

WisTAF Grants Management System Recommendation

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This document contains a portion of the latest Idealware *Consumer Guide to Grant Management Systems* (July 2016) report. Idealware provides nonprofits with free in-depth analysis and reporting of available resources for almost any nonprofit information or systems management programs available commercially.

The portion I've excerpted contains information pertaining to the best Flexible Relationship Management programs available. Flexible Relationship Management programs are a step above programs that allow you to create online grant applications (which is what we use now). They allow you to create things like searchable reports, or interface with accounting programs, or generate reviewer materials for grants review committees. Each program is customizable to a greater or lesser degree, depending on the options it offers.

More complex grant management programs were also reviewed in the report, but I disregarded them. They not only cost more, but the increased customization and management features they offer aren't very relevant to WisTAF, since many of them are based on grant management requirements for multiple sources of public funding at the local, state and federal level, and our single public-funded grant program can easily be incorporated into a Flexible Relationship Management-level grants management program.

IOLTA programs have reported using two of the recommended Flexible Relationship Management programs: FLUXX and SmartSimple GMS360. These programs offered IOLTA agencies the most options relevant to grants funding the provision of legal services. I've highlighted those programs in the materials and left comments on them. Just in case the comments don't survive the website upload and download process, here's what they say:

- FLUXX : This program is used by several of the smaller IOLTA agencies. It's a good, solid program, but does not offer accounting interfaces, and you need to purchase a separate tied-in program to access specific outcomes from specific grantees, doubling the cost shown on the chart for both first year and ongoing costs.
- SmartSimpleGMS360: This is the program California uses, and that several of the larger programs are adopting based on CA's experience. It is extremely robust, allows for easy information retrieval for individual grantees or for types of outcomes, and has a very sophisticated accounting interface. It's about 25-33% more expensive than Fluxx (once the cost of the two necessary Fluxx modules is considered).

WisTAF falls under the "Small Grantmaker, basic functionality" category. However, we would need to use aspects of both programs that go beyond the basic functionality features into more customizable features. The upgrades would put us at the high end of the "Small Grantmaker" estimated first year and ongoing yearly costs for both programs.

Based on the way WisTAF currently uses grantee information, the way we would like to use grantee information and taking into account aspects of our program such as site visits, accounting needs for both the state and Bank of America grant programs and ease of use/support and training for board members who access the review features of the programs, I recommend that WisTAF purchases the SmartSimple GMS360 grant management program. I think it will offset the bulk of its cost through more efficient and effective use of staff time currently spent on grants management, reporting and review. The IOLTA

programs that use it highly recommend it, while I've heard some complaints about FLUXX costing more than expected through its price structure that charges for features that IOLTA programs define as necessary, but are not offered as part of the basic package (great if you don't use it for much, but increasingly expensive the more you customize your use). Since FLUXX doesn't offer the accounting features and requires multiple modules to access reporting data, I just don't think it would be as efficient for us to use, even if it's a bit cheaper. I think staff would still be doing a significant portion of the reporting and review work that I'd like us to cut back on.

Summary:

Recommended grants management program: SmartSimple GMS360

Estimated cost: \$25,000 to \$35,000 for the first year; \$12,000/year ongoing for access, support and upgrades.*

*This estimate is not included in the 2017 budget proposal. The first year is a one-time cost that I recommend be funded as part of the administrative cost for the Bank of America settlement, which would also cover a significant portion of the ongoing annual cost, based on our need to customize the grants management program to track outcomes for national reporting and to track income from our Bank of America investments.

applications, and easily configurable grant review workflows bolster an already solid application review process. However, Grants Management System is less strong when it comes to creating letters or other print communications, as there is no mail merge functionality. Since we last reviewed the system, the vendor has improved the reporting functionality, adding the ability for users to save their personal custom reports and settings to an easily-accessible “favorites” list, and support for charts, graphs, and other visualizations based on report results. An organization with five users, 10 grants per year, and only light online application and review functionality could pay as little as \$2,998 depending on the level of customization needed. An organization that receives more than 500 applications annually, and more-robust donor management capabilities, might pay closer to \$7,000 per year. Additional granting programs are possible with an additional yearly fee.

ZoomGrants

ZoomGrants is a well-laid out, hosted grants management solution centered on requests for proposals (RFPs) and the grant applications submitted in response to RFPs. Grant applications support an eligibility quiz in addition to the application itself, and can include fields for post-grant reporting. The system has robust support for the application process—applicants can manage their proposals and information for all funders using the system using one account, and can carry over contact information and other data from one application to another, or from a Letter Of Intent to a proposal. Only applicants, not foundation staff, can make changes to organizational information. Since the last time we reviewed this system, the vendor has added a global search functionality, and the ability for reviewers to report if they have a conflict of interest in reviewing a particular application, but there is no ability to use that information to match reviewers to applications. Merge fields are supported for emails, and you can schedule payments for individual grantees, but you cannot define a default payment schedule that applies to all awards. Pricing for the system is based on the number of grant or scholarship programs per year, starting at \$4,500 per year for one program, including support, unlimited users, and

unlimited applications, plus a one-time activation fee of \$500. Each additional grantmaking program adds \$2,000 annually.

Flexible Relationship Management

If you are hoping to track not just the basic details of a grant, but complex custom tracking information about applications and relationships, consider the growing number of systems geared to support this need with customizable options and strong support for relationship management.

First Akoya.net

First Akoya.net, Bromelkamp’s online grants management system built on Microsoft’s Dynamics CRM platform, provides solid mid-level functionality for a great price. The system leverages its Dynamics’ flexible constituent tracking base to provide users great relationship management capabilities, along with the ability to track applicants and grants by virtually any characteristics you choose. Like its sister product, First Pearl, First Akoya.net relies on Bromelkamp’s eGrant.net module, at additional cost, for online data collection and grants review. Dynamics CRM makes for a solid grants management platform, but its interface at times can obscure Akoya’s functionality. The outcomes module provides strong reporting on grantee progress, and grant requirements and progress report forms can be customized by giving program, but you’ll need the Builder module, at extra cost, to create new forms without paying additional fees. The vendor is open to performing custom development at additional cost for clients who need it and there are Dynamics CRM and First Akoya.net APIs available for those who want to extend the system themselves. Initial setup fees start at \$9,870 and \$1,920 annually for the first user. Each additional user costs \$870 per year.

Fluxx

Fluxx has a unique interface that replaces traditional menus and screens with cards arranged horizontally on the screen. Users can save sets of cards as “dashboards” containing frequently viewed information.

These cards are easily searchable and filterable to allow efficient access to information related to any entity in the system and can also contain graphical views of data. Like the rest of the system, the reporting functionality is polished, and Fluxx has added support for ad hoc reporting as well. Fluxx has added some new capabilities to let grantees manage their organization contacts in the system, the ability for new applicants to auto-fill their profile using GuideStar's Simplify Initiative, and support for grantees to manage all their grants for multiple funders in the system, through Grantseeker, a new standalone product. Fluxx boasts flexible, powerful automated workflow facility that supports grants review and payment approval processes. In addition, you can easily set up reminders for grantees and staff, and assign tasks to users based on schedules and events. Since the previous version of this report, the vendor now offers sophisticated reporting functionality for tracking outcomes data by grantee or program, although it's a standalone product called Impact Intelligence, which costs an additional \$5,940 per year. Though Fluxx began as an open source project, the creators of the system have made the decision to charge for licenses, hosting, and support in order to support its long-term sustainability. Pricing for the system is determined by multiple tiers, with differing levels of implementation and customization, starting at a flat fee of \$5,940 per year for the Streamline tier for smaller organizations that do not require any custom build-out. Larger organizations, which require considerable build out, could pay up to \$250,000 in the first year, with annual recurring costs starting at \$50,000 per year.

foundationConnect

foundationConnect is an online hosted solution built on top of the Salesforce platform. The vendor, roundCorner, is a privately held for-profit company, but the platform was originally created by the grantseeking nonprofit NPower. The system capitalizes on Salesforce's strong relationship-management features to provide robust tracking for organizations, contacts, and grants, including the ability to track and report on grantees with multiple related business units. Strong support for dashboards, task lists, and role-based views provides a feature-rich experience for grants managers while allowing program officers

and management to see only the information relevant to them. Grantees and external reviewers log in through a separate-but-tightly-integrated portal built on Salesforce Communities. Users will want to visit the Salesforce AppExchange to add third-party add-ons—such as Conga Composer or LOOP Document Services—for mail-merge and template capability. Email sent from foundationConnect is automatically logged and routed through Salesforce email servers, which shields organizations from the risk of being blacklisted for mass mailing, but is limited to 1,000 emails per day, and users can easily attach emails generated outside the system to a grantee's record. Many broadcast email programs, such as Vertical Response and Team Approach, also integrate tightly with Salesforce, while a free connector lets users log email sent from Outlook and synchronizes their contacts with the system. roundCorner, Inc. acquired the foundationConnect product and their team of experts from NPower in 2014. The initial setup cost for foundationConnect ranges from \$25,000 for small foundations to \$40,000 for larger foundations, with maintenance and support ranging from \$7,200 to \$14,400 and up per year. The Salesforce license is free for nonprofits for up to 10 user licenses, and costs \$432 per license per year on top of that.

GIFTS Online

Acquired by Blackbaud in 2014, GIFTS Online is a fully web-accessible, online hosted entry into the grants management arena that offers many of the strengths of MicroEdge's legacy installed products GIFTS and GIFTS Alta. It's fully loaded with optional modules, and its strong suits are tracking grant information, mail merging, and application review. Since we last saw the system, the vendor has added new modules with support for tracking grantee outcomes and scholarships. GIFTS Online can offer customized views per user and per role, including customizable user dashboards and online forms. The vendor offers tiered pricing for the system, based on the number of users and modules—an entry-level client could acquire GIFTS Online for about \$3,900 per year, while a very large foundation could expect to pay around \$42,477 per year.

SmartSimple's GMS360° is a flexible, easy-to-use system—qualities that have been enhanced in recent updates with new global search functionality. This system lets you create relatively complex online forms that can contain a wide variety of field types, including rich text fields with formatting toolbars and internal tracking fields that can be made invisible to applicants. New functionality allows users to create multiple versions of the same form and display different versions to different applicants automatically through conditional logic. Uploaded files can be version-controlled and indexed, making their contents available to queries and reports. The system provides useful support for managing relationships, broadcast email, mail-merged letters, and reporting, as well as integrated task lists and dashboards to manage each user's work. Payment functionality and Budgeting are particularly strong, with support for payment workflows, multiple currencies, and interest repayment schedules for program-related investments. SmartSimple implementation starts at about \$15,000, depending on number of programs and complexity of grant workflows and processes. Annual support and maintenance are included in monthly user fees. "High usage" staffers, such as grants administrators and program officers who use the system more than forty hours a month, are billed at \$1,176 per user per year (billed on a monthly basis). "Low usage" staffers who are logged into the system for less than forty hours per month are billed at \$192 per year (again on a monthly basis), and there is no charge for users who use the system less than two hours a month. External users, like reviewers or board members, are billed annually at \$2,400 total (on a monthly basis). License fees are based on actual usage and the system automatically audits the user type for fair billing.

Zengine Grants Management

Zengine is a hosted, online system by the makers of WizeHive Grants Management System that provides a flexible platform for managing grants on its own or integrated with WizeHive's original product. Zengine provides strong support for tracking grantee history (or that of other constituents), with the ability to track chapters of larger networks of organizations in separate, but related records, and to set rules for which contact at an organization should receive which types of communi-

cations—for example, to send payment letters to the designated payment contact. Emails can be set up to send automatically by specific events or at a scheduled date and time, but this requires a third-party plug-in. The reporting engine is straightforward and easy to use, and provides a good selection of options for creating charts, graphs, or other visualizations, and support for online applications is solid. Pricing for the system is dependent on the level of customization needed, but starts at an annual subscription of around \$3,000 for a single grant program, including support and basic training.

Complex Online Data Collection

If your core priority in a grants management system is to collect complex application and grantee progress report data online, a number of systems provide both strong online support and useful general grants management functionality.

DonationXchange

This hosted, online system, specializing primarily in corporate and private foundations, provides well-rounded functionality. DonationXchange has solid application review features and online application forms are flexible, with the option to embed the forms directly in a webpage. Budgeting in the system is mostly solid. A smaller foundation with five users dealing with fewer than 100 grants a year could get up and running in the system for about \$10,000; larger foundations dealing with 100 grants or more per year and ten concurrent users could expect to pay \$40,000 or more in the first year.

Good Done Great Grant Management System

Good Done Great Grant Management System (GDG) has undergone significant changes in the past couple of years, including a new focus on Corporate Social Responsibility (CSR) and corporate philanthropy clients. It remains an affordable hosted solution with strong functionality. Online forms built in Grant Management System can be matched to the look and feel of an organization's website. Facilitated by an intuitive navigation scheme, information collected online can easily be managed, viewed, and

FLEXIBLE RELATIONSHIP MANAGEMENT

FLEXIBLE RELATIONSHIP MANAGEMENT	First Akoya.net	Fluxx	foundation Connect	GIFTS Online	SmartSimple GMS360°	Zengine Grants Management
Small Grantmaker, basic functionality						
First year cost	\$28,060	\$5,940	\$25,000 - \$35,000	\$3,900	\$17,000 to \$25,000	\$2,998 to \$10,788
Ongoing yearly cost	\$9,600	\$5,940	\$7,500 - \$15,000	\$3,900	\$7,500 to \$12,000	\$2,998 to \$10,788
Large Grantmaker, basic functionality						
First year cost	\$47,495	\$50,000 to \$250,000	\$45,000 to \$100,000	The vendor has declined to provide pricing	\$25,000 to \$100,000	\$2,998 to \$24,995
Ongoing yearly cost	\$25,160	\$7,500 to \$50,000+	\$25,000 to \$65,000		\$12,000 to \$20,000	\$2,998 to \$24,995
Internal Tracking	●	●	●	●	●	●
Online Applications–Grantmaker Experience	●	●	●	○	●	○
Online Applications–Grantseeker Experience	●*	●	●**	●	●	○
Form Design & Flexibility	○	○	○	○	●	○
Application Review	●*	●	●*	●	●	○
501(c)3 & OFAC Status	○	●	●**	●	●	○
Letters & Board Dockets	○	●	●*	●	●	●*
Emails	●*	●*	●*	○	●	○*
Relationship Management	●*	●	●	●	●	●*
Grant Requirements & Outcomes Evaluation	●*	●	○**	●	○	○
Payments	●*	●	●**	○	○	○**
Budgeting	●*	●	●	●*	●	●**
System Querying and Reporting	●	●	●	○	●	○
Permissions & Workflow	●	●	●	●	●	○
Data Access	●	●	●	○	●	●
Overall Customization	●	●	●	○	●	●
Ease of Use	○	○	●	●	●	●
Support & Training	●	●	○	●	●	●
Stability in the Market	○	●	●	●	●	○
Support Customer Experience	○	○	○	○	○	•
Training Customer Experience	○	○	○	○	○	•
Implementation Customer Experience	○	○	○	○	○	•

• None ○ Basic ○ Solid ● Advanced • < 5 responses ○ Below Average ○ Good ● Outstanding

*with module or app at additional cost
**with customization

*** Small foundation parameters: Five named users, five concurrent users, 50 external reviewers, \$10,000,000 asset base, 10 grants per year. Basic functionality to review applications, track and pay grants, and to accept applications online.

*** Large foundation parameters: Twenty named users, 10 concurrent users, 50 external reviewers, \$1,000,000,000 asset base, 100 grants per year. With all functionality covered in this report.