

# **A guide to grant management systems for not-for-profit organisations**

v1.1

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## Introduction

Welcome to the first edition of Adapta Consulting's guide to grant management systems for not-for-profit organisations. We will be issuing further versions of this guide in the future to reflect the ever-changing landscape grant-making organisations find themselves operating within and the systems available.

We have primarily developed the guide for grant-making trusts and foundations, that have a sustainable and independent source of income (such as income from endowments) and whose prime purpose is to use and distribute that income in the form of grants. Grant-making reached £2.7 billion in 2014/2015<sup>1</sup>, with grants awarded to both organisations and individuals. Increasingly the trusts and foundations are defining their giving programmes which in turn demands reporting and feedback to assess impact of the awards as well as to define future strategy.

Grant management systems continue to evolve and make the process of compiling the information to inform grant funding decisions more efficient, robust, transparent and less paper-driven. At the same time, new technologies are making it possible for people to provide feedback more creatively and flexibly, through short videos and podcasts together with the more traditional written reports. Trusts and foundations are also seeking to improve the overall experience for applicants and grantees. Suppliers have developed web portals enhance communication for both the grantee and grantor during the grant application process and throughout the grant lifecycle.

As applicants generally expect to be able to submit applications online, so staff are continually seeking to achieve greater efficiencies in grant administration without compromising on the personal experience for the applicants and grantees. Suppliers have developed workflow management functionality in their systems to support greater standardisation and robustness of processes. Increasingly organisations are looking to their grant management system to hold data about other contacts and their relationships with the organisation, and other areas of activity such as events. Grant management software is meeting that need to varying degrees.

The reason that we felt now is a good time to offer this guide is because there has been a blossoming of the software market in the past few years. In particular the growth in cloud-based systems has meant that many of the newer systems are relatively quick to implement and easy to maintain, whilst also having minimal (or zero) up front capital costs. This means that smaller grant makers that might

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<sup>1</sup> Giving Trends 2016 report, published by the Association of Charitable Foundations (ACF)

historically have been reduced to using Excel to manage their data can now realistically investigate some of the systems listed here. A well implemented grant management system can significantly reduce the cost of selecting and administering grants, thus enabling grant makers to focus more time on the organisations and individuals awarded the grants. It can also speed up and increase the quality of decision making.

Many people who come to us with questions about grant making systems say that they do not know where to start as they do not know what 'good looks like'. 'Good' will be different for each organisation but we hope that with the data provided here we can at least enable you to start down that road. Our aim in producing this guide is to share information about the many choices available, based on our extensive experience and specialist knowledge of the sector. We hope it will be of interest to organisations regardless of income, the number of applications received or the values of the grants awarded.

## About this guide

We would like to emphasise that suppliers have not paid to appear in this guide and that we have tried to be as inclusive as possible in order to demonstrate the wide range of systems available. The only criterion for inclusion is that the suppliers are prepared and able to deliver their systems and associated implementation and support to UK-based organisations. The guide provides details of suppliers and software packages that are capable of meeting many of the key requirements for managing contact relationships, document and communication storage, grant application process and grant management.

The first table shows summary details of all the systems that we felt are currently relevant to grant managers. These systems vary hugely and are by no means all comparable. Some are very specialist; for example, some focus on providing monitoring and evaluation tools and outcomes management. However, the majority of the systems are designed to fulfil some or all of the requirements of a grant-giving organisation. Some are aimed at particular sizes of organisation and others are aimed at specific types of grant maker such as corporate foundations or public sector grant makers. The products listed could also be divided up by location of the supplier, some are developed and based in the UK, others in other parts of Europe and a significant number come from the USA or Canada. Some of the US suppliers have offices in the UK or Europe and actively market to UK grant makers, others do not yet do this but are likely to change in the future due to the relative small size of the total grant-making market and the suppliers' interest in exploring markets beyond their immediate environs.

The second table shows some core functionality data that has been provided by suppliers that responded to a questionnaire we sent out in February 2017. To gather the information contained in the guide, we asked suppliers to provide answers to questions covering some of the core functionality that can be expected in a modern grant management system. The functionality table is by no means comprehensive and is provided for information and as a starting point for market review, longlisting and discussion with suppliers. Adapta Consulting makes no representation as to the suitability of any of the companies or solutions listed; equally we can make no guarantees as to the accuracy of the data.

Finally we would like to emphasise that we plan to update this guide regularly so it would be extremely valuable to us if you could send us your comments on how useful the guide is for your organisation. Similarly, please advise us of any details that are out of date or gaps that you think we should address.

## How we can help?

At Adapta Consulting, **we are independent, we are not resellers and do not receive commission or income from suppliers.** We help you meet the challenges of change: processes, people and technology. **We work exclusively with not-for-profit organisations,** where our consultants bring a combination of deep systems knowledge and wide experience, gained over many years working at senior levels in the sector. We are completely independent and, in all our work, we set the highest professional standards to ensure we provide an objective service, adapted to your needs.

## Our services

Advice and support	Process improvement
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Digital	Software selection
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## Details of Grant Management Systems

Package name	Made/resold by	Illustrative clients
AIMS	<b>Quest Computing</b> Based in Dublin and founded in 1989	Comic Relief, The Health Foundation, The Dept. of Health, Barnabas Aid International.
Alms.net	<b>Westwood Forster</b> Based in London	Charis, World Horse Welfare, Family Holiday Association.
Apricot for Funders	<b>Social Solutions</b> , sold in the UK by Gallery Partnership	3SC, Barnet Mencap, Deptford Reach, Social Finance, Resources for Autism.
Benefactor	<b>Gallery Partnership</b> Based in London	Archbishops Council, Veolia Environmental Trust, Waterloo Foundation, Motor Neurone Disease Association, ITF Seafarers Trust, Westminster Foundation, Kings Fund, Shetland Islands Council, Roddick Foundation, SITA Trust.
CC Grant Tracker	<b>CC Technology</b> Founded 1988, with 44 staff; based in Glasgow with small office in London	Wellcome Trust, Trust for London, British Heart Foundation, Leverhulme Trust, Alzheimer's Society.
CiviCRM with CiviGrant and CiviCase	<b>CiviCRM / GMCVO</b> GMCVO Databases is a small social enterprise based in Manchester that specialises in developing CiviCRM solutions for charities	
CiviCRM with CiviGrant and CiviCase	<b>CiviCRM / MTL Software Solutions Ltd</b> Miller Technology Ltd (MTL) is a commercial organisation which has supplied membership and contact management (CRM) systems to the not for profit sector for approximately 30 years	Amnesty International, American Friends Service Committee, Techsoup, Conservation Fund, Democrats Abroad, Frontline Defenders, Wikipedia.
Cybergrants	<b>Cybergrants</b> Founded in 1999 and based in Andover, Massachusetts, USA	Nike, Intel, Levi's, Walmart, McDonalds, Microsoft, Symantec, Motorola, Starbucks.

Notes on system
Enterprise-wide system specifically designed for the needs of Funding and Grant making organisations. Launched in 2003. It controls all aspects of the funding process – from initial request, through assessment and recommendations, to authorisation, payment and the subsequent monitoring of outcomes.
Alms was developed as a fundraising CRM solution in 1992. Grant management functionality was subsequently added to the core Alms system.
Web based case management system that offers client, donor and volunteer tracking as well as comprehensive outcomes management and reporting.
Launched in 1997.
Launched in 2006.
CiviCRM is created by an open source community coordinated by CiviCRM LLC, and the 501c3 non-profit Social Source Foundation. CiviCRM is a web-based, open source software constituent relationship management solution. CiviCRM is designed specifically to meet the needs of advocacy, non-profit and non-governmental groups. CiviGrant is a version of CiviCRM designed for grant makers. For those that have more complex grant processes they can use CiviGrant in conjunction with CiviCase.
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A one-stop system for employee engagement, corporate giving and grants management programmes.

Package name	Made/resold by	Illustrative clients
EasyGrants	<b>Altum</b> HQ in Herndon, Virginia, USA and UK office in London	Alzheimer's Association (USA), National Institute of Mental Health.
EGrAMS	<b>HTC Global Services</b> Founded in 1990 with HQ in Troy, Michigan, USA and UK office in Uxbridge	
Eximium Grant Management Solution	<b>Eximium</b> Founded in 2005 and based in Luton	UK Sport, Team GB.
Flexi-Grant	<b>Fluent Technology</b> Founded 2001 and based in Belfast	The Royal Society, The Local Trust, Royal Academy of Engineering, Academy of Medical Sciences, Alan Turing Institute, Imperial Healthcare Charity, Lloyds Register Foundation.
FluidReview	<b>Fluidware</b> (now owned by SurveyMonkey) Founded in 2009 and based in Ottawa, Canada	University of Sussex, Consortium for the Humanities and the Arts South-East England, University of Bristol, Commonwealth Foundation.
Fluxx Grantmaker	<b>Fluxx</b> Founded 2011; based in San Francisco with offices in New York and Boston and staff in Ireland and UK	Children's Investment Fund Foundation, Premier League Charitable Fund.
Foundant Grant Lifecycle Manager	<b>Foundant</b> Based in Montana, USA	Elton John Aids Foundation, Living Well Foundation, Harry Frank Guggenheim Foundation, Cullen Foundation, Parkinson's Disease Foundation, National Express Giving Foundation.
GAP	<b>Bright Systems</b> Founded in 1993 and based in Laughton, Sussex	Canon Collins Educational Trust, Market Harborough Charities, First Light.
GIFTS and Gifts Online	<b>Blackbaud</b> Blackbaud has 100 staff in the UK across all the company's solutions; as well as grant management systems, the solutions include CRM, fundraising, membership, event management, alumni, payment services, social engagement, employee engagement, and CSR	

Notes on system
This integrates with their proposalCENTRAL system for online applications.
An end-to-end solution for public sector grant makers.
Bespoke system built for UK Sport and can be adapted for any grant maker with complex requirements.
Launched in 2013. This system is available in a low-price option for very small grant makers or customised version for larger more complex organisations.
Previously called ReviewRoom. Launched in 2010 this online application system that can be used to collect, manage, review and select grant applications. They also supply systems for scholarships, fellowships and awards programmes.
Launched in 2012.  They have a separate system for grant seekers.
Launched in 2006, this is a cloud-based grant management solution. They also provide GrantHub, a low cost solution for grant seekers.
Launched in 2000.
Launched in 1985 by MicroEdge; Blackbaud acquired MicroEdge in 2014. Two earlier versions GIFTS Classic and GIFTS Alta are still widely used.

Package name	Made/resold by	Illustrative clients
GIFTS and Gifts Online	<b>Buzzacott Giving Solutions</b> Buzzacott have been supporting GIFTS users in the UK for over 20 years have 10 staff	StreetGames, British Skin Foundation, DP World, Old Enfield Charitable Trust, Helena Kennedy Foundation, BBC Children in Need, Garfield Weston Foundation, Paul Hamlyn Foundation, Breadsticks Foundation, Clothworkers Foundation and Royal Television Society.
Gingergrant	<b>Myreka</b> Founded in 2003, Myreka is a small company based in Yorkshire	Family Action.
GMS360°	<b>SmartSimple</b> Founded in 2003 with offices in USA, Canada, Ireland and UK	JDRF, Muscular Dystrophy UK, StoneWall, Company of Biologists.
Grantium	<b>CSDC</b> Founded in 1989 and based in Ontario, Canada, with offices in the USA and India. They specialise in case management systems for many professions	
Grant Manager	<b>Team Solutionz</b> Founded in 2003, based in Antrim, Northern Ireland. They also provide a board/committee management system as well as systems for risk and performance management	Lloyds Bank Foundation Belfast City Council.
Grants United and Grants Limited	<b>Communityforce.com</b> Founded in 2010 and based in Ashburn, VA, USA	
GrantVisor	<b>ID Computer Software</b> Based in Rutherglen, Scotland	South Lanarkshire and East Ayrshire Councils, Clyde Windfarm Project, West of Scotland Loan Fund.
Icaris Grant Management	<b>Icaris</b> Founded 2001, based in Spalding, Lincolnshire. They also supply a fundraising and event module that integrates with grant management	Grocery Aid, BLESMA, Cinema and Television Benevolent Fund.
Kashana	<b>Aptivate</b> Aptivate is a UK-based not-for-profit digital agency for international development	
MS Dynamics 365 and Microsoft Grant ManagerPlus	<b>InfoStrat</b> Based in Washington DC, USA	St Louis County Children's Service Fund.

Notes on system
Launched in 1985 by MicroEdge; Blackbaud acquired MicroEdge in 2014. Two earlier versions GIFTS Classic and GIFTS Alta are still widely used.
This is a basic system for small grant makers. They also provide Fund Match online application checking and an online application portal.
Launched 2003. A cloud-based system hosted on Amazon Web Services. This system sits alongside research grants and medical case management solutions.
An online system designed to support large and multiple grant programmes.
A well featured grant management system used extensively by public sector and corporate grant makers in Northern Ireland.
This is a traditional SQL Server system that can be hosted internally or on their servers. It can also be used as a purely cloud-based system in which case the data is hosted in the USA.
A system designed for to manage grants and loans, especially for those giving smaller community grants.
Launched on 2010. Formerly BENEFICIARease by JACSolutions.
An open source monitoring, evaluation and learning tool that can be downloaded for free.
Microsoft Grant ManagerPlus is an accelerator for MS Dynamics CRM which integrates with MS Dynamics AX and is widely used by public sector funders in the USA.

Package name	Made/resold by	Illustrative clients
MS Dynamics 365	<b>SFW</b> Founded in 1992 and based in Woking, they are now part of the Civica Group. SFW are an MS Dynamics specialist focussing on public sector and financial services and have a staff of 200	Heritage Lottery Fund, Sport England.
MS Dynamics 365 and NGO Online	<b>Precio Fishbone</b> One of Sweden's leading suppliers of Microsoft-based solutions	Save the Children, British Red Cross, Diakonia, Church of Sweden.
Openflow	<b>Openflow</b> A Danish company founded 2012, expanding into the UK market. They have one member of staff in the UK and 14 in Denmark and Poland	Copenhagen Municipality, NRG Energy, SPAR NORD BANK.
Optimy	<b>Optimy</b> Founded in 2011, Optimy is a Belgian company with more than 150 customers worldwide. They are the market leader in France and Belgium and growing across Europe. They are currently actively trying to grow their UK market and have four UK customers	Veolia Environmental Trust, Viridor Credits, Fondation Bettencourt Schueller, Johnson & Johnson Corporate Citizenship Trust.
Salesforce	<b>Hyphen8</b> A small CRM consultancy that specialises in building cloud solutions with Salesforce. They work with SMEs and not-for-profits	Barts Charity, Esmee Fairbairn, UK Community Foundations and The Robertson Trust.
Salesforce: Salesforce for grantmakers	<b>Issimo</b> A small consultancy specialising in Salesforce for grant makers, founded in 1999 and based in Richmond-upon-Thames.	Hackney Parochial Charities, D'Oyly Carte Charitable Trust, Credit Union Foundation, AB Charitable Trust.
Salesforce: foundationConnect	<b>RoundCorner</b> A specialist NfP Salesforce partner based in Philadelphia, New York and San Francisco, USA	Open Society Foundations, Leon Levine Foundation, Skoll Foundation, American Red Cross.
thankQ	<b>The Access Group</b> Founded 1997. 1,100 staff in the UK. Access Group also supplies finance and HR/payroll solutions to the not-for-profit sector	LionHeart, Help Musicians, UnLtd.

Notes on system
A UK based MS Dynamics CRM grant management solution aimed predominantly at the public sector but with accelerators that can be rolled out to much smaller grant makers.
NGO Online. This system provides project and programme management support for aid organisations that conduct global operations. It includes project management, document management, grant management and project economics. It is based on SharePoint and can be deployed locally or in Office365.
Launched in 2012. Designed around a flexible online workflow system. It is marketed as an all-in-one grant application and management solution. It does not rely on 3 <sup>rd</sup> party add-ons and can meet exact requirements, processes and workflows.
Launched in 2011. Software used mostly by corporate foundations but also some research and charitable foundations.
A highly personalised grant management system that is built in the Salesforce platform.
A Salesforce application aimed at smaller community grant makers. Supported and promoted by The Trust Partnership.
Widely used US Salesforce application.
Launched in 1997. thankQ is a CRM software with configurable modules, specially designed for not for profit organisations.



Package name	Made/resold by	Illustrative clients
Versaic Grants	<b>Versaic</b> Based in San Mateo, USA	Citi Group, Santander, Del Monte, Hilton Worldwide, Qantas, Dell, SAP, Safeway Foundation.
WizeHive	<b>WizeHive</b> Based in Conshohocken, USA.	Sutton Trust, Global Innovation Fund, Born Free Foundation, Federation of European Screen Printing Associations.
Zoomgrants	<b>Zoomgrants</b> Founded in 2002	They do not currently have any UK clients though some US customers have UK offices. They are happy to support UK clients.

Notes on system
This system is currently aimed at the corporate grant making sector but Versaic Grants is planning on broadening out to all grantmakers over the coming couple of years.
An applications process management system for grants, scholarships and awards combined with a CRM. Used by companies, universities and foundations. They also offer a separate module called Zengine for a fully customisable business process management system.
An online system that is priced per grant programme rather than per user, which can make it a very cost effective solution for smaller grant makers.



Functionality chart

Product name	Max users	Typical customer turnover	System environment	Pricing model
AIMS	Unlimited	£10m - £25m	Cloud/On-site	Licence and support
alms.NET	Unlimited	Less than £1m	Cloud/On-site	Subscription
Benefactor	Unlimited	£5m - £10m	Cloud/On-site	Subscription
CC Grant Tracker	Unlimited		Cloud/On-site	Licence and support
Flexi-Grant	Unlimited		Cloud/On-site	Subscription
Fluxx Grantmaker	Unlimited		Cloud	Subscription
GAP	200	Less than £1m	Cloud	Subscription
GIFTS Online	Unlimited		Cloud	Subscription
GMS360	Unlimited	£5m - £10m	Cloud/On-site	Subscription
Salesforce	Unlimited	£5m - £10m	Cloud/On-site	Subscription
ICARIS	Unlimited	£5m - £10m	Cloud/On-site	
Openflow	Unlimited		Cloud/On-site	
Optimy	Unlimited	£5m - £10m	Cloud/On-site	Licence and support
thankQ CRM	Unlimited	£1m - £5m	Cloud/On-site	Licence and support

Max users	Levels of analysis	Mobile app	Microsoft Office integration	Office 365 integration	OCR capture
Unlimited	Unlimited	x	Partial	Partial	x
Unlimited	Unlimited	x	✓	✓	✓
Unlimited		x	✓	✓	✓
Unlimited		x	Partial	Partial	✓
Unlimited		x	Partial	Partial	x
Unlimited	Unlimited	✓	✓	✓	✓
200	6	✓	✓	✓	Partial
Unlimited	Unlimited	✓	✓	✓	x
Unlimited	Unlimited	✓	✓	✓	✓
Unlimited	Unlimited	✓	✓	✓	✓
Unlimited	3	✓	x	x	✓
Unlimited		✓	Partial	Partial	✓
Unlimited		x	Partial	Partial	✓
Unlimited		✓	✓	✓	✓

Product name	Social media integration	Online applications	Event management	Document management	Bulk email
AIMS	x	✓	x	✓	✓
alms.NET	✓	✓	✓	✓	x
Benefactor	x	✓	✓	✓	✓
CC Grant Tracker	x	✓	✓	✓	✓
Flexi-Grant	✓	✓	x	Partial	✓
Fluxx Grantmaker	✓	✓	✓	✓	✓
GAP	✓	✓	✓	✓	✓
GIFTS Online	✓	✓	Partial	✓	✓
GMS360	✓	✓	✓	✓	✓
Salesforce	✓	✓	✓	✓	✓
ICARIS	x	✓	✓	✓	✓
Openflow	x	✓	x	✓	✓
Optimy	Partial	✓	✓	✓	Partial
thankQ CRM	✓	x	✓	✓	✓

Email opens etc captured	Bulk email integration	Multi-currency	Editable workflows	Board packs	Forecasting/ref orecasting
✓	x	✓	✓	✓	✓
x	✓	x	✓	✓	✓
✓	✓	✓	✓	✓	✓
x	x	✓	✓	✓	✓
Partial	x	x	✓	✓	Partial
x	✓	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓
x	x	✓	✓	✓	✓
✓	✓	✓	✓	✓	✓
x	✓	✓	✓	✓	Partial
x	x	✓	✓	✓	x
x	x	✓	✓	✓	x
✓	✓	✓	✓	✓	✓