**Grant Funding Solutions - Databases & Research 2021**

Rayna’s Proposal June 2021

Joellen Notes: Looked at Grant Advance - Huge Savings until June 30th

\*\*General Notes:

* Stay Local, aim for Ontario based
* Good to keep in mind: *Who controls your data? If you decide not to renew your contract, can you get your data back easily and will it be in a form that you can import into another vendor's software? (By the way, having heard many horror stories, we strongly recommend that, if you sign up with a web based system, that you download all of your data at least once a month.)*
* *What safeguards you from significant price increases? You can buy a perpetual license for CharityMaster and so there is no such thing as a price increase.*
* *If you are a Canadian charity, the Canada Revenue Agency requires that your accounting records be stored in Canada. Ask the big guys where your data will be stored?*
* *Will the vendors of the web based system make the customizations you require - at no charge?*

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| --- | --- | --- | --- | --- |
| Product | Cost | Description | Main Features: | Pros & Cons |
| Grant Advance | **20/20 VISION JULY PRICING**  Registration and Monthly - $595 + $79/month  ($1543/year ) SAVE $440  (regular price is $795 + $99/month)  1 extra user (total 2) | Our Campaign Manager allows you to create a project library of all of your specific funding objectives.  Finding the right foundations to apply to is the single most important factor in successfully applying for grants.  Our unique Document Generators assist you in the creation of your Letter of Inquiry, Grant Proposal, and Project Budget.  Grant Secretary makes the final stages of your application simple and seamless allowing you to preview, print, and track every funder in all of your campaigns.  Our Management Centre includes a Campaign Calendar, detailed reports, editing and tracking tools, as well as a Document Library.  Online tutorials, user guides, training videos, FAQs, and an Education section along with our Support Team ensure your fund development success.  Simple ProcessThe three essential elements to building partnerships with foundations: Research, Writing, Relationship. | Combined Services   * Campaign Manager / Managing Funders * Research Tools (DB size 70,000+) * Document Generators * Grant Secretary * Support & Training * Renewal Rate Guarantee * (in development) Management Centre | * Learn as you go approach * Caring/Down to Earth * Great savings opportunity on right now * Easy cancellation policy * Their personal experience and knowledge directly applies * We have had the opportunity to connect and understand the services already * Canadian (BC) but not Ontario based |
| Grant Connect, Imagine Canada | $1704/ 1 year subscription  From $142/month\*  Thousands of funders  Pipeline Management  Significant discount for 3 year plan  2 users  5 years of grant history  \*depending on length of commitment, charity size | Identify connections: See how your extended network is connected to each of your funding prospects.  Search and filter: Zero in on what you're looking for fast, targeting by gift size, deadline, type of support and more.  View detailed profiles: Insights on specific grant programs, application preferences, financial summaries and even key decision makers.  Analyze gift history: Search Billions of dollars in past donations, categorized by size, cause, population and region. | Combined Services   * Identify Connections * Search and Filter * View Detailed Profiles * Analyze Gift History * Integrated Training Tools | * Payment plan options: 3 year term, 1 year term or pay as you go * Reputable partners such as the United Way and YMCA * Canadian based * Users say it is reliable and easy to use * Cons: Reports of missing, out of date or incorrect source information |
| CharityMaster | We have several pricing options:  Perpetual (permanent) licenses allow you to pay for our software just once. You can buy the standard version or the LITE version. The ONLY difference between these versions is that the LITE version is limited to 500 names.  You can also SUBSCRIBE to CharityMaster by paying just a small fee annually. ($ | Plans on sale right now + 1 year support plan for $100   * *Who controls your data? If you decide not to renew your contract, can you get your data back easily and will it be in a form that you can import into another vendor's software? (By the way, having heard many horror stories, we strongly recommend that, if you sign up with a web based system, that you download all of your data at least once a month.)* * *What safeguards you from significant price increases? You can buy a perpetual license for CharityMaster and so there is no such thing as a price increase.* * *If you are a Canadian charity, the Canada Revenue Agency requires that your accounting records be stored in Canada. Ask the big guys where your data will be stored?* * *Will the vendors of the web based system make the customizations you require - at no charge?*   When you buy or subscribe to CharityMaster, you can install it on as many computers as you like. The only limitation is that you cannot have more than 5 concurrent users sharing your single database. | Highlights   * Donor Management for major gift prospects * Efficiently handle regular donations * Special Events * Membership Support * Direct mail & campaign management | * Canadian based! * 5 concurrent users included with license * Quickbooks & windows friendly * Overall good response from users * Some services do not have automatic crossover features meaning some data still needs to be entered manually * Some lags have been reported between Quickbooks integration and main system |
| CharityCan | Are you from a registered charity with revenues of less than $1M?  A single-user license is available for a special price of $999 (reg $2500) | Integrated Prospect Search: Quickly search all of our datasets for donation records, compensation records and biographical information  Prospect Profiles: Automatically generated prospect profiles that bring together data on an individual into one place  Relationship Mapping: Find out who your prospects know through boards they sit on and companies they work for, and create your own searchable maps  Relationship Path Search: Find relationships between people, charities and companies  Household Data: Current year estimates of real estate values and donation amounts for every postal code in Canada  Foundation Search: Detailed reports on Canada’s 85000 registered charities including all granting foundations | Combined Services   * Prospect Research Software * Donor Screening * Integrations * Avenue Donor Data | * Upto 5000 records - LOTS of room to grow * Reputable among some big names such as the Canadian Cancer Society * Costly - however offers special pricing for lower annual revenue agencies |

In Closing:

I am confident that any of these canadian systems would help us achieve our goals in terms of identifying and researching potential key donors and prospects. With this in mind, we have:

* Great savings opportunities and a good idea of what we are getting into through Grant Advance
* Alternative subscription options depending on our unique needs through Grant Connect
* Adequate overall functionality in terms of concurrent users and integrations through CharityMaster
* Ample room to grow and create relationships among larger organizations CharityCan

Rayna’s Recommendation:

Taking physical location and file storage location, overall tools needed as well as their ease of use, and cost into consideration, I would feel confident going with either Grant Advance or CharityMaster. I recommend going with either of these systems as they both currently have savings opportunities available (ChairtyMaster offers 5 concurrent users), they have similar services and integrations, and they both feel like trustworthy, canadian companies. I understand that Joellen & Christine had good feelings about Grant Advance. I did as well, and I think that their first hand experience will be an asset if we choose their system. I also found CharityMaster to be incredibly insightful and upfront which I admired greatly when comparing services and feel that they have a good understanding of our needs and obligations when using these services.

**Joellen’s Recommendations:**

I recommend the purchase of Grant Advance for $1,826 + HST for 1.5 years. It is a promotion until June 30th, we have a great promo available. It's our last one until winter (and it's better). The details are as follows as Christine and I really felt that this had strong Family/Corporate Foundations focus and it was an easy software to use. I have also found the customer service to be very responsive and helpful at answering all our questions. Charity Master seems to have less of a Family/Corporate Foundations focus and more of a donor management software.