LANDSCAPE OF INTEGRATED SOFTWARE FOR COMMUNITY FOUNDATIONS

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TECHIMPACT®

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grantbook

PEAK GRANTMAKING

TECHNOLOGY ASSOCIATION of GRANTMAKERS

FOREWORD

Dear Colleagues,

We are truly excited to support Tech Impact's new and improved 2022 edition of the **Landscape of Integrated Software for Community Foundations**. The like-minded sponsors of this guide share a deep commitment to lifting the tremendous work of community foundations. We also jointly appreciate that the sheer range of activities needed to accomplish that work requires a unique approach to tech solutions.

What's improved in this edition? Rather than the feature-focused Consumers Guide of prior years, this landscape overview helps you travel the available tech pathways at a higher altitude, comparing and contrasting the several available routes for solving for your needs across five key functional areas: Grant and Application Management, Financial Management, Donor Management, Relationship Management, and Business Intelligence.

And what's new? If you're reading this, you're likely all too aware that the technology systems landscape for community foundations has evolved rapidly in the five years since we published the last guide. Most systems have expanded their integration options. There is an increased focus on Business Intelligence tools fueled by the need to convert data into compelling insights. And there's a new vendor in the space, Give Interactive, making its first appearance in this guide. In addition, we're seeing a correlation between the size of a community foundation and its approach to the tech stack.

Smaller foundations gravitate towards all-in-on solutions like Foundation C-Suite, Stellar Solutions, or the Blackbaud and nPact family of products. Large foundations—higher proponents of custom solutions and custom integrations—tend to adopt such tools as NetSuite, Sage Intacct, Salesforce, and SmartSimple, sometimes coupled with Blackbaud, Foundant and others. But the mid-sized foundations tend to identify a single core element of their toolstack that serves priority business needs and build around the core tool for the remaining areas of functionality. In this category, we often see a blend of products by Blackbaud, Foundant, and Akoya. This segment also reflects the most uncertainty regarding future pathways for their tech stacks.

Thanks to Tech Impact and to all the vendors who participated in this clarifying distillation of complex and varied terrain. We're confident this guide will help community foundations of all sizes ladder up the digital maturity scale and into greater and greater impact.

Whether you are searching for an all-in-one platform to solve for the majority of your needs or pursuing multiple "best-in-breed" solutions that play well together and with your existing tools, we sincerely hope this landscape overview will prove invaluable as you evaluate your options.

Warmly,

Nikki Barrett, Satonya Fair,
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on behalf of Grantbook; PEAK Grantmaking;
Technology Association of Grantmakers (TAG);
Finance, Administration & Operations Group (FAOG);
and Tech Impact.

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INTRODUCTION

Finding the right software to manage your community foundation is no easy task. Community foundations vary greatly in terms of size and complexity, which means that there is no one-size-fits-all solution.

According to the Council on Foundations, there are more than 750 community foundations in the U.S. with assets ranging from less than $100,000 to more than $1.7 billion. These entities make grants, solicit donations, manage investments, act as fiscal custodians for donor-advised funds, award scholarships, and build relationships with nonprofits in their area.

Community foundations need software that can help them steward the many types of relationships, manage complex financial arrangements, and streamline their grantmaking activities. They need to track incoming gifts, outgoing grants and investment income for each of potentially hundreds of different funds, and to be able to see the balance of each more or less in real time. This means they need software that can handle CRM, donor management, finance and accounting, grants management, and reporting. They also need these disparate systems integrated so data can be accessed and updated wherever it's needed.

There are several different approaches that software vendors catering to the community foundation market take:

- Develop a platform that includes all the major functionality a community foundation needs
- Develop several individual tools that integrate with each other to create an all-in-one solution
- Develop a specialized tool that provides in-depth functionality for one aspect of community foundation management and can integrate with third-party tools to extend its functionality.

> ***Finding the right software to manage your community foundation is no easy task.***

This varied approach to meeting the needs of community foundations poses an additional challenge to decision makers within the foundation. Do you use some of the solutions you already have in place? Do you start fresh with an all-in-one platform? What part of the functionality is most important to your organization? There's no "right" answer to these questions, just as there is no "right" approach to the development of software solutions for this market.

The goal of this resource is to show you what these different types of software can do for your community foundation, the pros and cons of the different approaches, how specific tools on the market today fit into these approaches, and how they do (or don't) work together to provide the functionality you need.

We worked with our technical advisory group to develop a list of software vendors that are actively marketing their products to community foundations. In April 2022, we distributed a survey to 11 vendors that covered a wide range of functions of interest to community foundations. Our *Vendor and System Overviews* section provides a brief look at each of these systems. We also provide detailed extended profiles of seven systems from vendors (or implementation partners) who responded to our survey.

Hopefully this report will help you understand what is possible with community foundation-focused technology and spur you to start thinking strategically about the types of systems and functionality that is best for you.

WHAT KIND OF SYSTEMS DO COMMUNITY FOUNDATIONS NEED?

Community foundations use software to facilitate their many diverse activities around grants, scholarships, donations, financial management, reporting, and more. This software has a multitude of touchpoints: staff, leadership, grantees and scholarship recipients, donors, boards of directors, and community nonprofits.

Whether community foundations choose one of the standalone all-in-one solutions on the market or a number of specialized systems that can integrate with one another, either natively or through custom development, their options are plentiful.

In the next section we'll explore how community foundations decide what types of systems to use and how they choose the right ones for their own needs. But first, let's look at the features common to most of the software for community foundations, which primarily address five core areas of functionality: grants management, financial management, customer relationship management (CRM), donation/donor management, and business intelligence/reporting.

Grant and Application Management

Relationships are at the heart of a community foundation's work. In terms of transactions, though, these relationships often take the form of grants, and grants management software can greatly streamline an organization's grant application and administration processes. This software is designed to manage the full grant lifecycle from application through final reporting, and as such, it can also determine how grantees experience the process, as well.

To do this, grants management software collects and stores a lot of information about applicants and grantees, grant requirements, payments, and reporting. This means that the software can accommodate both individual and organizational records and store a complete history of an individual's or organization's applications and received grants. This may also include relationships between individuals and also connect individuals to organizations in the database.

In fact, many grants management platforms provide a number of the features one can find in a CRM, albeit at varying levels of depth. (For more information on these types of features, see *Relationship and Communication Management* on page 12.)

Today, most grants management software offers community foundations the ability to create online grant applications. Among the functionality that differentiates systems is the ability to customize the look and feel of online applications—including adding your foundation's logo and brand colors, changing fonts, and customizing layouts and fields—and for foundations to create new applications on their own, without additional vendor charges.

Because many foundations like to have eligibility quizzes or multi-stage applications, it is helpful to look for software that supports this as well as supporting eligibility quizzes that branch to multiple applications based on an applicant's responses or grant applications that branch. Another helpful feature is if the system will allow grant seekers to search for and find appropriate grant opportunities.

One set of functions often overlooked when selecting grants management software is applicants' user experience. It's best to look at software with an eye to the challenges and needs of your grant-seekers. Smaller nonprofits—which often are also led by and serve marginalized communities—are more likely to have fewer resources to manage the administrative burdens posed by lengthy grant applications and online systems that force specific formatting or limit word counts. You can reduce the amount of time it takes an organization to fill out an online application by having a system that auto-populates data in an application based on a grant-seeker's previous applications or based on the organization's EIN. Systems that facilitate electronic signatures or integrate with a third-party e-signature tool can also help grant-seekers save time and effort.

If you provide grants to organizations or individuals with primary languages other than English, you can look for systems that provide multilingual support or a translation add-on. If you have grant-seekers that need to upload supporting documentation as part of an application, you should look at how the system handles attachment uploads and whether there are limitations on file sizes (which can come into play when you need high-resolution images or video files as part of an application). Another helpful feature is the ability to offer grantee portals that allow applicants and grantees to check on the status of their application, grant, payments, due dates for required reports, or submit reports.

Systems differ in how an online application is entered into the database. Some automatically add all applications to the database while others require staff to review and approve or import an application before it is added. Once applications are received, grants management systems usually provide a set of features to help facilitate the review and approval process. Depending on your review process and participants, systems that offer simplified, permission-based interfaces or reviewer portals may be of interest. Other features that help streamline the review process are the ability to create a default format for grant application summaries; automated and customizable workflows for grant review processes with automated notifications of assigned tasks; support for multiple scoring schemes; the ability to view numeric scores and report them as summary statistics; and the ability to assign reviewers at random based on their workload or other attributes.

> ***The core set of functionality for grants management systems are the tools and features that allow foundations to track, manage, and report on grants***

Reviewers also appreciate the ability to review applications offline and have their comments sync to the system when they log on to the system, the option to see other reviewers' comments and scores when appropriate, and the ability to see the foundation's relationship history with prospective grantees.

Of course, the core set of functionality for grants management systems are the tools and features that allow foundations to track, manage, and report on grants. In addition to collecting contact and relationship information from individuals and organizations (*see Relationship and Communication Management*, page 12), many grants management systems provide connections to 501(c)(3) registries, such as GuideStar and the IRS Business Master File, that make it easier to do status checks and due diligence on grantees. Some systems even perform status checks automatically and update records on a specified schedule.

As with any workplace, community foundation personnel differ greatly in terms of their comfort with using technology. That's why it is important to look at a system's ease of use across a range of features. The abilities to customize what the system displays to a user or group of users, to group or arrange system fields into sections or tabs to streamline data entry, and to provide "dashboard" views that summarize the grants and tasks currently relevant to an individual user all make a system more user-friendly. This can go a long way toward encouraging widespread adoption. In addition, the ability to create and customize workflows to automatically assign tasks to users can reduce task assignment and management burdens on administrators and facilitate the management of grants throughout their lifecycles.

Most grants management platforms provide some level of support for financial management, such as payments, fund management, and even budgeting. (For more information, see the next section on *Financial Management*.) Some include features that assist foundations with outcomes reporting and evaluation efforts. (See *Business Intelligence and Reporting*, page 13.) And finally, several grants management systems include specialized tools for managing scholarship programs and case management.

Financial Management

Because so much of the work community foundations do revolves around the stewardship and distribution of funds, the financial management functions are a critically important piece of their software stack. In general, there are three ways that community foundations approach the finance and accounting piece of the puzzle::

1. Opt for an all-in-one system that bundles finance and accounting management in with their CRM, grants, and donation tools.
2. Implement a grants management solution that includes fund management and payment tracking tools and then connect it to their accounting software, either through an integration or via manual download and upload of files.
3. Implement a specialized finance and accounting solution that integrates with other community foundation software platforms.

Whichever way a community foundation wants to manage its software stack, the tool or set of tools need to provide a variety of functions. Most critical of all is a tool that can manage the different types of funds that comprise a community foundation's portfolio. This can include unrestricted funds, designated funds, field-of-interest funds, and scholarship funds. For each fund, the system tracks the fund balance, incoming donations, outgoing grants, and changes in income based on investments. Each fund has its own set of rules and restrictions that need to be tracked, such as policies on how much should be paid out in a fiscal year, and different reporting schedules, so fund management software needs to track this as well. The complexity of community foundation financial management means that you may likely benefit from software that provides customizable workflows for complex functions, such as agency endowments and multi-agency reporting.

Endowment funds can be unitized, or combined into an investment pool for investment purposes, but still need separate tracking and reporting mechanisms. Investment pools can contain numerous funds and fund assets can also be a part of multiple pools. Some software solutions make it easier to manage investments and track investment fees. Community foundations that offer Donor Advised Funds (DAFs) can benefit from software that provides approximate real time information on fund balances and include that information on donor portals. Because community foundations "compete" with investment brokerages for DAFs, features that improve the donor experience—such as donor portals that contain real time fund balances, the ability to easily set up new DAFs, and the ability search for restricted funds that match desired grant opportunities based on donor interests—all can help make a community foundation-managed DAF more attractive.

An important part of grant financial management is the ability to manage payments. Software tools that facilitate this have to be able to handle a variety of different ways in which foundations provide grant payments to individuals and organizations. This includes customizable payment schedules, payments contingent or conditional on specific grant requirements, disbursement of grant funds via wire transfer or ACH, and payments made in different currencies. Security around payment data is of critical importance, so look for software that provides the ability to configure audit or security controls so only certain staff can change payment information.

Software that allows users to void payments, make refunds, and place payments on hold automates some time consuming tasks, while being able to customize workflows for payment approval processes gives foundations the ability to adapt the tool to meet the needs of a variety of different programs.

Some all-in-one software includes accounting capabilities, while other foundations look to specialized tools for this aspect of their financial operations. Among the accounting functionality that community foundations need are payment processing for donations and other incoming funds; Electronic Funds Transfer (EFT)/Automated Clearing House (ACH) payment integration; the ability to track and manage stock, real estate, and in-kind donations; integration with the foundation's bank accounts, and the ability to manage the general ledger. In addition, accounting software can facilitate asset management, expense and credit card management, compliance management and reporting, and tax and audit preparation.

Beyond accounting and audit functions, financial management software can also facilitate planning efforts like budgeting and forecasting. This includes the ability to track budgets in hierarchically defined categories or program areas, enter a budget amount for each grants program and report on that information with actuals, view the impact a particular grant will have on future year payouts with a "what if" type feature, choose whether to track either the amount awarded or the amount budgeted in a particular year, and calculate suggested annual payout for a fund given defined spending rules.

Donor Management/Donor Portal

Individual and organizational donations are an important funding stream for some community foundations, and that means they need software that manages donations and donors as part of their technology stack. This software needs to have traditional donation management functionality like donation tracking, pledge scheduling and tracking, support for honor/memory gifts, the ability to track non-cash donations, and the ability to create and customize online donation pages.

Software that provides donor portal functionality can improve the experience of this constituency as they interact with your foundation. This type of tool can allow donors to view account statements, see their grant history, make deposits, renew previously awarded grants, and even allow donors to select grants by matching giving opportunities with their specified interests and criteria. An important feature for DAFs is the ability to provide donors with real-time updates of their account balances. Having a portal interface that is intuitive to use and that the donor can customize with widgets or modules improves the donor's experience, as does a clean and attractive interface.

Relationship and Communication Management

CRM functionality is often built into grants management and donor management systems, but community foundations may need a more robust CRM system to manage and communicate with their diverse constituents. These include grantees, donors, board members, and community leaders. Within these constituents are a vast network of relationships.

The purpose of CRMs is to manage constituent data and relationships. These platforms store constituent information and touchpoints, helping organizations to personalize constituent interactions and automate a variety of tasks. To that end, this software provides the ability to create individual and organization contact records that can store a wide range of information—including multiple addresses, phone numbers, and emails—keep a log of interactions between the organization and constituents, and track relationships and connections between individual constituents and between individuals and organizations.

The amount of information you can store about a contact is large and diverse, and some platforms have developed integrations that allow you to pull demographic information into organizations from third-party registries. Some CRMs will even track individual business units under a larger organization and allow you to automatically email the appropriate contact within an organization for a specific purpose, like sending payment information to the payment contact.

Most CRMs provide the ability to directly email constituents, either natively or through pre-built integrations. This allows you to search for individuals or a group of individuals, send an email, and have that email interaction be recorded in the system. Many CRMs also integrate with Microsoft Office 365 so that you can capture emails sent and received through that platform in your CRM contact records. Others allow you to add emails from external systems into a record by using a specific email address. Emails sent directly through the system can be automated to go out based on specific times, like scheduled reminders to grantees, or triggered by certain events, like the submission of a grant report. Some systems will even allow you to see basic performance metrics on emails, like open rate and clickthrough rate.

Business Intelligence and Reporting

The amount of data produced by a community foundation's systems is considerable, but is of limited utility without reporting and analysis. That's why reporting and business intelligence tools are important to assist organizations with strategic decision-making. Most of the types of systems we discuss in this report include some level of reporting, whether it is pre-packaged templates for commonly used reports or ad hoc reporting tools that allow you to build custom queries and reports that pull data from the system.

How the systems differ, however, is in the depth of reporting they provide, the amount of data available to use in ad hoc reporting, and your ability to modify, save, favorite, and schedule reports. Systems also differ in how accessible

The amount of information you can store about a contact is large and diverse, and some platforms have developed integrations that allow you to pull demographic information into organizations from third-party registries.

reports are to non-technical staff.   Some systems provide visual query builders with drag-and-drop functionality or report builder wizards. Some allow you to create a variety of dashboards for different types of staff to see and use reports relevant to them. And some allow you to select data that you can use to drill down for more information. Systems also differ based on the type of report data you can share with individuals who are not users of the software—some allow you to email out static reports as attachments in formats such as PDF or Excel, while others let you share links to reports or dashboards hosted in the cloud that update with current data.

In addition, certain platforms include features for specialized reporting, such as outcomes reporting that includes the ability to calculate progress toward outcome goals using submitted progress reports, program evaluation, and reporting of data along demographic and economic categories.

Relying on just one tool for reporting only provides you with part of the picture and if you have multiple systems it can be time-consuming to run separate reports in each system. Business intelligence tools aggregate data from multiple sources to allow you to analyze performance across your organization and find connections that can help you optimize your programs and operations.

When looking at business intelligence tools, it is helpful to find out whether you can pull data from all your platforms into the system without vendor assistance and use this data to create, view, and export charts, graphs, and other visualizations. Systems vary in their ease of use and in their pricing models—it may be worth looking for tools that allow you to create reports using drag-and-drop functionality and that you can make accessible to a wide range of users within your organization.

Technical Considerations

We've talked a lot in this section about the features of different platforms that might be helpful for community foundations, but there are some technical considerations that are worth looking at for any platform you are considering.

Security

The first is security. Odds are your community foundation collects a lot of sensitive data, much of which might be of interest to hackers—and some of which could harm your community if it's breached. Therefore, ensuring the security of your data is paramount. This includes features to protect login security, such as Multi-Factor Authentication (MFA) and/or Single Sign On (SSO). Cloud-based software can differ in the ways in which data is encrypted—it can be encrypted at rest, which protects data that is stored in your system, and/or in transit, which protects data as it moves between locations. Ask software vendors about their backup and redundancy policies to ensure that you can recover your data if anything happens. You should also ask what types of actions are recorded in system audit logs to make sure you can document anything needed for compliance requirements.

One way to get an independent overview of the strength of a vendor's security and privacy protocols is to request a copy of their System and Organization Controls (SOC) report. A SOC report (and SOC certification) is a third party assessment of the effectiveness of the controls a vendor has in place to protect their customer's data.

System permission controls help you protect areas of your system from unauthorized access. This ensures that only specified staff can see and access sensitive data, such as financial transaction details, and that only certain staff can modify or delete important data. Most systems allow you to assign users certain roles in the system and their permissions correspond to those roles, but others are more granular in the types of permissions, going all the way down to individual users and individual fields in the system.

Privacy

Privacy is another important factor, as there are several regulations that may apply to community foundations based on who they interact with online and what kind of data they store in their systems. It is important to ask vendors to provide you with information on how their tools comply with the patchwork of regulations, such as the Health Insurance Portability and Accountability Act (HIPAA), the European General Data Protection Regulation (GDPR), and state privacy laws, such as the California Consumer Privacy Act (CCPA).

Integration

The way in which software handles integration with third-party tools or platforms is of particular importance to community foundations that use multiple systems to manage their activities. Software handles integration in several different ways.

- Pre-built connections are already-developed integrations available as add-ons to a system either from the vendor or via an online marketplace.
- Third-party integrations are facilitated via an Integration Platform as a Service, or IPaaS, a tool that simplifies integrations so you can more easily connect different types of software. (Zapier and Workato are two popular IPaaS tools).
- Custom integrations are built by developers to meet a specific need, and are often created by using Application Programming Interfaces (APIs) as a gateway for transferring data between systems. Private APIs allow vendors to create new custom connections for their customers, while Open (or Public) APIs provide external developers with the information necessary to build integrations.

Integrations are important because they allow staff to continue using the platforms or tools they most rely on while still having access to data that resides in other systems. They streamline processes for things like transferring transactions into accounting systems and ensuring updates made to contact records in a grants management system are reflected in the organization's CRM. They also make it possible to bring together multiple sources of data for analysis and manipulation in a business intelligence tool.

Training and Support

Finally, systems differ widely in the types of training and support they offer to users. A vendor's Service Level Agreement (SLA) outlines the level of service and support you can expect from a vendor, both in terms of system performance and services provided.

Training and support are critical to the widespread adoption and utility of a software platform, and can include live online training, online training videos, in-person training, access to a knowledge base, access to a user community or forum, email support, phone support, and chat support. The availability of these options varies from vendor to vendor and some may require you to purchase training or support plans for an additional cost. The smaller your staff, the more tech support you will likely need.

Security Glossary

MFA: Multi Factor Authentication (is an authentication method that requires users to provide two or more verification factors to access an application or account, decreasing the likelihood of a successful cyber attack.

SSO: Single Sign-On allows a user to log in to any of several related, independent software systems with a single identification.

SOC 1 TYPE II: The first part of the Service Organization Controls series (SOC 1), a voluntary compliance standard developed by the American Institute of CPAs (AICPA), SOC 1 addresses an organization's internal controls around financial reporting and applies to organizations that directly interact with customer or partner financial information. Type 2 compliance examines the security of financial controls over a specified period of time and requires annual re-evaluation to maintain compliance.

SOC 2 TYPE II: The second part of the compliance standards specifies how organizations should manage customer data.

LEVEL 1 PCI STATUS: The Payment Card Industry Data Security Standard assures that all organizations that accept, handle, store, or transfer credit card information operate in a secure manner. Level 1 compliance is the highest and most stringent of four levels.

PRIVACY SHIELD CERTIFIED: The Privacy Shield Framework allows U.S.-based organizations to comply with the GDPR when transferring personal data from the European Economic Area (EEA). American companies join the Privacy Shield by self-certifying to the U.S. Department of Commerce and publicly committing to comply with requirements.

GDPR: Though the European Union enacted the General Data Protection Regulation to govern data protection and privacy, it imposes obligations onto organizations anywhere, including the U.S., if they target or collect data related to people in the EU.

VENDOR AND SYSTEM OVERVIEWS ▶▶▶

As mentioned previously, vendors have three fundamental approaches to the community foundation software market:

- Develop a platform that includes all the major functionality a community foundation needs
- Develop several individual tools that integrate with each other to create an all-in-one solution
- Develop a specialized tool that provides in-depth functionality for one aspect of community foundation management and that can integrate with third-party tools to extend its functionality

The following is a brief look at examples of these three different approaches to serving the community foundation market. You can find more detailed profiles of selected vendors and products beginning on page 35.

All-In-One Platforms

Comprehensive platforms for community foundations provide some level of functionality across all the major aspects of managing this type of philanthropic entity: business intelligence, donors, finance and accounting, grants, and relationships. These types of systems simplify the software procurement and management processes by limiting the number of vendors and contracts needed to build out and maintain your software solution. When there is a problem or question, you have a single company to contact for support. However, these systems usually carry a larger price tag, you may not need all the functionality these systems provide (and therefore are paying for features you aren't using), and some of the tools in a comprehensive solution may not be as feature-rich as more specialized systems.

> ***[Comprehensive platforms for community foundations] simplify the software procurement and management processes by limiting the number of vendors and contracts needed to build out and maintain your software solution.***

akoyaGO leverages the power of Microsoft Dynamics to provide grants management, CRM, donor management, fund management, accounting, and business intelligence tools. With a client base of small to midsize community foundations, the system includes strong CRM functionality and a recently upgraded grantee application tool and portal. Its integration with Microsoft Business Central provides excellent finance and accounting capabilities and a deep integration with Office 365 allows you to capture interactions and work completed outside the system into related records. It also includes robust reporting and business intelligence tools, with the ability to create charts and dashboards using both Dynamics 365 and Microsoft Power BI. Donation management and donor portal tools are not as robust as other areas of the system, but the vendor reports that they are planning to release a redeveloped fund management portal in summer 2022. New features are rolled out throughout the year in six-week release cycles, which means that there are continual upgrades and improvements to the system. Customers report that sometimes this shortened development cycle means new features can be buggy; however, they say that the vendor is responsive to problems as they arise and fixes bugs quickly. (Read akoyaGO's detailed system profile beginning on page 36.)

Give Interactive is one of the newest entries into the community foundation software market. It launched in 2021 as a single platform designed to meet the needs of large community foundations with complex financial structures. The core of the system is a sophisticated fund accounting tool that can manage complex investment portfolios and money movement for community foundations that have high transaction volumes. A feature-rich donor portal provides constituents with in-depth data about their funds and even supports individually managed investment accounts. The platform does not include an online grant application tool, but the vendor reports that it is working to develop a competitive grant module with an expected release in 2023. It also does not include a full general ledger accounting system but the vendor has a preferred partnership and integration with Sage Intacct. Give Interactive has created multiple integrations that extend the capabilities of their platform and the vendor works with clients to build custom integrations to third-party tools as needed. The software also integrates with Segment to provide a Customer Data Platform (CDP) that simplifies integrations with a variety of other applications. (Read Give Interactive's detailed system profile beginning on page 43.)

Product Suites

Blackbaud has long had a significant presence in the community foundation market and its extensive set of nonprofit software offerings allows you to mix and match modules to get what you need. The company's FIMS platform provides robust fund accounting and grants and scholarship management tools to community foundations. Financial Edge NXT provides back-office support for financial management, while Raiser's Edge NXT provides donor management and Blackbaud CRM provides for strong relationship and communications management. Blackbaud's DonorCentral is a donor portal tool that provides constituents with the ability to manage their funds and grant recommendations. Customers give high marks to the CRM functionality and the integration between the CRM and financial tools; however, they have expressed concern about the cost of these various tools, customer support, and some integration difficulties with third-party software tools.

Foundant is a widely used software platform with three products geared toward community foundations that offer a variety of tools to manage all aspects of work. CommunitySuite brings together CRM, fund accounting, online donations, donor portal, and events management functionality; Grant Lifecycle Manager is a full-featured grants management solution; and Scholarship Lifecycle Manager streamlines scholarship application, review, and award processes. CommunitySuite currently integrates with Google Data Studio to provide advanced dashboards and data visualizations. Customers report that all three tools are easy to use and that the integration between the products is very smooth. They also say that the vendor is very responsive and that customer service is excellent. Some customers have raised concerns about the depth of the CRM functionality and also that the flexibility of reporting could be improved. The vendor reports that it offers discounts on purchasing multiple products. (Read Foundant's detailed system profile beginning on page 39.)

NPact (formerly Fusion Labs) has undergone a dramatic transformation over the past year after more than a decade in the grants management market. The vendor provides three products to meet the needs of community foundations: Grant Edge, which provides foundations with donor-advised fund, grants, and endowment management and fund tracking capabilities; Spectrum, a portal tool for applicants, reviewers, donors, and board members; and Endowment Manager, a fund management tool to automate income pools, fee schedules, spending policies, and rebalancing strategies. The platform extends its functionality by leveraging longstanding integrations with Blackbaud's Financial Edge NXT, Raiser's Edge NXT, and BBCRM; however, the vendor reports that it is expanding its partnerships with large CRM and accounting solutions and expects to roll out integrations with Salesforce, Sage Intacct, and Microsoft Power BI in 2022. Customers report that the quality of customer support varies, especially when issues need to be escalated, and have noted problems with the email functionality in the system. (Read NPact's detailed system profile beginning on page 46.)

Salesforce has continued to evolve its nonprofit and philanthropic software offerings and now has several tools built to meet the needs of community foundations. The industry-leading CRM has expanded its native applications to include Grants Management, an application built on top of the Outbound Funds Module that came out of the company's Open Source Commons program, and data visualization and business intelligence tool Tableau. In addition, the company's Nonprofit Success Pack provides donation management tools to foundations that need them. Salesforce does not include accounting modules, so you would need to integrate a third-party accounting software platform with the system in order to connect your grant activities with your financial systems. Connectors already exist for Sage Intacct and Oracle Netsuite integrations, in addition to several other accounting solutions. More than 4,000 pre-built integrations for the platform are available on the AppExchange and Salesforce also acquired iPaaS provider MuleSoft to facilitate integration with even more third-party tools. A variety of the systems discussed in this report either have developed or are developing integrations with the tool as well. The depth of reporting, the scalability of the system, and the sophistication of workflows all received high marks from customers; however, the system can be complex to configure and you need to work with an implementation partner—rather than the vendor—to build out your system. Because of this complexity, foundations looking to transition to the platform or optimize their implementation may want to consider hiring a staff member who specializes in the platform. (Read Salesforce's detailed system profile beginning on page 51.)

> *Salesforce has continued to evolve its nonprofit and philanthropic software offerings and now has several tools built to meet the needs of community foundations.*

Stellar Technology Solutions has proven to be a lasting presence in the community foundation space with more than 20 years in the marketplace. The vendor's iPhi suite of products—iPhi CoreEnterprise and iPhi PrivateViews—provides strong fund management and accounting, grants management, and the ability to create applicant and donor portals for your different constituencies. Customers report that the CRM functionality and reporting is limited and that integration with third-party tools can be improved.

Specialized Tools

Grants Management

SmartSimple Cloud is a tracking and reporting platform that provides support for a wide variety of grantmaking programs and can also deliver donor portal functionality. The vendor has specialized installations for Grants Management, Scholarship Management, and more, as well as a SmartSimple Cloud for Salesforce installation that integrates directly with the popular CRM. SmartSimple includes several pre-built integrations as well as tools to help build additional connectors. This includes three APIs and an integration with iPaaS service Workato. Customers praise the flexibility of the system but note that it can be complex to configure. (Read SmartSimple Cloud's detailed system profile beginning on page 54.)

For more specialized grants management solutions see Tech Impact's **A Consumers Guide to Grants Management Systems**.

Financial Management

The management of funds, finance, investments, and accounting is easily one of the most complex aspects of community foundation administration. That is why a number of foundations choose a specialized finance and accounting software system. **Sage Intacct** provides a comprehensive set of tools that include pre-built reports for compliance and reporting, sophisticated fund management and reporting capabilities, and the ability to track both financial and non-financial information. In addition, numerous community foundation software platforms have either pre-built or in-progress integrations with Sage Intacct. (Read Sage Intacct's detailed system profile beginning on page 49.)

Other specialized accounting and finance tools used by foundations include **Oracle Netsuite** and **Intuit Quickbooks**.

Constituent Relationship Management (CRM)

Relationships—with donors, grantees, community organizations, board members, and more—are the heart of community foundation work. While most of the platforms discussed in this report have some form of CRM functionality, more community foundations have been looking to invest in more sophisticated, purpose-built CRMs. Salesforce has been at the forefront of this, but other systems in use by community foundations include **Microsoft Dynamics** and **Blackbaud CRM**.

Donation Management/Donor Portal

Although there are a lot of specialty fundraising platforms available (see **A Consumers Guide to Low-Cost Fundraising Systems**), there are not many specialty donor portal options available. A survey of community foundations shows that most are using Blackbaud products (DonorCentral and NetCommunity), Foundant, or Salesforce Experience Cloud (formerly known as Salesforce Communities) for this purpose.

Business Intelligence

All the systems discussed here have some level of reporting functionality built in, but several have integrated powerful business intelligence tools into their platform for in-depth dashboards and more sophisticated visualizations. These tools, which are also available as standalone products, include **Microsoft Power BI** and **Google Data Studio**.

HOW DO THE SYSTEMS COMPARE?

With the complexity of community foundations' software needs and the variety of different approaches vendors take to meeting those needs, it can be difficult to compare systems in the marketplace. The previous section provided an overview of systems that serve the different needs of the market, and later we'll provide a more in-depth look at some of those systems.

But how do the systems stack up in relation to one other? The chart below provides an overview of the core functionality built into each of the systems detailed in this report. That functionality is broken out into five major "buckets" common among community foundations: business intelligence, CRM, donor management and donor portals, finance and accounting, and grants management.

		Accounting/ Finance	CRM	Donor Mgmt/ Portal	Grants Mgmt	Business Intelligence
akoyaGO	akoyaGO	✓	✓	✓	✓	✓
Foundant	Community Suite	✓	✓	✓		
	Grant Lifecycle Manager				✓	
Give Interactive	Give Interactive	✓		✓	✓	✓
NPact	Granted Edge NXT				✓	
	Spectrum NXT			✓		
	Endowment Manager	✓				
Sage Intacct	Sage Intacct	✓				
Salesforce	Grants Management		✓	✓	✓	
	Tableau					✓
SmartSimple	SmartSimple Cloud		✓	✓	✓	

While all of the systems we reviewed for this report can integrate with other systems that extend their functionality and check additional boxes, it is helpful to know what is included natively with each product.

In April 2022, we distributed a survey to 11 vendors that provide software marketed to community foundations. The survey covered a wide range of functions of interest to community foundations. We received responses from six vendors and one implementation partner to a seventh vendor. The survey responses detailed what functionality the core system provides, what can be achieved through custom development or the purchase of an additional module or product from the vendor, and what can be done through integration with a third-party tool.

The chart beginning below summarizes vendor responses so that you can see how the different systems approach specific functions. While there is a lot of commonality in what the systems can do, the way that they achieve these results vary. While the information in this chart was provided by the vendors, we confirmed it to the best of our ability during demos.

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
SECURITY							
Two-Factor Authentication	Yes	Yes	Yes	No	Yes	Yes	Yes
Single Sign On	Yes	No	Yes	No	Yes	Yes	Yes-$
Data encryption at rest	Yes	Yes	Yes	Yes	Yes	Yes-$	Yes
Data encryption in transit	Yes	Yes	Yes	Yes	Yes	Yes-$	Yes
Customizable system permissions	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Grant users or roles access to certain large areas of system information, such as a module	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Grant users or roles granular access to view, edit, or delete data for a wide variety of system functions	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Define user or role-based permissions on a field-by-field basis	Yes	Yes	Yes	No	No	Yes	Yes
Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log	Yes	Yes	Yes	Yes	Yes	Yes	Yes
INTEGRATIONS							
Do you provide a secure API?	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Do you have an open API?	Yes	No	No	No	Yes	Yes	Yes
Do you have a marketplace of pre-configured integrations with third-party software?	Yes	No	Yes	No	Yes	Yes	Yes

Yes: This is core functionality.
Yes-$: This can be done with an add-on module or at additional cost.
Workaround: This can be done with a workaround in the system.
Integration: This can be done via a pre-existing integration with a third-party solution.
Custom Dev: This requires custom development.
No: This is not a feature the vendor provides.
N/A: Not applicable.

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
TRAINING & SUPPORT							
Online training videos	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Live online training	Yes-$	Yes	Yes	Yes-$	Yes-$	Yes-$	Yes
In-person training	Yes-$	Yes-$	Yes-$	Yes-$	Yes	Yes-$	Yes-$
Knowledge base	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Email support	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Phone support	Yes	Yes	Yes	Yes-$	Yes	Yes-$	Yes
Chat support	No	Yes	No	Yes	No	Yes	Yes
User community or forum	Yes	Yes	No	No	Yes	Yes	Yes
GRANT APPLICATIONS							
Online applications	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Supports multiple application stages (letter of intent, eligibility quiz, detailed proposal)	Yes	Yes	Yes-$	Yes	N/A	Work-around	Yes
Eligibility quizzes can branch to multiple applications	Yes	Yes	Yes-$	Yes	N/A	Work-around	Yes
Supports multiple logins for grantees on a single application	Yes	Work-around	Yes-$	Yes	N/A	Yes	Yes
Both individuals and organizations can complete online applications	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Two or more organizations can collaborate on an application	Custom dev	Work-around	Yes-$	No	N/A	Yes	Yes
Administrators can create new online applications without additional vendor charges	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Administrators can customize online forms with colors, fonts, navigation	Yes	Yes	Yes-$	No	N/A	Yes	Yes
Auto-populate information in applications	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
From previous grant applications	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
From third-party databases via EIN	Yes	Yes	Yes-$	Integ-ration	N/A	Custom dev	Yes
Electronic signature support	Yes	No	Yes-$	Yes	N/A	Integ-ration	Integ-ration
Grantee portal allows applicants/grantees to check the status of their application/grant	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Multi-lingual content	Work-around	Yes-$	No	Yes	N/A	Yes	Yes
Supports multi-lingual system-generated content	Work-around	No	No	Yes	N/A	Yes	Yes
All content can be multi-lingual or the system integrates with online translation add-ons		Yes-$	No	Yes	N/A	Yes	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
APPLICATION REVIEW							
Define a default format for grant application summaries and choose which fields to include	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Offline review of applications with comments synced online	Work-around	No	Yes-$		N/A	No	Yes
Allow reviewers to see other comments and scores	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
View numeric scores and report as summary statistics	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Supports multiple scoring schemes for different programs	Yes	Yes	Yes-$	Yes	N/A	Work-around	Yes
Reviewer portal	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Allow reviewers to see relationship history with prospective grantees	Yes	Yes	Yes	Custom dev	N/A	Yes	Yes
Can assign additional system privileges to reviewers	Yes	Work-around	Yes-$	Yes	N/A	Yes	Yes
Administrator can define multiple workflows for grants review processes	Yes	Work-around	Yes	Yes	N/A	Work-around	Yes
Ability to assign reviewers at random based on workflow or other attributes	Yes	No	Yes-$	No	N/A	Work-around	Yes
GRANT TRACKING							
View related records	Yes	Work-around	Yes	Yes	N/A	Yes	Yes
Capture emails sent from external systems into grant, individual, or organization records	Yes	Work-around	Yes	Yes	N/A	Yes	Yes
Perform batch updates of record fields	Yes	Yes-$	Yes	Yes	N/A	Work-around	Yes
User can group or arrange fields into sections or tabs	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Automatically perform status checks and updates in batch on a specified schedule via connection to a standard registry of 501(c)(3) nonprofits	Yes	Yes	Yes	Yes	N/A	Custom dev	Yes
Support grants made in multiple currencies by storing currency and exchange rate information	Yes	No	No	No	N/A	No	Yes
Provides “dashboard” views, which summarize the grants and tasks currently relevant to each individual user	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Assign tasks to users through workflow functionality.	Yes	Work-around	Yes	Yes	N/A	Yes	Yes
Assign tasks to users based on rules and roles	Yes	No	Yes	Yes	N/A	Yes	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
PAYMENTS							
Define a default payment schedule for all grants and then adjust amounts and dates for grants individually	Custom dev	Yes	Yes	Yes	N/A	Work-around	Yes
Customize payment schedules	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Make payments contingent or conditional on specific requirements	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Automated payment approval process with configurable workflow	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Configure audit or security controls so only certain staff can change payment information	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Void payments, make refunds, and place payments on hold	Yes	Yes	Yes	Yes	N/A	Yes-$	Yes
Grantees can view payment schedules and upcoming payments through a grantee portal	Yes	Yes	Yes	Yes	N/A	Yes	Yes
FUND MANAGEMENT							
View current fund balance for any fund	Yes	Yes	Yes	Yes	N/A	Integ-ration	Yes
Set up multiple funds from which to grant with separate requirements	Yes	Yes	Yes	Yes	N/A	Work-around	Yes
Create new donor-advised funds	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Associate funds with one or many investment pools	Yes	Yes	Yes	Yes	N/A	Work-around	Yes
Calculate suggested annual payout for a fund given defined spending rules	Yes	Yes	Yes	Yes-$	N/A	Work-around	Yes
Grant managers can search to find restricted funds that match desired grant opportunities based on donor interests	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Set separate reporting schedules for each fund	Yes	Work-around	Yes	Yes	N/A	Work-around	Yes
Update the value of a fund based on investment income (manual or automatic)	Yes	Yes	Yes	Yes	N/A	Integ-ration	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
BUDGETING							
Track budgets in hierarchically defined categories or program areas	Yes	Yes	Yes-$	Yes	N/A	Work-around	Yes
Enter a budget amount for each grants program and report on that information with actuals	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
View the impact a particular grant will have on future year payouts with a "what if" type feature	Yes	No	Yes-$	No	N/A	Custom dev	Yes
Choose whether to track either the amount awarded or the amount bud-geted in a particular year	Yes	No	Yes-$	Yes	N/A	Yes	Yes
Split grants across more than one pro-gram for budgeting purposes	Yes	Work-around	Yes-$	No	N/A	Yes	Yes
Forecasting	Yes	No	Yes-$	No	N/A	Custom dev	Yes
Use previous years' budgets as a base and adjust them for current year	Yes	Yes	Yes-$	No	N/A	Yes	Yes
Use scheduled payment data to predict cash flow needs for a specified time period	Yes	No	Yes-$	Custom dev	N/A	Yes	Yes
Generate reports showing current year payments to date plus projections for anticipated payments	Yes	No	Yes-$	Custom dev	N/A	Yes	Yes
GRANT REQUIREMENTS & PROGRESS REPORTING							
Grantees can see due dates for required reports through grantee portal	Yes	Yes	Yes-$	Yes	N/A	Yes	Yes
Grantees can submit required reports through grantee portal	Yes	Yes	Yes	Yes	N/A	Yes	Yes
INDIVIDUAL CONTACT RECORDS							
Track multiple phone numbers and addresses for each contact, label them, mark the primary number and address, and track the persons' preferred con-tact methods	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Keep a log of communications such as phone calls or personal meetings	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Mark that a particular person should not be contacted	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Track people's seasonal addresses with effective dates and automatically switch primary addresses for the appro-priate timeframe	Yes	Yes	Work-around	Integ-ration	N/A	Yes	No
Track relationships between contacts and label them with custom relationship types	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
ORGANIZATION RECORDS							
Track organizations separately from individual grants to allow you to see a history of all grants to an organization	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Associate multiple contacts with an or-ganization and define their relationships to you and to a specific grant	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Track individual business units under a larger organization	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Pull demographic information into organization records from a standard registry of 501(c)(3) nonprofits	Yes	Yes	Yes	Integ-ration	N/A	Custom dev	Integra-tion
COMMUNICATION							
Capture emails from external email systems into grantee or organization records	Yes		Integ-ration	Integ-ration	N/A	Yes	Yes
Communicate with a contact accord-ing to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact)	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Send emails through the system to a single individual or a group of people who meet particular criteria	Custom dev	Yes	Integ-ration	Integ-ration	N/A	Yes	Yes
Set up and send automatic emails based on certain events	Yes	Yes	Integ-ration	Integ-ration	N/A	Yes	Yes
Set up and send scheduled reminders to applicants and grantees	Yes	Yes	Integ-ration	Integ-ration	N/A	Yes	Yes
Create emails or letters to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
View and customize individual letters before printing them	Yes	Yes	Yes	Integ-ration	N/A	Yes-$	Yes
Automatically stores a record of all system-generated letters and emails for each contact	Yes	Yes	Yes	Integ-ration	N/A	Yes-$	Yes
See the open rate, clickthrough rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports	Integ-ration	No	Integ-ration	Integ-ration	N/A	Yes-$	Yes
Attach files to emails sent to individuals and groups	Yes	Yes	Integ-ration	Integ-ration	N/A	Yes	Yes
CONFIGURATION							
Customizable dashboards for different users	Yes	No	Yes	Integ-ration	N/A	Yes	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
DONATION MANAGEMENT							
Add and track individual donations	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Add, schedule, and track pledges for future gifts	Yes	Yes	Yes	Integ-ration	N/A	Yes	Yes
Create a set of pledges based on a pay-ment schedule	Yes	Yes	Yes	Integ-ration	N/A	Work-around	Integ-ration
System prompts to apply new gifts against open pledges	Custom dev	Yes	Yes	No	N/A	Work-around	Yes
Add and track organization donations	Yes	Yes	Yes	No	N/A	Yes	Yes
Support In Honor Of/In Memory Of gifts	Yes	Yes	Yes	Yes	N/A	Yes	Yes
Add and track value of stock gifts	Yes	Work-around	Yes	Integ-ration	N/A	Yes	Yes
Create/customize fund statements	Yes	Yes	Yes	Yes	N/A	Yes-$	Yes
Real-time data updates	Yes	Yes	Yes	No: Over-night sync/ manual refresh available	N/A	Yes	Integ-ration
DONOR PORTAL							
Donors can check account balances from donor portal	Yes	Yes	Yes	Yes	N/A	Yes	Integ-ration
Donors can view account statements and grant history from donor portal	Yes	Yes	Yes	Yes	N/A	Yes-$	Yes
Donors can make deposits from donor portal	Yes	Yes	Yes	Yes	N/A	Yes-$	Integ-ration
Donors can renew previously awarded grants from their giving history	Yes	Yes	Yes	Yes	N/A	Work-around	Yes
Donors can select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria	No	Yes	Yes	No	N/A	Work-around	Yes
Donors can browse through a founda-tion-provided list of "approved nonprofits"	Yes	Yes	Yes	Yes	N/A	Work-around	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
ACCOUNTING							
Payment processing	Yes	Yes	Yes	Integ-ration	Integ-ration	Yes-$	Integ-ration
EFT/ACH payment integration	Yes	Yes	Yes	Integ-ration	Yes	Yes-$	Integ-ration
Bank account integration	Integ-ration	No	Yes	Integ-ration	Yes	Yes-$	Integ-ration
Accounting and ledger	Yes	Yes	Integ-ration	Integ-ration	Yes	Yes-$	Integ-ration
Fund-level accounting	Yes	Yes	Yes	Yes	Yes	Yes-$	Integ-ration
Asset management	Yes	Work-around	Yes	Yes	Yes	Yes-$	Integ-ration
Investment management	Yes	Work-around	Yes	Yes	Work-around	Yes-$	Integ-ration
Expense/credit card management	Yes	Work-around	Integ-ration	Integ-ration	Yes	Yes-$	Integ-ration
Compliance management and reporting	Yes	Yes	Yes	Integ-ration	Yes	Yes-$	Yes
Tax and audit preparation	Yes	Yes	Yes	Yes	Yes	Yes-$	Yes
Customizable workflows for complex functions (e.g.agency endowments, multi-agency reporting)	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Drill-down reporting	Yes	Yes	Yes	Yes-$	Yes	Yes	Yes

	akoyaGO	Foundant	Give Interactive	NPact	Sage Intacct	Salesforce	SmartSimple
BI/REPORTING							
Generate fund statements using pre-packaged templates	Yes	Yes	Yes	No	Yes	Yes-$	Yes
Standard reports for common fundrais-ing and donor management needs	Yes	Yes	Yes	Yes	No	Yes	Yes
Create ad hoc reports, which can in-clude nearly any field displayed to users	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Ad hoc reports can include custom data columns, datasets, sorting, grouping, logos, and headers	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Visual query builder or report builder wizard	Yes	Integ-ration	Yes	Yes	Yes	Yes	Yes
Save reports that you create or modify	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Mark reports as favorites	Yes	No	Yes	Yes	Yes	Yes	Yes
Reports can be set to automatically run on a schedule and sent to individuals or groups	Yes	No	Yes	Yes	Yes	Yes	Yes
Outcome/impact reporting	Yes	Yes	Yes-$	Yes	Yes	Work-around	Yes
Automatic calculation of progress toward outcome goals using submitted progress reports	Yes	Work-around	No	Custom dev	Yes	Work-around	Yes
Evaluation of and reporting on out-comes across programs and/or all grantees	Custom dev	Yes	No	Yes	Yes	Work-around	Yes
Capture and reporting of data along demographic and economic categories	Yes	Yes	Yes	Yes	Yes	Work-around	Yes
Create multiple unique dashboards	Yes	No	Yes	Yes	Yes	Yes	Yes
Search the contents of file attachments	No	No	No	No	Yes	Yes	Yes
Drill down for more information on some or all reports	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Data visualization: create, view, and export data in a visual graphic repre-sentation	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Collect and report on data from multi-ple sources/systems	Yes	No	Integ-ration	Yes	Integ-ration	Yes	Yes
Pull data from CRM, financial system, grants management software without vendor assistance	Yes	Yes	Yes	Yes	Integ-ration	Yes	Yes

WHAT DO THE SYSTEMS COST?

The cost of community foundation software varies widely and is generally affected by several factors. For many systems, yearly subscription costs are determined by your foundation's total asset base, the number of staff and/or external users of the system, and the modules you select.

Most of the vendors we contacted for this report declined to offer pricing examples for the small/medium/large foundation scenarios we provided, instead noting that their pricing was customized for each client. But in general, small foundations that provide less than $25 million in grants can find software providing a full set of the functionality discussed in this report for less than $10,000 per year, while solutions for large foundations that distribute more than $500 million in grants can easily run $50,000 or more per year.

Implementation Costs

At the outset of your engagement with a vendor or an implementation partner, you will likely have to pay a separate fee for system setup and configuration. This will usually include such work as setting up roles and permissions in the system, customizing display screens, building out basic dashboards and reports, and translating business processes into system workflows. These costs can increase significantly if you have more complex workflows, if you need the vendor to provide custom development, or if you have large amounts of data you want to migrate from your current system. One-time implementation costs can range from several thousand dollars to more than $20,000. Some vendors have set implementation costs, while others customize pricing based on a scope of work that takes into account the effort to implement needed customizations and system configurations.

> ***Most of the vendors we contacted for this report declined to offer pricing examples for the small/medium/large foundation scenarios we provided, instead noting that their pricing was customized for each client.***

Subscription Fees

Yearly subscription fees (or license fees) are the heart of your investment in community foundation software. Vendors have a variety of methods of pricing for their software. As noted previously, the most common pricing structure is determined by the total amount of assets your foundation manages and/or the number of system users. Other vendors will provide pricing based on the number of records in your system, the volume of grant applications you process, and/or the number of documents stored in the system. Vendors will often provide a discount on pricing if you use multiple products from the same vendor.

Add-Ons

One thing to be aware of is what modules or functionality are included with different types of licenses. Some vendors have multiple license types that provide access to different levels of functionality. Others require additional fees for "add on" modules. If you find that you really need a certain feature of a software package, be sure to ask if it is included in the base package pricing or if it is an optional module that requires additional fees.

Maintenance and Support Packages

Customer support can be a lifeline when there's a problem with the system. Most systems have a certain level of support included—which usually means support via email and access to a knowledgebase or a customer forum. Enhanced support—often meaning phone support—is offered for an additional fee. Some systems also offer maintenance packages, which are a set number of consulting hours each month from the vendor to help maintain and enhance your system. You should consider your staff size and their overall experience and comfort with using technology when deciding on a support package or evaluating a vendor's customer service options—how can your staff contact them, how soon do they respond to support requests, and so forth.

Training Packages

Most systems come with an initial set of training options for different users in the system. This is often some combination of pre-recorded videos, webinars, and access to a knowledge base. Extended training packages are often offered for an additional fee and they can help orient new staff to the system after the initial implementation and teach "super users" how to make the most of their systems. In-person trainings, which were largely suspended during the pandemic, are now returning, but they often require additional fees.

HOW TO SELECT THE RIGHT SOFTWARE FOR YOUR COMMUNITY FOUNDATION

Past editions of this guide focused on software solutions designed to meet the varied needs of community foundations in a single package. While this is a popular approach—and can be an effective one—it's not necessarily the best fit for all community foundations.

Which approach is right for your community foundation? It depends on many factors. Here are some key issues to help frame your thinking about which system or systems are right for you.

Integration Type and Level

As mentioned previously, vendors take several different approaches when catering to the community foundation market. One is to provide an all-in-one tool that brings donor, financial, and grant management capabilities together with CRM and reporting. Another is to build several different tools that can be used separately or work together as an all-in-one system. Finally, some tools are purpose-built for a single essential area of community foundation management, but can connect (or integrate) with a wide range of other platforms to extend their functionality.

Each comes with benefits and trade-offs. An all-in-one solution can provide you with the tools that you need without having to manage multiple platforms and vendors, for example, but might not be as feature-rich in some areas, or may require you to work outside the system or adapt some of your business processes to fit the platform. Using multiple systems can allow you to select the individual tools that best meet your needs, but integration requires technical expertise (and added expense if you need to outsource the work) and staff time to learn and stay up to date with multiple systems.

> ***The purchase price of software is an important consideration, but it's not the only component of a platform's cost.***

Organization Size and Budget

The purchase price of software is an important consideration, but it's not the only component of a platform's cost—overall costs include implementation, customization, subscription, training, support, maintenance, and staff time. All-in-one systems may ease the management and training burden on staff, but they usually come with a considerably higher price tag and a lengthier implementation. You can better find options to fit your budget with an a la carte approach, but that means you will have more vendor relationships and support systems to navigate and will likely need more customization work to get the systems to interact with each other.

With an all-in-one system, you know that all elements will work together, and a single vendor will provide implementation, training, and support. But if your community foundation has the staffing and technical expertise to manage it, a modular approach to creating a platform may work for you—and may save you money. Generally, you can find vendors who provide specialized software at a lower price than comprehensive systems. With this approach you can more easily upgrade parts of your system if you grow or your needs change without having to upgrade the entire system.

Business Processes and Complexity

Much of the benefit of software platforms that serve the community foundation market lies in the automation of certain tasks. Some of this is very simple, such as assigning follow-up tasks to an approved grant or moving applications through the review process. Other pieces are complex, like managing investment allocations for pooled funds or managing a large volume of Donor Advised Funds (DAFs).

The Technology Association of Grantmakers (TAG) recently asked its community foundation members about their current technology stacks, and where they are headed. It found that smaller foundations, which usually have less-complicated or lower-volume programs, tended to gravitate toward all-in-one solutions that allow them to manage programs without added staff time. Mid-size foundations were more likely to select one "core" platform that address their biggest priorities to serve as the base for their technology and add on complementary or supportive products as needed. Finally, large foundations, which are more likely to have very complex business processes, lean toward enterprise-level CRM or finance packages and then to custom-built solutions or integrations to add functionality.

What are your foundation's most challenging or resource-intensive business processes? Can they be streamlined or managed by a technology solution on the market? What processes are you willing to change and what cannot be changed? For many community foundations, the greatest complexities lie in fund or donor management. Others are challenged by grants management.

Before looking at software options it is helpful to conduct a business process audit or at least document your existing processes. That way, when talking to vendors you can ask how their software handles these types of processes, whether it would require an additional module or custom development, or where you would need to change the way you handle certain tasks.

What are your foundation's most challenging or resource-intensive business processes? Can they be streamlined or managed by a technology solution on the market? What processes are you willing to change and what cannot be changed?

Existing Technology Stack and Unmet Needs

What systems does your community foundation already have in place? Chances are you are already working with a set of tools to manage grants, finances, donor relationships, and programs. Which ones work best for your organization? Where are the pain points? If you have a tool or set of tools that works well, there may not be a benefit to a replacement that may or may not be a good fit.

Many community foundations may find themselves looking for a new solution when they are really only seeking better support for one or two areas of their work. For example, iIf you are happy with your donor management tool, it is worth exploring options that may not have that functionality but that have a pre-existing integration with the software you are using. What this does is limit the disruption that migration to new software brings and reduces the amount of training necessary.

It is helpful to think about what you want the "core" of your system to be, and then align that with the software solution you choose. Every platform on the market has its strengths and weaknesses. Traditionally, fund management and finance platforms have been the core systems for community foundations because of the need to track frequent and complex financial transactions. Relationships with donors, grantees, board members, and community members are also important to many foundations, so CRMs that are deep and rich in constituent engagement and communication tools serve as core systems.

Staff Expertise and Technological Maturity

It is particularly important to keep your staff's comfort level with technology in mind when looking to new systems. User experience and ease of important tasks, such as running reports, vary widely among platforms. Feature-rich solutions can be complex to navigate and may present an unnecessarily high learning curve for your staff. Similarly, platforms that rely heavily on integration may pose more challenges, as different systems can require staff to switch between tabs or windows, adjust to different layouts, and log in to multiple systems.

The number and type of integrations you use is also a factor. As we discussed in a previous section, there are several types of third-party software integrations: pre-built integrations; integrations that are facilitated via an iPaaS solution; and custom-built integrations that use APIs.

Many pre-built integrations are easy to set up and can be done by your staff, even with limited technical knowledge. However some do require technical expertise, vendor involvement, or the services of an implementation consultant. Similarly, iPaaS facilitated integrations can run the gamut from simple to complex, while custom-built API integrations almost always require software developer or vendor involvement.

Another issue is how technology fits into your current operations and where you are looking to grow. TAG's 2020 report, **The Strategic Role of Technology in Philanthropy**, outlines four stages of technological maturity—Essentials, Enhancements, Elevation, and Transformation—and how a foundation's technology tools reflect where they are in each stage.

In the Essentials stage, a foundation relies on tools that provide a basic infrastructure that helps keep it afloat. Foundations in the Enhancements stage begin to expand outward, experimenting with integrations and starting to focus on systems that streamline their work. In the third stage, Elevation, foundations go beyond operations and start exploring technology that better engages and serves their constituents. The final stage, Transformation, expands that outward focus even more, moving from meeting constituent needs to anticipating them.

Community foundations in the Essentials stage need to make sure they have a strong set of tools for operations in place, and are not yet in a position where paying for software that provides them with advanced engagement tools makes sense. Organizations in the Enhancements stage should be looking at things like automation and workflow features to streamline operations. Finally, organizations with a strong technology foundation can look at systems that provide sophisticated donor engagement and portal tools.

There is no one software package that meets the needs of all foundations, and there are many excellent solutions in the marketplace. In the next section we provide you with a closer look at several different types of systems that serve community foundations and the different ways they meet some common requirements.

DETAILED SYSTEM PROFILES

We worked with the vendors of the most commonly used systems in this report to get a better understanding of what their software does and how it integrates with other tools. Not all of the vendors were willing or able to participate. Vendors completed a detailed questionnaire. Based on their responses, we scheduled demos to verify functionality. Vendors were given the opportunity to fact-check their profiles prior to publication.

akoyaGO | akoyago.com

akoyaGO is an all-in-one system built on Microsoft Dynamics that provides foundations with grants management, CRM, donor management, fund management, accounting, and business intelligence tools. akoyaGO has provided software solutions to the community foundation sector for more than 40 years, first with the Microsoft Access-based Pearl, and more recently with the cloud-based Akoya.net, also built on Dynamics. The vendor reports that it currently serves nearly 200 foundation customers.

Pricing

Small foundation*	• $5,000+ One-Time (Implementation) • $7,500+ Recurring/Annual
Mid-size foundation**	• $12,500+ One-Time (Implementation) • $20,000+ Recurring/Annual
Large foundation***	• $25,000+ One-Time (Implementation), • $40,000+ Recurring/Annual

Grant and Application Management

akoyaGO's grants management tools allow you to manage the full lifecycle of your grants and scholarships. The system stores both individual and organization records, including a full history of all interactions.

In 2021, the vendor undertook a significant enhancement of its online grant application and review tool with the goal of making it more intuitive and easier to use. The tool, now known as GOapply, allows for multi-stage applications with custom phases, eligibility quizzes, and branching logic. Foundations can customize the logo, branding, colors, and themes on applications, using a drag-and-drop form-builder with a built-in preview ability that can show how your form will appear across a variety of devices.

Applicants can register either as individuals or organizations, and upon registration will only see the applications that correspond to their user type. Applicants can use the Employer Identification Number (EIN) search to pre-populate the application with their organization's information. The system allows for multiple file uploads on each question and electronic signatures (either directly in the application or via a connection to DocuSign). It also auto-saves responses every two minutes and can generate a blank PDF of the application form to allow applicants to fill out an offline application.

The grantee portal allows applicants to see the status of their applications as well as next payment due, next requirement due, and total amount paid. Constituents can also use the portal to edit contact and organization information, which updates directly in the database. You can also list open grant or scholarship opportunities on the grantee portal and provide each opportunity with its own landing page.

Grant reviewers can log into GOapply to see and rate the applications assigned to them. The system facilitates multiple scoring schemes and administrators can also define multiple workflows to capture different review processes.

Financial Management

akoyaGO includes the ability to manage a variety of fund types. You can set the fund type and class, as well as the fee percent or fee amount and spend percent for each fund. Accounting functionality is managed through an integration with Dynamics 365 Business Central. Funds can be added to multiple investment pools and, when gain/loss statements come in, you can perform joint

* Less than $25 million in grants, 1-5 staff
** $25-500 million in grants, 10-25 staff
*** More than $500 million in grants, 50+ staff

investment allocations in Business Central, which will calculate out the shares for each fund.

As of publication, donor portal financials are only updated during the nightly sync; the vendor reports it is working on the ability to see real-time financial data in the next update. Business Central integrations with Evestnet or AMC Banking 365 allow you to connect the system with your bank account to facilitate ACH payments.

Grant payments can be scheduled and adjusted, and you can make them dependent on the completion of specific requirements. Payments can also be voided or placed on hold. The system supports multi-currency payments and fiscal sponsor payments.

The system also supports budgeting and forecasting. Program budgets can be set up to track the amount available, awarded, and paid out in a given year, and grants can be split across more than one program for budgeting purposes. You can use previous years' budgets as a base and adjust the numbers for the current year so you don't have to start from scratch. You can also track budgets across multiple years.

Donor Management/Donor Portal

Donation management and a donor portal are provided by akoyaGO's FundWeb tool; the vendor reports that a new fund management portal called GOfund is coming in summer 2022. Within the current tool, constituents can make donations, see donations they have made, update their contact information, and recommend grants. The system also provides the ability for prospect tracking, campaigns, and events. An integration with Donor Search allows for wealth management screening of donor prospects.

Relationship and Communication Management

The core of akoyaGO is Microsoft Dynamics CRM. This means that you can track a great deal of information about organizations and individuals, including multiple addresses, phone numbers, and emails, as well as relationships between individuals and organizations. You can send emails through system to individuals or groups or work within Outlook and have the interactions saved on constituent records. The system also has integrations with MailChimp and Constant Contact for email marketing purposes.

Business Intelligence and Reporting

akoyaGO has a variety of reporting and business intelligence features built into the platform. The system comes with a number of pre-packaged reports and also provides an easy-to-use report wizard that allows you to create, save, and share ad hoc reports. An outcomes module allows you to roll up outcomes reporting on grantee-submitted metrics across programs.

The platform also provides a large variety of dashboards for users. You can select between Dynamics 365 dashboards and Power BI dashboards, with all options allowing you to drill down to the underlying information. Dashboards are permission-based and you can create a variety of role-based dashboards for different types of users. Users can also build their own dashboards if they have the permissions within the system and share their dashboards with other users.

Integrations

As a system built on the Dynamics platform, akoyaGO offers a deep integration with Microsoft Office 365. Contacts, emails, appointments, and tasks can be set in either Outlook or akoyaGO and when you connect an email in Outlook to a request or opportunity all replies go back to that record. The system leverages SharePoint for document storage.

The vendor reports that any of the Dynamics 365 integrations available on Microsoft's AppSource will integrate with the platform. Some can be self-service integrations, while others require vendor assistance. Among those integrations are MailChimp, Constant Contact, Adobe Sign, DocuSign, and Donor Search. The system also integrates with GuideStar charity check.

Additional custom integrations can be built using the platform's API—akoyaGO offers both private and open APIs.

Technical Considerations

Login security is protected by both Multi-Factor Authentication and Single Sign On with Office 365. Because all of akoyaGO's tools and integrations are managed on the same platform, there's no need to log into multiple systems or switch between windows or tabs to move from one module to another. The system is hosted in a Microsoft Azure environment, which provides enterprise-level security, redundancy, and backup for the platform. The vendor reports that it operates on six-week release cycles, which means that it rolls out new features and functionality throughout the year rather than on a quarterly basis.

Access to areas of the system, dashboards, and actions are governed by granular individual permissions, which allow administrators to provide or restrict access down to the field level.

akoyaGO offers online training videos, with live online training and in-person training available at an extra cost. Users have access to a knowledge base, email support, and phone support, as well as an online user community.

Foundant | www.foundant.com

First launched in 2007, Foundant is a software platform that offers community foundations a variety of tools to manage all aspects of their work. The platform is widely used in the sector and the vendor reports that its CommunitySuite product is currently in use by more than 500 community foundations of all sizes and its Grant Lifecycle Manager software is used by more than 400 community foundations.

Foundant offers three cloud-based products that serve the needs of community foundations.

- CommunitySuite brings together CRM, fund accounting, online donations, donor portal, and events management functionality.
- Grant Lifecycle Manager is a grants management solution that allows foundations to manage the entire grant lifecycle.
- Scholarship Lifecycle Manager streamlines scholarship application, review, and award processes.

Pricing

Pricing for the system is asset-based and includes an unlimited number of licenses. The annual cost for each product is as follows:

CommunitySuite	
Small foundation*	$4,500–$18,000
Mid-size foundation**	$23,000–$87,000
Large foundation***	$87,000–$215,000
Grant Lifecycle Manager	
Small foundation*	$3,000–$6,000
Mid-size foundation**	$4,000–8,500
Large foundation***	$8,500–$11,500
Scholarship Lifecycle Manager	
Small foundation*	$3,000–$6,000
Mid-size foundation**	$4,000–8,500
Large foundation***	$8,500–$12,300

* Less than $25 million in grants, 1-5 staff
** $25-500 million in grants, 10-25 staff
*** More than $500 million in grants, 50+ staff

Foundant offers three levels of licensing with varying features for Grant Lifecycle Manager and Scholarship Lifecycle Manager: Standard, Standard +2, and Advanced (see a list of the additional features for Standard +2 and Advanced licenses on the vendor's website). The vendor offers discounts on pricing for clients purchasing more than one product.

Grant and Application Management

Foundant's Grant Lifecycle Manager (GLM) provides community foundations with a comprehensive tool to manage their grants programs.

GLM's online application tools allow community foundations to create grant applications and customize them with logos and font colors and sizes . The system supports multi-stage applications, but a community foundation will need an Advanced license to create eligibility quizzes or add branching logic to applications. Applicants can invite other individuals within their organization or from external organizations to collaborate on an application and can specify collaborators' ability to view and/or edit the draft application. An integration with Candid's GuideStar for Grant Applications allows applicants to pull information from their organization's GuideStar profile into a grant application and community foundations that have GLM's Advanced license can allow applicants to copy answers from previous grant applications into new applications.

An applicant portal allows applicants and grantees to view their grant applications, update their individual or organization profile data, see the status of applications, and submit follow up materials. An integration with Google Translate allows foundations to provide multi-language support within the applicant portal.

Grant application reviewers use the same login page as platform administrators but are presented with a simplified version of the dashboard and navigation via role-based permissions. Individuals can have multiple roles in the system, so this access can be expanded to other areas. The tool supports multiple scoring schemes and administrators can create multiple review workflows. When reviewing applications, reviewers have the option to view the scorecard and the application fields related to the scoring side-by-side, rather than having to toggle back and forth.

Once a grant is approved, an administrator can add payment installment dates, set any required follow up tasks (such as grant agreements and reporting), and sync the grant record with CommunitySuite (CS) if the foundation is also using that platform. During the sync, the system will look for matching organization or individual records in CS and connect the grant to the matching profile or will create a new constituent record if there is not a match. After this initial sync, any subsequent changes or updates to the individual or organization records in any system will be reflected in all systems. If the foundation is not using CS, they can export payment data to their accounting or financial software.

Financial Management

Foundant's CommunitySuite provides community foundations with a variety of tools for fund accounting, grant payment tracking, budgeting, and other financial management tasks. The system was designed to meet the needs of community foundation and allows you to set up and manage a wide variety of fund types. Administrators can set up funds, classify fund types, define distribution types and spending policies, create different types of administrative fees and fee calculations, and define different fund statement formats. Each fund record displays real time fund, principal, and spendable balances, which are updated each time a community foundation's general ledger posts.

Funds can be added to pooled sets of foundation-defined investment strategies and when you enter unrealized gain/loss data from your investment account, the software automatically spreads the data to all funds in the pool. You can also use the chart of accounts to define investment strategies for the funds. In addition, the software can recommend bank-level and fund-level transfers to help maximize your investments.

Grant payments can be created either in CS or GLM and users can edit payment data in either system once the records are synced. You can map payments to multiple funds and math them contingent on certain requirements – the system will notify you of the requirement and the grant manager will have to go to the record in GLM to review and approve the payment. The vendor reports that they are adding support for multiple currencies, with an anticipated roll out later in 2022.

In addition to fund accounting, CS also has a full set of accounting tools built in, including modules for accounts payable, accounts receivable, cash management, general ledger, payment processing, and more. The system simplifies 990 reporting by automatically pulling in the information needed for donor and grantee schedules. It also has budgeting functionality that you can turn on or off for each fund to help manage performance against projections.

Donor Management/Donor Portal

CommunitySuite's donation management and donor portal tools help community foundations collect individual donations and provide donors with a variety of tools to monitor and manage their accounts. In addition to facilitating contributions and pledges, the donor portal allows your constituents to browse through a grant catalog that can highlight immediate needs in the community and be categorized by interest areas, see a list of their past grants and easily make grant recommendations, access their fund statements and receipts, and see their Statement of Financial Position and Statement of Activities .

The vendor reports that it is also possible to use the donor portal functionality to create a board portal where board members can access financial statements and uploaded documents.

Relationship and Communication Management

In addition to financial management and donation tools, CommunitySuite also provides CRM functionality to community foundations. The software allows you to track multiple addresses, emails, and phone numbers for individuals and organizations and mark which numbers are do not mail/do not email/do not call. Individual records can also be connected in household records that provide a combined view of all interactions with each individual. You can store a variety of information on records, including bank account information for ACH transactions. The system allows you to send individual emails and store that information on the constituent record and a one-way integration with MailChimp allows you to send email lists over for bulk email campaigns.

Business Intelligence and Reporting

Each of Foundant's software solutions includes reporting capabilities. Pre-packaged basic reports are included with each system that users can run, modify, and save, and you can include every data field in ad hoc reports. The system allows you to create pie charts and graphs with data and export it all in a variety of formats. You can drill down within reports to access the underlying data.

Foundant currently integrates with Google Data Studio to create dashboards and data visualizations. All the reports in the system can be used as data sets in Google Data Studio and the data that appears in the reports refreshes in real time. Users can build multiple dashboards in Google Data Studio and share those dashboards with others via email or schedule them to be sent out at certain intervals. The vendor reports that they are working on transitioning to a business intelligence tool for robust analytics and dashboards that will be available within CommunitySuite, but this will not be available until 2023.

Grant Lifecycle Manager also includes impact and outcome measurement tools that allow you to collect data from grantees and report on the efficacy of your grant programs.

Integrations

Foundant products have several pre-built integrations that are useful for community foundations. Their integration with Candid provides access to Guidestar Charity Check and Guidestar for Grant Applications. Their integration with Google Data Studio allows you to create more in-depth reports and visualizations, as well as a variety of dashboards. They have a one-way integration with MailChimp that allows you to export email lists to the broadcast email tool.

Both Grant Lifecycle Manager and Scholarship Lifecycle Manager have read-only open APIs, which allows you to build custom integrations with other software products. The vendor also reports they are currently building an integration with Workato, an iPaaS and workflow automation tool, to allow customers to more easily integrate with a variety of systems.

Technical Considerations

All Foundant products offer multi-factor authentication to increase login security. While there currently is no ability to implement Single Sign On, the vendor reports that they are evaluating solutions to provide this functionality in the future. This also means that you have to log in to each system separately and toggle between browser tabs or windows to work between systems. Some content updates to records in one system will sync with the other systems.

Data is encrypted both in transit and at rest. Client data is stored in multi-tenant databases with SOC 2 compliant hosting. The systems maintain full audit logs that enable you to see changes made to records.

Access to areas of the system is managed by role-based permissions. CommunitySuite customers can build out permission groups that determine what group members can see, edit, and delete, and these permission assignments can be even more granular. Grant Lifecycle Manager and Scholarship Lifecycle Manager both come with a set of default permissions separated into five roles, with Standard +2 and Advanced licenses providing access to a sixth “Grants Manager” role that can be customized with a limited number of additional settings. Individuals in the system can be assigned multiple roles.

Foundant offers unlimited email, phone, and chat support, as well as a support article library and a discussion forum for funders and community foundations. In-product learning courses, product certification exams, educational webinars, and live online training are available to clients, and in-person training is available at an additional cost.

Give Interactive | giveinteractive.com

Give Interactive is one of the newest entries into the community foundation software market. The company was founded three years ago to build a single platform that can handle the needs of large community foundations with complex financial structures, and it launched the platform in 2021. The vendor reports three community foundation clients currently, and is onboarding multiple new clients at this time.

Pricing

The vendor did not provide sample pricing for the platform, as pricing is based on proposals customized to the client. The vendor reports that its focus is on large community foundations with assets over $1 billion.

Grant and Application Management

The system provides community foundations with grants management tools that allow you to track grant status, perform due diligence, and schedule payments. The software is set up to move grants through a defined workflow. There currently is not a built-in online application tool, grantee portal, or reviewer portal, but the vendor reports it is developing a competitive grant module and form-based application process with an expected launch in 2023.

Clients currently using the system have used a third-party tool like SurveyMonkey Apply or Submittable to manage online grant applications through a custom integration. You can also build out a grantee dashboard that will allow grantees to see their grant status and scheduled payments, and that will provide grantees with a system login that lets them access the dashboard. Grant reviewers can view applications within the system. While the vendor does not currently support scoring on application reviews, the functionality is on the product roadmap for the competitive grant module.

Financial Management

The core of the system is a sophisticated fund accounting tool that can manage complex investment portfolios and money movement for community foundations that have high transaction volumes. The platform supports individually managed investment accounts as well. You can view and manage your fund, principal, and spendable balances and manage investment settings for funds directly in the system. Funds can be unitized into a variety of investment pools. Fund balances update nightly.

You can add an unlimited number of bank and custodian accounts to the platform and connect them to your funds. A native integration with MorningStar allows you to pull in bank account and investment account data feeds to automate your reconciliation. The money movement module shows all your transactions and the source and destination accounts. Reconciliation aggregates all transactions nightly and automatically matches them to your account data. It also updates the price-per-unit for unitized funds. The platform supports daily Net Asset Valuation (NAV).

Give Interactive does not include a full general ledger accounting system but has a preferred partnership and integration with Sage Intacct. The integration automatically creates transaction-level journal entries to the general ledger and manages data between systems for consolidated reporting, audits and tax filing. The system also does not include a budgeting module, but this can be managed with the Sage Intacct integration if you have the budget module. The vendor reports that it can develop integrations with other accounting systems as well.

Donor Management/Donor Portal

Give Interactive also includes a robust donor and fundholder portal that provides donors with tools and dashboards to help them manage their foundation accounts and activities. The donor portal can be configured to match the foundation's branding and you can customize colors, layout, icons, and more. Content for the donor portal is managed through a series of content blocks and advanced content overlays for in-system marketing and communication.

Donors can make one-time or recurring donations, view and manage their accounts, update their contact information, add in multiple bank accounts and credit cards to use for contributions, make donations of stock and securities, search for nonprofits, and make grant recommendations. In addition, donors can manage their funds' investment and divestment instructions and balance their investments across pools set up by the foundation. The portal also can include a donor dashboard that features drill-down charts and data generated in Microsoft Power BI.

The donor portal includes an in-depth charity discovery tool. Give Interactive will work with the client during implementation to take all of the nonprofits in the foundation's database and create pages that pull in the nonprofits' GuideStar profiles and information. Foundation staff can then edit or enhance the profile and select organizations to feature or spotlight. The platform also supports multiple microsurvey options in-system to collect data about donor interests and set up banners and marketing campaigns to highlight nonprofits that would be of interest to the donor.

Relationship and Communication Management

A purpose-built CRM module in the system allows you to collect and track information and interactions with your constituents. You can create individual and organization records with multiple addresses, phone numbers, and emails, add in a variety of tags, and define relationships between constituents.

Emails can be sent through the system via a two-way integration with Intercom, which also provides you with the ability to provide in-system chat. As of publication, you do need a separate login to use the Intercom system, but the vendor reports that it is working on Single Sign On between the two systems.

Business Intelligence and Reporting

Give Interactive provides reporting via an integration with Microsoft Power BI. Every client receives a Power BI workspace embedded in the platform that includes a standard reporting package. Clients can then build out their own reports and dashboards with drill-down capabilities, as well as create end-user reports and dashboards that can be embedded in donor pages. This integration provides reporting of data throughout the system.

Integrations

The vendor has created multiple integrations that extend the capabilities of its system. This includes integrations with Chameleon (for in-platform constituent engagement), GuideStar Charity Check (to bring in nonprofit data), Intercom (for email marketing and chat), Microsoft Power BI (for reporting across the platform), MorningStar (to connect banking and investment accounts), Sage Intacct (for accounting), and Stripe and Plaid (for banking and payment processing).

The vendor does not include an open API. However, it will work with clients to build custom integrations as needed and the software also integrates with Segment to provide a Customer Data Platform (CDP) that simplifies integrations with a variety of other applications.

Technical Considerations

Security is very important for a company that focuses on serving large community foundations. Login security leverages Amazon Web Services Cognito for Multi-Factor Authentication, but Single Sign On is not available as of publication. Give Interactive provides independent database structures for each client rather than using a multi-tenant database, and they are located in SSAE16 SOC-2 Type II-certified cloud data centers. All data is encrypted at rest and secured in transit through end-to-end encryption.

Permissions

User permissions are role-based for both Fund Contacts and Foundation staff. A Fundholder or Foundation Admin may add people to the fund, assigning them to a role (e.g. Financial Advisor, Grant Advisor) and an access permission level (e.g. Full Access, Read Only). Foundation Staff role permissions support a "need to have" accessibility model to protect sensitive data such as bank account information.

Give Interactive offers online training videos and live online training, with in-person training available at an extra cost. Users have access to a knowledge base, dedicated support desk, email support, and phone support.

NPact | npact.com

After more than a decade in the grants management market, NPact (formerly Fusion Labs) has undergone a dramatic transformation over the past year. The company was purchased in late 2020 and shortly thereafter was rebranded as NPact. The vendor has doubled its engineering and products development resources and has been working toward a greater focus on customer service, training, and support. In addition, the vendor reports that it is growing beyond its traditional partnership with Blackbaud and is developing a series of integrations with other large CRM and accounting players in the foundation software sector.

The vendor provides three cloud-based products to meet the needs of community foundations:

- Grant Edge, which provides foundations with donor-advised fund, grants, and endowment management and fund tracking capabilities.
- Spectrum, a portal tool for applicants, reviewers, donors, and board members.
- Endowment Manager, a fund management tool to automate income pools, fee schedules, spending policies, and rebalancing strategies.

Pricing

The vendor did not provide pricing for any of the above systems but said that pricing is calculated based on a foundation's assets under management, gift, and grantmaking activities.

Grant and Application Management

Grants are managed and processed in Grant Edge, with online applications and reviews created and managed in Spectrum. Foundations can create one or multiple "brand" pages in Spectrum that allow applicants, reviewers, grantees, donors, and board members to log in. You can brand Spectrum pages with your logo and brand fonts and colors, but the rest of the content remains in the default screen layout. The content and menus available to each user when they log in are driven by the user's role(s) and associated permissions in the system. Users can move tiles around on their dashboard with drag-and-drop functionality.

The system supports multi-stage applications and eligibility quizzes that can branch to multiple applications, as well as electronic signatures. The system can prepopulate organization information in application fields if the organization has a profile in Grant Edge or in a CRM that is integrated with Grant Edge, but it does not have an integration with a 501(c)(3) registry for this purpose. Also, while the system doesn't include a translation add-on for multi-language support, you can create different language pages for your constituents and allow them to select which language to use. Applicants can easily see a list of their submitted grant applications and the status of those applications.

Reviewers use the Spectrum portal to access their assigned applications and submit reviews. The system allows for multiple scoring schemes and automated review workflows. You can view and report on aggregated numerical scores for applications. Foundations can also use Spectrum as a board portal for approving grant dockets and sharing additional content via the document library.

Grantees and scholarship recipients can view due dates and submit and track any follow up materials in Spectrum. You can collect grantee reports online by creating new stages, or supplemental pages, of an application. Similarly, you can add follow up questions to scholarship applications by creating an addendum page.

The back office, workflow, task assignment, and management of grants is handled in Grant Edge. Online grant requests come in through the web processing queue. You can perform 501(c)(3) status checks via an integration with Charity Evaluator, which is included as part of NPact's Foundation Cloud suite. Approved grants can be multi-fund and multi-payment, but a grant can only belong to one program area and portfolio in the system.

Financial Management

Fund assignments and management take place in Grant Edge, along with payment scheduling, while fund accounting, asset management, and investment management are done in Endowment Manager. Fund records in Grant Edge compile information from all systems (Endowment Manager, Blackbaud Financial Edge NXT, and Blackbaud Raisers Edge NXT), with icons that allow you to click through to the fund records in each system.

Grant Edge does not include an accounting module, so it integrates with Financial Edge NXT for accounting, payment processing, banking, and compliance management and reporting. The vendor reports that it is currently developing an integration with Sage Intacct, which will be available later in 2022. Financial data syncs between the systems nightly and can be manually synced on demand, and the vendor reports that it has helped clients make the system display real time data with custom development.

Endowment Manager provides tools to calculate fees and spending policies, manage income allocations and rebalancing, and report on endowment management activities. As with Granted Edge, the tool also has a two-way integration with Financial Edge NXT.

While the software allows you to track budgets, it does not include any tools to facilitate budget creation. It also does not include forecasting tools or the ability to create "what if" scenarios.

Donor Management/Donor Portal

The Spectrum web portal provides donors with the ability to track their giving, manage their investments, recommend grants, make additional donations, and submit new fund requests. Donors can see their grants summary and fund summary, grant history, and investment strategy, all with links to additional details, and export their fund statement in PDF or Excel format. They can donate to their own fund(s) or other funds in the system. Foundations can highlight nonprofits and campaigns and attach goals to a campaign (with a thermometer showing progress toward the goal) to encourage donations. Donors can make grant and transfer recommendations, including by duplicating previous recommendations, and see the status of their previous recommendations. Fundholders can also use the portal to set their investment strategies based on the foundation's defined opportunities.

Grant Edge's integration with Blackbaud's Raisers Edge NXT and BBCRM allows additional options for individual donations, including pledge functionality. Payment processing for donations is made through Blackbaud Merchant Services, so donors cannot store add credit card or bank account information to be stored on their profile for future transactions.

Relationship and Communication Management

Grant Edge collects basic constituent information but relies on its native integration with Raisers Edge NXT for full CRM and communication functionality. Grant Edge does include the ability to email constituents, as well as mail merge functionality that generates documents or emails and saves these to individual records in the system. The vendor reports that it is working on an integration with Salesforce that will be rolled out later in 2022.

Business Intelligence and Reporting

Grant Edge includes SQL server-based reporting on data within its system. The system includes approximately 100 canned reports and you can build queries from fields and tables in the system that can be exported for mail merge and Excel use. The vendor also assists clients with building custom reports. Reports and their visualizations can be favorited and added to dashboards for quick visibility, you can create multiple dashboards, and you can save and schedule reports.

The vendor reports that it will soon roll out a beta version of an integration with Microsoft Power BI for advanced reporting and business intelligence. Each client will have their own Power BI workspace. While the initial roll out will have limited customization, clients will be able to drill down to access underlying data and the integration will eventually allow organizations to build a variety of dashboards and display them within the system.

Integrations

Grant Edge extends its functionality with longstanding integrations with Blackbaud's Financial Edge NXT, Raiser's Edge NXT, and BBCRM. The system also uses Blackbaud Merchant Services and Fiserv for payment processing. Grant records in Grant Edge have icons for the integrated systems that open up the linked records in other platforms when clicked. Platforms open in new browser tabs or windows and require separate logins; there is not a single sign on option for any of the integrations. Integration with the document management tool PaperSave Cloud is also available in Grant Edge.

The vendor reports that integrations with Microsoft Power BI, Sage Intacct, and Salesforce are in development and are expected to be rolled out during 2022.

The system has a private API that the vendor uses to build custom integrations when requested. The vendor reports that an open RESTful API similar to Blackbaud SKYAPI is under development, which will allow developers to create additional custom integrations using certain data tables in the system.

Technical Considerations

Login security is managed through password complexity. None of the platforms offer multi-factor authentication or single sign on at the time, although the vendor reports it is working on Single Sign On capability within its products and Multi-Factor Authentication, with the expectation that it will be able to release this before the end of 2022. Passwords are encrypted with SHA 256 salted one-way hashes, and other secure data is encrypted at rest using the AES-256 protocol.

Role-based security determines what individuals can see or do in the systems. The software comes with a limited number of pre-set roles, but you can customize those roles and add new ones as needed. There are approximately 200 different permissions that you can configure for users.

Data is encrypted at rest and in transit, using HTTPS 2.0 and TLS 1.2. The vendor notes that this level of security is also required in all third-party integrations with their systems. Databases are stored at a secure hosting facility and the vendor reports that it is moving to the Microsoft Azure Cloud.

NPact offers online training videos, with live online training and in-person training available at an additional cost. Clients have access to a knowledge base, email support, and chat support.

Sage Intacct | clarknuber.com/industries/foundations

Sage Intacct is a finance and accounting software platform used by numerous foundations and nonprofits to manage all aspects of their fiscal activities. The base software for Sage Intacct includes the following functionality: general ledger, reporting and dashboards, accounts payable, accounts receivable, cash management, purchasing, and order entry. Optional modules are available to handle inventory, fixed assets, and budget and planning.

The information about Sage Intacct in this report was provided by Clark Nuber PS, an accounting and consulting firm and one of the leading implementation specialists for Sage Intacct in the community foundation sector.

Pricing

The vendor did not provide specific pricing for the system. Clients are provided custom pricing following the completion of the discovery period.

Grant and Application Management

Sage Intacct does not provide grants management support, but numerous grants management platforms integrate with the system.

Financial Management

The platform is focused on finance and accounting functionality. The system supports posting to both general ledger accounts and statistical accounts, so you can track both financial and non-financial information. Sage Intacct allows you to produce full sets of financials by fund, easily run standard reports for year-end financial reporting and tax reporting for foundations and bring in automated bank feeds from more than 200 financial institutions.

Workflows within the system allow you to automate accounts payable and approvals across the organization. Investment management is generally done via third-party tools, but you can bring in financial statements for reconciliation and allocate them across funds. The base system automatically allocates indirect costs, and there's also an allocations module available at an additional cost that provides more sophisticated functionality (such as earnings and fund rebalancing) that can be particularly helpful to community foundations.

Sage Intacct includes Automated Clearing House (ACH) payment capability and will facilitate payment processing via integrations with payment gateways. You can import and track multiple budget versions in the base system, and a budgeting and planning module available at an additional cost provides additional functionality around budgeting.

Donor Management/Donor Portal

Sage Intacct does not provide donor or fundraising support, but numerous donor management and donor portal platforms integrate with the system.

Relationship and Communication Management

Sage Intacct does not provide CRM functionality, but numerous CRM platforms integrate with the system. The system does have a strong integration with Salesforce.

Business Intelligence and Reporting

The system provides users with flexible reporting tools to help organizations close books quickly and with less manual work. Role-based dashboards capture financial and operational (non-financial) information that allows you to drill down to the underlying data for details. You can filter the dashboard by date or program or fund.

Dashboards are widget-based and customizable, which allows users to create personal dashboards and share them with other users or roles. The system's reports center allows you to create new reports via a step-by-step report creation wizard or to duplicate and edit existing reports. You can also save and favorite reports and the system supports parent/child relationships for entities so you can create roll-up reports. The report wizard includes a large variety of formatting options, including conditional formatting and the ability to add notations to reports.

The platform's Collaboration feed allows you to document conversations and decisions and save snapshots of related charts and reports with the documentation.

Integrations

Sage Intacct has more than 200 pre-built direct integrations with tools that serve all sectors of the business and nonprofit landscape, including existing or planned integrations with many of the platforms discussed in this report. (See the online marketplace to browse available integrations.) The vendor provides clients with access to both private and open APIs to allow custom-developed integrations as well.

Technical Considerations

Access to the system is provided by either user-based or role-based permissions. Permissions are assigned to specific tasks within a module instead of simply to the module itself, but do not extend down to the field level. Login security is provided by Multi-Factor Authentication, and organizations have the option to enable Single Sign On.

Security and privacy are a focus for the platform, with the software garnering both SOC 1 Type II and SOC 2 Type II opinions and Level 1 PCI status. The system is HIPAA certified, Privacy Shield certified and meets GDPR requirements. Data is encrypted in transit and is also encrypted at rest where required or the vendor determines it is necessary.

There are multiple ways to navigate the system and you can even bookmark a specific page in a multi-screen transaction for quick access to the data you need.

Sage Intacct offers a library of online training videos, with live online training available at an additional cost. In-person trainings were suspended during the pandemic but the vendor notes that they will likely be available in the near future. User support is offered via email and phone, and users have access to both a knowledge base and an online user community.

Salesforce | salesforce.com

Salesforce has continued to evolve its nonprofit and philanthropic software offerings, including Salesforce Grants Management, an application built on top of the Outbound Funds Module that came out of the company's Open Source Commons program. The company acquired the data visualization and business intelligence tool Tableau in 2019 to deepen the platform's dashboards, reporting, and analytics capabilities.

Pricing

The vendor did not provide pricing for their products for this publication. However, Salesforce does provide a Nonprofit Cloud Pricing Guide on its website, which includes pricing for some of the products discussed in this profile. The Grants Management license fee includes access to Experience Cloud, which provides applicant and donor portal capabilities.

Grant and Application Management

Salesforce Grants Management provides community foundations with the ability to create online grant applications, manage the grant review process, track and manage approved grants through their entire lifecycle, and report on grantmaking programs.

Administrators can create a variety of online application forms using Flow, Salesforce's native form builder. These applications can be shared directly with potential grantees or added to an applicant portal that you can create using Salesforce's Experience Cloud (formerly known as Salesforce Communities). The applicant portal, built using drag-and-drop tools to arrange components, can be customized with your organization's branding and a variety of layouts and components. Salesforce has created a template for an applicant portal that reduces the amount of time it takes to design one from scratch. The applicant portal also can function as a grantee portal, displaying additional requirements and scheduled payments.

New applicants can use the portal to create a profile, while applicants already in the system can use the portal to update their profiles. Applicants can also invite other users to collaborate on grant applications. The application tool supports eligibility quizzes and branching logic, including the ability for an eligibility quiz to branch to multiple applications. While you can customize the portal branding, application questions, and pagination, you are unable to customize application fonts or colors. The system supports e-signatures on applications via an integration with DocuSign.

Once an application is submitted, you can use Flow to create workflows that automate the review and approval stages. The software allows you to customize your scoring scheme (multiple scoring schemes are not supported), include links to related objects, and provides custom review workspaces that allow you to configure the application reviews to show only selected parts of the application to each individual reviewer. The Grants Management tool includes an integration with GuideStar that not only allows you to look up the status of 501(c)(3) applicants, it also allows you to import and store up to 70 fields of information from the organization's GuideStar profile on the organization record.

When an application is approved, you can set up an action plan for the grant that includes tasks and checklists and schedule disbursements. Action plan templates include preconfigured tasks and checklist items and the disbursements scheduler allows you create your own schedule for payments with the ability to modify dates and amounts and link payments to the completion of specific requirements. Within the action plan, you can specify who should own specific tasks, set due dates for the tasks, and schedule reminders.

Financial Management

Currently, fund management is done through General Accounting Units, which require the foundation to have Salesforce's Nonprofit Success Pack in addition to the Grants Management tool. However, the vendor reports that it is expanding the Budgets module within Grants Management to track fund-related information. Funds created using General Accounting Units can include the current fund balance, information about allocations (donations to the fund) and disbursements, and information about the fund type, giver, and fund manager. Payments can be split across funds and you can update fund records with interest and other transactions via an integration with an accounting solution.

Grants Management's current Budget module allows you to create budgets and monitor fund commitments and disbursements.

Salesforce does not include accounting modules, so you would need to integrate a third-party accounting software platform with the system in order to connect your grant activities with your financial systems. The vendor reports that connectors already exist for Sage Intacct and Oracle NetSuite integrations, in addition to several other accounting solutions.

Donor Management/Donor Portal

You can configure a donor portal that provides your constituents with information and tools to manage their donations, funds, and grants by using Experience Builder. Donors can use the portal to view and update their profiles, see their giving history, check their fund balances and disbursements, and make grant recommendations. When making grant recommendations, donors can renew grants they have made previously, look up a charity already in the system, or submit information about an organization that is not listed and select the fund from which they would like to make the grant.

Foundations that also have Salesforce's Nonprofit Success Pack can seamlessly collect donations and pledges through the software. While it is possible to collect donations and pledges with the tools discussed in this profile, the vendor reports that it would require some configuration to do so. In addition, a variety of donation management tools have pre-built integrations with Salesforce.

Relationship and Communication Management

At its core, Salesforce is a sophisticated, enterprise-level CRM, which means that you can track extensive information about your constituents, their relationships, and their interactions with your organization. This includes managing multiple mailing addresses, email addresses, and phone numbers; specifying relationships between individuals and of individuals with companies or organizations; and capturing a variety of interactions in constituent records. Salesforce's integration with Microsoft Office 365 allows you to easily save emails sent through Outlook to constituent records. The system also allows you to send emails to individuals and groups, including scheduled reminders and triggered emails.

While you can send emails through the system to large groups of constituents, you will still likely need to use an email marketing tool for bulk emails. Salesforce's Pardot is a sophisticated email marketing tool that is available at an additional cost or you can use one of the many integrations to third-party email marketing software, like MailChimp or Constant Contact.

Business Intelligence and Reporting

The Salesforce platform has flexible and customizable dashboards and reporting built into the system. Pre-packaged reports in the Grants Management module can be run, modified, saved, and shared. You can also create ad hoc reports using a report wizard that can include data from virtually any field in the system. Reports can also be used to generate a variety of data visualizations that can be added to dashboards and you can drill down to access the underlying data that drives those visualizations. Users can create multiple dashboards, customize them, and subscribe to others' dashboards.

Salesforce users can get more in-depth reporting and data visualizations by using Tableau, which is available at an additional cost. Tableau allows you to create charts, tables, graphs, maps, and more, click to apply filters, create and save views, and drill down to the underlying information. In addition, Salesforce has built out a grants reporting package in Tableau to provide foundations with a head start on creating effective visualizations and you can also access other shared reporting packages on the Tableau Exchange.

Integrations

Over the years, numerous third-party software platforms have built integrations with Salesforce that allow you to extend the functionality of the core CRM. These integrations run the gamut from accounting to cloud storage to messaging to productivity to email marketing. The company's AppExchange includes more than 4,000 pre-built integrations for the platform and Salesforce also acquired iPaaS provider MuleSoft to facilitate integration with even more third-party tools. Many of the pre-built integrations on the AppExchange are self-service, but there are a significant number that require custom development to install.

Technical Considerations

Administrators have granular control to grant, limit, or restrict user access not only to a wide variety of system functions, but also on a field-by-field basis. The system includes password complexity rules and logs users out after a specified time of inactivity. Administrators can enable two-factor authentication for access to the administrative side of the system, and the system can also integrate with Single Sign On. Salesforce also offers an authentication app for mobile devices to provide additional security. The system retains full audit info for two years and a separate product will allow foundations to retain this information for 10 years.

System data is encrypted in transit; however, data at rest is not automatically encrypted. Foundations can encrypt specific fields that need increased security, such as bank account or routing numbers, but this is at an additional cost.

Salesforce provides customers with online training videos. Live online training and in-person training is available at an additional cost. Customers have access to a knowledgebase and email and chat support, with phone support available at an additional cost. There is also an active Salesforce user community online. Grants Management licenses come with access to the Salesforce Services Cloud, which not only provides you with access to tech support and a knowledge base, but also to self-service support for applicants using your portal.

SmartSimple | smartsimplecloud.com

SmartSimple Cloud is a tracking and reporting platform that provides support for a wide variety of grantmaking programs. The vendor has specialized installations for Grants Management, Scholarship Management, and more, as well as a SmartSimple Cloud for Salesforce installation that integrates directly with the popular CRM. The software, which has been in use since 2003, currently serves more than 25 community foundation customers.

Pricing

The vendor did not provide specific pricing for different sized foundations. According to its website, a low-priced SmartSimple Direct subscription provides system access for up to three internal users and 50 external users; this costs $10,000 for implementation and $6,000 per year, and their Flexible SmartSimple Solutions pricing is customized based on number of team members, usage levels, and number of external users.

Grant and Application Management

SmartSimple provides foundations with full grant lifecycle tracking, online applications, grantee and reviewer portals, and report collection. The starting point for all staff and constituents is a multi-purpose portal that displays content relevant to the user's role. The portal can be displayed in two different ways: either via a graphical interface that resembles a web page, or as a flat portal that only displays text and links. The graphic interface is configurable with a foundation's logos, graphics, and text, and foundations can choose from among six different themes, several of which have multiple templates. A foundation can put key calls to action at the top of the page to serve as a sort of "quick actions" menu.

Through the portal, grantees can access required tasks, applications in progress, and current funding opportunities, and can update user and organization profiles. New users can register themselves; if an account with that email address already exists in the system, the user will be notified and prompted to log in to the existing account. Foundations can customize online applications with logos, colors, fonts, and navigation, and can create eligibility quizzes that branch to multiple applications, as well as add branching logic within applications themselves. The system includes multilingual support, with the ability to create multilingual captions, help text, and validation messages.

Reviewers access the system through the same login page as other users, with their views governed by role-based permissions. They can also be assigned other system permissions to allow enhanced system access. The system supports different scoring schemes for different programs with the ability to view and report on summary review scores and administrators can create multiple review workflows. Reviewers can see media files uploaded by applicants in gallery format, view uploaded image files and videos in the context of the application, and can annotate videos that are uploaded.

Once grants are approved, the system allows you to manage the grant through its entire lifecycle. An integration with GuideStar Charity Check allows you to perform 501(c)(3) status checks and you can also search organizations against Office of Foreign Assets Control (OFAC) databases and bring in LexisNexis data related to an organization. When working in the system there is a tab bar at the bottom of the browser window that allows you to open multiple records at the same time and split the screen to view records side-by-side.

Financial Management

SmartSimple allows you to create, manage, and track a variety of fund types using the platform's Budget Manager module. You can track fund balances, commitments, payments, and adjustments, and group funds into pools. Funds can be added to multiple pools and grant payments can be split across funds.

The platform does not include accounting functionality, nor is there a pre-built integration with a third-party accounting tool; however, the vendor reports that it has created custom integrations with Sage Intacct, Quickbooks, Microsoft Dynamics, SAP, and other accounting tools for customers. Scheduled payments can be exported to accounting manually or you can schedule file transfers or use the API to transfer them automatically.

The system does include an integration with the payment processor Stripe to facilitate credit card transactions for fund donations.

Donor Management/Donor Portal

Role-based permissions also drive donor portal functionality in SmartSimple. You can create a portal that allows fund donors to access their funds and grants, download fund statements, update and add fund contacts, and submit new grant requests. They can also make additional donations to funds via the portal. The portal can display fund balances, fund status, and grant requests, and you can set up featured grant opportunities to showcase organizations for donors to support.

Relationship and Communication Management

SmartSimple has CRM functionality built into the system, and it also has a pre-built integration with Salesforce. The built-in CRM allows you to build out both individual and organization profiles and specify relationships between constituents. Organization profiles include sections to add both contacts (individuals employed by the organization) and associates (individuals affiliated with but not employed by the organization). You can also add in fields to track demographic data from your constituents. All interactions with constituents are captured in the platform and saved on the related records. The system allows you to send letters and email to constituents and also includes a built-in bulk email function that provides you with metrics on email open rates and clickthroughs.

Business Intelligence and Reporting

A robust reporting module facilitates access to a large variety of charts and visualizations that can be used in dashboards or exported. These include not only standard chart types but also geomapping (with the ability to add HTML/CSS on top of the map to customize the look and feel) and flow diagrams that map out funding allocations and drill down to individual payments.

Each system module includes a standard list view of data in the module that you can search and filter and build more complex queries using Boolean logic. There is also an advanced search and a report builder. The system does not come with any canned reports, but you can save, categorize, schedule, and share any reports that you create. You can also use the platform's OData connector to export data to business intelligence and visualization platforms like Microsoft Power BI and Tableau.

You can create role-based dashboards in the system that display at login and users can create an unlimited number of personal dashboards that they can also share with colleagues. Dashboards contain real-time data and you can drill down to the underlying data from any chart in the system.

Integrations

SmartSimple includes several pre-built integrations, as well as tools to help build additional connectors. There are native integrations with Salesforce and GuideStar Charity Check and the vendor provides a marketplace with additional tools to extend the system's functionality. They support three APIs: an OData connector, a SOAP-based web services API, and SmartConnect (a RESTful-JSON based API). SmartSimple also integrates with iPaaS service Workato. The vendor reports that it is planning to develop an integration with Microsoft Office 365 in the future.

Technical Considerations

Access to the system is primarily managed through role-based permissions, although SmartSimple also offers attribute-based permissions as well. These permissions can be customized by system administrators and are adjustable down to the field or attribute level. Login security is protected with Multi-Factor Authentication and the platform also supports Single Sign On. Data is encrypted both in transit and at rest.

SmartSimple has an intensive implementation process to help configure the system to meet the specific needs and processes for each client. Working with either the vendor or one of its implementation partners, the configuration will include custom built business processes that align with your foundation's needs. Clients can also set up their own business process rules within the system.

SmartSimple offers online training videos and live online training, with in-person training available at an extra cost. Users have access to a wiki, email, chat, and phone support, as well as an online user community. The vendor offers dedicated support packages and also will work with clients to create a budget for professional services support.

APPENDIX A: ADDITIONAL RESOURCES ▶▶▶

Strategic Roadmap for IT in Community Foundations, *Technology Association of Grantmakers*
https://www.tagtech.org/resource/resmgr/it_strategy/tagstrategicIT-CF.pdf

Your Philanthropy Tech Strategy for 2021, *Technology Association of Grantmakers*
https://www.tagtech.org/resource/resmgr/it_strategy/Philanthropy-Tech-Strategy-2.pdf

A Consumers Guide to Grants Management Systems, *Tech Impact*
https://www.tagtech.org/resource/resmgr/it_strategy/Philanthropy-Tech-Strategy-2.pdf

A Consumers Guide to Low-Cost Fundraising Systems, *Tech Impact*
https://offers.techimpact.org/reports/consumers-guide-to-low-cost-fundraising-software

The More Good Podcast Episode 4: Platform versus Product, **with Jonathan Mergy**, *Grantbook*
https://www.grantbook.org/blog/platform-vs-product-jonathan-mergy

How Much Does a Grants Management System Really Cost?, *Grantbook*
https://www.grantbook.org/blog/how-much-does-a-grants-management-system-really-cost

APPENDIX B: RESEARCH METHODOLOGY

Product Selection

At the outset of this report, we worked with our technical advisory group to develop a list of software vendors that are actively marketing their products to community foundations. We began with systems that were profiled in Tech Impact's 2017 Consumers Guide to Integrated Systems for Community Foundations and expanded the list with internal data from Technology Association of Grantmakers (TAG) members. This was supplemented by desk research on changes to community foundation technology and interviews with four representatives of community foundations and one software vendor. A list of the vendors and products was distributed to subject matter experts for review and comment before selecting the final list of vendors and products to include in the report.

Vendor Survey

In April 2022, we distributed a survey to 11 vendors that covered a wide range of functions that are of interest to community foundations. The survey was distributed by email, with multiple follow up emails to vendors that did not respond. We received responses from six vendors and one implementation partner to a seventh vendor. Three vendors did not respond and one vendor declined to participate.

Product Demos

We scheduled one-hour product demos in April and May 2022 with vendors who responded to the vendor survey. These demos focused on recent changes to the vendors' products, areas of differentiation between products, and integrations with third-party solutions. Vendors were provided a rough draft of their profile for review to ensure there were no inaccuracies in the write up.

Voice of the Customer

In April and May 2022, TAG distributed an informal survey, Customer Feedback on Technology Systems for Community Foundations, to their members and other representatives in the community foundation space. They received 49 responses to the survey and the feedback provided helped inform the content in the Vendor and System Overviews section of this report.

APPENDIX C: VENDOR SURVEY ▶▶▶

Vendors were sent a survey divided into seven sections and asked to complete all the sections pertaining to their company's software offerings. If their software didn't provide a specific functionality but they have integrations available with systems that do provide the functionality, they were asked to indicate this in response to the question and list the third-party system that provides this functionality in the "Additional Information" column. Drop-down lists with the following options were provided for most questions in order to standardize responses across vendors and products:

- This is core functionality
- This can be done with a workaround in the system
- This can be done with an add-on or module at an extra cost
- This can be done via a pre-existing integration with a third-party solution [Please identify the 3rd party system(s)]
- This requires custom development
- This is not a feature we provide

Vendor Contact Information

- Company Name
- Contact Name
- Contact Job Title
- Contact Email
- Contact Phone

Product Information

Please use this section to list your software solutions that serve the Community Foundation marketplace in the following areas: grants management, CRM, donor portals/donor management, finance/accounting, and business intelligence.

- Product Name
- Product Website
- Product Type
- Additional Information (if necessary)
- Current # of Community Foundation Customers
- Pricing
  - Small foundation (< $25 million in grants, 1-5 staff)
  - Mid-size foundation ($25-500 million in grants, 10-25 staff)
  - Large foundation (> $500 million in grants, 50+ staff)

Technical & Support Considerations

Security

- Two-factor authentication
- Single Sign On
- Data encryption at rest
- Data encryption in transit
- Customizable system permissions
- Grant users or roles access to certain large areas of system information, such as a module
- Grant users or roles granular access to view, edit, or delete data for a wide variety of system functions
- Define user or role-based permissions on a field-by-field basis
- Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log

Privacy

- Please provide a link to your GDPR compliance policy
- Please provide a link to your HIPAA compliance policy

Backup and Disaster Recovery

- Please describe your backup and disaster recovery measures

Integrations

- Do you provide a secure API?
- Do you have an open API?
- Do you have a marketplace of pre-configured integrations with third-party software?

Training & Support

- Online training videos
- Live online training
- In-person training
- Knowledge base
- Email support
- Phone support
- Chat support
- User community or forum

Grants Management

The following is a selected subset of functionality for grants management software. For each function, please select the response from the dropdown list that best describes your product's functionality. You can use the Additional Information column to provide details, if necessary

Grant Applications

- Online applications
- Supports multiple application stages (letter of intent, eligibility quiz, detailed proposal)
- Eligibility quizzes can branch to multiple applications
- Supports multiple logins for grantees on a single application
- Both individuals and organizations can complete online applications
- Two or more organizations can collaborate on an application
- Administrators can create new online applications without additional vendor charges
- Administrators can customize online forms with colors, fonts, navigation
- Auto-populate information in applications
  - From previous grant applications
  - From third-party databases via EIN
- Electronic signature support
- Grantee portal allows applicants/grantees to check the status of their application/grant
- Multilingual content
  - Supports multilingual system-generated content
  - All content can be multilingual or the system integrates with online translation add-ons

Application review

- Define a default format for grant application summaries and choose which fields to include
- Offline review of applications with comments synced online
- Allow reviewers to see other comments and scores
- View numeric scores and report as summary statistics
- Supports multiple scoring schemes for different programs
- Reviewer portal
- Allow reviewers to see relationship history with prospective grantees
- Can assign additional system privileges to reviewers
- Administrator can define multiple workflows for grants review processes
- Ability to assign reviewers at random based on workflow or other attributes

Grant Tracking

- View related records
- Capture emails sent from external systems into grant, individual, or organization records
- Perform batch updates of record fields
- User can group or arrange fields into sections or tabs
- Automatically perform status checks and updates in batch on a specified schedule via connection to a standard registry of 501(c)(3) nonprofits
- Support grants made in multiple currencies by storing currency and exchange rate information
- Provides "dashboard" views, which summarize the grants and tasks currently relevant to each individual user
- Assign tasks to users through workflow functionality.
- Assign tasks to users based on rules and roles

Payments

- Define a default payment schedule for all grants and then adjust amounts and dates for grants individually
- Customize payment schedules
- Make payments contingent or conditional on specific requirements
- Automated payment approval process with configurable workflow
- Configure audit or security controls so only certain staff can change payment information
- Void payments, make refunds, and place payments on hold
- Grantees can view payment schedules and upcoming payments through a grantee portal

Fund Management

- View current fund balance for any fund
- Set up multiple funds from which to grant with separate requirements
- Create new donor-advised funds
- Associate funds with one or many investment pools
- Calculate suggested annual payout for a fund given defined spending rules
- Grant managers can search to find restricted funds that match desired grant opportunities based on donor interests
- Set separate reporting schedules for each fund
- Update the value of a fund based on investment income (manual or automatic)

Budgeting

- Track budgets in hierarchically defined categories or program areas
- Enter a budget amount for each grants program and report on that information with actuals
- View the impact a particular grant will have on future year payouts with a "what if " type feature
- Choose whether to track either the amount awarded or the amount budgeted in a particular year
- Split grants across more than one program for budgeting purposes
- Forecasting
- Use previous years' budgets as a base and adjust them for current year
- Use scheduled payment data to predict cash flow needs for a specified time period
- Generate reports showing current year payments to date plus projections for anticipated payments

Grant Requirements & Progress Reporting

- Grantees can see due dates for required reports through grantee portal
- Grantees can submit required reports through grantee portal

CRM

The following is a selected subset of functionality for CRM software. For each function, please select the response from the dropdown list that best describes your product's functionality. You can use the Additional Information column to provide details, if necessary

Individual contact records

- Track multiple phone numbers and addresses for each contact, label them, mark the primary number and address, and track the persons' preferred contact methods
- Keep a log of communications such as phone calls or personal meetings
- Mark that a particular person should not be contacted
- Track people's seasonal addresses with effective dates and automatically switch primary addresses for the appropriate timeframe
- Track relationships between contacts and label them with custom relationship types

Organization records

- Track organizations separately from individual grants to allow you to see a history of all grants to an organization
- Associate multiple contacts with an organization and define their relationships to you and to a specific grant
- Track individual business units under a larger organization
- Pull demographic information into organization records from a standard registry of 501(c)(3) nonprofits

Configuration

- Customizable dashboards for different users

Communication

- Capture emails from external email systems into grantee or organization records
- Communicate with a contact according to their relationship with the grant or organization (for example, send the payment letter to the payment contact, or email reporting reminder to report contact)
- Send emails through the system to a single individual or a group of people who meet particular criteria
- Set up and send automatic emails based on certain events
- Set up and send scheduled reminders to applicants and grantees
- Create emails or letters to individuals and groups based on templates that include both standard text and "mail-merge" type inserted data
- View and customize individual letters before printing them
- Automatically stores a record of all system-generated letters and emails for each contact
- See the open rate, clickthrough rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports
- Attach files to emails sent to individuals and groups

Donor Portal/Donor Management

The following is a selected subset of functionality for donor management and donor portal software. For each function, please select the response from the dropdown list that best describes your product's functionality. You can use the Additional Information column to provide details, if necessary

Donation Management

- Add and track individual donations
- Add, schedule, and track pledges for future gifts
- Create a set of pledges based on a payment schedule
- System prompts to apply new gifts against open pledges
- Add and track organization donations
- Support In Honor Of/In Memory Of gifts
- Add and track value of stock gifts
- Create/customize fund statements
- Real-time data updates

Donor Portal

- Donors can check account balances from donor portal
- Donors can view account statements and grant history from donor portal
- Donors can make deposits from donor portal
- Donors can renew previously awarded grants from their giving history
- Donors can select grants by matching giving opportunities and/or nonprofits with a donor-definable list of interests and criteria
- Donors can browse through a foundation-provided list of "approved nonprofits"

Finance and Accounting

The following is a selected subset of functionality for finance and accounting software. For each function, please select the response from the dropdown list that best describes your product's functionality. You can use the Additional Information column to provide details, if necessary

Accounting

- Payment processing
- EFT/ACH payment integration
- Bank account integration
- Accounting and ledger
- Fund-level accounting
- Asset management
- Investment management
- Expense/credit card management
- Compliance management and reporting
- Tax and audit preparation
- Customizable workflows for complex functions (e.g.agency endowments, multi-agency reporting)
- Drill-down reporting

Business Intelligence and Reporting

The following is a selected subset of functionality for business intelligence and reporting software. For each function, please select the response from the dropdown list that best describes your product's functionality. You can use the Additional Information column to provide details, if necessary

BI/Reporting

- Generate fund statements using pre-packaged templates
- Standard reports for common fundraising and donor management needs
- Create ad hoc reports, which can include nearly any field displayed to users
- Ad hoc reports can include custom data columns, datasets, sorting, grouping, logos, and headers

- Visual query builder or report builder wizard
- Save reports that you create or modify
- Mark reports as favorites
- Reports can be set to automatically run on a schedule and sent to individuals or groups
- Outcome/impact reporting
- Automatic calculation of progress toward outcome goals using submitted progress reports
- Evaluation of and reporting on outcomes across programs and/or all grantees
- Capture and reporting of data along demographic and economic categories
- Create multiple unique dashboards
- Search the contents of file attachments
- Drill down for more information on some or all reports
- Data visualization: create, view, and export data in a visual graphic representation
- Collect and report on data from multiple sources/systems
- Pull data from CRM, financial system, grants management software without vendor assistance

APPENDIX D: ABOUT THIS REPORT

Authors

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Amadie Hart is a contract writer and researcher for Tech Impact and President of Hart Strategic Marketing LLC. She has a wide range of experience helping nonprofits assess

their needs, select software to meet them, and engage audiences and constituents. She

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This work would not be possible without the generosity of time and expertise of many people, including the following:

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This report is the product of a partnership with the **Finance, Administrations & Operations Group (FAOG)**, **Grantbook**, **PEAK Grantmaking**, and the **Technology Association of Grantmakers (TAG)**, who funded and contributed expertise to the work.

Maintaining editorial integrity and impartiality while funding reports in the technology sector demands rigor. Tech Impact works hard to meet those demands as well as the expectations of our audience. To maintain editorial integrity and impartiality, we take the following steps:

- Tech Impact is responsible for research and editorial content of this report.
- Our funding partners contributed subject matter expertise to help inform the work but were not involved in the system demos or reviews.
- Vendors of systems included in this report or any of our reports do not pay for inclusion.
- Vendors have no input over the editorial content of this report and do not see the report prior to publication.

About Our Partners

The Finance, Administration & Operations Group's (FAOG) mission is to provide provide education, support and networking opportunities for community foundation finance, administration and operations professionals. Learn more at **faogcf.org**.

Grantbook is a strategic technology consultancy and certified B Corp helping grantmakers around the world plan, select, implement, and optimize their philanthropy tech. Over the course of ten years and hundreds of digital transformation projects, Grantbook has helped grantmakers reach the full potential of their people, process, and technology. Our team operates at the intersections of philanthropy and technology, and strategy and execution. As trusted partners to grantmakers, we are proud our clients consider us allies in their digital evolution.Learn more at **grantbook.org**.

PEAK Grantmaking is a member-led nonprofit association supporting funding organizations and philanthropy professionals. Our members form a vibrant community that advances shared leadership and learning across the philanthropic sector. Collectively, we advance PEAK's mission to transform philanthropy by elevating the field of grants management and empowering grants professionals to lead the way in operationalizing equity-centered, values-driven grantmaking practices. Learn more at **peakgrantmaking.org** and follow **@PEAKgrantmaking** on Twitter.

The Technology Association of Grantmakers (TAG) is a 501(c)(3) nonprofit membership organization that promotes the strategic, innovative, and equitable use of technology in philanthropy to solve problems and improve lives. With over 1,900 members in 300 foundations throughout North America and beyond, TAG provides technology professionals and "accidental techies" in philanthropy with knowledge, networks, mentoring, and educational opportunities. Learn more at **www.tagtech.org.**

About Tech Impact

Tech Impact is a nonprofit that leverages technology to advance social impact. Our proven workforce training programs and intermediary services prepare our graduates to launch or advance their careers in technology. We strengthen nonprofits through a full spectrum of technological support, giving them the education and services they need to deliver greater impact and help their communities thrive. Learn more at techimpact.org.

Learn more at **www.techimpact.org**.

About the Technology Learning Center

A program of the nonprofit Tech Impact, the Nonprofit Technology Learning Center is the online home to over 200 learning resources about technology for nonprofits. It includes original, impartial research publications, planning workbooks, software reviews, in-depth live and on-demand courses, webinars, and a free technology assessment. By using these resources, nonprofit professionals build knowledge, skills, and confidence to make smart technology decisions and improve organizational effectiveness.

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