**idealware**

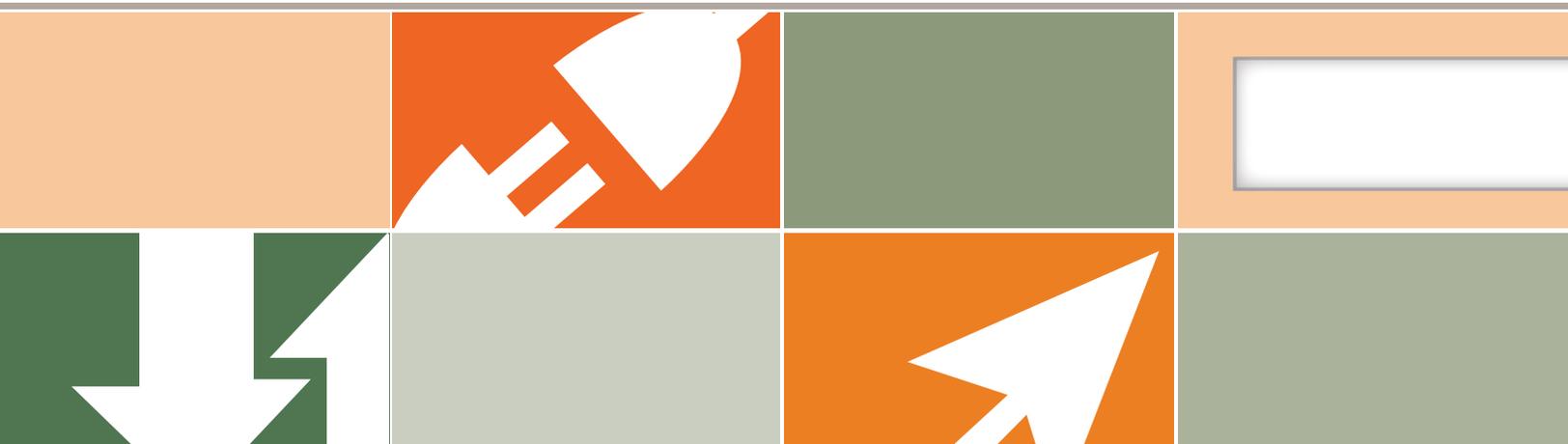# STREAMLINING ONLINE GRANT APPLICATIONS: A REVIEW OF VENDORS

Commissioned by
Project Streamline
and the Grants
Managers Network

**GMN**
Grants Managers Network

Project Streamline

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# TABLE OF CONTENTS

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## ABOUT PROJECT STREAMLINE

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

## ABOUT THE GRANTS MANAGERS NETWORK

The Grants Managers Network (GMN) improves grantmaking by advancing the knowledge, skills and abilities of grants management professionals and leading grantmakers to adopt and incorporate effective practices that benefit the philanthropic community. GMN has more than 1,400 members from 1,000-plus grantmaking organizations who represent the breadth of the philanthropic community, including small family foundations, prominent national foundations, grantmaking public charities and socially responsible corporations. For more information, go to www.gmnetwork.org.

## ABOUT IDEALWARE

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

# INTRODUCTION

Online grant application systems can be a timesaver for all involved—or they can cause grantseekers and grantmakers alike to tear out their hair in frustration. Clearly, these systems represent an advancement over paper applications, but the degree to which they actually provide a good experience varies significantly from system to system.

## In this report, we evaluate seven different vendors against Project Streamline's Essential and Gold Standard features for online applications and reporting.

Project Streamline's Online Applications and Reporting Guide encourages grantmakers to consider the features of the systems from the perspective of the user. This report does just that. The Online Applications and Reporting Guide outlined a set of Essential and Gold Standard features for online systems—in this report we go one step further, evaluating seven different vendors against those features.

We chose the grants management tools targeted at a wide market, and with a fair number of clients. We also included two products—PhilanTrack and Common Grant Application—specifically intended to help streamline grant processes. The systems reviewed included:

- EasyGrants by Altum
- eGrant.net, by Bromelkamp
- WebGrants by Dulles Technology Partners
- Grant Lifecycle Manager by Foundant Technologies
- IGAM by MicroEdge
- Common Grant Application by Ocean Peak
- PhilanTrack by PhilanTech

We also invited Cybergrants to be reviewed, but they declined to participate in our process.

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

# THE CRITERIA FOR COMPARISON

To most usefully be able to compare these seven systems, we've divided the list of features into a set of high level categories. Each of these categories summarizes an important group of Essential and Gold Standard features that allows us to compare the systems on an apples-to-apples basis. Below, we describe the categories, and map them to the guidelines from the Project Streamline report.

## Getting Started: Ease for Applicants

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

This category includes the guidelines:

**Essential Standard 1. Simple account creation with lost password functionality.** Systems that require applicants to log in should follow standard Web best practices and include a way to deal with lost passwords, both at the user level (have password e-mailed to the user) and at the grantmaker level (in case the employee that started the application is no longer available to complete the application).

**Essential Standard 2. Ability to preview and print a full application before starting and at any point before submission.** It is important to provide a way for applicants to preview and print the full application form before starting so they can gather the information they need and begin working on responses offline. In addition, applicants should be able to print out their application at any point in the process and after they complete the application.

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

## Getting Started: Reuse of Information

It doesn't make sense for an organizations to re-enter its mailing address on every new application. Systems can provide for this, and even better, allow organizations to reuse other applicable documents, find and reuse whole questions from prior applications, or even copy an entire application.

This category includes the guidelines:

**Essential Standard 3. Storage and retrieval of past data.** Address, contact and organizational history information should be retained so that returning applicants do not have to enter this data with each new application.

**Essential Standard 4. Duplicate Controls.** Online systems should include good controls to ensure that returning applicants are not treated as new to the database. The system should check for organization name as well as the Employer Identification Number (EIN) and name and telephone number for contact people.

**Gold Standard 1. Access to previously submitted applications.** Applicants should be able to see a history of previously submitted applications, print them out, and use them as a template for new submissions.

## Overall Applicant Ease of Use

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

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

This category includes the guidelines:

**Essential Standard 5. Ability for an applicant to save work and return to it later.** Applicants can't always complete their application in one session. Essential information may not be at their fingertips. And some applications are completed by more than one person—e.g., a program staffer and a financial staffer—both of whom need access to the online application forms.

**Essential Standard 6. Clear and widespread opportunities to save work.** Computers crash and Internet connections get dropped. Getting 95% through an application and having all the work lost because of a computer crash can make for a very unhappy grantseeker. Online application systems should provide automatic saves or regular opportunities to save work manually during the application process so that inputted text is saved event if the system goes down.

**Essential Standard 7. Ability to copy and paste text from word-processed documents into Web forms.** Grantseekers often cut and paste answers from similar proposals or from stock language developed to describe their organization or project. Retyping those answers into a grantmaker's form wastes time.

**Essential Standard 8. Required fields.** Because one advantage of using online application systems is to make sure grantseekers provide all the necessary information, online application systems should have the ability to require that certain fields be filled out. These fields should be clearly delineated for the applicant.

**Essential Standard 9. Error notices.** If a required field is not filled out, or if incorrect information is entered (such as text in a numeric field), the online system should provide clear and simple feedback to the applicant about what the error is and how to fix it.

**Essential Standard 10. Word or character counter.** Online systems often provide grantmakers the ability to put word and/or character limits on fields. These can be frustrating to grantseekers filling out the application.
If limits are used, the fields should include a counter so that applicants are aware of how much space remains as they fill out the application.

**Essential Standard 11. File attachments.** Online systems that allow applicants to include file uploads should make this process as simple as possible, follow-

ing common Web practices. Clear instructions should be included regarding how to attach a file, what types of files are acceptable, and what file size limitations there are, if any. Virus scanning on all attachments should be done before any files are brought into the database.

**Essential Standard 12. Acknowledgement of receipt of submission.** All online systems should generate an e-mail to applicants letting them know that their application was received. These emails should be customizable to allow the grantmaker to include information the applicant will need to follow up on the grant request, such as a request number, staff member to contact for more information, and next steps in the review process.

## Good Form Design: Self-Service Creation

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

This category includes the guideline:

**Essential Standard 14. Online forms editing** Online forms should be easy for foundation staff to edit, improve instructions or incorporate suggestions, and make the online process easier and more user-friendly.

As this feature is often important to grantmakers, and is a big differentiator between the systems, we felt it was worth a category of its own.

## Good Form Design: Flexibility of Forms

Some systems make it easy to create polished forms that are easy to parse and fill out. With others, it's an uphill battle. How easy is it to add advanced fields,

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

or categories? Can you ask a set of questions of only a particular set of applicants?

This category includes the guidelines:

**Essential Standard 13. Good design** Good design and layout can make or break the usability of an online application system. This requires grant application design tools that allow the creator of a form to group fields into categories, include hyperlinks, and incorporate at least basic HTML design elements like underlining, centering and bolding text.

**Essential Standard 15. Drop-down lists, check boxes and radio buttons** Online forms should have the ability to include drop-down lists, check boxes and radio buttons to preserve data integrity in the database and keep it simple for the applicant.

**Gold Standard 2. Branch logic** In eligibility quizzes, letters of inquiry, and full proposals, it is very useful to be able to include branch logic—e.g., if applying for this type of grant, then one set of criteria applies; if applying for another type of grant, a different set of criteria applies. This allows applicants to easily answer only the questions that are appropriate to them.

**Gold Standard 3. Advanced design capabilities** Gold-standard systems use full Web design tools to allow for true flexibility in the creation of forms and multimedia "Web 2.0" features.

## Support for Multiple Stages

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

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

This category includes the guidelines:

**Essential Standard 16. Support for eligibility quizzes.** Grantmakers should provide clear and easily accessible guidelines on what they do or don't fund. An eligibility quiz that takes the applicant through a simple set of questions can be an excellent tool to reinforce these guidelines. It can also save the applicant the time of applying for a project that has no chance of being funded and the grantmaker the time of reviewing an ineligible request. Ideally, quiz functionality should include the ability to automatically check the Office of Foreign Asset Control (OFAC) list and verify 501(c)(3) status (via the IRS or Guidestar), as appropriate to the grantmaker's needs, as well as provide applicants the specific reason for ineligibility.

**Essential Standard 17. Online reporting.** Systems should allow applicants to submit interim and final reports online. This would include providing a grantee with their responses to the original proposal questions and allowing them to report on the outcomes and submit attachments. Upon submission, the data should feed back into the grants management database so that the grantmaker has a complete record of the grant from proposal through final report.

**Gold Standard 4. Multiple-stage applications.** Systems should allow grantmakers to define multiple online application stages, including an eligibility quiz, a Letter of Inquiry or Intent (LOI), and a full-proposal. Grantseekers should be able to easily convert an LOI-stage application into a full proposal online form without having to re-enter their information.

## Information Sharing: Collaboration

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

This category includes the guidelines:

**Gold Standard 5. Application editing and collaboration.** It's useful for grantseekers and grantmakers to be able to work collaboratively on a pending application until it is completed. For example, an applicant can be working on a proposal that the funder can access, make suggestions for edits, and work with the grantseeker to refine before final submission.

**Gold Standard 6. Extranet capabilities.** Beyond the application process, it's very useful for applicants to be able to check on the status of a request online, see when reports will be due and when payments are scheduled, and change their contact/address information (with approval control from the funder organization).

## Information Sharing: Data Export and Access

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

This category includes the guideline:

**Gold Standard 7. Software should allow data to be written to and from third-party systems.** Grantmakers could benefit greatly by taking the best parts of one system and marrying them with another system or creating their own programs to extend the capabilities of a grants management database. In order to do this, vendors need to offer an application programming interface, or API, at low cost. The API would enable software developers to create programs that would "talk" to the database. This would allow grantmakers to create just the look and feel they want, access data in a way that best suits their needs, and provide a better interface for grantseekers. And, perhaps counter-intuitively, it could also benefit vendors by allowing them to concentrate their development efforts on those things they do best and allowing their customers to get what they really want.

As this guideline varied so much across vendors, we felt it was worth a category of its own.

## Product Background

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

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

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# HOW DO THE VENDORS COMPARE?

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

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

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

| | EasyGrants by Altum | eGrants.net by Bromelkamp | WebGrants by Dulles | Grant Lifecycle Manager by Foundant | IGAM by MicroEdge | Common Grant Application by Ocean Peak | PhilanTrack by Philantech |
|---|---|---|---|---|---|---|---|
| Getting Started: Ease for Applicants | Excellent | Excellent | Excellent | Solid | Solid | Fair | Solid |
| Getting Started: Reuse of Information | Excellent | Solid | Solid | Solid | Solid | Excellent | Excellent |
| **Overall Applicant Ease of Use** | Excellent | Solid | Solid | Excellent | Solid | Fair | Solid |
| Good Form Design: Self Service Creation | Fair | None | Excellent | Excellent | Solid | None | Solid |
| Good Form Design: Flexibility of Forms | Excellent | Excellent | Excellent | Solid | Excellent | Fair | Excellent |
| **Support for Multiple Stages** | Excellent | Solid | Solid | Solid | Excellent | Fair | Excellent |
| Information Sharing: Collaboration | Excellent | Excellent | Excellent | Solid | Fair | Fair | Solid |
| Information Sharing: Data Export and Access | Excellent | Excellent | Excellent | Fair | Excellent | Fair | None |
| **Product Background** | Solid | Solid | Solid | Excellent | Excellent | Fair | Solid |

Legend: • None  ◎ Fair  ⬤ Solid  ⬤ Excellent

## EasyGrants by Altum

EasyGrants is a powerful but expensive grants management system with substantial support for complex online applications, status reports and custom workflows, part of a full-featured grants management system. The system is reasonably easy for applicants to use, and generally follows usability best practices. Application forms are very flexible, but grantmakers must have substantial technical skills to edit them—most work with the vendor to create or edit forms. The system provides strong access to the data—any application or status report field can be exported, included in ad-hoc reports, or accessed by a programmer via API.

## eGrant.net by Bromelkamp

Bromelkamp's eGrant.net online application system allows for very flexible online forms, but gives grantmakers little ability to update fields themselves. The vendor will set up each online form at an estimated charge of $3,500 to $6,000, depending on complexity, designing each form exactly to the grantmakers' specifications. The application forms themselves lack some of the polish and ease-of-use of some of other reviewed systems, but are generally straightforward and understandable. Grantmakers can use eGrant.net to view and review grant applications, but it's most often used in conjunction with a specific grants management system, like Bromelkamp's Pearl. All grant applications and status reports must be manually exported from eGrant.net and imported into Pearl (or another grants management system).

## WebGrants by Dulles Technology Partners

Dulles WebGrants provides an interesting option that lets grantmakers without technical skills create and edit sophisticated, customized online application forms, as part of a full-featured grants management system.

The applicants' side of the forms would benefit from usability improvements (like better error handling, and the ability to more easily save applications in progress without filling out all required fields), but in general it's polished-looking and easy to understand. There's fairly robust access to application and status report data through reports, exports, or via programmatic integration.

## Grant Lifecycle Manager by Foundant Technologies

Foundant offers affordable, polished online application and status reporting functionality within a full-featured grant managemnet system. It has a surprising amount of power for the price. Interfaces for applicants and grantmakers are well-designed and usable, making it straightforward to create and fill out applications forms. It lacks some of the advanced features of more expensive packages, like eligibility quizzes, support for multiple applicants to collaborate on the same application, or the ability for grantees to easily reuse detailed organizational information (like a list of board members), but is a solid, cost-effective choice for grantmakers with less complex granting processes.

## IGAM by MicroEdge

IGAM provides mid-level online application and status report functionality for a middle-of-the-road cost. As it integrates specifically (and only) with MicroEdge's popular GIFTS and FIMS, it will be particularly useful for users of those systems. The system is reasonably easy for applicants to use, and generally follows usability best practices. It has particularly useful functionality in support of eligibility quizzes. The self-service tools to allow grantmakers to set up their own applications and status reports are flexible but somewhat complex to understand. All data can be imported into GIFTS or FIMS and then viewed in one of those systems via reports or programatically extracted via a direct database connection or API.

## Common Grant Application by Ocean Peak

Common Grant Application uses a different model than most systems. It's tailored to encourage applicants to fill out a detailed profile which can be reused to apply to many different grants, and provides interesting functionality to facilitate this. For instance, applicants can set up multiple users who each have different permissions to edit applications, can copy entire applications to reuse for different grantmakers, and view statistics on each grantmaker's giving. The process is awkward, however, for a flow in which an applicant comes from a grantmaker's website to apply for a particular grant. In this case, it's difficult to preview what fields the grantmaker requires—which often are a subset of the large amount of information gathered. It also provides very limited customization for grantmakers—for example, the questions that appear in both the LOI and proposal forms are fixed, and grantmakers can only append questions to the end. These supplemental questions must be in free text format.

## PhilanTrack by PhilanTech

PhilanTrack also uses a somewhat different model. In addition to online application and reporting functionality, and a grants management package for grantmakers, it provides robust functionality for grant applicants to track, view, manage and reuse questions across many applications for different grantmakers, whether or not those grantmakers are using Philan-Track. For instance, applicants can easily search for their past responses to similar questions on different applications. The system also offers polished, highly usable and well-thought-out functionality for online applications and reporting which offers a number of advantages to both grantees and grantmakers looking

to streamline the process. Grantmakers can create their own application forms, but have limited control over formatting—for instance, they must email the vendor to bold a word or change a question from required to optional. There is some nice analysis functionality built into the system, but unfortunately data from applications and status reports is not easily exported in an analyzable form, and there's currently no programmatic access to the data.

# EASYGRANTS BY ALTUM

**URL: www.altum.com/Products/Easygrants/**

**Summary:** EasyGrants is a powerful but expensive grants management system with substantial support for complex online applications, status reports and custom workflows, part of a full featured grants management system. The system is reasonably easy for applicants to use, and generally follows usability best practices. Application forms are very flexible, but grantmakers must have substantial technical skills to edit them—most work with the vendor to create or edit forms. The system provides strong access to the data—any application or status report field can be exported, included in ad-hoc reports, or accessed by a programmer via API.

**Technical Setup:** Online application in .NET, which can be installed on you own web server or hosted by Altum.

**Cost:** A mid-sized organization might expect to pay $100,000 to $150,000 in first-year licensing costs for the entire EasyGrants grant management system. Getting started also requires a substantial needs analysis and configuration—while the tools are available for grantmakers to set up the system on their own, or with a consultant, the process is complicated and technical. All existing clients have hired Altum for this process, which might cost anywhere from $150,000 for grantmakers with only a few programs to $500,000 or more for those with extremely complex processes. The yearly maintenance fee is 20 percent of the license fee. The vendor estimates hosting costs, if desired, at about $50,000 per year for both infrastructure and system maintenance. Configuration costs include data migration as well as integration with other internal IT systems, such as accounting, constituent databases, or website content management systems.

The vendor provides unlimited phone and e-mail support as part of the yearly maintenance fee. Phone support can be provided to grantees and reviewers as well for an additional cost.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants fill out a number of registration fields and are automatically logged into the system. If applicants forget their passwords, they can enter their login IDs to receive them by email (if they forget their user IDs, they must call the grantmaker or vendor to retrieve them). If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker can look up login IDs, and email or reset passwords.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview packet shows the full text of all uploaded documents, as well as which fields are required and which are optional, and character limits for fields.

## Getting Started: Reuse of Information

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

**Duplicate controls:** The system checks the email address and login ID of each new registrant to make sure it doesn't

already exist in the system. It also checks the organization's name and EIN number—if the organization already exists, the system typically informs the applicant, and allows them to choose to proceed or not (this functionality can be customized to the needs of the grantmaker).

<span style="background-color:yellow">**Gold Standard**</span> **Access to previously submitted applications:** Applicants can easily see submitted applications, copy and paste answers, or copy an entire existing application to use as a template for a new one (if the grantmaker allows). Grantmakers can also choose to automatically pre-populate fields from any information they've filled out in a previous year or application.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time regardless of whether they've filled out all required fields in the application. Grantmakers can choose when required fields are validated—if they're validated at the page level, applicants must fill out all required fields before saving. Alternatively, grantmakers can opt to wait until applicants check the entire application to identify any issues. If multiple people from the same organization want to collaborate on an application, they would use the same login—only one applicant can edit a given grant application.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is not automatically saved—if the applicants do not manually save their work, the applicants will typically show a warning after 10 minutes prompting them to save their work. After 20 minutes the application will time out and they will lose their work. Grantmakers can configure these time thresholds.

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

**Required fields:** Grantmakers can use an interface to define what fields are required before an entire application is submitted. If they want to check for required fields on the page level, they will need technical knowledge (of XML) to define this. Required fields are designated with an asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system warns them with red text at the top of the page describing all the issues. This functionality follows standard usability best practices. For specific formatting issues (like a field that must be a number, or in phone number format), grantmakers can also opt not to let the applicant exit the field. In addition to providing error messages that preclude the application from being submitted, grantmakers can choose to include "soft" warnings, which are displayed but which the applicant can choose to ignore.

**Word or character counter:** The grantmaker can easily define character limits for each field. Character limits are shown in the question label or the help text of forms. Grantmakers can choose how to enforce the character limit—by allowing applicants to type more than the allowed characters in the field, or by displaying error messages. The vendor doesn't typically include a character counter to show applicants how many characters remain as they type, but could for minimal additional cost.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can define in instruction text which file type(s) may be uploaded, and then validate uploaded files to ensure they're the right format.

The system checks each uploaded file for a virus; if one is found, the document is quarantined and removed from the application without notification. The applicant would then see the upload field as empty, and they'd have to upload a different file if the field is required.

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

## Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers have limited ability to update application forms through an online interface, including the ability to modify instructional text, budget fields, file uploads, drop-down lists, or add a new page with only text fields onto a new page in the grant application. They can also define what validation should be done against each field, including some fairly sophisticated validation. Grantmakers must have substantial technical skills (including familiarity with XML data structure and the ability to add new fields to an MS SQL database) in order to add new fields or to make other edits—most clients rely on the vendor for this. The system includes a form library of about 100 forms which can be used as a starting point, but nearly every client has some customizations.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** The instructional text or new form fields that grantmakers are able to add through an online interface can include basic formatting or hyperlinks. The vendor can create any formatting, categorization, paging or layout that is possible through HTML.

**Drop-down lists, check boxes and radio buttons:** Online forms can include any fields supported by HTML, including text boxes, drop-down lists, check boxes, radio buttons and file uploads. The vendor also has experience creating fields with automatic calculations.

| Gold Standard | **Branch logic:** Standard application forms do not include branch logic—for example, asking a particular question only if the answer to a previous question was positive—but the vendor often builds that into an application at additional cost. |

| Gold Standard | **Advanced design capabilities:** The vendor could create any application form possible through HTML, including support for complex layouts or embedded video or audio files. |

## Support for Multiple Stages

**Support for eligibility quizzes:** The grantmaker can set up their own customized eligibility quiz through a relatively straightforward interface. Once applicants have completed the quiz, they are informed of their eligibility status and shown the answers that are required for eligibility if they are not eligible. This quiz can automatically check 501(c)(3) or OFAC status based on the organization's EIN number—however, this would be a customization by the vendor at additional cost.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report. This data is all available for export or reporting.

| Gold Standard | **Multiple-stage applications:** Grantmakers can design a process with as many application stages and status report stages as they'd like. A proposal can automatically pull pre-populated application-specific |

fields from an LOI (such as the project description).

## Information Sharing: Collaboration

| Gold Standard | **Application editing and collaboration:** Application and status report data can be seen by grantmakers as a review packet, or viewed in ad hoc reports. Grantmakers can also log in as applicants via one-click functionality to review or modify applications in progress. Grantmakers can return submitted applications (either entire applications or just sections of them) to grantees through the system in order to ask for edits. |

| Gold Standard | **Extranet capabilities:** Applicants can see application status and due dates for progress reports and payment dates online, and change their own contact information. In addition, both applicants and grantees can receive reminders and updates via email. |

## Information Sharing: Data Export and Access

| Gold Standard | **Software should allow data to be written to and from third party systems:** The MS SQL Server database is accessible, to allow programmers to access EasyGrants data or integrate it with other systems. In addition, a SOAP API is available that is typically customized to clients' specific needs. All screens are configurable and almost all data is accessible—if desired, a programmer could create a whole new interface on top of the EasyGrants data. |

## Product Background

**Product Background:** Easygrants has been in use by clients since 1999, and was purchased by Altum in October 2006. Currently, 13 grantmakers are using the system.

# EGRANT.NET BY BROMELKAMP

## URL: www.egrant.net

**Summary:** Bromelkamp's eGrant.net online application system allows for very flexible online forms, but gives grantmakers little ability to update fields themselves. The vendor will set up each online form at an estimated charge of $3,500 to $6,000, depending on complexity, designing each form exactly to the grantmakers' specifications. The application forms themselves lack some of the polish and ease-of-use of some of other reviewed systems, but are generally straightforward and understandable. Grantmakers can use eGrant.net to view and review grant applications, but it's most often used in conjunction with a specific grants management system, like Bromelkamp's Pearl. All grant applications and status reports must be manually exported from eGrant.net and imported into Pearl (or another grants management system).

**Technical Setup:** Software as a Service

**Cost:** Grantmakers pay a setup fee of about $3,500 to $6,000 per application or status report form. They then pay an annual fee of $1,200 for the first form and $108 for each additional form. This does not include any substantial grant management functionality—clients typically use Bromelkamp Pearl for that, at additional cost. Initial training is included with the setup fee. Support is available for an hourly fee.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants fill out basic account information, including login and password, and are emailed a confirmation. If applicants forget their passwords, they can enter their email addresses to receive their user names and passwords by email. If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker can look up user names and passwords, or reset passwords.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview version is displayed as a PDF file with the ability to fill in fields—the PDF could be filled in and mailed by an applicant in lieu of the online form, but any edits made in the PDF are not saved into the online form, leaving considerable room for confusion. The preview version is fully customizable to the grantmakers' needs, and could include both an indication of required fields and character limits. The packet shows links to uploaded documents but does not actually append the text of the documents themselves.

## Getting Started: Reuse of Information

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

**Duplicate controls:** The system checks the email address and user ID of each new registrant to make sure it doesn't already exist in the system. It does not check the organization's name and EIN number against existing records, but the grantmaker could manually map two records together once they've been created.

**Gold Standard** **Access to previously submitted applications:** Applicants can easily see submitted applications. They cannot copy an entire existing application to use as a template for a new one, but they can copy and paste the answers to individual questions. Grantmakers can also choose to automatically pre-populate fields from any information they've filled out in a previous year or application.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application. If multiple people from the same organization want to collaborate on an application, they would use the same login—only one login can edit a given grant application.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is not automatically saved—if applicants do not manually save their work, they will see a warning after 15 minutes that they should save. After 20 minutes the application will time out and they will lose their work.

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

**Required fields:** Grantmakers can easily define which fields are required. Required fields are designated with an asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), when the applicant tries to submit the application the system shows a friendly message with a list of incorrectly filled-out fields with a link to fix each of them.

**Word or character counter:** The grantmaker can easily define character limits for each field. Character limits are shown in the question label on forms. There is no character or word counter to show the applicant how much space they've used as they fill out applications.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can define in instruction text which file type(s) may be uploaded, and then validate uploaded files to ensure they're the right format. The system checks each uploaded file for a virus; if one is found, the document is quarantined and removed from the application without notification—in which case, the applicant would believe the document had been uploaded while the grantmaker would believe that it hadn't.

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

## Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers cannot add or edit application forms beyond modifying text at the top of pages—the vendor must create each form, at additional cost. A typical application form might cost in the range of $3,500 to $6,000. If grantmakers require more than one form, additional forms are typically less expensive, and more likely to range from $2,250 to $4,500.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers can add text at the top of many pages,

including an overall "instruction page," login page, registration page and confirmation page. This text can include basic formatting or hyperlinks. The vendor can create any formatting, categorization, paging or layout possible through HTML.

**Drop-down lists, check boxes and radio buttons:** Online forms can include any fields supported via HTML, including text boxes, drop-down lists, check boxes, radio buttons and file uploads. The vendor also has experience creating fields with automatic calculations.

> **Gold Standard** **Branch logic:** The vendor has never created an application form with branch logic—for example, asking a particular question only if the answer to a previous question was positive.

> **Gold Standard** **Advanced design capabilities:** The vendor could create any application form possible through HTML, including support for complex layouts or embedded video or audio files.

## Support for Multiple Stages

**Support for eligibility quizzes:** The system does not support eligibility quizzes. The eGrant.net online package does not support automatic 501(c)(3) status or OFAC checking based on EIN number, but if the grantmaker pulls the application into Bromelkamp's affiliated Pearl grant management system, they could click to check the EIN number against Guidestar's 501(c)(3) status and OFAC lists.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report. This data needs to be manually exported from eGrant.net and imported into Pearl (or another grants management system), but once imported Pearl will allow you to report on any field in the status report.

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

## Information Sharing: Collaboration

> **Gold Standard** **Application editing and collaboration:** Grant applications can be seen and reviewed in eGrant.net, but the system does not have sophisticated grants management functionality. Instead, application and status report information is typically exported manually from eGrant.net and imported into Pearl (or another grants management system). Grantmakers can see applications in progress—to, for example, collaborate with applicants—but cannot edit them. Grantmakers can return submitted applications to grantees through the system in order to ask for edits.

> **Gold Standard** **Extranet capabilities:** Applicants can see application status, due dates for progress reports and payment dates online, and change their own contact information. Application and report status can be manually entered into eGrant.net for display to grantees, or this information can be automatically pulled in from Pearl for an additional $1,200 one-time fee using the Application Status module.

## Information Sharing: Data Export and Access

**Gold Standard** **Software should allow data to be written to and from third party systems:** Vendor provides a SOAP API that allows a programmer to develop automated processes to retrieve application data from eGrant.net, and to update status information for applicants. All application and status report information can also be exported into a XML or MDB file format which could then be manually or programmatically imported into another system.

## Product Background

**Product Background:** eGrant.net has been in use by clients since about 2002. Currently, 44 grantmakers are using eGrant.net.

# WEBGRANTS BY DULLES TECHNOLOGY PARTNERS

**URL: www.dullestech.com**

**Summary:** Dulles WebGrants provides an interesting option that lets grantmakers without technical skills create and edit sophisticated, customized online application forms, as part of a full-featured grants management system. The applicants' side of the forms would benefit from usability improvements (like better error handling, and the ability to more easily save applications in progress without filling out all required fields), but in general it's polished-looking and easy to understand. There's fairly robust access to application and status report data through reports, exports, or via programmatic integration.

**Technical Setup:** Online application, which can be installed on you own web server or hosted by Dulles.

**Cost:** Small grantmakers who install the system themselves onto their own web servers with bare bones implementations might pay $15,000 for the entire Dulles grants management system. More typically, clients work with Dulles to customize the implementation, bringing costs closer to $100,000 or more. Dulles can also host the application for an additional cost of $500 per month.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants enter their user ID and password and complete a set of customizable additional fields. Typically, registration requests are sent to the grantmaker for new user approval, although grantmakers can opt not to do this. If applicants forget their passwords, they can enter user IDs to receive their password by email (if they forget their user IDs, they must call the grantmaker or vendor to retrieve them). If applicants call the grantmaker for help retrieving forgotten passwords or other information, staff members can look up their email addresses or passwords or reset passwords, depending on their security privileges.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview packet shows links to all uploaded documents (though not the full text of the documents themselves), which fields are required and which are optional, and character limits for fields.

## Getting Started: Reuse of Information

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

**Duplicate controls:** The system does not check the email address or any other information about a new registrant to make sure it doesn't already exist in the system. Since grantmakers typically review each new request for access to the system, they can manually check at that point if a registrant has already created an account and, if so, link the two accounts.

**Gold Standard** — **Access to previously submitted applications:** Applicants can easily see submitted applications, and make complete copies of previously submitted applications in order to revise and resubmit them to the grantmaker.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, but it's difficult to do if they haven't filled out all the required fields on a given page. The grantmaker can choose to allow multiple people from the same organization to set up an unlimited number of system users who can all collaborate on a single application.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is not automatically saved. If applicants do not manually save their work, the application will time out and they will lose their work after a length of time defined by the grantmaker.

**Ability to copy and paste text from word-processed documents into web forms:** Applicants can easily copy and paste text from Microsoft Word. Some formatting is lost, but not all of it, and text, bullet points and line breaks remain intact and usable.

**Required fields:** Grantmakers can easily define which fields are required. Required fields are designated with an asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system warns them to fill out the first incorrectly filled-out field. If the applicants left multiple fields empty, the system will only notify them of the first one, and require them to fill out that field and save again to see the second field, and save that one to see the third, and so on.

**Word or character counter:** Grantmakers can easily define character limits for each field. Information about character limits can be included in the field descriptions shown to applicants. There is no character or word counter to show applicants how much space they've used as they fill out applications.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can include instructions in the question text regarding desired file types, but the system will not validate file format. The system checks each uploaded file for a virus; if one is found, the document is deleted from the server. In this case, the system can be configured to send email notifications to applicants, the grantmaker, or both.

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

## Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers can easily create or edit application forms through a well-designed online interface. They can start from scratch, with a standard form (like a common application format), or with default forms set up by the grantmaker.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers control formatting for application forms through the web interface. They can group fields into separate pages or categories within the pages. Each individual page of an application can be reused or copied in different applications. All text labels and descriptions can include HTML hyperlinks or other text formatting.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, check boxes, radio buttons, file uploads and many more types. They offer a number of specialized form types, like budget tables and calculated fields, which can be easily customized.

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

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| **Gold Standard** | **Advanced design capabilities:** Grantmakers can include HTML in any text header—including, for example, the ability to embed video or audio files. However, they do not have advanced control over the layout, for instance to lay out a form into multiple columns. |

## Support for Multiple Stages

**Support for eligibility quizzes:** The system does not support traditional eligibility quizzes out of the box, but the vendor could create a form that scores a set of responses and provides automatic eligibility feedback at additional cost. This functionality could also automatically check 501(c)(3) status or OFAC-checking based on EIN number at additional cost.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report. This data is all available for export or reporting.

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| **Gold Standard** | **Multiple-stage applications:** The system supports a two-stage application with an LOI and proposal out of the box, but the vendor could add additional stages at additional cost. Grantmakers can also create as many status report stages as they'd like. A proposal can automatically pull pre-populated application-specific |

fields for an LOI (such as the project description).

## Information Sharing: Collaboration

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| **Gold Standard** | **Application editing and collaboration:** Application data is provided to grantmakers in read-only format after it's submitted. Grantmakers can also log in as applicants via one-click functionality to review or modify applications in progress. Grantmakers can return submitted applications to grantees |

through the system in order to ask for edits.

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| **Gold Standard** | **Extranet capabilities:** Applicants can see application status, the due date for a progress report and payment dates online, and change their own contact information. |

## Information Sharing: Data Export and Access

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| **Gold Standard** | **Software should allow data to be written to and from third party systems:** If the web application is installed on the grantmakers' own web servers, they can integrate application data with other systems by connecting directly to the database (for example, via ODBC). The vendor also provides a SOAP |

API interface that lets programmers extract most information from the system, but is more limited as to what can be written into it.

## Product Background

**Product Background:** WebGrants has been in use by clients since 2001. Currently 30 grantmakers and governmental organizations are using the system.

# GRANT LIFECYCLE MANAGER BY FOUNDANT TECHNOLOGIES

**URL: www.foundant.com**

**Summary**: Foundant offers affordable, polished online application and status reporting functionality within a full-featured grant managemnet system. It has a surprising amount of power for the price. Interfaces for applicants and grantmakers are well-designed and usable, making it straightforward to create and fill out applications forms. It lacks some of the advanced features of more expensive packages, like eligibility quizzes, support for multiple applicants to collaborate on the same application, or the ability for grantees to easily reuse detailed organizational information (like a list of board members), but is a solid, cost-effective choice for grantmakers with less complex granting processes.

**Technical Setup:** Software as a Service

**Cost:** Grantmakers pay $5,000 for each two-year contract for the entire grant management system, which allows up to two sets of application and status report forms (for example, for two different grant programs). Each set of two additional grant programs costs an additional $1,000 for a two-year contract. The vendor also charges a setup fee, which includes training for a single  and a small amount of system customization—setup averages about $1,500. The two year contract includes phone and email support.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants fill out basic account and organizational information, and then set up passwords. Grantmakers can customize what user and organizational information should be included or required on the registration form. If applicants forget their password, they can enter their email address to receive their passwords by email. If applicants call the grantmaker for help retrieving their forgotten passwords or other information, the grantmaker can look up or change the email address on record for their account so applicants can retrieve their own login information, or change the passwords.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview packet includes the full text of all up-loaded documents, but does not show which fields are required or show character limits for fields.

## Getting Started: Reuse of Information

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

**Duplicate controls:** The system checks the email address of each new registrant to make sure it doesn't already exist in the system. It does not check the organization's name and EIN number against existing records, but the grantmaker could manually map two records together once they've been created.

| Gold Standard | **Access to previously submitted applications:** Applicants can easily see submitted applications, either online or in a complete print packet (including all uploaded documents). They cannot copy an entire existing application to use as a template for a new one, but they can copy and paste the answers to |

individual questions.

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application. If multiple people from the same organization want to collaborate on an application, they would use the same login—only one user can edit a given grant application, but the grantmaker can manually map two users (working on two different grants) to the same organization.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is also automatically saved about every 10 minutes.

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

**Required fields:** Grantmakers can easily define which fields are required. Required fields are designated with a red asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system pops up an error message showing a list of fields with which there are issues. When applicants close the error message, the system shows a message in red text describing the issue beside each field that's incorrectly filled out. This functionality follows standard usability best practices.

**Word or character counter:** The grantmaker can easily define character limits for each field. Character limits are shown in the question label on forms. A character counter shows the applicant how many characters remain as they type in answers.

**File attachments:** Applicants can easily upload files using standard upload functionality. The total size of all uploaded files must be under 20MB. Grantmakers can include instructions in the question text regarding desired file types, but the system will not validate file format other than to weed out executable files. The system checks each uploaded file for a virus; if one is found, the document is deleted from the server without notification—in which case, the applicant would believe the document had been uploaded while the grantmaker would believe the field had been ignored. The vendor also offers a "fax-to-PDF" service for an additional fee ($500 for a two year subscription) that lets applicants fax documents to a particular phone number, and then download the fax as a PDF file to be uploaded to applications.

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

## Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers can easily create or edit application forms through a well-designed online interface. The vendor will copy existing forms from one client to another without cost to encourage the re-use and standardization of application forms.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers control formatting for application forms through the web interface. Grantmakers can create questions, format them, include HTML hyperlinks and add instructions or other descriptive text. Questions can be grouped into categories by adding dividing lines and boldface

headers. All applications are limited in length to a single web page.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, radio buttons and file uploads. The system does not support more-advanced fields provided by some of the other systems, like table formats or calculations.

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

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| **Gold Standard** | **Advanced design capabilities:** Grantmakers have control over basic HTML text formatting, but not advanced customization to lay out a form into multiple columns or embed video or audio files, for example. |

## Support for Multiple Stages

**Support for eligibility quizzes:** The system does not support automatic eligibility quizzes (they offer a qualification stage, but it must be manually reviewed and scored by the grantmaker). The system cannot automatically check 501(c)(3) status or OFAC checking based on EIN number as part of the application process, but grantmakers can run a Guidestar Charity Check (including 501(c)(3) and some basic OFAC checking) for applicants by clicking a button in the grants management interface. This Charity Check module requires an additional cost.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report. This data is provided in read-only format to grantmakers, who can then export any or all status report fields into an Excel file format.

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| **Gold Standard** | **Multiple-stage applications:** The system supports a three-stage application with a manually reviewed qualification stage, LOI and proposal. Grantmakers can also create as many status report stages as they'd like. A proposal can automatically pull pre-populated application-specific fields from an LOI (such as the project description). |

## Information Sharing: Collaboration

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| **Gold Standard** | **Application editing and collaboration:** Application data is provided to grantmakers in read-only format after it's submitted. Grantmakers can export any or all status report fields into an Excel file format. Grantmakers can see applications in progress, to for example collaborate with applicants, but cannot edit them, |

except by attaching additional files as supporting documents. Grantmakers can return submitted applications to grantees through the system in order to ask for edits.

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| **Gold Standard** | **Extranet capabilities:** Applicants can see application status and due dates for progress reports, and change their own contact information. In addition, both applicants and grantees can receive reminders and updates via email. Applicants do not have the ability to see dates of scheduled payments. |

## Information Sharing: Data Export and Access

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| **Gold Standard** | **Software should allow data to be written to and from third party systems:** Vendor does not currently offer any way (like an API) for programmers to access data to integrate it with other systems. All data for contacts, grants, applications, evaluations and status reports can be exported from the system, however, into a CSV format. |

## Product Background

**Vendor Background:** The product has been in use by clients since 2007. Currently, about 130 grantmakers are using the system.

# IGAM BY MICROEDGE

**URL: www.microedge.com/products/igam**

**Summary:** IGAM provides mid-level online application and status report functionality for a middle-of-the-road cost. As it integrates specifically (and only) with MicroEdge's popular GIFTS and FIMS, it will be particularly useful for users of those systems. The system is reasonably easy for applicants to use, and generally follows usability best practices. It has particularly useful functionality in support of eligibility quizzes. The self-service tools to allow grantmakers to set up their own applications and status reports are flexible but somewhat complex to understand. All data can be imported into GIFTS or FIMS and then viewed in one of those systems via reports or programatically extracted via a direct database connection or API.

**Technical Setup:** Software as a service

**Cost:** Microedge declined to disclose any pricing information for IGAM or GIFTS.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants enter their email address and a password, and are sent a confirmation email. If applicants forget their password, they can enter their email addresses to receive their user names and passwords by email. If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker can look up their email addresses or reset the passwords.

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

## Getting Started: Reuse of Information

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

**Duplicate controls:** The system checks the email address of each new registrant to make sure it doesn't already exist in the system. It does not check the organization's name and EIN number against existing records, but the grantmaker could manually map two records together once they've been created.

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

# Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application. If multiple people from the same organization want to collaborate on an application, they would use the same login—only one user can edit a given grant application.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is saved when an applicant moves from page to page, but is not automatically saved otherwise.

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

**Required fields:** Grantmakers can easily define which fields are required. Required fields are designated with an asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system warns them with red text at the top of the page, and highlights each field that's incorrectly filled out. This functionality follows standard usability best practices.

**Word or character counter:** Grantmakers can easily define word limits for each field. Information about word limits can be included in the field descriptions shown to applicants. There is no character or word counter to show applicants how much space they've used as they fill out applications.

**File attachments:** Applicants can easily upload files using standard upload functionality. Grantmakers can define which file type(s) may be uploaded, and appropriate file sizes, and then validate uploaded files to ensure they comply. Each uploaded file must be smaller than 100MB, and the combined size of all attached documents cannot exceed 1GB per application. The system checks each uploaded file for a virus; if one is found, applicants are notified and the file is not uploaded.

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

# Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers can create or edit application forms through a fairly complex online interface. The interface requires grantmakers to both create online forms and map each field to a particular field in GIFTS. Grantmakers can also deactivate or re-activate forms.

# Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers control formatting for application forms through the web interface. Grantmakers can create and format questions, include HTML hyperlinks, and add instructions or other descriptive text. Questions can be grouped into categories by adding boldface headers. Grantmakers can group questions into as many pages as desired.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, check boxes, radio buttons and file uploads. More advanced fields, like calculated fields, are possible, but may require the purchase of the additional Customizer module.

**Gold Standard**

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

| Gold Standard | **Advanced design capabilities:** Grantmakers can include HTML in any text header—including, for example, the ability to embed video or audio files. However, they do not have advanced control over the layout, for instance to lay out a form into multiple columns. |
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## Support for Multiple Stages

**Support for eligibility quizzes:** The grantmakers can set up their own eligibility quiz. This quiz can automatically check the organization's tax number against both U.S. and Canadian official records for nonprofit status. By design, the quiz does not provide OFAC-checking functionality, to avoid issues with false positives. At the end of the quiz, applicants are shown a message written by the grantmaker informing them whether they are eligible, but that message cannot list specific reasons in the event of ineligibility.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report. This data is all available for export or reporting

| Gold Standard | **Multiple-stage applications:** The system supports a three-stage application with an eligibility quiz, LOI and proposal. Grantmakers can also create as many status report stages as they'd like. A proposal can automatically pull pre-populated application-specific fields for an LOI (such as the project description). |
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## Information Sharing: Collaboration

| Gold Standard | **Application editing and collaboration:** Application data is reviewed by grantmakers in a separate Grant Application Manager. Applications can be viewed or declined in this interface, or published into GIFTS. There is no way for grantmakers to see applications in progress—to, for example, collaborate |
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with applicants—unless applicants provide login information. Grantmakers can easily ask applicants for additional information, and then enter that information themselves into GIFTS, but not in the separate Grant Application Manager, and they cannot return submitted applications to grantees through the system to ask for edits.

| Gold Standard | **Extranet capabilities:** Applicants can see application status and due dates for progress reports. Payment information cannot easily be shown, and applicants cannot change their own contact information except through the submission of a new application. |
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## Information Sharing: Data Export and Access

| Gold Standard | **Software should allow data to be written to and from third party systems:** There is no easy way to automatically extract data from the IGAM interface itself into anything other than GIFTS or FIMS (MicroEdge's grant management products). However, application data could be exported from the |
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Grant Application Module (a component of IGAM) into HTML or an Excel spreadsheet.

If the data has been pulled into GIFTS, there are a number of possibilities for extracting it. Data can be exported into spreadsheets, or a programmer could extract it via a direct database connection at no additional charge. An API is also available, at considerable extra charge, for grantmakers who wish to write data directly into GIFTS.

There are a number of possibilities if the data is pulled into FIMS as well. Data can be exported into spreadsheets, or a programmer could extract it via a direct database connection at no additional charge.

## Product Background

**Product Background:** IGAM has been in use by clients for about 13 years. Currently about 450 grantmakers are using the system.

# COMMON GRANT APPLICATION, BY OCEAN PEAK

**URL: www.commongrantapplication.com**

**Summary:** Common Grant Application uses a different model than most systems. It's tailored to encourage applicants to fill out a detailed profile which can be reused to apply to many different grants, and provides interesting functionality to facilitate this. For instance, applicants can set up multiple users who each have different permissions to edit applications, can copy entire applications to reuse for different grantmakers, and view statistics on each grantmaker's giving. The process is awkward, however, for a flow in which an applicant comes from a grantmaker's website to apply for a particular grant. In this case, it's difficult to preview what fields the grantmaker requires—which often are a subset of the large amount of information gathered. It also provides very limited customization for grantmakers—for example, both LOI and proposal forms are fixed, and grantmakers can only append supplemental free text questions.

**Technical Setup:** Software as a Service

**Cost:** Grantmakers pay an annual fee based on their assets. The annual fee starts at $120 per year. A grantmaker with $1 million in assets would pay $960 per year; a grantmaker with $100 million in assets would pay $12,000 annually. There is an additional charge of $11-$15 per submitted proposal—the system is set up to charge applicants for this fee, but the grantmaker can "waive" it for applicants by paying it for them. The vendor provides unlimited phone and e-mail support as part of the yearly maintenance fee.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** To register, applicants fill out a detailed registration form. This process is geared toward nonprofits that want to set up a profile and look for appropriate grants rather than those coming from grantmakers' sites to apply for specific grants. Those coming from grantmaker sites may be confused by the registration process—it's not immediately clear what they should do or where to register. If applicants forget their passwords, they can enter their email addresses through an unusual interface to be sent their passwords. A grantmaker cannot look up or change the email or password on record for applicants.

**Ability to preview and print a full application before starting and at any point before submission:** The system is tailored to make it easy for applicants to fill out detailed overall profiles for their organizations, as opposed to filling out particular grant applications. Applicants can preview and print each section of their overall profiles (organizational background, program information, or staff details). They can see notes from particular grantmakers as to which fields are required for each of these sections on the top of each page, and what custom fields they need to fill out on a separate page, but there is no way to see the package of only required questions for a grantmaker in one place. It is, however, possible to preview the full application before it is submitted to a grantmaker.

## Getting Started: Reuse of Information

**Storage and retrieval of past data:** The system retains contact information for individual applicants and organizations, as well as detailed organizational information—like program descriptions, a list of board members, an uploaded 501(c)(3) determination letter and financial information—so returning applicants do not have to re-enter it with each new application.

**Duplicate controls:** The system checks the email address and user ID of each new registrant to make sure it doesn't already exist in the system. It does not check the organization's name and EIN number against existing records, but the vendor could merge two records together once they've been created.

<table>
<tr><td>**Gold Standard**</td><td>**Access to previously submitted applications:** Applicants can easily see submitted applications, and make complete copies of them to submit to a different grantmaker, including a copy of all the documents.</td></tr>
</table>

## Overall Applicant Ease of Use

**Ability for an applicant to save work and return to it later:** Applicants can save their work at any time, but they must fill out all the required fields on a given page before saving. If multiple people from the same organization want to collaborate on their organization and program information before submitting an application, they can set up an unlimited number of system users with individual permissions to edit or view applications.

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. Pages are not automatically saved—if applicants do not manually save their work, the system will time out after 90 minutes and they will lose their work on that page.

**Ability to copy and paste text from word-processed documents into web forms:** Applicants can easily copy and paste text from Microsoft Word. The text, bullet points and line breaks remain intact and usable.

**Required fields:** Grantmakers cannot define which fields are required for the standard application to be validated by the system. They can, however, add text saying which fields they require, and add supplemental fields and define which of those are required. Required fields on each organization's profile are shown in bold text, as opposed highlighting them with an asterisk, which is more common. The convention of bolding required fields may not be clear to all applicants.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system warns them with red text at the top of the page, and highlights each field that's incorrectly filled out. This functionality follows standard usability best practices.

**Word or character counter:** Grantmakers cannot define character limits for standard fields in the organizational profile. They can, however, add supplemental fields and define character limits for them. Character limits are shown in the question labels on forms. There is no character or word counter to show applicants how much space they've used as they fill out applications.

**File attachments:** Applicants can easily upload files into their overall organizational profile using standard upload functionality. Grantmakers cannot define which types of files should be accepted in each upload field. There is no virus scanning on uploaded files.

**Acknowledgment of receipt of submission:** When an application is submitted, the applicant is emailed a confirmation. There is no way for grantmakers to edit this email.

## Good Form Design: Self-Service Creation

**Online forms editing:** The system is geared to allow applicants to submit a fairly standardized packet of information to grantmakers. Grantmakers can define supplemental free-text questions to append to the standard LOI or proposal forms, and add supplemental text to their own grantmaker profile in the system that explains to applicants which fields they'll review, but cannot remove fields unnecessary to them, or add any fields other than free-text fields.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers cannot edit or change the overall format or categorization of the forms applicants use to submit information. This information is sensibly broken up into categories and pages, but the grantmaker isn't able to make it immediately obvious which of the large set of questions an applicant needs to answer for a specific grant. As the flow is quite different than most online application systems, it's difficult for the grantmaker to create an application process which will be quickly intuitive for applicants.

**Drop-down lists, check boxes and radio buttons:** The standard organizational forms include a variety of field types, including text boxes, drop-down lists, check boxes, radio buttons and file uploads. However, the supplemental fields grantmakers can add must be answered in a text box format.

| **Gold Standard** | **Branch logic:** The standard application forms do not include branch logic—for example, asking a particular question only if the answer to a previous question was positive. |

| **Gold Standard** | **Advanced design capabilities:** Grantmakers can include HTML to add links or embedded video in the supplemental text shown at the top of their system profile. |

## Support for Multiple Stages

**Support for eligibility quizzes:** The system will provide guidance to applicants who have filled out organization profiles to help them determine which grants in the system they are eligible for based on grantmaker-established criteria. Applicants can also see the reasons they are not eligible for others. This provides strong functionality for those already using the system to understand their eligibility, but does not provide very useful functionality for those coming from a grantmaker's site wanting quick insight as to whether they're eligible for a particular grant.

**Online reporting:** Grantees can submit interim and final reports online as Word documents or other files. Grantmakers can only define a due date in the system for a single report, but grantees can submit as many different reports over time as they like. Since report data is gathered in external files, it is not possible to include the grantees previous answers (such as how the applicant said they would measure outcomes) in the report format, or to report on information across grantees.

| **Gold Standard** | **Multiple-stage applications:** The system supports either a one- or two-stage application process, with an LOI and proposal. Grantmakers can only define a due date in the system for a single final report, but they can request, and the grantee can upload, as many interim reports as they like. Most application |

information is pulled from the standard organization profile, and thus is automatically pre-populated into both LOIs and proposals.

## Information Sharing: Collaboration

| **Gold Standard** | **Application editing and collaboration:** Application data is provided to grantmakers in editable format once it's been submitted. Grantmakers can report on most of the application fields and export them into Excel or CSV file format. The applicant can create a new user with review permissions for their |

account, and provide that account to the grantmaker—to allow, for example, a grantmaker to collaborate with an application in process. It's not possible for grantmakers to return submitted applications to grantees through the system in order to ask for edits, but grantmakers can edit them on their own if desired.

**Gold Standard** **Extranet capabilities:** Applicants can see the status of all applications, and a description of when reports are due. They can change their own contact information, which will be reflected in future application submissions. They do not have the ability to see dates of scheduled payments, but the vendor expects to add this functionality soon.

## Information Sharing: Data Export and Access

**Gold Standard** **Software should allow data to be written to and from third party systems:** Vendor does not currently offer any way (like an API) for programmers to access data to integrate it with other systems, but is currently working on a set of APIs for release. However, most application fields can be exported from the system, for example to look at the status of all grants submitted for a grant cycle.

## Product Background

**Product Background:** Common Grant Application has been in use since the end of 2007. The system initially had one grantmaker beta testing with its grantseekers. Additional grantmakers started joining the site in 2009. Currently six grantmakers are using the system.

# PHILANTRACK BY PHILANTECH

## URL: www.philantech.com

**Summary:** PhilanTrack uses a somewhat different model than many of the reviewed packages. In addition to online application and reporting functionality, and a grants-management package for grantmakers, it provides robust functionality for grant applicants to track, view, manage and reuse questions across many applications for different grantmakers, whether or not those grantmakers are using PhilanTrack. For instance, applicants can easily search for their past responses to similar questions on different applications. The system also offers polished, highly usable and well-thought-out functionality for online applications and reporting which offers a number of advantages to both grantees and grantmakers looking to streamline the process. Grantmakers can create their own application forms, but have limited control over formatting—for instance, they must email the vendor to bold a word or change a question from required to optional. There is some nice analysis functionality built into the system, but unfortunately data from applications and status reports is not easily exported in an analyzable form, and there's currently no programmatic access to the data.

**Technical Setup:** Software as a Service

**Cost:** Grantmakers pay both a setup and an annual fee, which includes a grants management system and online application and reporting functionality. Most clients pay between $15,000-$40,000 for licensing and implemenation in their first year, including 30 days of phone support, full email support and full documentation. After that, they could expect to pay from about $5,000 to $35,000 in annual licensing, depending on organization size, the number of programs and the amount of vendor setup required.

Nonprofits who have submitted an application to a grantmaker using the system can currently use the entire grantseeker interface to manage their grants program, without cost.

## Getting Started: Ease for Applicants

**Simple account creation with lost password functionality:** System registration follows standard best practices—applicants fill out basic account information and are emailed a login and password. If applicants forget their passwords, they can enter their email address to receive their password by email. If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker can look up the email address on record for the account so the applicant can retrieve their own login information, or add a whole new contact at the organization.

**Ability to preview and print a full application before starting and at any point before submission:** Applicants can easily view or print applications at any stage in the process. The preview packet includes the full text of all uploaded documents but does not show which fields are required and which are optional. If desired, character limits could be mentioned in the question text, which would then be shown on the preview version.

## Getting Started: Reuse of Information

**Storage and retrieval of past data:** The system retains contact information for individual applicants and organiza-

tions, as well as detailed organizational information—like program descriptions, a list of board members, an uploaded 501(c)(3) determination letter and financial information—so returning applicants do not have to re-enter it with each new application.

**Duplicate controls:** The system checks the email address of each new registrant to make sure it doesn't already exist in the system. It also checks the organization's name and EIN number—if the organization already exists, the system informs the applicant that they'll need to ask the primary user already set up for that account to add them.

| Gold Standard | **Access to previously submitted applications:** Applicants can easily see submitted applications and their whole history with a given grantmaker. They cannot copy an entire existing application to use as a template for a new one, but the system is built specifically to make it easy to reuse answers to previous |

questions—applicants use a "find similar questions" feature to easily copy and edit past answers from any application they've filled out using the system.

## Overall Applicant Ease of Use

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

**Clear and widespread opportunities to save work:** The applicant is given clear and abundant opportunities to save work in progress. The application is not automatically saved, but has no practical timeout after which you would lose your work—you can work on a page for up to 24 hours before any work would be lost.

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

**Required fields:** Grantmakers cannot easily define which fields are required through a web interface, but the vendor typically sets them up as per grantmaker specifications in the initial implementation process, and will update them without charge when needed. Required fields are designated with a red asterisk as per standard user interface best practices.

**Error notices:** If applicants try to submit an application with required fields left empty, or with an invalid value (like a character in a number field), the system warns them with red text at the top of the page, and with a message in red text describing the issue beside each field that's incorrectly filled out. This functionality follows standard usability best practices.

**Word or character counter:** While the vendor can help grantmakers define and implement character limits for responses, they have never done so. If imposed, character limits would likely be shown with the field name. There is no character or word counter to show the applicant how much space they've used as they fill out applications.

**File attachments:** Applicants can easily upload files using standard upload functionality. Commonly requested files, like 501(c)(3) determination letters, can be uploaded once and stored with the organizational profile. Each file must be smaller than 5MB. Grantmakers can include instructions in the question text regarding desired file types, but the system will not validate file format. The system checks each uploaded file for virus; if one is found, the document is quarantined and removed from the application. The vendor is notified of the quarantine, and can then notify the applicant.

**Acknowledgment of receipt of submission:** When an application is submitted, the main user on the organizational account is emailed a confirmation. The vendor frequently customizes this email for free as part of the setup process, but grantmakers need to go through the vendor for any additional changes.

## Good Form Design: Self-Service Creation

**Online forms editing:** Grantmakers can construct application forms by choosing questions from a large existing set and adding them to the application in any order they wish. This interface is easy to use. The vendor typically works with the grantmaker to add any funder-specific questions in the initial implementation phase, and will continue to add additional questions to the pool over time on request, without charge.

## Good Form Design: Flexibility of Forms

**Support for good form formatting and categorization:** Grantmakers can add instructional text at the top of forms, which can include hyperlinks, and choose questions from a large database. If desired, they can use a number of existing application templates as a starting point and add or subtract questions. Any formatting changes to questions—for instance, to bold words or add hyperlinks—must be done by the vendor. The fields on each application form are automatically grouped into categories based on vendor definitions. The vendor typically works with the grantmaker in the initial implementation phase to define formatting and categories, and will continue to make changes over time without charge. All applications are limited in length to a single web page.

**Drop-down lists, check boxes and radio buttons:** Online forms can include text boxes, drop-down lists, check boxes, radio buttons and file uploads, as well as more-advanced fields like tables and detailed financial fields that automatically sum.

**Gold Standard** **Branch logic:** Branch logic—asking a particular question only if the answer to a previous question was positive, for example—can be used in eligibility quizzes, but not in LOIs, proposals and status reports. Eligibility quizzes can direct certain applicants to an entirely different LOI or proposal form based on their quiz responses, however.

**Gold Standard** **Advanced design capabilities:** Grantmakers have little direct control over more sophisticated formatting of application forms (for instance, sub-headers or dividing lines), but the vendor will help on request. The vendor has never created a form which plays a video or audio file, but believes it could on request.

## Support for Multiple Stages

**Support for eligibility quizzes:** The vendor can set up a customized eligibility quiz for grantmakers as part of the initial implementation process. This quiz can include branching questions and an automatic check of 501(c)(3) status based on the organization's EIN number. It does not, however, provide OFAC-checking functionality. The vendor has never created a quiz that provides the applicant with the specific reasons for ineligibility, but could on request.

**Online reporting:** Grantees can submit interim and final reports online via forms similar to the application forms. There is no way for grantmakers to automatically include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report, but they could ask it again, and grantees could use the "find similar questions" functionality to reuse previous answers. Reports provide the ability to do some analysis, for instance, to analyze numeric fields across grantees.

**Gold Standard** **Multiple-stage applications:** The system supports a three-stage application with an eligibility quiz, LOI and proposal. Grantmakers can also create as many status report stages as they'd like. It's not possible for a proposal to automatically pull pre-populated application-specific fields for an LOI (such as the project description), but defined organizational information would be automatically filled into every form and the applicant could easily search and find their answers to previous questions.

## Information Sharing: Collaboration

| Gold Standard |
|---|

**Application editing and collaboration:** Application data is provided to grantmakers in read-only format after it's submitted. Reports provide the ability to do some analysis, for instance to analyze numeric fields across grantees. There is no way for grantmakers to see applications in progress, to for example collaborate with applicants, unless applicants provide login information. It's not possible for grantmakers to currently return submitted applications to grantees through the system in order to ask for edits, though this functionality is scheduled for release soon.

| Gold Standard |
|---|

**Extranet capabilities:** Applicants can see application status and due dates for progress reports, and change their own contact information. In addition, both applicants and grantees receive reminders and updates via email. They do not have the ability to see dates of scheduled payments.

## Information Sharing: Data Export and Access

| Gold Standard |
|---|

**Software should allow data to be written to and from third party systems:** Vendor does not currently offer any way (like an API) for programmers to access data to integrate it with other systems, but is currently working on a set of APIs for release. Only limited data can be exported from the system—for instance, there is no way to export all application or status report data except in Word or PDF format.

## Product Background

**Product Background:** PhilanTrack has been in use by clients since 2007. Currently, 34 grantmakers are using the system.

# APPENDIX A: HOW WE RATED THE PRODUCTS

Each rating assumes that the system also meets the criteria for all previous rating level—so for instance, a system cannot be rated Excellent unless it also meets the critera for Solid and Fair.

| FAIR | SOLID | EXCELLENT |
|---|---|---|
| **Getting Started: Ease for Applicants** | | |
| • Applicant can log in using standard login functionality.<br><br>• It's possible to tell what questions are required to apply for a particular grant. | • If applicants forget their passwords, they can enter their information to receive help in logging in by email.<br><br>• Applicants can easily view or print all the questions required to apply for a particular grant prior to starting an application, in a single step.<br><br>• If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker is able to provide information to help. | • The application preview packet shows which fields are required and which are optional, and character limits for fields.<br><br>• If applicants call the grantmaker for help retrieving forgotten passwords or other information, the grantmaker can either look up their password or reset the passwords. |
| **Getting Started: Reuse of Information** | | |
| • Applicants can easily see applications they've submitted in the past. | • The system retains contact information for individual applicants and organizations so returning applicants do not have to re-enter it with each new application.<br><br>• Applicants can copy and paste the answers to individual questions from previous applications.<br><br>• The system checks the email address of each new registrant to make sure it doesn't already exist in the system OR there is a process for grantmakers to review applicants to look for duplicates. | • Applicants can easily reuse answers from previous applications (in a more sophisticated way than copying and pasting) OR the applicant can copy an entire existing application to use as a template for a new one.<br><br>• The system retains detailed organizational information (like a list of board members) so returning applicants do not have to re-enter it with each new application.<br><br>• There is a way for the applicant or grantmaker to manually map two users together into the same organizational account. |

| FAIR | SOLID | EXCELLENT |
|---|---|---|
| **Overall Applicant Ease of Use** | | |
| • Applicants are reasonably able to use the system to apply for a grant, given enough instruction.<br><br>• Applicants can save their work and return to it later. | • Applicants can easily copy and paste text from Microsoft Word. Most text remains intact and usable.<br><br>• Required fields are designated with an asterisk as per standard user interface best practices.<br><br>• Any character limits are clearly marked.<br><br>• Error handling follows standard best practices.<br><br>• Applicants can easily upload files using standard upload functionality.<br><br>• Grantmakers can customize the email that is sent as an acknowledgement of the receipt of an application (to for instance, provide information on next steps). | • When applicants copy and paste text from Microsoft Work, both text and line breaks remain intact and usable.<br><br>• Applicants can save their work at any time, regardless of whether they've filled out all required fields in the application.<br><br>• The application is automatically saved periodically OR the applicant is given a warning before the application times out to allow them time to save.<br><br>• A character counter shows the applicant how many characters remain as they type in answers (included, or at minimal cost). |
| **Good Form Design: Self-Service Creation** | | |
| • Most fields, text and information on the application forms are customizable, at least by someone with substantial technical skills.<br><br>• Grantmakers can remove questions that are not useful to them. | • Grantmakers can create or edit most fields, text and information on the application forms through a usable online interface. | • Grantmakers can easily create or edit application forms through a well-designed online interface.<br><br>• Almost all fields, text and information on the application forms can be customized by a grantmaker without help from the vendor. |
| **Good Form Design: Flexibility of Forms** | | |
| • Grantmakers can create at least basic forms that include text boxes, drop-downs and check boxes. | • Instructional text can include hyperlinks.<br><br>• Questions can be grouped into visually delineated, logical categories specific to the grantmaker. | • Forms support more advanced fields like tables and fields that automatically sum.<br><br>• Grantmakers can include HTML in any text header—including, for example, the ability to embed video or audio files. |

| FAIR | SOLID | EXCELLENT |
|---|---|---|
| **Support for Multiple Stages** | | |
| • The system supports at least a two stage application with an LOI and proposal.<br><br>• Grantees can submit at least one status report via online forms. | • Grantees can submit unlimited interim and final reports online via forms similar to the application forms.<br><br>• Grantmakers can include answers to previously asked questions (such as how the applicant said they would measure outcomes) in the status report.<br><br>• Status report information can be exported into a format in which numerical answers can be analyzed across reports. | • The grantmaker can set up their own customized eligibility quiz.<br><br>• An eligibility quiz can automatically check 501(c)(3) status based on the organization's EIN.<br><br>• A proposal can automatically pull pre-populated application-specific fields for an LOI (such as the project description) OR the applicant can easily find the field and reuse it. |
| **Information Sharing: Collaboration** | | |
| • Applicants can see their application status, and due dates for progress reports online. | • Grantmakers can see applications in progress, to for example collaborate with applicants.<br><br>• Applicants can change their own contact information online without submitting a new application. | • Grantmakers can return submitted applications to grantees through the system in order to ask for edits.<br><br>• Applicants can easily see the dates of expected payments online. |
| **Information Sharing: Data Export and Access** | | |
| • The grantmaker can extract most application and status report data in some way, for instance by manually exporting to a standard file format, connecting directly to the database, or providing an API. | • The grantmaker provides an API that allows programmers to import or export data from the system automatically OR the grantmaker can integrate application data with other systems by connecting directly to the database (for example, via ODBC).<br><br>• The grantmaker can export most application and status report data into a standard format, such as CSV, XML, or Excel. | • The grantmaker provides an API that allows programmers to import or export data from the system automatically. |

| FAIR | SOLID | EXCELLENT |
| --- | --- | --- |
| **Product Background** | | |
| • The software package has been in use by clients for more than one year OR the vendor reports that the software package has more than 10 grantmaker clients. | • The software package has been in use by clients for more than one year.<br><br>• The software package has been in use by clients for more than five years OR the vendor reports that the software package has more than 20 grantmaker clients. | • The software package has been in use by clients for more than two years.<br><br>• The vendor reports that the software package has more than 50 grantmaker clients. |

# APPENDIX B: ABOUT THE AUTHORS

## Laura Quinn

**Executive Director, Idealware**

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

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

## Chris Bernard

**Italics Media**

Chris, a freelance writer and editor at italics media (www.italicsmedia.com), edited all of the text throughout the report. He's been a senior copywriter for the internal ad agency of a Fortune 25 company, a marketing communications specialist, a newspaper managing editor, and a newspaper and magazine journalist. He was also a technical writer, and does a lot of communications work with nonprofits.

He's won awards for his journalism, columns, public relations and other work, as well as for his photography.