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# Grants Management Software: Survey Results and Analysis

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# Executive Summary

In November 2007, Idealware conducted an online survey of grantmaking organizations about software used for grants management. 311 staff members at United States-based foundations provided information about their current software, rating both the perceived importance and the effectiveness of this software at handling a list of thirty grants management software attributes.

The participants were not carefully sampled, and thus the results cannot be considered representative of the sector as a whole. However, the survey results provide an interesting picture of the priorities and perceptions of a group of grantmakers.

The majority of the respondents – 55 percent - were using MicroEdge GIFTS as their grants management package. No other package came close to GIFTS' dominance: the next most used software package was Bromelkamp Pearl at 6 percent.

The grants management attributes rated most important were, not surprisingly, core parts of most grant management processes, such as: finding contact information; creating create required reports; customizing reports to specific needs; getting support for using the software; and, understanding the historic relationship with a grant applicant.

The attributes rated as least effective in the software are also interesting. Online features – for instance, allowing grantees to view their status, or to submit reports online - were among those that respondents

considered least well supported. Tracking outcomes and evaluation data, and synchronization between grants management systems and accounting systems, were also key challenges.

Some of the most interesting survey results arise from identifying the software attributes that are both very important to users, and less effectively handled by current systems. The biggest gap was perceived in tracking evaluation/outcomes data, followed by online submission of grantee reports, and interfacing grants management systems with other software packages.

The narrative below provides more details about these findings, and how they varied across the different types of foundations that participated in the survey. The **Appendices** provide data tables that offer even more detail.

**This report is intended as a preliminary deliverable, targeted to those interested in relatively raw survey findings.** These results will also be folded into in a larger project: the creation of a “Consumers Guide to Grants Management Software.” This guide, to be released in March 2008, will provide an overview for a larger audience of available software, the features that are important to many foundations, and how those features compare across the software.

We welcome your suggestions for this research at [info@idealware.org](mailto:info@idealware.org).

# About the Survey

In November 2007, Idealware conducted an online survey of grantmaking organizations, asking them about the software they used to help with their grants management processes. Along with demographic questions and specifics about the software, the survey asked respondents to rate both the importance and the effectiveness of their software at handling a list of thirty grants management software attributes. (See **Appendix F** for the full survey questionnaire.)

The survey invitation was distributed via email through several lists used by the foundation community. A large number of the respondents were recruited through the Grants Managers Network email discussion list; survey invitations were also emailed to members of the Foundation Financial Officers Group (FFOG), the Association of Small Foundations, the Solpath distribution list, and more than twenty associations of regional and topic-specific grantmakers (for instance, the Washington Regional Association of Grantmakers, and the Environmental Grantmakers Association). Those who received the invitation were encouraged to share it.

**311** staff members from United States-based foundations filled out the survey. (As this survey focused on American foundations, 21 respondents from foundations based outside the country were dropped from the data set.) It is impossible to judge the response rate for this type of open survey, but it is

likely that only a small percentage of those who saw an invitation responded.

There was a very high completion rate among those who responded: all but eight participants, or 2.6 percent, completed at least one question on the last page of the survey.

The 311 respondents worked for a reasonable distribution of foundation sizes and types. (See **Appendix A** for more detailed demographic information about the respondents.)

Note, however, that no survey using an open distribution method like this can be viewed as fully representative of any group wider than the pool of respondents themselves. Because each individual voluntarily chose to contribute about 10 minutes of time to complete the survey, it is likely that respondents are more concerned with grants management issues, and perhaps less busy, than those who did not respond.

For this reason, these survey results should be viewed as an impressionistic view of some of the priorities and challenges related to grants management software, rather than hard data about the state of the grantmaking sector.

# Software Usage

MicroEdge GIFTS was by far the most widely used software package among our respondents, with more than 55 percent of all respondents reporting that they used it. Custom software was the next most popular, with 16 percent using a custom Access or FileMaker Pro database, and 12 percent using another custom-built system.

No other packaged software came close to the dominance of GIFTS. 6 percent of respondents reported using Bromelkamp Pearl; 4 percent MicroEdge FIMS or Foundation Power; 3 percent reported using Altum ProposalCentral; CyberGrants was also used by 3 percent of respondents.

Software Used	Count	%
MicroEdge GIFTS	173	56%
Custom Access/FileMaker Pro database	49	16%
Other custom designed/built system	37	12%
Bromelkamp Pearl	19	6%
MicroEdge FIMS or Foundation Power	12	4%
Altum proposalCENTRAL	10	3%
CyberGrants	10	3%
Foundant Technologies	7	2%
JK Group Grants Management	5	2%

N=311; participants could chose multiple options

Note that an open survey of this type can be manipulated by distributing the survey invitation to interested parties. For instance, a vendor could pass on the survey to its own customer list, resulting in an overrepresentation of that particular software package. This, this survey should not be considered representative of average patterns of software usage.

5 percent of the respondents wrote in a software package that was not on the software list. The majority of these packages were general administrative software such as Word, Quickbooks, Crystal Reports, or MindMap; or donor management tools such as Raiser's Edge or Donor Perfect. A few respondents wrote in additional grants management packages such as GMS or GrantPoint.

**Table B1 in the Appendix** reports the number of responses for each grants management package included in the survey.

The survey yielded some indications of what types of foundations are using which package. Community Foundations were more likely to be using the tools geared towards their needs – 28 percent reported using FIMS or Foundation Power, and 12 percent reported Bromelkamp Pearl – and less likely to be using GIFTS (22 percent). Both JK Group and CyberGrants were more likely to be used by Corporate Foundations.

GIFTS and Bromelkamp were used fairly widely across organizations of all sizes and grant volumes, but larger organizations, and ones with more grant volume, were more likely to design a custom system. ProposalCENTRAL was much more likely to be used by large organizations – but those with smaller grant

volumes. Foundant Technologies was largely used by smaller organizations with smaller grant volumes.

**Tables B2** through **B5** in the Appendix summarize the usage of the top software packages across a number of different demographics.

## Important Attributes in Grants Management Systems

The 10 features rated most important for future needs were, not surprisingly, core parts of most grant management processes. Starting with the most important, they were:

1. Easily look up contact information for grant applicants
2. Easily get support or answers to questions about the software
3. Generate required reports about grants and applicants
4. Customize reports to meet your specific custom needs
5. Understand the historic relationship between your foundation and a grant applicant
6. Merge to word processing system to create letters or board book/docket info
7. Customize data fields to meet your specific custom needs
8. Generate required financial reports
9. Track the status of each grant letter of intent/proposal

10. Create merged emails to applicants/grantees
11. Manage the process of collecting grantee reports
12. Generate aggregate statistical information on grants

See **Table C1** for a full ranked list of features.

Note that the data is somewhat ambiguous for attributes that are likely to only be of interest to part of the audience, such as “donor fund management” or “employee matching gifts.” As there was a “no need” response as well as one for “not applicable,” it’s likely that some respondents chose “no need” for features that didn’t apply to them, and thus artificially brought down the average.

### Importance by Foundation Type

It’s interesting to look at the differences in the importance ratings across various demographic attributes. When looking at foundation type:

- The 32 respondents from **Community Foundations** had the most divergent set of

needs. On average, they rated accounting functions – both integration with the accounting system and check writing – much more important than others, and also put a higher premium on automatically routing proposals through a complex review workflow. Niche needs – such as support for Program Related Investments, scholarships, and (of course) donor fund management – were much more important to respondents at Community Foundations than anyone else.

- The 27 **Corporate Foundation** respondents **most often** prioritized online grant submission, automatic checks of tax status or OFAC lists, and tracking of employee matching gifts.
- The 21 respondents who marked themselves as **Other Private Foundations** had a surprisingly different set of needs from Family and Independent foundations. They strongly emphasized online functionalities, such as online report submissions, and allowing grantees to view their own status. However, these respondents rated the ability to store their data on their own servers as more important than staff from other types of foundations.

### Importance by Number of Grants

The 180 respondents from foundations who gave out more than 100 grants per year found **everything** more important, on average, than the 131 who gave out less than 100 grants per year. In particular, they put a premium upon:

- Merging to a word processing package
- Viewing and reporting by budget category

- All of the online features (accepting applications, accepting reports, allowing grantees to view their status, and publishing awarded grants to their website)
- Automatic checks of tax status or OFAC lists
- Updating source code to meet specific custom needs
- Storing data on their own internal servers

### Importance by Staff Size

The 134 respondents from organizations with more than 10 staff members also found any given feature more important than those with less than 10 staff members. In particular, they put a premium upon:

- Provide remote access to the system for staff members working outside the office
- All of the online features
- Automatically routing applications through a complex review process
- Viewing electronic versions of pertinent application and grant documents

Note that foundation staff size and the number of grants distributed were not substantially correlated themselves. Different types of foundations have different models of grantmaking, leading to different proportions of staffing to grant distribution.

### Importance by Role

There was little variation in perceptions of importance by the respondents' role in the organization, except for Board Members/Trustees.

The 25 Board Members found several attributes considerably **less** important than others:

- Merging to word processing system to create letters or board book/docket info
- Updating or add to the source code to meet specific custom needs
- Robustly interfacing with other software/systems

The 245 respondents who used their grants management more than weekly were more likely to prioritize:

- Creating merged emails to applicants/grantees
- Updating the source code to meet specific custom needs

### **Importance by Software Package**

While typically there were not enough respondents per software package to do an analysis in depth, information can be gleaned simply comparing GIFTS users' priorities to those using anything other than GIFTS. On average, the 173 GIFTS users were more likely to prioritize:

- Merging to a word processing software package
- Interfacing with other software/systems
- Storing data on their own internal systems

On the other hand, GIFTS users were *less* likely than others to prioritize online features.

### **Other Factors**

Other factors – such as IT Staff Size, Asset Size, and Geographic Focus – did not appear to have an independent relationship with perceptions of future importance. Instead, these factors appeared tied to the size of the organization, as measured by Staff Size.

There did not appear to be much correlation between the respondents' perceptions of their organization's typical rate of IT Adoption – for instance, if it was an Early Adopter or Conservative – and which features were important. Instead, the Early Adopters (those who said they “often try out innovative new technologies”) and those who said they were In Trouble (“We don't use a number of common technologies that would benefit us”) gave higher importance to nearly every feature than those who said they were Fast Followers (“We quickly adopt the technologies that work for other foundations”) or Conservative (“We adopt a particular technology after many other foundations try it”).

# Effectiveness of the Attributes of Current Systems

Survey participants were asked to rate how well their *current* software system supported each of 28 different grants management features and attributes.

The 10 attributes that were the highest rated in effectiveness, started with the one that respondents felt was most effectively supported, were:

- Easily look up contact information for grant applicants
- Track the status of each grant letter of intent/proposal
- Understand historic relationship with a grant applicant
- Merge to word processing system to create letters or docket info
- Generate required reports about grants and applicants
- Create merged emails to applicants/grantees
- Easily get support or answers to questions about the software
- Customize data fields to meet your specific custom needs
- Customize reports to meet your specific custom needs
- Generate aggregate statistical information on grants

The 10 attributes that were the lowest rated, starting with the one that respondents felt was least effectively supported, were:

1. Allowing applicants/grantees to view their own status
2. Publishing grants awarded to your website
3. Donor fund management
4. Tracking of evaluation/outcomes data
5. Online submission of grantee reports or narratives
6. Program Related Investments
7. Easily write checks or transfer funds
8. Automatically enter or transfer data into your foundation's accounting system
9. Automatic checks of tax status or OFAC lists
10. Automatically route letter of intents/proposals through a complex review process

The meaning of these low ratings should be carefully considered. For nearly all of the above items, about a third of respondents did not answer them or answered “Don’t Know/Not Applicable,” and a majority of those who did respond reported their system “can’t do this at all.” Many of these attributes are likely to be of interest to only part of the audience – for instance, “Donor Fund Management” and “Program Related Investments” are functions that many foundations do not require.

In general, these effectiveness ratings should be taken with a grain of salt, and should be considered to be independent of whether or not the features would actually be useful to foundations. For instance, the low score of Donor Fund Management indicates that many foundations have systems that don’t offer

functionality in this area, regardless of whether the foundations would ever actually use it or not.

See **Table D1** for a full of attributes ranked by importance.

### **Effectiveness by Foundation Type**

In general, the 27 respondents from **Corporate Foundations** were more likely than average to find any particular attribute more effective. The ones they found more effective by the largest margins were:

- Online submission of grant applications
- Providing remote access to staff
- Automatic checks of tax status or OFAC lists
- Online submission of grantee reports
- Automatically entering or transferring data into their accounting system

Corporate Foundations were more likely than others to be using an online, hosted system, which may account for some of these variances.

On the other hand, the 32 staffers from **Community Foundations** were less likely than average to find any particular attribute effective. The ones they found less effective by the widest margins were:

- Viewing applications and documents electronically
- Viewing/reporting by budget category
- Automatic checks of tax status or OFAC lists
- Generating required reports about grants and applicants
- Robustly interfacing with other software/systems

Community Foundations were **more** likely than others to find their accounting functions effective, however – both their ability to enter or transfer data into an accounting system and the ability to easily write checks or transfer funds. This may be due, at least in part, to the fact that Community Foundations are more likely to be using grants management systems with an integrated accounting component (like FIMS or Community Pearl), to support their complex accounting requirements.

### **Effectiveness by Number of Grants/Staff**

Interestingly, the 180 respondents from foundations who gave out more than 100 grants per year found almost all attributes of their current software more effective, on average, than those who gave out less than 100 grants per year. They found their systems particularly effective in merging to a word processing software package and automatic checks of tax status or OFAC lists.

Foundation staff size had little impact on perceptions of software package effectiveness. Larger foundations found their systems to be slightly more effective at:

- Online submission of grant applications
- Publishing grants awarded to their website
- Providing remote access to staff

### **Effectiveness by Frequency of Use**

Those who used their grants management systems more often were more likely to find almost every attribute of it more effective – implying, perhaps, that

familiarity with the systems increases staff members' perception of what they are able to do.

In particular, the 245 respondents who used their system weekly or more often were more likely to feel their system effectively supported the following attributes:

- Viewing applications and documents electronically
- Easily searching for applications by criteria or keyword
- Managing the process of collecting grantee reports
- Online submission of grant applications
- Automatic checks of tax status or OFAC lists
- Robustly interfacing with other software or systems

### **Effectiveness by Software Package**

There was not a huge gap in perceptions of effectiveness between GIFTS users and those using other systems. In general, GIFTS users were more likely to find any given attribute more effective, excepting the online features and the ability to provide remote access. In particular, GIFTS users were more likely to rate effectiveness more highly for:

- Easily searching for applications by criteria or keyword
- Merging to a word processing application
- Automatic checks of tax status or OFAC lists
- Creating merged emails to applicants/grantees

### **Effectiveness by IT Adoption**

Overwhelmingly, respondents from organizations rated as Early Adopters and Fast Followers found their software packages more effective than those who rated themselves as Conservative or In Trouble, often by a wide margin.

In particular, some of the attributes that Early Adopters and Fast Followers were more likely to see as effective with a particularly large margin were:

- Viewing applications and documents electronically
- Online submission of grant applications
- Providing remote access to staff
- Robustly interfacing with other software or systems
- Easily searching for applications by criteria or keyword
- Automatically entering or transferring data into accounting system
- Online submission of grantee reports and narratives
- Publishing grants awarded to website

### **Other Factors**

As with Importance, factors such as IT Staff Size, Asset Size, and Geographic Focus did not appear to have much independent influence on perceptions of effectiveness. Instead, these factors appeared tied to the size of the organization, as measured by Staff Size.

# Gaps Between Importance and Effectiveness

Some of the most interesting survey results derive from identifying the attributes of current systems that were rated as most important but least effectively handled. Nearly every attribute has a higher average rating for importance than for effectiveness.

The following attributes have the widest discrepancy between their average importance score and their average effectiveness score, starting with the greatest discrepancy first:

1. Tracking of evaluation/outcomes data
2. Online submission of grantee reports or narratives
3. Robustly interface with other software/systems
4. Allowing applicants/grantees to view their own status
5. Publishing grants awarded to website
6. Easily get support or answers to questions about the software
7. Customize reports to meet specific needs
8. Automatic checks of tax status or OFAC lists
9. Automatically enter or transfer data into the foundation's accounting system
10. Generate required financial reports

See **Table E1** for a list of all attributed ranked by this discrepancy.

# Appendix A: Demographics

**Table A1: Respondents by Foundation Type**

Foundation Type	Count	%
<b>Family Foundation:</b> Private foundation strongly influenced by a single family	98	32%
<b>Independent Foundation:</b> Private, self-governed, nonprofit foundation	89	29%
<b>Corporate Foundation:</b> Philanthropic arm within a corporate entity	27	9%
<b>Other Private Foundation:</b> Private foundation that doesn't fit into any of the categories above	21	7%
<b>Community Foundation:</b> Supported by pooled contributions of a number of donors	32	10%
<b>Arts Regranting Organization:</b> Re-grants money to arts organizations or artists	6	2%
<b>Other Public Foundation:</b> Supported by the government or other public money	34	11%
(blank)	4	1%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A2: Respondents by Grants Disbursed**

# Grants Disbursed in FY 2006	Count	%
500 or more	50	16%
250 to 499	60	19%
100 to 249	70	23%
50 to 99	59	19%
25 to 49	37	12%
10 to 24	22	7%
1 to 9	6	2%
None	4	1%
(blank)	3	1%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A3: Respondents by Number of Full Time Employees**

# Full Time Employees	Count	%
100 or more	17	5%
50 to 99	18	6%
25 to 49	39	13%
10 to 24	60	19%
5 to 9	54	17%
2 to 4	64	21%
1 or less	28	9%
None	27	9%
(blank)	4	1%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A4: Respondents by Number of IT Staff/Consultant FTEs**

# Full Time Equivalent IT Staff	Count	%
5 or more	29	9%
3 to 4	21	7%
About 2	38	12%
About 1	49	16%
About one-half	19	6%
About one-quarter or less	62	20%
None	88	28%
(blank)	5	2%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A5: Respondents by Foundation Asset Size**

Foundation Asset Size	Count	%
More than \$10 billion	6	2%
\$5 to \$10 billion	7	2%
\$1 to \$5 billion	18	6%
\$250 to \$999.9 million	50	16%
\$100 to \$249.9 million	36	12%
\$50 to \$99.9 million	39	13%
\$25 to \$49.9 million	33	11%
\$10 to \$24.9 million	39	13%
\$5 to \$9.9 million	33	11%
\$1 to \$4.9 million	21	7%
Less than \$1 million	10	3%
Don't know/Not Applicable	16	5%
(blank)	2	1%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A6: Respondents by Foundation Geographic Focus**

Geographic Focus	Count	%
Worldwide	42	14%
National	45	14%
Regional (i.e. several states)	55	18%
State based	60	19%
County or community based	73	23%
Other/Multiple of these	35	11%
(blank)	1	0%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A7: Respondents by Reported Approach to IT**

Approach to IT	Count	%
<b>Early Adopter:</b> We often try out innovative new technologies	53	17%
<b>Fast Follower:</b> We quickly adopt the technologies that work for other foundations	108	35%
<b>Conservative:</b> We adopt a particular technology after many other foundations try it	119	38%
<b>In Trouble:</b> We don't use a number of common technologies that would benefit us	25	8%
(blank)	6	2%
<b>Total</b>	<b>311</b>	<b>100%</b>

**Table A8: Respondents by Their Role within the Foundation**

<b>Role Within Their Foundation*</b>	<b>Count</b>	<b>%</b>
Senior management - VP or above	92	30%
Grants management specialist	181	58%
Program staff	100	32%
Financial management	70	23%
IT specialist	48	15%
Administrative support	91	29%
Consultant	11	4%
Board member/Trustee	25	8%

As respondents could choose multiple answers, the percentages do not add up to 100%

**Table A9: Respondents by Their Grants Mgt Software Usage Frequency**

<b>Grants Mgt Software Usage by Respondant</b>	<b>Count</b>	<b>%</b>
Every day	171	55%
Several times a week	74	24%
Several times a month	32	10%
Infrequently	16	5%
Never	9	3%
(blank)	9	3%
<b>Total</b>	<b>311</b>	<b>100%</b>

# Appendix B: Software Usage

**Table B1: Overall Software Used**

Software Used	Count	%
MicroEdge GIFTS	173	56%
Custom Access/FileMaker Pro database	49	16%
Other custom designed/built system	37	12%
Bromelkamp Pearl	19	6%
MicroEdge FIMS or Foundation Power	12	4%
Altum proposalCENTRAL	10	3%
CyberGrant	10	3%
Foundant Technologies	7	2%
JK Group Grants Management	5	2%
WESTAF	4	1%
Peoplesoft	3	1%
Sharepoint - write in*	3	1%
CAMT eGrant	2	1%
ChesterCAP Dotche	2	1%
GMS (Grants Management System) – write in*	2	1%
Altum Easygrants	1	0.3%
FMS by Omnis - write in*	1	0.3%
Fusion Labs GRANTEDge	1	0.3%
GrantPoint - write in*	1	0.3%
GrantsSQL, developed by McArthur/Lilly/Pew, or variant	1	0.3%
NorthStar 500	1	0.3%
PowerOFFICE	1	0.3%
SAP	1	0.3%
None, or Excel only	23	7%
Other	17	5%

\*These packages were written in as an “Other” response. As packages not in the list are less likely to be chosen, they may be underrepresented

Software included in the survey, but not chosen by any respondents: Bamboo Solutions, Community TechKnowledge, Core Projects eGrantsManager, Dulles Technology Partners WebGrants, Foundation Source, FreeBalance, Philantech, Sage Endowment Management, and Salesforce.

**Table B2: Software Used by Foundation Type**

Software Used (for packages with five or more responses)	% of Software Use by Foundation Type							
	Total Usage	Family Fnd	Corporate Fnd	Independent Fnd	Other Private Fnd	Community Fnd	Arts Re-granting Org	Other Public Fnd
MicroEdge GIFTS	173	32%	10%	33%	9%	4%	1%	9%
Custom Access/FileMaker Pro database	49	33%	2%	22%	6%	6%	6%	24%
Other custom designed/built system	37	22%	5%	35%	11%	11%	5%	11%
Bromelkamp Pearl	19	21%	5%	16%	5%	21%	16%	16%
MicroEdge FIMS or Foundation Power	12	-	-	25%	-	75%	-	-
Altum proposalCENTRAL	10	-	10%	70%	-	10%	-	10%
CyberGrant	10	10%	50%	20%	-	-	-	20%
Foundant Technologies	7	57%	-	29%	-	14%	-	-
JK Group Grants Management	5	20%	80%	-	-	-	-	-
<b>Total Respondents</b>	<b>311</b>	<b>31.5%</b>	<b>8.7%</b>	<b>28.6%</b>	<b>6.8%</b>	<b>10.3%</b>	<b>1.9%</b>	<b>10.9%</b>

**Table B3: Software Used by Number Grants Disbursed**

Software Used (for packages with five or more responses)	Total Usage	% of Software Use, by # Grants Disbursed per Year	
		100 or More Grants/Year	Less Than 100 Grants/Year
MicroEdge GIFTS	172	68%	31%
Custom Access/FileMaker Pro database	49	57%	43%
Other custom designed/built system	37	69%	33%
Bromelkamp Pearl	19	58%	42%
MicroEdge FIMS or Foundation Power	12	83%	17%
CyberGrant	10	70%	30%
Altum proposalCENTRAL	9	40%	50%
Foundant Technologies	7	29%	71%
JK Group Grants Management	5	80%	20%
<b>Total Respondents</b>	<b>311</b>	<b>58%</b>	<b>41%</b>

**Table B4: Software Used by Number of Staff Members**

Software Used (for packages with five or more responses)	Total Usage	% of Software Use, by # Total Foundation Staff	
		10 or More	Less Than 10
MicroEdge GIFTS	173	45.7%	53.2%
Custom Access/FileMaker Pro database	49	46.9%	53.1%
Other custom designed/built system	37	75.7%	24.3%
Bromelkamp Pearl	19	42.1%	57.9%
MicroEdge FIMS or Foundation Power	12	58.3%	41.7%
Altum proposalCENTRAL	10	100.0%	-
CyberGrant	10	30.0%	70.0%
Foundant Technologies	7	-	100.0%
JK Group Grants Management	5	20.0%	80.0%
<b>Total Respondents</b>	<b>311</b>	<b>43.1%</b>	<b>55.6%</b>

**Table B5: Software Used by Reported Organizational IT Approach**

Software Used (for packages with five or more responses)	Total Usage	% of Software Use by IT Approach			
		Early Adopter	Fast Follower	Conservative	In Trouble
MicroEdge GIFTS	173	13%	43%	39%	5%
Custom Access/FileMaker Pro database	49	20%	35%	41%	4%
Other custom designed/built system	37	49%	27%	19%	3%
Bromelkamp Pearl	19	5%	37%	37%	16%
MicroEdge FIMS or Foundation Power	12	17%	-	83%	-
Altum proposalCENTRAL	10	20%	60%	20%	-
CyberGrant	10	20%	50%	30%	-
Foundant Technologies	7	57%	29%	-	14%
JK Group Grants Management	5	20%	40%	40%	0%
<b>Total Respondents</b>	<b>311</b>	<b>17%</b>	<b>35%</b>	<b>38%</b>	<b>8%</b>

# Appendix C: Importance of Software Attributes

## Key to Reading Software Attribute Tables

The following tables summarize the respondents' ratings of the importance or the effectiveness of their current systems for a series of grants management attributes. Both importance and effectiveness are represented with a numeric average score.

These scores are based on the following scales:

### Importance

1. No need
2. Nice to have
3. Important
4. Essential

Thus in reading an average score, a higher importance score represents an attribute that respondents felt was more important.

### Effectiveness of Current Software

1. Can't do this at all
2. Supports a bit, but not well
3. Does most of what we need
4. Works great for us

Thus a higher average effectiveness score represents an attribute that respondents felt was more effectively supported by their current systems.

“Don't Know/Not Applicable” responses are represented in the data set by blank entries – in the same way as if the respondent skipped the question. For this reason, the count of responses varies considerably between software attributes, and is shown on each table. Note that respondents may have chosen either “Not applicable” or “No need/Can't do this at all” for attributes that didn't apply to them (like “Donor Fund Management”). If they chose “No need/Can't do this at all,” the average scores were

artificially lowered. For this reason, the data for attributes that have a lower response count should be viewed as questionable – likely lower than the true value. This is a particularly important when viewing Effectiveness scores.

When comparing average scores across different demographics, the differences between the averages are more important than the numbers themselves. Any table that includes ordered values includes a “Difference” column that shows the difference between the highest and the lowest values in the row.

Blue shading, as per: 

2.6
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 has been used to highlight rows that have a particularly large difference, showing that the average scores vary notably based on the demographic variable. This shading represents rows which have a difference value greater than 0.5. On the few demographics which are not ordered (Foundation Type and Respondent Role), the shading instead represents a value that deviates from the average for all respondents by more than 0.3.

Asterisks (\*) are used to denote attributes for which respondents tended to feel strongly at one end of the scale or the other, rather than picking a middle value (for instance, more chose “Can't do this at all” and “Works Great for Us” than the middle responses). In statistical terms, the responses for these attributes were bimodal. For these items, the average should be viewed with care: it doesn't represent a “typical” respondent, but can only be used in comparison across demographics. None of the attributes were strong bimodal for Importance, so this applies only to the Effectiveness tables.

**Table C1: Ranking of Software Attributes by Importance** \*see key on p 18

Importance of GM Features and Attributes		Count of Responses	Average Score	% "No need"	% "Nice to have"	% "Important"	% "Essential"
1	Easily look up contact information for grant applicants	302	3.71	0.7%	3.6%	20.2%	75.5%
2	Easily get support or answers to questions about the software	296	3.65	1.7%	4.1%	22.0%	72.3%
3	Generate required reports about grants and applicants	299	3.64	0.7%	5.7%	22.4%	71.2%
4	Customize reports to meet your specific custom needs	300	3.57	1.7%	7.3%	23.7%	67.3%
5	Understand historic relationship with a grant applicant	302	3.50	1.3%	9.3%	27.2%	62.3%
6	Merge to word processing system to create letters or docket info	297	3.46	4.0%	10.1%	21.9%	64.0%
7	Customize data fields to meet your specific custom needs	300	3.45	2.0%	9.7%	29.3%	59.0%
8	Generate required financial reports	294	3.35	3.4%	12.6%	29.3%	54.8%
9	Track the status of each grant letter of intent/proposal	300	3.35	4.0%	16.0%	20.7%	59.3%
10	Create merged emails to applicants/grantees	294	3.30	6.8%	12.9%	23.5%	56.8%
11	Manage the process of collecting grantee reports	294	3.30	2.7%	14.3%	33.3%	49.7%
12	Generate aggregate statistical information on grants	297	3.30	1.7%	16.5%	32.3%	49.5%
13	Update or add to the source code to meet specific custom needs	269	3.18	6.7%	15.6%	30.5%	47.2%
14	Robustly interface with other software/systems	287	3.15	5.6%	15.7%	37.3%	41.5%
15	View pertinent application and grant documents electronically	293	3.09	6.1%	23.2%	25.9%	44.7%
16	Store data on your own internal servers	266	3.01	12.0%	15.0%	32.7%	40.2%
17	View/report by budget category	286	2.96	10.8%	20.3%	30.8%	38.1%
18	Provide remote access to staff members working outside the office	291	2.92	8.2%	29.9%	23.0%	38.8%
19	Easily search for applications that meet specific criteria or keywords	296	2.88	10.1%	27.0%	27.7%	35.1%
20	Tracking of evaluation/outcomes data	286	2.79	7.3%	31.1%	36.4%	25.2%
21	Online submission of grant applications	286	2.74	18.2%	25.2%	20.6%	36.0%
22	Online submission of grantee reports or narratives	288	2.72	13.5%	30.6%	26.4%	29.5%
23	Automatic checks of tax status or OFAC lists	286	2.71	9.1%	37.8%	26.6%	26.6%
24	Automatically route applications through complex review	285	2.54	20.4%	29.1%	26.7%	23.9%
25	Automatically enter or transfer data into accounting system	260	2.45	23.8%	31.2%	21.5%	23.5%
26	Publishing grants awarded to your website	282	2.37	20.6%	39.4%	23.0%	17.0%
27	Tracking of grants to self, for internal projects	237	2.28	34.2%	22.4%	24.9%	18.6%
28	Easily write checks or transfer funds	248	2.20	37.1%	26.6%	15.7%	20.6%
29	Allowing applicants/grantees to view their own status	282	2.18	30.9%	34.4%	20.6%	14.2%
30	Program Related Investments	214	2.17	39.3%	24.3%	16.4%	20.1%
31	Scholarships/grants to individuals	211	2.06	51.7%	11.8%	15.2%	21.3%
32	Donor fund management	204	1.83	59.8%	13.2%	10.8%	16.2%
33	Employee matching gifts	199	1.72	62.3%	16.6%	8.0%	13.1%

**Table C2: Importance of Attributes by Foundation Type** \*see key on p 18

GM Feature/Attribute	Total		Average "Importance" Score by Foundation Type					
	Count	Avg Score	Family Fnd	Independant Fnd	Corp-orate Fnd	Other Private Fnd	Comm-unity Fnd	Other Public Fnd
Track the status of each grant letter of intent/proposal	300	3.4	3.3	3.4	3.1	3.4	3.6	3.4
Easily look up contact information for grant applicants	302	3.7	3.7	3.7	3.5	3.8	3.8	3.8
Understand historic relationship with a grant applicant	302	3.5	3.6	3.5	3.4	3.3	3.5	3.3
View pertinent application and grant documents electronically	293	3.1	2.9	3.3	3.2	2.6	3.3	2.6
Easily search for applications that meet specific criteria or keywords	296	2.9	2.7	3.0	3.1	2.9	3.1	2.9
Automatically route applications through a complex review process	285	2.5	2.2	2.7	2.8	2.5	3.0	2.5
Create merged emails to applicants/grantees	294	3.3	3.1	3.5	3.1	3.3	3.4	3.3
Merge to word processing system to create letters or docket info	297	3.5	3.3	3.6	3.4	3.8	3.4	3.8
Manage the process of collecting grantee reports	294	3.3	3.2	3.4	3.1	3.2	3.5	3.2
Generate required reports about grants and applicants	299	3.6	3.7	3.6	3.5	3.8	3.6	3.8
Generate required financial reports	294	3.4	3.3	3.4	3.4	3.3	3.6	3.3
Generate aggregate statistical information on grants	297	3.3	3.2	3.3	3.2	3.3	3.5	3.3
View/report by budget category	286	3.0	3.1	2.8	3.3	3.1	2.9	3.1
Automatically enter or transfer data into accounting system	260	2.4	2.2	2.5	2.7	2.1	3.4	2.1
Easily write checks or transfer funds	248	2.2	2.1	2.0	2.3	2.1	3.1	2.1
Online submission of grant applications	286	2.7	2.3	2.9	3.4	1.9	3.2	1.9
Online submission of grantee reports or narratives	288	2.7	2.4	2.8	3.0	2.0	3.0	2.0
Allowing applicants/grantees to view their own status	282	2.2	2.0	2.2	2.3	1.7	2.6	1.7
Publishing grants awarded to your website	282	2.4	2.2	2.4	2.3	2.1	2.7	2.1
Automatic checks of tax status or OFAC lists	286	2.7	2.7	2.7	3.2	2.7	2.8	2.7
Tracking of evaluation/outcomes data	286	2.8	2.5	2.8	2.8	3.0	3.2	3.0
Tracking of grants to self, for internal projects	237	2.3	2.1	2.2	2.0	2.7	2.9	2.7
Program Related Investments	214	2.2	2.0	2.3	1.8	2.3	3.0	2.3
Scholarships/grants to individuals	211	2.1	1.8	1.6	1.7	1.7	3.3	1.7
Donor fund management	204	1.8	1.6	1.3	1.8	1.4	3.4	1.4
Employee matching gifts	199	1.7	1.5	1.9	2.2	1.7	2.0	1.7
Customize data fields to meet your specific custom needs	300	3.5	3.5	3.6	3.2	3.5	3.3	3.5
Customize reports to meet your specific custom needs	300	3.6	3.5	3.7	3.3	3.6	3.5	3.6
Provide remote access to staff members working outside the office	291	2.9	2.8	3.0	3.1	2.6	3.2	2.6
Update or add to the source code to meet your specific custom needs	269	3.2	3.0	3.3	3.1	3.6	3.0	3.6
Robustly interface with other software/systems	287	3.1	3.0	3.2	3.1	3.4	3.6	3.4
Store data on your own internal servers	266	3.0	3.0	3.0	2.7	3.7	3.1	3.7
Easily get support or answers to questions about the software	296	3.6	3.6	3.7	3.6	3.7	3.7	3.7

**Table C3: Importance of Attributes by Number of Grants Disbursed** \*see key on p 18

GM Feature/Attribute	Total		Average "Importance" Score by Number of Grants Disbursed Per Year		
	Count	Avg Score	More than 100	Less than 100	Difference
Track the status of each grant letter of intent/proposal	300	3.4	3.5	3.2	0.3
Easily look up contact information for grant applicants	302	3.7	3.8	3.5	0.3
Understand historic relationship with a grant applicant	302	3.5	3.6	3.3	0.3
View pertinent application and grant documents electronically	293	3.1	3.2	2.9	0.3
Easily search for applications that meet specific criteria or keywords	296	2.9	3.0	2.7	0.3
Automatically route applications through a complex review process	285	2.5	2.7	2.3	0.3
Create merged emails to applicants/grantees	294	3.3	3.5	3.1	0.4
Merge to word processing system to create letters or docket info	297	3.5	3.6	3.2	0.5
Manage the process of collecting grantee reports	294	3.3	3.4	3.2	0.2
Generate required reports about grants and applicants	299	3.6	3.7	3.5	0.2
Generate required financial reports	294	3.4	3.5	3.1	0.4
Generate aggregate statistical information on grants	297	3.3	3.5	3.1	0.4
View/report by budget category	286	3.0	3.2	2.6	0.6
Automatically enter or transfer data into accounting system	260	2.4	2.6	2.2	0.4
Easily write checks or transfer funds	248	2.2	2.4	1.9	0.4
Online submission of grant applications	286	2.7	3.0	2.4	0.5
Online submission of grantee reports or narratives	288	2.7	2.9	2.4	0.5
Allowing applicants/grantees to view their own status	282	2.2	2.4	1.9	0.4
Publishing grants awarded to your website	282	2.4	2.6	2.1	0.5
Automatic checks of tax status or OFAC lists	286	2.7	2.9	2.4	0.5
Tracking of evaluation/outcomes data	286	2.8	2.9	2.6	0.3
Tracking of grants to self, for internal projects	237	2.3	2.4	2.1	0.3
Program Related Investments	214	2.2	2.5	1.7	0.8
Scholarships/grants to individuals	211	2.1	2.4	1.6	0.8
Donor fund management	204	1.8	2.1	1.5	0.5
Employee matching gifts	199	1.7	2.0	1.3	0.7
Customize data fields to meet your specific custom needs	300	3.5	3.5	3.4	0.2
Customize reports to meet your specific custom needs	300	3.6	3.7	3.4	0.3
Provide remote access to staff members working outside the office	291	2.9	3.1	2.7	0.4
Update or add to the source code to meet your specific custom needs	269	3.2	3.4	2.9	0.5
Robustly interface with other software/systems	287	3.1	3.3	2.9	0.4
Store data on your own internal servers	266	3.0	3.2	2.7	0.5
Easily get support or answers to questions about the software	296	3.6	3.8	3.5	0.3

**Table C4: Importance of Attributes by Number of Foundation Staff** \*see key on p 18

GM Feature/Attribute	Total		Average "Importance" Score by Number of Staff		
	Count	Avg Score	More than 10	Less than 10	Difference
Track the status of each grant letter of intent/proposal	300	3.3	3.5	3.2	0.3
Easily look up contact information for grant applicants	302	3.7	3.8	3.6	0.2
Understand historic relationship with a grant applicant	302	3.5	3.6	3.4	0.1
View pertinent application and grant documents electronically	293	3.1	3.4	2.9	0.5
Easily search for applications that meet specific criteria or keywords	296	2.8	3.1	2.7	0.4
Automatically route applications through a complex review process	285	2.5	2.9	2.2	0.7
Create merged emails to applicants/grantees	294	3.3	3.5	3.1	0.4
Merge to word processing system to create letters or docket info	297	3.4	3.6	3.4	0.2
Manage the process of collecting grantee reports	294	3.3	3.4	3.2	0.3
Generate required reports about grants and applicants	299	3.6	3.7	3.6	0.1
Generate required financial reports	294	3.3	3.5	3.3	0.2
Generate aggregate statistical information on grants	297	3.3	3.5	3.2	0.3
View/report by budget category	286	2.9	3.1	2.8	0.3
Automatically enter or transfer data into accounting system	260	2.4	2.7	2.3	0.4
Easily write checks or transfer funds	248	2.2	2.3	2.2	0.1
Online submission of grant applications	286	2.7	3.3	2.4	0.9
Online submission of grantee reports or narratives	288	2.7	3.1	2.4	0.7
Allowing applicants/grantees to view their own status	282	2.2	2.6	1.9	0.7
Publishing grants awarded to your website	282	2.4	2.7	2.1	0.5
Automatic checks of tax status or OFAC lists	286	2.7	2.8	2.7	0.1
Tracking of evaluation/outcomes data	286	2.8	3.0	2.6	0.4
Tracking of grants to self, for internal projects	237	2.2	2.5	2.1	0.4
Program Related Investments	214	2.1	2.6	1.8	0.9
Scholarships/grants to individuals	211	2.0	2.4	1.8	0.7
Donor fund management	204	1.8	2.1	1.6	0.4
Employee matching gifts	199	1.7	1.9	1.6	0.4
Customize data fields to meet your specific custom needs	300	3.4	3.6	3.4	0.2
Customize reports to meet your specific custom needs	300	3.5	3.7	3.5	0.2
Provide remote access to staff members working outside the office	291	2.9	3.3	2.6	0.7
Update or add to the source code to meet your specific custom needs	269	3.1	3.4	3.0	0.3
Robustly interface with other software/systems	287	3.1	3.3	3.0	0.3
Store data on your own internal servers	266	3.0	3.2	2.8	0.4
Easily get support or answers to questions about the software	296	3.6	3.8	3.6	0.4

**Table C5: Importance of Attributes by Respondent Role** \*see key on p 18

GM Feature/Attribute	Total		Average "Importance" Score by Respondent Role							
	Count	Avg Score	Senior Mgt	Program Staff	Grants Mgt	Financial Mgt	IT Specialist	Admin Staff	Consultant	Board Member
Track the status of each grant letter of intent/proposal	300	3.3	3.2	3.2	3.4	3.1	3.2	3.2	3.2	3.1
Easily look up contact information for grant applicants	302	3.7	3.6	3.7	3.8	3.6	3.7	3.6	3.5	3.5
Understand historic relationship with a grant applicant	302	3.5	3.4	3.3	3.6	3.3	3.4	3.4	3.5	3.3
View pertinent application and grant documents electronically	293	3.1	2.8	2.9	3.1	2.9	2.9	2.9	2.6	2.9
Easily search for applications that meet specific criteria or keywords	296	2.8	2.7	2.7	2.9	2.7	2.9	2.7	2.7	2.7
Automatically route applications through a complex review process	285	2.5	2.3	2.4	2.6	2.4	2.5	2.3	2.5	2.4
Create merged emails to applicants/grantees	294	3.3	3.1	3.2	3.4	3.0	3.2	3.2	3.1	3.0
Merge to word processing system to create letters or docket info	297	3.4	3.4	3.3	3.5	3.4	3.4	3.4	3.5	2.9
Manage the process of collecting grantee reports	294	3.3	3.1	3.2	3.3	3.3	3.2	3.1	3.5	3.2
Generate required reports about grants and applicants	299	3.6	3.6	3.6	3.6	3.6	3.6	3.6	3.7	3.5
Generate required financial reports	294	3.3	3.2	3.3	3.4	3.3	3.2	3.2	3.6	3.3
Generate aggregate statistical information on grants	297	3.3	3.2	3.2	3.3	3.2	3.2	3.1	3.5	3.2
View/report by budget category	286	2.9	2.9	2.8	3.1	2.8	2.8	2.9	2.9	2.9
Automatically enter or transfer data into accounting system	260	2.4	2.4	2.4	2.5	2.3	2.4	2.2	2.1	2.4
Easily write checks or transfer funds	248	2.2	2.1	2.4	2.2	2.0	2.1	2.1	2.2	2.3
Online submission of grant applications	286	2.7	2.5	2.6	2.8	2.6	2.6	2.5	2.1	2.5
Online submission of grantee reports or narratives	288	2.7	2.5	2.6	2.7	2.5	2.7	2.5	2.5	2.5
Allowing applicants/grantees to view their own status	282	2.2	2.1	2.0	2.2	2.0	2.2	2.0	1.7	2.1
Publishing grants awarded to your website	282	2.4	2.2	2.2	2.4	2.4	2.4	2.3	2.0	2.0
Automatic checks of tax status or OFAC lists	286	2.7	2.5	2.7	2.8	2.6	2.8	2.6	3.0	2.7
Tracking of evaluation/outcomes data	286	2.8	2.7	2.8	2.8	2.9	2.8	2.7	3.2	2.7
Tracking of grants to self, for internal projects	237	2.2	1.9	2.4	2.3	2.1	2.2	2.3	2.3	2.0
Program Related Investments	214	2.1	2.0	2.0	2.2	2.0	2.2	2.0	2.0	1.9
Scholarships/grants to individuals	211	2.0	2.0	2.1	2.1	2.1	2.1	2.0	2.0	1.6
Donor fund management	204	1.8	1.6	1.9	1.8	1.7	1.8	1.9	2.0	2.0
Employee matching gifts	199	1.7	1.7	1.6	1.7	1.8	2.0	1.6	1.6	1.4

Customize data fields to meet your specific custom needs	300	3.4	3.4	3.5	3.5	3.5	3.7	3.4	3.6	3.1
Customize reports to meet your specific custom needs	300	3.5	3.5	3.6	3.7	3.6	3.8	3.5	3.7	3.2
Provide remote access to staff members working outside the office	291	2.9	2.7	2.8	3.0	2.8	2.8	2.8	2.4	2.6
Update or add to the source code to meet your specific custom needs	269	3.1	3.0	3.2	3.3	3.0	3.2	3.0	3.3	2.4
Robustly interface with other software/systems	287	3.1	2.9	3.0	3.2	3.0	3.2	3.0	3.1	2.5
Store data on your own internal servers	266	3.0	2.9	2.8	3.1	3.0	3.0	3.1	3.0	2.7
Easily get support or answers to questions about the software	296	3.6	3.5	3.5	3.7	3.5	3.6	3.5	3.5	3.3

**Table C6: Importance of Attributes by Respondent Frequency of Usage** \*see key on p 18

GM Feature/Attribute	Total		Average "Importance" Score by Respondent Frequency of Software Use		
	Count	Avg Score	Weekly or More Often	Less than Weekly	Difference
Track the status of each grant letter of intent/proposal	300	3.3	3.4	3.2	0.2
Easily look up contact information for grant applicants	302	3.7	3.7	3.6	0.1
Understand historic relationship with a grant applicant	302	3.5	3.5	3.4	0.2
View pertinent application and grant documents electronically	293	3.1	3.1	3.1	0.0
Easily search for applications that meet specific criteria or keywords	296	2.8	2.9	2.7	0.2
Automatically route applications through a complex review process	285	2.5	2.6	2.4	0.1
Create merged emails to applicants/grantees	294	3.3	3.4	3.0	0.3
Merge to word processing system to create letters or docket info	297	3.4	3.5	3.1	0.4
Manage the process of collecting grantee reports	294	3.3	3.3	3.2	0.1
Generate required reports about grants and applicants	299	3.6	3.7	3.5	0.2
Generate required financial reports	294	3.3	3.4	3.1	0.3
Generate aggregate statistical information on grants	297	3.3	3.3	3.1	0.2
View/report by budget category	286	2.9	3.0	2.9	0.1
Automatically enter or transfer data into accounting system	260	2.4	2.4	2.6	-0.2
Easily write checks or transfer funds	248	2.2	2.1	2.4	-0.2
Online submission of grant applications	286	2.7	2.7	2.7	0.0
Online submission of grantee reports or narratives	288	2.7	2.7	2.8	-0.1
Allowing applicants/grantees to view their own status	282	2.2	2.2	2.2	0.0
Publishing grants awarded to your website	282	2.4	2.4	2.3	0.1
Automatic checks of tax status or OFAC lists	286	2.7	2.7	2.6	0.2
Tracking of evaluation/outcomes data	286	2.8	2.8	2.9	-0.2
Tracking of grants to self, for internal projects	237	2.2	2.2	2.4	-0.2
Program Related Investments	214	2.1	2.2	2.3	-0.1
Scholarships/grants to individuals	211	2.0	2.0	2.2	-0.2
Donor fund management	204	1.8	1.8	2.1	-0.4
Employee matching gifts	199	1.7	1.7	1.8	-0.1
Customize data fields to meet your specific custom needs	300	3.4	3.5	3.3	0.2
Customize reports to meet your specific custom needs	300	3.5	3.6	3.4	0.2
Provide remote access to staff members working outside the office	291	2.9	2.9	2.8	0.1
Update or add to the source code to meet your specific custom needs	269	3.1	3.3	2.8	0.5
Robustly interface with other software/systems	287	3.1	3.2	2.9	0.2
Store data on your own internal servers	266	3.0	3.0	2.9	0.1
Easily get support or answers to questions about the software	296	3.6	3.7	3.6	0.1

**Table C7: Importance of Attributes – Those Using GIFTS vs Other Than GIFTS** \*see key on p 18

GM Feature/Attribute	Total		Average “Importance” Score - GIFTS vs Non-GIFTS		
	Count	Avg Score	GIFTS	Not GIFTS	Difference
Track the status of each grant letter of intent/proposal	300	3.3	3.5	3.2	0.3
Easily look up contact information for grant applicants	302	3.7	3.8	3.6	0.1
Understand historic relationship with a grant applicant	302	3.5	3.6	3.4	0.2
View pertinent application and grant documents electronically	293	3.1	3.1	3.1	0.1
Easily search for applications that meet specific criteria or keywords	296	2.8	3.0	2.7	0.2
Automatically route applications through a complex review process	285	2.5	2.6	2.5	0.1
Create merged emails to applicants/grantees	294	3.3	3.4	3.2	0.2
Merge to word processing system to create letters or docket info	297	3.4	3.7	3.2	0.5
Manage the process of collecting grantee reports	294	3.3	3.3	3.3	0.1
Generate required reports about grants and applicants	299	3.6	3.7	3.6	0.2
Generate required financial reports	294	3.3	3.4	3.3	0.1
Generate aggregate statistical information on grants	297	3.3	3.4	3.2	0.2
View/report by budget category	286	2.9	3.1	2.8	0.2
Automatically enter or transfer data into accounting system	260	2.4	2.4	2.5	-0.1
Easily write checks or transfer funds	248	2.2	2.1	2.3	-0.2
Online submission of grant applications	286	2.7	2.6	2.9	-0.3
Online submission of grantee reports or narratives	288	2.7	2.6	2.9	-0.3
Allowing applicants/grantees to view their own status	282	2.2	2.1	2.3	-0.3
Publishing grants awarded to your website	282	2.4	2.3	2.4	-0.1
Automatic checks of tax status or OFAC lists	286	2.7	2.8	2.5	0.3
Tracking of evaluation/outcomes data	286	2.8	2.8	2.8	0.0
Tracking of grants to self, for internal projects	237	2.2	2.2	2.4	-0.2
Program Related Investments	214	2.1	2.2	2.2	0.0
Scholarships/grants to individuals	211	2.0	1.8	2.3	-0.5
Donor fund management	204	1.8	1.6	2.1	-0.5
Employee matching gifts	199	1.7	1.8	1.6	0.2
Customize data fields to meet your specific custom needs	300	3.4	3.5	3.4	0.1
Customize reports to meet your specific custom needs	300	3.5	3.6	3.5	0.1
Provide remote access to staff members working outside the office	291	2.9	2.9	2.9	0.0
Update or add to the source code to meet your specific custom needs	269	3.1	3.3	3.0	0.3
Robustly interface with other software/systems	287	3.1	3.3	2.9	0.3
Store data on your own internal servers	266	3.0	3.2	2.8	0.4
Easily get support or answers to questions about the software	296	3.6	3.8	3.5	0.4

**Table C8: Importance of Attributes by Reported IT Adoption** \*see key on p 18

GM Feature/Attribute	Total		Average “Importance” Score by Reported IT Adoption				
	Count	Avg Score	Early Adopter	Fast Follower	Conser-vative	In Trouble	Difference
Track the status of each grant letter of intent/proposal	300	3.3	3.4	3.4	3.3	3.5	0.2
Easily look up contact information for grant applicants	302	3.7	3.7	3.8	3.7	3.7	0.1
Understand historic relationship with a grant applicant	302	3.5	3.5	3.5	3.5	3.6	0.1
View pertinent application and grant documents electronically	293	3.1	3.6	3.1	2.8	3.3	0.8
Easily search for applications that meet specific criteria or keywords	296	2.8	3.0	3.0	2.7	3.0	0.4
Automatically route applications through a complex review process	285	2.5	3.1	2.6	2.2	2.7	0.8
Create merged emails to applicants/grantees	294	3.3	3.5	3.4	3.2	3.5	0.3
Merge to word processing system to create letters or docket info	297	3.4	3.4	3.5	3.4	3.3	0.2
Manage the process of collecting grantee reports	294	3.3	3.4	3.3	3.3	3.6	0.3
Generate required reports about grants and applicants	299	3.6	3.7	3.7	3.6	3.7	0.1
Generate required financial reports	294	3.3	3.5	3.3	3.3	3.6	0.3
Generate aggregate statistical information on grants	297	3.3	3.4	3.3	3.2	3.5	0.3
View/report by budget category	286	2.9	3.2	2.9	3.0	2.8	0.4
Automatically enter or transfer data into accounting system	260	2.4	2.9	2.3	2.3	3.1	0.8
Easily write checks or transfer funds	248	2.2	2.4	2.0	2.1	2.8	0.8
Online submission of grant applications	286	2.7	3.3	2.7	2.4	3.3	0.9
Online submission of grantee reports or narratives	288	2.7	3.3	2.7	2.4	3.2	0.9
Allowing applicants/grantees to view their own status	282	2.2	2.7	2.1	1.9	2.7	0.8
Publishing grants awarded to your website	282	2.4	2.7	2.3	2.3	2.6	0.4
Automatic checks of tax status or OFAC lists	286	2.7	2.9	2.9	2.5	2.6	0.4
Tracking of evaluation/outcomes data	286	2.8	3.0	2.7	2.7	3.1	0.4
Tracking of grants to self, for internal projects	237	2.2	2.4	2.2	2.3	2.8	0.6
Program Related Investments	214	2.1	2.6	1.8	2.1	3.0	1.2
Scholarships/grants to individuals	211	2.0	2.5	1.9	1.9	3.0	1.1
Donor fund management	204	1.8	2.0	1.8	1.7	2.6	0.9
Employee matching gifts	199	1.7	2.2	1.7	1.5	2.1	0.7
Customize data fields to meet your specific custom needs	300	3.4	3.6	3.5	3.3	3.7	0.3
Customize reports to meet your specific custom needs	300	3.5	3.6	3.6	3.5	3.8	0.2
Provide remote access to staff members working outside the office	291	2.9	3.3	2.8	2.8	2.9	0.5
Update or add to the source code to meet your specific custom needs	269	3.1	3.2	3.2	3.2	3.1	0.1
Robustly interface with other software/systems	287	3.1	3.3	3.1	3.1	3.0	0.3
Store data on your own internal servers	266	3.0	3.0	3.0	3.0	3.0	0.0
Easily get support or answers to questions about the software	296	3.6	3.8	3.6	3.6	3.8	0.2

# Appendix D: Perceived Current System Effectiveness

**Table D1: Rank of Software Attributes by Perceived Effectiveness of Current System** \*see key on p 18

Effectiveness of GM Features and Attributes		Count of Responses	Average Score	% "Can't Do This At All"	% "Supports, but not well"	% "Does most of what we need"	% Works great for us"
1	Allowing applicants/grantees to view their own status	206	<b>1.44</b>	81.1%	3.4%	6.3%	9.2%
2	Publishing grants awarded to your website	201	<b>1.65</b>	65.2%	13.4%	12.4%	9.0%
3	Donor fund management	96	<b>1.79</b>	62.5%	10.4%	12.5%	14.6%
4	Tracking of evaluation/outcomes data	221	<b>1.84</b>	52.0%	21.7%	16.3%	10.0%
5	Online submission of grantee reports or narratives	217	<b>1.86</b>	60.4%	10.1%	12.9%	16.6%
6	Program Related Investments	123	<b>1.86</b>	57.7%	13.8%	13.0%	15.4%
7	Easily write checks or transfer funds	161	<b>1.88</b>	60.9%	8.1%	13.0%	18.0%
8	Automatically enter or transfer data into accounting system	174	<b>1.89</b>	56.3%	13.8%	14.9%	14.9%
9	Automatic checks of tax status or OFAC lists*	229	<b>2.10</b>	49.8%	12.2%	16.6%	21.4%
10	Automatically route applications through complex review process*	217	<b>2.10</b>	50.7%	11.1%	16.1%	22.1%
11	Employee matching gifts	102	<b>2.12</b>	52.0%	7.8%	16.7%	23.5%
12	Online submission of grant applications	223	<b>2.20</b>	48.9%	8.1%	17.0%	26.0%
13	Robustly interface with other software/systems	240	<b>2.32</b>	22.9%	34.6%	30.0%	12.5%
14	Tracking of grants to self, for internal projects	164	<b>2.37</b>	35.4%	15.2%	26.2%	23.2%
15	Scholarships/grants to individuals	134	<b>2.47</b>	28.4%	19.4%	29.1%	23.1%
16	Provide remote access to staff members working outside the office*	229	<b>2.53</b>	33.6%	11.8%	22.7%	31.9%
17	Easily search for applications that meet specific criteria/keywords*	242	<b>2.64</b>	26.0%	15.7%	26.9%	31.4%
18	View pertinent application and grant documents electronically*	265	<b>2.70</b>	26.4%	14.3%	22.3%	37.0%
19	View/report by budget category	231	<b>2.78</b>	18.6%	17.7%	30.7%	32.9%
20	Manage the process of collecting grantee reports	273	<b>2.78</b>	14.7%	20.5%	37.0%	27.8%
21	Generate required financial reports	266	<b>2.79</b>	13.2%	22.6%	36.1%	28.2%
22	Generate aggregate statistical information on grants	278	<b>2.80</b>	12.9%	24.8%	31.3%	30.9%
23	Customize reports to meet your specific custom needs	289	<b>2.91</b>	8.0%	23.2%	39.1%	29.8%
24	Customize data fields to meet your specific custom needs	285	<b>2.92</b>	10.2%	18.9%	39.6%	31.2%
25	Easily get support or answers to questions about the software	279	<b>2.96</b>	10.8%	18.3%	35.5%	35.5%
26	Create merged emails to applicants/grantees	269	<b>3.00</b>	12.6%	14.1%	34.2%	39.0%
27	Generate required reports about grants and applicants	287	<b>3.10</b>	6.3%	17.4%	36.6%	39.7%
28	Merge to word processing system to create letters or docket info	275	<b>3.14</b>	8.7%	13.5%	33.1%	44.7%
29	Understand historic relationship with a grant applicant	296	<b>3.27</b>	4.1%	11.8%	36.8%	47.3%
30	Track the status of each grant letter of intent/proposal	275	<b>3.32</b>	5.8%	8.4%	34.2%	51.6%
31	Easily look up contact information for grant applicants	298	<b>3.50</b>	3.0%	7.0%	27.2%	62.8%

**Table D2: Perception of Current Software Effectiveness by Foundation Type** \*see key on p 18

GM Feature/Attribute	Total		Average “Effectiveness” Score by Foundation Type					
	Count	Avg Score	Family Fnd	Independant Fnd	Corporate Fnd	Other Private Fnd	Community Fnd	Other Public Fnd
Track the status of each grant letter of intent/proposal	275	3.3	3.3	3.4	3.7	3.4	2.9	3.2
Easily look up contact information for grant applicants	298	3.5	3.4	3.5	3.6	3.6	3.3	3.5
Understand historic relationship with a grant applicant	296	3.3	3.3	3.3	3.4	3.4	2.9	3.2
View pertinent application and grant documents electronically*	265	2.7	2.6	2.9	3.5	2.7	1.9	2.6
Easily search for applications that meet specific criteria/keywords*	242	2.6	2.7	2.7	3.2	2.7	2.1	2.6
Automatically route applications through a complex review process*	217	2.1	2.1	2.1	2.6	1.9	1.8	2.1
Create merged emails to applicants/grantees	269	3.0	2.9	3.1	3.2	3.3	2.7	3.1
Merge to word processing system to create letters or docket info	275	3.1	3.0	3.3	3.3	3.4	2.9	3.2
Manage the process of collecting grantee reports	273	2.8	2.7	2.8	2.9	3.3	2.4	2.8
Generate required reports about grants and applicants	287	3.1	3.1	3.1	3.3	3.5	2.4	3.2
Generate required financial reports	266	2.8	2.7	2.8	3.2	3.0	2.4	2.8
Generate aggregate statistical information on grants	278	2.8	2.8	2.8	3.3	3.0	2.4	2.8
View/report by budget category	231	2.8	2.8	2.8	3.4	2.9	2.2	2.6
Automatically enter or transfer data into accounting system	174	1.9	1.6	1.9	2.8	1.6	2.4	1.7
Easily write checks or transfer funds	161	1.9	1.7	1.8	2.5	1.6	2.5	1.6
Online submission of grant applications	223	2.2	1.8	2.5	3.2	1.4	2.1	2.1
Online submission of grantee reports or narratives	217	1.9	1.6	2.0	2.8	1.5	1.8	1.8
Allowing applicants/grantees to view their own status	206	1.4	1.4	1.5	2.0	1.0	1.4	1.4
Publishing grants awarded to your website	201	1.7	1.8	1.7	1.5	1.3	1.3	1.8
Automatic checks of tax status or OFAC lists*	229	2.1	2.1	2.1	3.1	2.4	1.5	1.5
Tracking of evaluation/outcomes data	221	1.8	1.8	1.8	2.3	1.9	1.6	1.7
Tracking of grants to self, for internal projects	164	2.4	2.3	2.4	2.8	2.5	2.0	2.3
Program Related Investments	123	1.9	1.7	2.1	2.1	1.7	2.0	1.4
Scholarships/grants to individuals	134	2.5	2.2	2.6	2.4	2.4	2.6	2.3
Donor fund management	96	1.8	1.6	1.2	1.8	1.5	2.6	1.5
Employee matching gifts	102	2.1	2.1	2.3	3.2	1.8	2.0	1.2
Customize data fields to meet your specific custom needs	285	2.9	2.9	2.9	3.2	3.1	2.5	3.0
Customize reports to meet your specific custom needs	289	2.9	2.9	2.9	3.3	3.0	2.3	3.1
Provide remote access to staff members working outside the office*	229	2.5	2.4	2.5	3.4	2.2	2.4	2.5
Robustly interface with other software/systems	240	2.3	2.4	2.3	3.2	2.4	1.8	2.2
Easily get support or answers to questions about the software	279	3.0	3.0	2.9	3.2	3.1	2.7	2.8

**Table D3: Perception of Current Software Effectiveness by Number Yearly Grants** \*see key on p 18

GM Feature/Attribute	Total		Average "Effectiveness" Score by Number of Grants Disbursed Per Year		
	Count*	Avg Score	More than 100	Less than 100	Difference
Track the status of each grant letter of intent/proposal	275	3.3	3.4	3.2	0.3
Easily look up contact information for grant applicants	298	3.5	3.6	3.3	0.3
Understand historic relationship with a grant applicant	296	3.3	3.4	3.1	0.4
View pertinent application and grant documents electronically*	265	2.7	2.8	2.4	0.4
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.7	2.5	0.2
Automatically route applications through a complex review process*	217	2.1	2.1	2.1	0.0
Create merged emails to applicants/grantees	269	3.0	3.2	2.7	0.5
Merge to word processing system to create letters or docket info	275	3.1	3.3	2.8	0.5
Manage the process of collecting grantee reports	273	2.8	2.9	2.6	0.3
Generate required reports about grants and applicants	287	3.1	3.2	2.9	0.3
Generate required financial reports	266	2.8	2.9	2.6	0.3
Generate aggregate statistical information on grants	278	2.8	2.9	2.6	0.3
View/report by budget category	231	2.8	2.9	2.7	0.2
Automatically enter or transfer data into accounting system	174	1.9	2.0	1.6	0.4
Easily write checks or transfer funds	161	1.9	2.1	1.7	0.4
Online submission of grant applications	223	2.2	2.3	2.0	0.4
Online submission of grantee reports or narratives	217	1.9	1.9	1.8	0.2
Allowing applicants/grantees to view their own status	206	1.4	1.5	1.4	0.1
Publishing grants awarded to your website	201	1.7	1.8	1.4	0.4
Automatic checks of tax status or OFAC lists*	229	2.1	2.3	1.7	0.6
Tracking of evaluation/outcomes data	221	1.8	1.9	1.7	0.2
Tracking of grants to self, for internal projects	164	2.4	2.3	2.4	-0.1
Program Related Investments	123	1.9	2.0	1.6	0.5
Scholarships/grants to individuals	134	2.5	2.8	2.0	0.8
Donor fund management	96	1.8	2.1	1.4	0.8
Employee matching gifts	102	2.1	2.5	1.4	1.1
Customize data fields to meet your specific custom needs	285	2.9	2.9	2.9	0.1
Customize reports to meet your specific custom needs	289	2.9	3.0	2.8	0.2
Provide remote access to staff members working outside the office*	229	2.5	2.6	2.3	0.3
Robustly interface with other software/systems	240	2.3	2.4	2.2	0.2
Easily get support or answers to questions about the software	279	3.0	3.0	2.9	0.2

**Table D4: Perception of Current Software Effectiveness by Number of Staff** \*see key on p 18

GM Feature/Attribute	Total		Average “Effectiveness” Score by Number of Staff		
	Count	Avg Score	More than 10	Less than 10	Difference
Track the status of each grant letter of intent/proposal	275	3.3	3.4	3.2	0.1
Easily look up contact information for grant applicants	298	3.5	3.5	3.5	0.0
Understand historic relationship with a grant applicant	296	3.3	3.2	3.3	-0.1
View pertinent application and grant documents electronically*	265	2.7	2.8	2.6	0.3
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.6	2.6	0.0
Automatically route applications through a complex review process*	217	2.1	2.1	2.0	0.1
Create merged emails to applicants/grantees	269	3.0	3.1	2.9	0.2
Merge to word processing system to create letters or docket info	275	3.1	3.2	3.1	0.1
Manage the process of collecting grantee reports	273	2.8	2.7	2.8	-0.1
Generate required reports about grants and applicants	287	3.1	3.1	3.1	-0.1
Generate required financial reports	266	2.8	2.8	2.8	0.0
Generate aggregate statistical information on grants	278	2.8	2.7	2.9	-0.1
View/report by budget category	231	2.8	2.7	2.9	-0.2
Automatically enter or transfer data into accounting system	174	1.9	2.0	1.8	0.2
Easily write checks or transfer funds	161	1.9	1.8	2.0	-0.2
Online submission of grant applications	223	2.2	2.4	2.0	0.4
Online submission of grantee reports or narratives	217	1.9	1.9	1.8	0.1
Allowing applicants/grantees to view their own status	206	1.4	1.5	1.4	0.1
Publishing grants awarded to your website	201	1.7	1.9	1.5	0.4
Automatic checks of tax status or OFAC lists*	229	2.1	2.1	2.1	0.0
Tracking of evaluation/outcomes data	221	1.8	1.7	1.9	-0.2
Tracking of grants to self, for internal projects	164	2.4	2.3	2.4	-0.2
Program Related Investments	123	1.9	1.9	1.8	0.2
Scholarships/grants to individuals	134	2.5	2.6	2.4	0.2
Donor fund management	96	1.8	1.8	1.8	0.1
Employee matching gifts	102	2.1	2.2	2.1	0.1
Customize data fields to meet your specific custom needs	285	2.9	2.9	2.9	-0.1
Customize reports to meet your specific custom needs	289	2.9	2.9	2.9	0.0
Provide remote access to staff members working outside the office*	229	2.5	2.7	2.3	0.4
Robustly interface with other software/systems	240	2.3	2.3	2.4	-0.1
Easily get support or answers to questions about the software	279	3.0	2.8	3.0	-0.1

**Table D5: Perception of Current Software Effectiveness by Respondent Role** \*see key on p 18

GM Feature/Attribute	Total		Average “Effectiveness” Score by Respondent Role							
	Count	Avg Score	Senior Mgt	Program Staff	Grants Mgt	Financial Mgt	IT Specialist	Admin Staff	Consultant	Board Member
Track the status of each grant letter of intent/proposal	275	3.3	3.3	3.2	3.4	3.3	3.4	3.3	2.9	3.3
Easily look up contact information for grant applicants	298	3.5	3.5	3.5	3.5	3.4	3.6	3.4	3.1	3.5
Understand historic relationship with a grant applicant	296	3.3	3.3	3.2	3.3	3.3	3.4	3.2	3.2	3.2
View pertinent application and grant documents electronically*	265	2.7	2.4	2.6	2.9	2.7	2.8	2.7	2.6	2.8
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.5	2.6	2.7	2.5	2.7	2.5	2.6	2.6
Automatically route applications through a complex review process*	217	2.1	1.9	2.3	2.3	2.3	2.3	2.2	2.5	2.6
Create merged emails to applicants/grantees	269	3.0	3.0	3.0	3.0	2.9	3.2	2.9	3.0	2.7
Merge to word processing system to create letters or docket info	275	3.1	3.0	3.0	3.1	3.1	3.3	3.0	3.0	2.8
Manage the process of collecting grantee reports	273	2.8	2.6	2.8	2.9	2.8	2.8	2.8	2.6	2.6
Generate required reports about grants and applicants	287	3.1	3.0	3.1	3.2	3.1	3.2	3.1	3.4	3.0
Generate required financial reports	266	2.8	2.7	2.8	2.9	2.8	2.8	2.8	3.3	3.0
Generate aggregate statistical information on grants	278	2.8	2.8	2.8	2.8	2.7	2.7	2.7	3.0	2.8
View/report by budget category	231	2.8	2.7	2.8	2.8	2.7	2.8	2.7	3.3	2.9
Automatically enter or transfer data into accounting system	174	1.9	1.6	2.1	2.0	1.8	2.1	1.8	1.8	1.9
Easily write checks or transfer funds	161	1.9	1.8	2.0	1.9	1.9	2.1	1.8	1.8	2.1
Online submission of grant applications	223	2.2	2.1	2.4	2.3	2.2	2.3	1.9	1.9	2.4
Online submission of grantee reports or narratives	217	1.9	1.9	2.1	1.9	1.9	1.9	1.8	1.7	2.5
Allowing applicants/grantees to view their own status	206	1.4	1.4	1.6	1.5	1.7	1.7	1.4	1.4	1.8
Publishing grants awarded to your website	201	1.7	1.6	1.5	1.7	1.8	1.9	1.6	1.6	1.7
Automatic checks of tax status or OFAC lists*	229	2.1	1.7	2.3	2.3	2.0	2.3	1.9	2.3	1.8
Tracking of evaluation/outcomes data	221	1.8	1.8	2.0	1.9	2.0	1.9	1.8	2.1	2.2

## D5. Perception of Current Software Effectiveness by Respondent Role (cont'd)

GM Feature/Attribute	Total		Average "Effectiveness" Score by Respondent Role							
	Count	Avg Score	Senior Mgt	Program Staff	Grants Mgt	Financial Mgt	IT Specialist	Admin Staff	Consultant	Board Member
Tracking of grants to self, for internal projects	164	2.4	2.1	2.4	2.5	2.3	2.3	2.4	2.6	2.6
Program Related Investments	123	1.9	1.6	1.8	2.0	1.8	2.2	1.7	1.6	2.1
Scholarships/grants to individuals	134	2.5	2.3	2.5	2.5	2.6	2.6	2.3	1.8	2.1
Donor fund management	96	1.8	1.5	1.9	1.8	1.8	2.4	1.9	1.5	2.0
Employee matching gifts	102	2.1	1.8	2.0	2.2	2.3	2.4	1.9	1.8	1.7
Customize data fields to meet your specific custom needs	285	2.9	3.0	3.0	2.9	3.0	3.3	2.9	3.4	3.2
Customize reports to meet your specific custom needs	289	2.9	3.0	2.9	3.0	3.0	3.2	2.9	3.2	2.9
Provide remote access to staff members working outside the office*	229	2.5	2.4	2.6	2.7	2.7	2.6	2.3	2.0	2.8
Robustly interface with other software/systems	240	2.3	2.2	2.5	2.5	2.4	2.7	2.4	2.5	2.4
Easily get support or answers to questions about the software	279	3.0	2.9	3.0	3.0	3.0	3.1	2.9	2.8	3.1

**Table D6: Perception of Current Software Effectiveness by Respondent Frequency of Use** \*see key on p 18

GM Feature/Attribute	All Respondents		Average “Effectiveness” Score by Respondent Frequency of Software Use		
	Count	Avg Score	Weekly or More	Less than Weekly	Difference
Track the status of each grant letter of intent/proposal	275	3.3	3.4	2.9	0.5
Easily look up contact information for grant applicants	298	3.5	3.5	3.2	0.3
Understand historic relationship with a grant applicant	296	3.3	3.4	2.8	0.6
View pertinent application and grant documents electronically*	265	2.7	2.8	2.0	0.9
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.7	2.0	0.7
Automatically route applications through a complex review process*	217	2.1	2.2	1.8	0.4
Create merged emails to applicants/grantees	269	3.0	3.1	2.5	0.5
Merge to word processing system to create letters or docket info	275	3.1	3.2	2.7	0.6
Manage the process of collecting grantee reports	273	2.8	2.9	2.2	0.7
Generate required reports about grants and applicants	287	3.1	3.2	2.7	0.5
Generate required financial reports	266	2.8	2.9	2.4	0.5
Generate aggregate statistical information on grants	278	2.8	2.8	2.5	0.3
View/report by budget category	231	2.8	2.8	2.6	0.2
Automatically enter or transfer data into accounting system	174	1.9	1.9	1.6	0.3
Easily write checks or transfer funds	161	1.9	1.9	1.7	0.2
Online submission of grant applications	223	2.2	2.3	1.6	0.7
Online submission of grantee reports or narratives	217	1.9	1.9	1.7	0.3
Allowing applicants/grantees to view their own status	206	1.4	1.5	1.2	0.2
Publishing grants awarded to your website	201	1.7	1.8	1.3	0.5
Automatic checks of tax status or OFAC lists*	229	2.1	2.2	1.5	0.7
Tracking of evaluation/outcomes data	221	1.8	1.8	1.7	0.2
Tracking of grants to self, for internal projects	164	2.4	2.4	2.0	0.4
Program Related Investments	123	1.9	1.9	1.5	0.4
Scholarships/grants to individuals	134	2.5	2.5	2.0	0.5
Donor fund management	96	1.8	1.9	1.5	0.4
Employee matching gifts	102	2.1	2.2	1.8	0.5
Customize data fields to meet your specific custom needs	285	2.9	2.9	2.6	0.3
Customize reports to meet your specific custom needs	289	2.9	3.0	2.6	0.4
Provide remote access to staff members working outside the office*	229	2.5	2.6	2.1	0.5
Robustly interface with other software/systems	240	2.3	2.4	1.7	0.7
Easily get support or answers to questions about the software	279	3.0	3.0	2.7	0.3

**Table D7: Perception of Current Software Effectiveness – GIFTS vs. Other than GIFTS** \*see key on p 18

GM Feature/Attribute	Total		Average “Effectiveness” Score - GIFTS vs Non-GIFTS		
	Count	Avg Score	GIFTS	Not GIFTS	Difference
Track the status of each grant letter of intent/proposal	275	3.3	3.5	3.1	0.4
Easily look up contact information for grant applicants	298	3.5	3.6	3.3	0.3
Understand historic relationship with a grant applicant	296	3.3	3.5	3.0	0.4
View pertinent application and grant documents electronically*	265	2.7	2.8	2.5	0.3
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.9	2.3	0.7
Automatically route applications through a complex review process*	217	2.1	2.1	2.1	-0.1
Create merged emails to applicants/grantees	269	3.0	3.3	2.6	0.6
Merge to word processing system to create letters or docket info	275	3.1	3.4	2.7	0.7
Manage the process of collecting grantee reports	273	2.8	2.9	2.6	0.3
Generate required reports about grants and applicants	287	3.1	3.3	2.8	0.5
Generate required financial reports	266	2.8	2.9	2.7	0.2
Generate aggregate statistical information on grants	278	2.8	3.0	2.5	0.5
View/report by budget category	231	2.8	3.0	2.5	0.4
Automatically enter or transfer data into accounting system	174	1.9	2.0	1.8	0.2
Easily write checks or transfer funds	161	1.9	1.7	2.0	-0.3
Online submission of grant applications	223	2.2	2.1	2.3	-0.1
Online submission of grantee reports or narratives	217	1.9	1.7	2.0	-0.4
Allowing applicants/grantees to view their own status	206	1.4	1.2	1.6	-0.4
Publishing grants awarded to your website	201	1.7	1.6	1.7	-0.1
Automatic checks of tax status or OFAC lists*	229	2.1	2.4	1.7	0.7
Tracking of evaluation/outcomes data	221	1.8	2.0	1.7	0.3
Tracking of grants to self, for internal projects	164	2.4	2.6	2.1	0.5
Program Related Investments	123	1.9	1.8	1.9	-0.1
Scholarships/grants to individuals	134	2.5	2.6	2.4	0.2
Donor fund management	96	1.8	1.8	1.8	0.0
Employee matching gifts	102	2.1	2.5	1.7	0.8
Customize data fields to meet your specific custom needs	285	2.9	2.9	2.9	0.1
Customize reports to meet your specific custom needs	289	2.9	3.0	2.8	0.2
Provide remote access to staff members working outside the office*	229	2.5	2.5	2.6	-0.2
Robustly interface with other software/systems	240	2.3	2.4	2.2	0.2
Easily get support or answers to questions about the software	279	3.0	3.1	2.8	0.2

**Table D8: Perception of Current Software Effectiveness by IT Adoption** \*see key on p 18

GM Feature/Attribute	Total		Average “Effectiveness” Score by Reported IT Adoption				
	Count	Avg Score	Early Adopter	Fast Follower	Conservative	In Trouble	Difference
Track the status of each grant letter of intent/proposal	275	3.3	3.4	3.4	3.3	2.6	0.8
Easily look up contact information for grant applicants	298	3.5	3.6	3.6	3.4	3.3	0.4
Understand historic relationship with a grant applicant	296	3.3	3.3	3.3	3.3	2.9	0.5
View pertinent application and grant documents electronically*	265	2.7	3.3	2.8	2.4	1.7	1.7
Easily search for applications that meet specific criteria or keywords*	242	2.6	2.7	2.9	2.5	1.8	1.1
Automatically route applications through a complex review process*	217	2.1	2.4	2.2	1.9	1.4	1.0
Create merged emails to applicants/grantees	269	3.0	3.1	3.1	3.0	2.4	0.8
Merge to word processing system to create letters or docket info	275	3.1	3.1	3.3	3.1	2.3	0.9
Manage the process of collecting grantee reports	273	2.8	2.8	2.9	2.7	2.3	0.6
Generate required reports about grants and applicants	287	3.1	3.2	3.2	3.1	2.3	0.9
Generate required financial reports	266	2.8	3.2	2.8	2.8	1.9	1.3
Generate aggregate statistical information on grants	278	2.8	3.0	2.9	2.7	2.1	0.9
View/report by budget category	231	2.8	2.9	2.9	2.9	1.9	1.0
Automatically enter or transfer data into accounting system	174	1.9	2.5	1.8	1.7	1.3	1.1
Easily write checks or transfer funds	161	1.9	2.3	1.7	1.9	1.6	0.7
Online submission of grant applications	223	2.2	3.0	2.5	1.7	1.5	1.5
Online submission of grantee reports or narratives	217	1.9	2.5	2.0	1.5	1.4	1.1
Allowing applicants/grantees to view their own status	206	1.4	1.9	1.5	1.2	1.2	0.8
Publishing grants awarded to your website	201	1.7	2.3	1.5	1.6	1.2	1.1
Automatic checks of tax status or OFAC lists*	229	2.1	2.3	2.3	1.9	1.4	0.9
Tracking of evaluation/outcomes data	221	1.8	2.1	1.9	1.6	1.5	0.6
Tracking of grants to self, for internal projects	164	2.4	2.3	2.5	2.4	1.5	1.1
Program Related Investments	123	1.9	2.3	1.8	1.6	1.5	0.8
Scholarships/grants to individuals	134	2.5	2.7	2.4	2.4	2.3	0.4
Donor fund management	96	1.8	1.8	1.9	1.7	1.4	0.4
Employee matching gifts	102	2.1	2.3	2.3	1.9	2.0	0.4
Customize data fields to meet your specific custom needs	285	2.9	3.3	3.1	2.7	2.3	1.0
Customize reports to meet your specific custom needs	289	2.9	3.2	2.9	2.8	2.3	0.9
Provide remote access to staff members working outside the office*	229	2.5	3.0	2.6	2.4	1.6	1.4
Robustly interface with other software/systems	240	2.3	2.6	2.4	2.3	1.3	1.3
Easily get support or answers to questions about the software	279	3.0	3.2	3.1	2.9	2.3	0.9

# Appendix E: Gap Between Importance and Effectiveness

**Table E1: Ranking of Features by Gap between Importance and Effectiveness** \*see key on p 18

GM Feature/Attribute	"Effectiveness" Average Score	"Importance" Average Score	Differential
1 Tracking of evaluation/outcomes data	1.84	2.79	-0.95
2 Online submission of grantee reports or narratives	1.86	2.72	-0.86
3 Robustly interface with other software/systems	2.32	3.15	-0.83
4 Allowing applicants/grantees to view their own status	1.44	2.18	-0.74
5 Publishing grants awarded to your website	1.65	2.37	-0.71
6 Easily get support or answers to questions about the software	2.96	3.65	-0.69
7 Customize reports to meet your specific custom needs	2.91	3.57	-0.66
8 Automatic checks of tax status or OFAC lists	2.10	2.71	-0.61
9 Automatically enter or transfer data into your foundation's accounting system	1.89	2.45	-0.56
10 Generate required financial reports	2.79	3.35	-0.56
11 Generate required reports about grants and applicants	3.10	3.64	-0.54
12 Online submission of grant applications	2.20	2.74	-0.54
13 Customize data fields to meet your specific custom needs	2.92	3.45	-0.53
14 Manage the process of collecting grantee reports	2.78	3.30	-0.52
15 Generate aggregate statistical information on grants	2.80	3.30	-0.49
16 Automatically route letter of intents/proposals through a complex review process	2.10	2.54	-0.44
17 Provide remote access to staff members working outside the office	2.53	2.92	-0.40
18 View electronic versions of pertinent application and grant documents	2.70	3.09	-0.39
19 Merge to word processing system to create letters or board book/docket info	3.14	3.46	-0.32
20 Easily write checks or transfer funds	1.88	2.20	-0.32
21 Program Related Investments	1.86	2.17	-0.31
22 Create merged emails to applicants/grantees	3.00	3.30	-0.31
23 Easily search for letter of intents/proposals that meet specific criteria or keywords	2.64	2.88	-0.24
24 Understand the historic relationship between your foundation and a grant applicant	3.27	3.50	-0.23
25 Easily look up contact information for grant applicants	3.50	3.71	-0.21
26 View/report by budget category	2.78	2.96	-0.18
27 Donor fund management	1.79	1.83	-0.04
28 Track the status of each grant letter of intent/proposal	3.32	3.35	-0.04
29 Tracking of grants to self, for internal projects	2.37	2.28	0.09
30 Employee matching gifts	2.12	1.72	0.40
31 Scholarships/grants to individuals	2.47	2.06	0.41

# Appendix F: Survey Questionnaire

1. Are your operations primarily based in the US?
  - Yes
  - No
2. What is your geographic focus?
  - International, or within a country other than the U.S.
  - National, within the United States
  - Regional (i.e. several states)
  - State Based
  - County or community based
  - Other/Multiple of these
3. About how many grants did you disburse in FY 2006?
  - 500 or more
  - 250 to 499
  - 100 to 249
  - 50 to 99
  - 25 to 49
  - 10 to 24
  - 1 to 9
  - None
4. What was your organization's asset size as of your most recent fiscal year end?
  - \$10 billion or more
  - \$5 to \$10 billion
  - \$1 to \$5 billion
  - \$250 to \$999.9 million
  - \$100 to \$249.9 million
  - \$50 to \$99.9 million
  - \$25 to \$49.9 million
  - \$10 to \$24.9 million
  - \$5 to \$9.9 million
  - \$1 to \$4.9 million
  - Less than \$1 million
5. Which of the following best describes your foundation type?
  - **Family Foundation:** private foundation strongly influenced by a single family
  - **Corporate Foundation:** philanthropic arm within a corporate entity
  - **Independent Foundation:** private, self-governed, nonprofit foundation
  - **Other Private Foundation:** private foundation that doesn't fit into any of the categories above
  - **Community Foundation:** supported by pooled contributions of a number of donors
  - **Arts Regranting Organization:** regrants money to arts organizations or artists
  - **Other Public Foundation:** supported by the government or other public money
6. Which of the following phrases best describes your foundation's approach to information technology?
  - **Early adopter:** We often try out innovative new technologies
  - **Fast follower:** We quickly adopt the technologies that work for other foundations
  - **Conservative:** We may adopt a particular technology after many other foundations try it
  - **In trouble:** We have not adopted a number of commonly used technologies that would benefit us
7. About how many full time employees does your organization have?
  - 100 or more
  - 50 to 99
  - 25 to 39
  - 10 to 24
  - 5 to 9
  - 2 to 4
  - 1 or less
  - None

8. About how many full time people does your foundation employ or contract with to help with internal technology issues?

- 5 or more
- 3-4
- About 2
- About 1
- About one-half
- About one-quarter or less
- None

9. What role(s) do you hold within your organization? Check all that apply.

- Senior management - Vice President or above
- Program staff
- Grants management specialist
- Financial management
- IT specialist
- Administrative support
- Consultant
- Board member/Trustee

10. How often do you personally use any software to manage grants?

- Every day
- Several times a week
- Several times a month
- Infrequently
- Never

11. What software, if any, are you currently using to help with your grant making and management processes? Check all that your organization is using.

- **None**
- **Excel, or other spreadsheet**
- **Access/FileMaker Pro database**
- **Other custom designed/built system**

● **Don't know**

- Altum Easygrants
- Altum proposalCENTRAL
- Bamboo Solutions
- Bromelkamp Pearl (First Pearl, Corporate Pearl, Community Pearl)
- CAMT eGrant
- ChesterCAP Dotche
- Community TechKnowledge
- Core Projects eGrantsManager
- CyberGrants
- Dulles Technology Partners WebGrants
- Foundant Technologies
- Foundation Source
- FreeBalance
- Fusion Labs GRANTEDge
- JK Group Grants Management
- MicroEdge FIMS
- MicroEdge FoundationPower
- MicroEdge GIFTS
- MicroEdge Internet Grant Application (IGAM)
- NorthStar 500
- Peoplesoft Enterprise
- Philantech
- PowerOFFICE
- Sage Endowment Management
- WESTAF
- Other (if other, please describe)

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### How WELL does your current software support your needs?

#### Scale:

1. Can't do this at all
  2. Supports a bit, but not well
  3. Does most of what we need
  4. Works great for us
- (Don't Know/Not Applicable)

### How well does your current software allow staff to...

- Track the status of each grant application
- Easily look up contact information for grant applicants
- Understand the historic relationship between your foundation and a grant applicant
- View electronic versions of pertinent application and grant documents
- Easily search for applications that meet specific criteria or keywords
- Automatically route proposals through a review process involving multiple people and approvals
- Do automatic due diligence checks of prospective grantees, such as tax status/OFAC lists
- Create merged emails to applicants/grantees
- Merge to word processing system to create letters or board book/docket info
- Track grant applications in the same software system used to track grantee information
- Provide remote access to grant information for staff working outside the office
- Publish information to website about grants awarded
- Generate required reports
- Generate aggregate statistical information on grants
- View/report by budget category
- Automatically enter or transfer data into your foundation's accounting system
- Easily write checks or transfer funds

### How well does your current software support...

- Online submission of grant applications
- Online submission of grantee reports or narratives
- Tracking of evaluation/outcomes data
- Tracking of internally run operating projects
- Scholarships/grants to individuals
- Donor fund management

### How well does your current software allow you to...

- Customize data fields to meet your specific custom needs
  - Customize reports to meet your specific custom needs
  - Robustly interface with other software/systems
  - Easily get support or answers to questions about the software
- Would you like to elaborate on any of your answers above (for instance, if you found a question unclear)?
  - Have you found any other specific strengths or challenges with your current solution?

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**Imagine that your foundation wants to upgrade its current grants management software system(s). For planning your future software strategy, how IMPORTANT is it to your foundation to have SOFTWARE that supports the following needs?**

#### Scale:

1. No need
  2. Nice to have
  3. Important
  4. Essential
- (Don't Know/Not Applicable)

**How important is it for your foundation to have your software that allows your staff to...**

- Track the status of each grant application
- Easily look up contact information for grant applicants
- Understand the historic relationship between your foundation and a grant applicant
- View electronic versions of pertinent application and grant documents
- Easily search for applications that meet specific criteria or keywords
- Automatically route proposals through a review process involving multiple people and approvals
- Do automatic due diligence checks of prospective grantees, such as tax status/OFAC lists
- Create merged emails to applicants/grantees
- Merge to word processing system to create letters or board book/docket info
- Track grant applications in the same software system used to track grantee information
- Provide remote access to grant information for staff working outside the office
- Publish information to website about grants awarded
- Generate required reports
- Generate aggregate statistical information on grants
- View/report by budget category
- Automatically enter or transfer data to your foundation's accounting system
- Easily write checks or transfer funds

**How important is it for your foundation to have software that supports...**

- Online submission of grant applications
- Online submission of grantee reports or narratives
- Tracking of evaluation/outcomes data
- Tracking of internally run operating projects

- Scholarships/grants to individuals
- Donor fund management

**How important is it for your foundation to have software that allows you to ...**

- Customize data fields to meet your specific custom needs
- Customize reports to meet your specific custom needs
- Update or add to the source code to meet your specific custom needs
- Store data on your own internal servers
- Robustly interface with other software/systems
- Easily get support or answers to questions about the software
  
- Would you like to elaborate on any of your ratings above (for instance, if you found a question unclear)?
  
- What other things, if any, are important to you in software to help manage grants?

**Wrapping Up**

- What is the name of the organization you work for, if you're comfortable sharing it?
  
- As part of this research, we are conducting a series of interviews to understand key factors and considerations in more detail, about the ways in which foundations use software systems for grants management. Would you be willing to be interviewed about your experiences? If so, please enter your name and email address.

None of your answers will be connected back to you personally, and you won't be added to any mailing lists. This information will only be used if we'd like to contact you to set up an interview.

- Anything else you'd like to add?

## About Idealware

Idealware, a nonprofit organization, provides candid Consumer-Reports-style reviews and articles about software of interest to other nonprofits and the philanthropic sector.

Through product comparisons, articles and reports, online seminars, case studies, and software news, Idealware helps organizations choose the software that will allow them to be more effective.

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