require a bit more of a learning curve.

**Support for form formatting and categorization:** Grantmakers control formatting for application forms through powerful tools in the web interface, and can drag and drop group fields into separate pages or categories within the pages. All text descriptions must be set up through a fairly complicated interface, but these fields can include HTML hyperlinks or other HTML text formatting.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, check boxes, radio buttons, file uploads and many more types. They also offer the ability to add customized linked fields, like the ability to add an unlimited amount of test records, with date, type of test and score.

### Gold Standard

**Branch logic:** There is no way to include branch logic—for example, asking a particular question only if the answer to a previous question was positive.

### Gold Standard

**Advanced design capabilities:** Grantmakers can include HTML in any text header, including video or audio files. They also have a fair amount of control over form layout through Salesforce's sophisticated Page Layout functionality, but cannot simply build a form from scratch in HTML.

## Support for Multiple Stages

**Support for eligibility quizzes:** Grantmakers can set up their own eligibility quizzes. While it's not possible out-of-the-box to have the quiz automatically check the organization's tax number against U.S. records for nonprofit status, grantmakers can click a button from within the interface to perform the check. It will not, however, check OFAC status. Grantmakers can define which messages to show at every step of the eligibility quiz, including reasons why the applicant is not eligible. They can also forward applicants to another quiz based on their answers, essentially creating a branching structure.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. There is no way for grantmakers to automatically include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report, but they can set up the benchmark information requested in reports on either a program or individual grantee level. This data is available for export or reporting.

### Gold Standard

**Multiple-stage applications:** Grantmakers can design a process with as many application stages and status report stages as they'd like. A proposal can automatically pull pre-populated application-specific fields for an LOI (such as the project description).

## Information Sharing: Collaboration

**Application editing and collaboration:** Application data is provided to grantmakers with appropriate security rights in editable format—in real time, as it's saved by the applicant. Grantmakers can report on any of the application fields and export them into Excel file format. Grantmakers with appropriate permissions can see and edit applications in progress—for example, to collaborate with applicants. Grantmakers can also return submitted applications to grantees through the system in order to ask for edits.

**Gold  
Standard**

**Extranet capabilities:** Applicants can see application status and due dates for upcoming progress reports, and change their own contact information. They do not have the ability to see dates of scheduled payments.

**Gold  
Standard**

## Information Sharing: Data Export and Access

**Software should allow data to be written to and from third party systems:** All of the data in the Foundation Grant Manager is stored in Salesforce objects, which can be extracted programmatically via Salesforce's robust API.

**Gold  
Standard**

## Product Background

**Vendor Background:** The Foundation Grants Manager online application functionality has been in use since summer 2009. Currently 10 foundations are using the system.

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# GRANTEDGE BY FUSIONLABS

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**URL:** [www.grantedge.net](http://www.grantedge.net)

**Summary:** For those organizations already using Raisers' Edge for fundraising, like community foundations, GrantedGE provides an interesting option for integrated grant management and online applications. The system has fairly advanced usability in some areas (like a character counter that tells applicants how much room is left in a field) but has holes in others—for example, if users enter text into a numeric field, the system reverts the field to a default number without notifying them. Grantmakers can set up custom forms through a reasonable, but somewhat redundant, process, and if they know HTML they can completely customize forms to their requirements. The data from online forms can be reported on, and is accessible through an open data model and a set of APIs.

**Technical Setup:** GrantedGE is installed onto your network and your staff's Windows computers. The system also requires the separate purchase and installation of Blackbaud's Raiser's Edge; online applications require the separate purchase and installation of Blackbaud's NetCommunity.

**Cost:** License costs range from around \$20,000 to \$85,000 for the entire grants management system, with an equivalent amount for setup costs—the average first year price is about \$60,000, not including the required additional Blackbaud systems. You must purchase Blackbaud's Raisers Edge at a substantial five-figure cost. Blackbaud's NetCommunity is also required in order to have any of the online functionality described in this report, at another five- to six-figure cost. Blackbaud's Financial Edge is recommended, at another substantial cost.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants enter their user IDs and passwords and complete a set of customizable additional fields. If applicants forget their passwords, they can enter user IDs (usually email addresses) to receive their passwords by email. If they forget their user IDs, they must call the grantmaker or vendor to retrieve them; staff members can look up their user ID or send the applicant an email with a reset password.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process, although they must navigate back to the main menu to do so. The preview packet includes links to all uploaded documents, though not the full text of the documents, and can include which fields are required and the character counts for each field.

## Getting Started: Reuse of Information

**Storage and retrieval of past data:** Grantmakers can decide what applicant information is retained so returning applicants do not have to re-enter it with each new application, including contact information, list of board members or any other desired fields.

**Duplicate controls:** The system checks each new registrant to make sure they don't already exist in the system based on a set of criteria defined by the grantmaker. The system can be configured to check for existing users based on name, address, EIN or other information, and then inform the applicant if an account already exists based on those criteria.

**Gold Standard**

**Access to previously submitted applications:** Applicants can easily see submitted applications. They cannot copy an entire existing application to use as a template for a new one, but they can copy and paste the answers to individual questions.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application. If multiple people from the same organization want to collaborate on an application, they can set up an unlimited number of system users with individual permissions to edit or view applications.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. Applications are saved when applicants move from page to page, but is not automatically saved otherwise. If applicants do not manually save their work on a page, the application will time out and they will lose their work after a grantmaker-defined length of time.

**Ability to copy and paste text from word-processed documents into Web forms:** Applicants can easily copy and paste text from Microsoft Word. Some text formatting is lost, but the text, bullet points and line breaks remain intact and usable.

**Required fields:** Grantmakers can easily define which fields are required. Required fields are not automatically designated as such—grantmakers typically include “required” in the field name. Grantmakers cannot mark fields as required with a color, like making the label red, without knowledge of HTML code.

**Error notices:** If applicants try to submit applications with required fields left empty, the system warns them with text at the top of the page, and highlights each field that's incorrectly filled out. This functionality follows standard usability best practices. If users enter invalid values—like a character in a number field—the system reverts the field back to a default value (like 0.00) without notifying them, and they may submit the form without realizing their answer had been changed. Grantmakers could try to work around this limitation by validating that the field is greater than zero, but this would not work when “0” is a valid value for the field.

**Word or character counter:** Grantmakers can easily define character limits for each field. Character limits are shown below each question, and a character counter shows applicants how many characters remain as they enter answers.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can define in instruction text which file types may be uploaded. Files are validated before upload to ensure they're in a permissible format. There is no virus scanning on uploaded files.

**Acknowledgment of receipt of submission:** When an application is submitted, the applicant is emailed a confirmation. Grantmakers can easily edit this email through the admin interface.

## Good Form Design: Self Service Creation

**Online forms editing:** Grantmakers can create or edit application forms through a complex online interface in Blackbaud's NetCommunity. These forms must then be mapped by hand to fields in GrantedGE. Updating fields, adding new ones or creating new forms is relatively straightforward, but the process requires a lot of steps—for instance, to update a field you need to make the change in NetCommunity, add the field in GrantedGE and then regenerate the template that controls the field.

## Good Form Design: Flexibility of Forms

**Support for form formatting and categorization:** Grantmakers control formatting for application forms through the NetCommunity web interface. They can group fields into separate pages or categories within the pages using a straightforward interface. In addition, they can do any desired formatting directly in HTML.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, check boxes, radio buttons, file uploads and many more types of features. Grantmakers can also include custom validation logic on any field—for example, to say that a date needs to be in a particular date range, or a dollar amount needs to be greater than \$20,000.

### Gold Standard

**Branch logic:** There is no easy way to include branch logic—for example, asking a particular question only if the answer to a previous question was positive. This currently requires a lot of HTML coding by hand.

### Gold Standard

**Advanced design capabilities:** Grantmakers can create any application form possible through HTML, assuming they have the knowledge, including support for complex layouts or embedded video or audio files.

## Support for Multiple Stages

**Support for eligibility quizzes:** The system does not support automatically scored eligibility quizzes. The system cannot automatically check 501(c)(3) or OFAC status based on EIN number as part of the application process, but grant administrators can click on a link within GrantedGE to view the appropriate records in Guidestar or another system of their choosing.

**Online reporting:** Grantees can submit interim and final reports online, either as attachments or simple online forms. Grantmakers cannot include single answers to previously asked questions (such as how applicants said they would measure outcomes), but could refer back to a review copy of the entire application. All data submitted in a form is available for export or reporting.

### Gold Standard

**Multiple-stage applications:** The system supports a two-stage application with a LOI and proposal. This process works in a specific way—the LOI consists of the first few pages of an application. If the LOI is approved, the grantmaker can “open” the remainder of the application. Applicants would see the fields they submitted in the LOI in a read-only version. If the grantmaker wants to make particular fields editable, they can put them on the new application pages, but the system would not pull in the existing responses from the LOI. Grantmakers can also create as many status report stages as they'd like.

## Information Sharing: Collaboration

### Gold Standard

**Application editing and collaboration:** Application data is provided to grantmakers in editable format once it's been submitted. Grantmakers can report on any of the application fields and export them into Excel file format. Grantmakers can see applications in progress, for example to collaborate with applicants, but cannot edit them. Grantmakers can return submitted applications to grantees through the system in order to ask for edits.

### Gold Standard

**Extranet capabilities:** Applicants can see application status and change their own contact information. They do not have the ability to see dates of required reports or scheduled payments.

## Information Sharing: Data Export and Access

### Gold Standard

**Software should allow data to be written to and from third party systems:** Vendor provides an API interface at no additional charge that lets programmers access data or integrate it with other systems. The full database is also accessible with a published data model for those who want to extract or import data beyond what the API supports.

## Product Background

**Vendor Background:** GrantedGE was created as a custom application for a single client in September 2005, and has been used by multiple clients since the spring of 2006. Currently, about 45 foundations are using the system.

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# ABOUT THE AUTHORS

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## Laura Quinn

### **Executive Director, Idealware**

As Idealware's Director, Laura leads Idealware's activities to provide candid information to help nonprofits choose software. Through research, reports, articles and training, Idealware allows nonprofits to make smart, informed software decisions. She conducted all the research for this report, wrote the reviews and compiled the summaries.

Prior to Idealware, Laura founded Alder Consulting, where she helped nonprofits create internet strategies, select appropriate software, and then build sophisticated websites on a limited budget. She has also selected software and conducted user research for multi-million dollar software and website implementations with such companies as Accenture and iXL. Laura is a frequent speaker and writer on nonprofit technology topics.

## Chris Bernard

### **Italics Media**

A longtime freelance writer and editor, Chris edited all of the text throughout the report. Prior to joining Idealware, he was a senior copywriter for the internal ad agency of a Fortune 25 company, a marketing communications specialist, a newspaper and magazine journalist, and a technical writer.