



Technology Affinity Group  
Promoting technology in philanthropy



# 2016 Consumers Guide to Grants Management Systems Vendor Product Update Supplement

June 2017

Second Edition

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# INTRODUCTION

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In May 2016, we released the fourth edition of *A Consumers Guide to Grants Management Systems*, a collaborative effort of Idealware, PEAK Grantmaking (formerly Grants Managers Network), and the Technology Affinity Group. (Download it for free at <http://idealware.org/reports/consumers-guide-grants-management-systems-2016>.)

Each edition of the report allows us to publish a wider range of information about the grants management systems available to foundations, which is a push toward greater transparency in the marketplace. We believe this report has an effect on the market, as well. By making it easier for foundations to compare the different available systems not just against their own needs, but against one another, as well, we believe the *Consumers Guide* encourages vendors to make their software more competitive.

People choose systems based on more than just the features they offer—they also consider the strength of the vendors that produce them and the development trajectory for the software. Just as a grantmaker's

needs evolve and change, vendors also continue to develop their products. Last fall we began publishing this *Vendor Product Update Supplement* to the *Consumers Guide*. We invited vendors included in the report to submit information about any updates or additions they have made to their systems since our software demos for the report. We'll work with them to update this supplement twice more, in six-month intervals, as a way to keep you up-to-date on product changes between editions of the *Consumers Guide*. If you signed up to download the report, we'll email you each time the supplement is updated.

By publishing both the guide and the supplements, we strive to provide transparency that fosters healthy competition in the market and helps vendors to be more responsive to their clients' needs. Participation in this update is not mandatory, and not all vendors chose to participate in this inaugural edition. That does not mean they won't choose otherwise in subsequent editions, nor does it mean their systems are being updated. We'll continue to invite them in the future.

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# CYBERGRANTS

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**Company Name:** CyberGrants, LLC

**Product Name:** CyberGrants

**Website:** www.cybergrants.com

**Approximate number of foundation clients:** 300 grantmaking clients overall, 100 of which are foundations

**To what extent have you updated system functionality for the following feature-sets since publication of the Consumers Guide to Grants Management Systems in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking				X
Online Applications	X			
Form Design & Flexibility	X			
Application Review				X
Relationship Management	X			
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting				X

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	This capability became available in January 2017	We have upgraded our duplicated organization detection tools. The new tools are smarter, faster, and safer than before.
Online Applications		
Form Design & Flexibility		
Application Review	This capability became available in January 2017	We have introduced a new "snapshotting" capability that will allow users to automatically capture versions of the grant and then compare the results in a side-by-side display.
Relationship Management		
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting	This capability became available in January 2017	New payment batching capabilities allow administrators to be more strategic when selecting payments for their batches.

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:** N/A

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# FLUXX GRANTMAKER

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**Company Name:** Fluxx

**Product Name:** Grantmaker

**Website:** www.fluxx.io

**Approximate number of foundation clients:** 200

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	X
Online Applications				X
Form Design & Flexibility	X			
Application Review			X	X
Relationship Management	X			
Grant Requirements & Outcomes Evaluation				X
System Querying and Reporting			X	

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	Upgrade to existing functionality & new functionality:	<p>Improved Standard Dashboard UI (upgrade) We have improved filtering visibility and made it easier to reposition and close cards and records from the dock, added the ability to resize and position forms, simplified and improved visibility to workflow transitions, and improved record accessibility within the Dashboard.</p> <p>Executive Summary Dashboard (new) This configurable dashboard is perfect for executive staff, your board, or program officers, and presents a quickly referenceable graphical summary of the grantmaking activities from your Foundation's Fluxx instance.</p> <p>Lite Dashboard (new) Designed for the occasional or novice Fluxx User, the Lite Dashboard inherits the most commonly used functions in the standard dashboard, with the simplified user interface layer on top. The Lite dashboard enables any Fluxx user to complete the most frequently performed tasks - easily and quickly - with the ability to move to the regular dashboard to accomplish deeper tasks. With an "email-like" feel, Lite lets you focus and navigates you directly where you need to go.</p> <p>Fluxx for Android (new) Fluxx for Android is now available in the Google Play Store for download for smartphone devices only. With the Fluxx mobile app you can easily access all your data and dashboards while on the go, giving you ultimate flexibility to accomplish your daily task from anywhere.</p>
Online Applications	New functionality	<p>Grantee Budgeting (new) Foundations often request grantees to provide detailed budgets and projected spending to properly assess the need and accuracy of the amount they are granting. Admins can now specify budget items, access specific data in reporting, and assign permissions.</p>
Form Design & Flexibility		

<p><b>Application Review</b></p>	<p>Upgrade to existing functionality &amp; new functionality:</p>	<p>Adhoc Questions (upgrade) We have implemented additional functionality to our Adhoc Questions component, which allows users to edit and format text, as well as copy and paste formatted text from other word editors.</p> <p>Dashboard Visualizations (upgrade) Visualizations and Graphs are now available directly within Fluxx cards providing the flexibility of side-by-side comparisons within one dashboard.</p> <p>Versioning (new) Document versioning is now available for the documents component. This functionality allows you to easily store and access historical versions of documents as they are updated in your system.</p> <p>Word Edit-in-place (new) The Fluxx Document Sync allows working versions of Word documents to be synced back to Fluxx without manually uploading files. The integration is powered by a Fluxx Add-In for Microsoft Word that uploads the most recent version of the document.</p> <p>Bank Account Obfuscation (new) In order to promote confidentiality amongst end-users, Fluxx Admins now have the ability to configure the bank account component to only display the last four digits of the bank account field. Admins can enable Obfuscation to secure confidential and private banking information to other users.</p> <p>Charity Check on Satellite Organizations (new) Guidestar Charity Check can now be run on Satellite Organizations. The charity check can locate the Tax ID of the Parent Organization associated to its Satellite.</p>
<p><b>Relationship Management</b></p>	<p>New functionality</p>	<p>Bank Accounts &amp; Connected Data Bank Account Information can now be accessed via the Connected Data tabs on the Organization and Request records. In order to promote confidentiality amongst end-users, Fluxx Admins also have the ability to configure the bank account component to only display the last four digits of the bank account.</p>

<b>Grant Requirements &amp; Outcomes Evaluation</b>	New functionality	Grantseeker (new) Fluxx Grantseeker integrates directly with your Grantmaker platform as the next generation of the Grantee Portal. Grantseeker is a free product that eases the administrative and reporting burden by giving grantseekers and your grantee partners the tools to connect with funders and submit proposals, track project deadlines and milestones, manage projects and tasks, and log and share updates that include photos, videos, stories and metrics.
<b>System Querying and Reporting</b>	Upgrade to existing functionality	Report Dashboard (upgrade) You can now access and generate your reporting data in entirely new ways. Browse and preview different types of reports, store favorites, and more! The new Reports Dashboard BETA makes it easy to track, share, and organize your reporting data in Fluxx.

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** Product roadmap information is available to clients and prospective clients.

**If so, please provide a URL where the product roadmap can be viewed:** N/A

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# FOUNDANT TECHNOLOGIES

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**Company Name:** Foundant Technologies

**Product Name:** Grant Lifecycle Manager

**Website:** www.foundant.com

**Approximate number of foundation clients:** 1,150

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking				X
Online Applications			X	X
Form Design & Flexibility	X			
Application Review			X	X
Relationship Management				X
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting				X

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	New functionality	Grants Manager/Program Officer process assignment has been added to the Advanced License of the product. Allowing only the person(s) assign to the process/program/fund to manage the requests.
Online Applications	Upgrade to existing functionality	System navigation moved to the top of the screen to allow for more screen real estate, easier navigation, and responsive design.
Form Design & Flexibility		
Application Review	1 - New Functionality 2 - Upgrade to existing functionality 3 - Upgrade to existing functionality	1 - Side by side evaluations are now an option when reviewing an application or LOI. i.e. the evaluation form appears on the left of the screen and application and/or LOI on the right. 2 Our request summary page now has Tabs to easily display all of the information 3- System navigation moved to the top of the screen allowing for more screen real estate, easier navigation, and a responsive interface for all devices.
Relationship Management	New functionality	Administrators can now see the email deliverability status when emails are sent out off the system.
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting	New functionality	Emails going out of the software can now be searched by: date, type, status, subject, or sent to.

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** We do not provide a roadmap but we do have the Idea Lab where our product team proactively works with clients on features and new ideas.

**If so, please provide a URL where the product roadmap can be viewed:** N/A

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# GIVINGDATA

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**Company Name:** GivingData

**Product Name:** GivingData

**Website:** <http://givingdata.com/>

**Approximate number of foundation clients:** 15

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking				X
Online Applications				X
Form Design & Flexibility				X
Application Review				X
Relationship Management				X
Grant Requirements & Outcomes Evaluation			X	
System Querying and Reporting			X	

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
<b>Internal Tracking</b>	New Functionality	Redesign of Grantee and Grant detail pages, providing a more streamlined user experience. Improvements to support for mobile and tablet views, performance improvements, and additional permissions capabilities. Added Tax Status Verification against IRS Publication 78 and IRS Business Master File and OFAC checking with integration with LexisNexis BridgerInsight. Added matching gifts functionality, API integration with Intacct accounting systems, and additional functionality for creating document templates in Office365. Also added improvements to field level activity logging and refinements to the grant amendment process.
<b>Online Applications</b>	New Functionality	We have added the ability for clients to fully manage grant applications as well as grantee reporting and other intake processes via the grantee portal. Multi-page and multi-stage applications that can accept file uploads can be created. Additionally, grant monitoring and impact assessment data is now fully integrated with the Monitoring & Assessment tool for grant level and impact measurement dashboards.
<b>Form Design &amp; Flexibility</b>	New Functionality	Application, reporting, and intake process forms can be fully managed and configured by foundation staff. Administrators can add as many pages to their forms as needed and as many fields per page as needed. Fields can be mapped to system fields in the GMS or be stand-alone fields captured only in the application. Data validation rules can be added to fields, as well as help text. All data is saved in real time as the applicant enters data. No manual save process is required.
<b>Application Review</b>	New Functionality	Grant application and intake processes now support field level intake and integration with the GMS, making application data available inside the core GMS for foundation staff. Foundation staff and grant applicants can collaborate on applications with a new commenting feature available in all intake processes.
<b>Relationship Management</b>	New Functionality	Added Salesforce CRM integration.
<b>Grant Requirements &amp; Outcomes Evaluation</b>	Upgrades to Existing Functionality	Added the ability to associate requirements and grantee reporting intake with impact assessment and evaluation data. Also, can now specify grant-specific outcomes and other grant assessment data that is managed alongside system-defined assessment data points. Design improvements to the administrative tools provide better usability and administrative flexibility.

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
System Querying and Reporting	Upgrades to Existing Functionality	Introduced additional fields to be searchable from Super Search as well as full search results, list view, and export to Excel configuration of any field within the system. This allows users to customize which columns are visible and sortable in list views and Excel export operations. Added the ability to integrate third-party Business Intelligence (BI) services such as Microsoft Power BI and Tableau.
Financial Analysis Tools		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:** Product roadmap information is available to clients and prospective clients.

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# GRANTMAKER

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**Company Name:** Closerware, LLC

**Product Name:** Grantmaker

**Website:** www.Grantmaker.com

**Approximate number of foundation clients:** 50

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking	X			
Online Applications	X			
Form Design & Flexibility	X			
Application Review	X			
Relationship Management	X			
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting	X			

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		
Online Applications		
Form Design & Flexibility		
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:** N/A

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# MICROEDGE

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**Company Name:** Blackbaud

**Product Name:** GIFTS

**Website:** www.microedge.com

**Approximate number of foundation clients:** N/A

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking				X
Online Applications				
Form Design & Flexibility				
Application Review				
Relationship Management				
Grant Requirements & Outcomes Evaluation				X
System Querying and Reporting				

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	New Functionality	We added additional workflow capabilities so funders can better manage tasks as they move through the grant process.
Online Applications		
Form Design & Flexibility		
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation	Released Updates	We added mapping of the UN Sustainable Development Goals (SDGs) to our Blackbaud Outcomes solution to enable funders to track which SDGs their grants are contributing to.
System Querying and Reporting		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:**

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# ROUNDCORNER, INC.

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**Company Name:** roundCorner, Inc.

**Product Name:** foundationConnect

**Website:** roundcorner.com/foundationconnect/

**Approximate number of foundation clients:** 05

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking		X		
Online Applications		X	X	X
Form Design & Flexibility		X	X	X
Application Review		X	X	
Relationship Management		X	X	X
Grant Requirements & Outcomes Evaluation		X	X	X
System Querying and Reporting	X			

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking	Released updates	Support for large volume mass editing, enhanced automation on submitted grant applications, enhanced application tracking across multi-step application processes, increased flexibility in docket organization, easy display of grantee-submitted attachments
Online Applications	Upgrades to existing functionality; New functionality	Multiple role assignments for contacts involved in a grant, enhanced options for capturing and modifying organization and contact level data, enhanced user interface to highlight required grantee activities
Form Design & Flexibility	New functionality	Enhanced options for capturing and modifying organization and contact level data, additional options for dynamic displays,
Application Review	Upgrades to existing functionality; New functionality	External review of multi-step grant applications including Letters of Inquiry, external reviews can access more data related to an application
Relationship Management	New functionality	Contacts can be associated with multiple organizations
Grant Requirements & Outcomes Evaluation	New functionality	Capture updates on grant-specific milestones and intended outcomes
System Querying and Reporting		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:**

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# SMARTSIMPLE SOFTWARE

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**Company Name:** SmartSimple Software

**Product Name:** GMS360°

**Website:** www.smartsimple.com

**Approximate number of foundation clients:** 200

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	
Online Applications	X			
Form Design & Flexibility			X	
Application Review	X			
Relationship Management	X			
Grant Requirements & Outcomes Evaluation	X			
System Querying and Reporting				X

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		<p><b>Audit Logs - upgrade to existing functionality</b> As part of our security audit feature, we've updated the audit log option. Now, you can activate an audit log on any user or contact profile. Enabling this feature means you have the ability to track:</p> <ul style="list-style-type: none"> <li>• Changes to roles on the profile</li> <li>• Changes to user access levels</li> <li>• Merged contact records</li> <li>• Password resets</li> <li>•</li> </ul> <p><b>Status History - upgrade to existing functionality</b> This upgraded feature gives you the ability to monitor the time it takes for a grant status to move from one stage to another, who changed the status, and track any delays that occur during the process. For example, the applicant starts their application and submits it 3 days later. The grant manager then moves that application to "under review" status 5 days after that. It remains in the review stage for another 30 days before taking 1 day to be moved to "approved" status.</p>
Online Applications		
Form Design & Flexibility		<p><b>List View Enhancement - upgrade to existing functionality</b> To provide greater usability and improve consistency throughout the SmartSimple system, we've moved the search panel and made the search interface more intuitive to use. For example, certain action buttons have been shifted down the header list, making it easier to find them when you are in a list view. Organization and contact association list views have also been updated with a simplified screen view. Now, associates have been consolidated within an "add" button that will open a new window so you can filter and attach multiple organizations and contacts as well as create new ones much more easily than before.</p> <p><b>Enhanced Interface Styling - upgrade to existing functionality</b> We've made some enhancements to the overall look and feel of the system. Changes include a new style for our title bars, while icon images have been added to the header menu options. These changes improve readability and navigation speed of the system by making it easier to identify sections and headers. Spacing in the text has also been increased to improve readability.</p>
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation		

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
System Querying and Reporting		<p><b>OData Integration - new functionality</b>            OData (Open Data Protocol) provides users with the ability to link programs like Excel to their SmartSimple system directly through an OData link. This saves time and gives users the ability to create real-time reports without needing to export information from one program and then import it into another. The advantages to using an OData integration for reports means it's easier to collect and move information, and users gain the ability to link to 3rd party tools as options for presenting their data.</p> <p><b>New Visualization Options for US Census Data - new functionality</b>            SmartSimple has added a new feature to display US census data. This option displays a predefined set of US census data statistics, and is available on all user and company profiles with addresses in the US. This tab can also be displayed on the grant application record, making configuring the display of US census data much simpler, as it appears on user and company profiles in a new tab that outlines the pre-defined set of useful fields.</p>

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:**

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# SUBMITTABLE

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**Company Name:** Submittable

**Product Name:** Submittable

**Website:** www.submittable.com

**Approximate number of foundation clients:** 350

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	
Online Applications				
Form Design & Flexibility				
Application Review				
Relationship Management		X		
Grant Requirements & Outcomes Evaluation		X		
System Querying and Reporting				

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		all tags and categories can be used for reporting
Online Applications		
Form Design & Flexibility		
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation		Updates to deadline reminder emails and report tracking have been released. Please change first sentence to read in the affirmative.
System Querying and Reporting		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:**

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# VERSAIC

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**Company Name:** Versaic

**Product Name:** Versaic Grants

**Website:** www.versaic.com

**Approximate number of foundation clients:** 75

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking		X	X	X
Online Applications		X	X	
Form Design & Flexibility	X			
Application Review		X	X	X
Relationship Management		X	X	
Grant Requirements & Outcomes Evaluation		X	X	X
System Querying and Reporting		X	X	

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		<ol style="list-style-type: none"> <li>1. Added configurable board/committee meeting dashboard displaying all grants ready for meeting with custom filtering and reporting options.</li> <li>2. Ability to create ad-hoc PDF grant summaries with Excel charts/graphs/data tools and with the capability to append to the resulting PDF file any selected attachments added to the grant record.</li> <li>3. New capability to support importing of data directly to the grants management system.</li> </ol>
Online Applications		<ol style="list-style-type: none"> <li>1. For conditional question/page display, added option to use any logical statement to control when a question/page is displayed (e.g. display Question X only if Focus Area B is selected and requested amount over \$25,000).</li> <li>2. Ability to create custom ad-hoc Excel report templates, which can be made available to applicants (typical use case is to provide custom populated progress worksheets for applicants to generate and use for offline tracking).</li> </ol>
Form Design & Flexibility	New Functionality	
Application Review		<ol style="list-style-type: none"> <li>1. Default attachments, attachments from the grant application or mail merge documents can now all be automatically added to email templates.</li> <li>2. Supporting multiple new approval UI's to streamline approval with payment creation.</li> <li>3. Workflows support batch complete actions and custom reporting across all/select tasks within to-do list.</li> <li>4. New application lock feature allows for configurable settings to be created that will enforce the locking of any portion of the application when some conditions are met (e.g. after Stage 3 of the Workflow, lock all editing capabilities for the application until Workflow is completed).</li> <li>5. Ability to mass download all attachments in a Zip file for a single grant application.</li> <li>6. New Notification option triggered against incomplete applications</li> </ol>
Relationship Management		<ol style="list-style-type: none"> <li>1. Option to create custom ad-hoc Excel reports based on the full Contact list with filtering options by contact type, association, etc.</li> </ol>
Grant Requirements & Outcomes Evaluation		<ol style="list-style-type: none"> <li>1. Created ability to support child submission types within parents, enabling clients to capture and report on individual activities, milestones, etc. for single grant records (e.g. during application submission the applicant can add any number of activities and the system can automatically follow up with the applicant to capture results for each of them independently).</li> <li>2. Enhanced triggers to assign tasks to internal team members to seamlessly evaluate progress/final reports when submitted.</li> </ol>
System Querying and Reporting		<ol style="list-style-type: none"> <li>1. New ad-hoc reporting templates for contacts, notes, child submissions (e.g. activities, stories/photos, etc.) and workflows/tasks</li> </ol>

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?** No

**If so, please provide a URL where the product roadmap can be viewed:**

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# ZOOMGRANTS

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**Company Name:** ZoomGrants

**Product Name:** ZoomGrants

**Website:** zoomgrants.com

**Approximate number of foundation clients:** 115

**To what extent have you updated system functionality for the following feature-sets since publication of the *Consumers Guide to Grants Management Systems* in May 2016?**

## Summary of Changes

	No change to functionality in this area	We have released update(s) that were not yet available at time of last review	We have implemented upgrades to existing functionality in this area	We have implemented new functionality in this area
Internal Tracking			X	X
Online Applications			X	X
Form Design & Flexibility			X	X
Application Review			X	X
Relationship Management			X	X
Grant Requirements & Outcomes Evaluation			X	X
System Querying and Reporting			X	X

## Detailed Description of Changes

	Status: Released updates; upgrade to existing functionality; new functionality	Description of change
Internal Tracking		
Online Applications		
Form Design & Flexibility		
Application Review		
Relationship Management		
Grant Requirements & Outcomes Evaluation		
System Querying and Reporting		

**Do you provide a publicly accessible product roadmap for your system for current or potential clients to view future planned development and updates to the system?**

**If so, please provide a URL where the product roadmap can be viewed:**

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# ABOUT THE REPORT PARTNERS

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## About Idealware

Idealware, a 501(c)(3) nonprofit, provides thoroughly researched, impartial, and accessible resources about software to help nonprofits and the philanthropic sector make smart software decisions. By synthesizing vast amounts of original research into credible and approachable information, Idealware helps organizations make the most of their time and financial resources. Visit [www.idealware.org](http://www.idealware.org) to learn more or view our hundreds of free articles, resources, and reports.

## About PEAK Grantmaking

PEAK Grantmaking (formerly Grants Managers Network) is an association of 3,600 grants management professionals. The people of PEAK Grantmaking come together to form a vibrant community of grantmaking practice that advances shared leadership and learning across the sector. This is where Practice Meets Purpose. By cultivating resources, learning opportunities, and collaborations across the philanthropic spectrum, we support grantmaking practices designed to maximize mission-driven efficiency and effectiveness of funders of every size. PEAK Grantmaking is a leader in identifying and promoting effective grantmaking practices through field-wide change efforts. Learn more at [www.peakgrantmaking.org](http://www.peakgrantmaking.org).

## About the Technology Affinity Group

The Technology Affinity Group (TAG) is a nonprofit membership organization that promotes the power of technology to advance the goals of the philanthropic sector. TAG is an active community of professionals responsible for aligning technology with the philanthropic objectives of their organizations, striving to provide the highest quality resources and learning opportunities for TAG members in an open environment built on trust and a shared belief in the greater common good.