

# GRANTBOOK

— INSIDE —

Certified



Corporation

**Managed services to meet the needs of  
grantmakers with few or no staff**

# About Us

We are **SECTOR SPECIFIC AND TOOL AGNOSTIC** — meaning we focus exclusively on the needs of grantmakers and specialize in matching them with vetted & right-sized technology solutions to run their organizations.



## GRANTBOOK



Founded: February 2012

Toronto, NYC, & Vancouver based team

Financing through:



# Case Studies & Testimonials Available



Our inspiration  
for developing  
GrantBook Inside



# Key Challenges

Increased  
funding  
requests

1

Require  
streamlined  
processes to  
manage  
requests

+

Shifts in  
investment  
strategy

2

Require  
systems that  
improve with  
time and are  
easy to learn

+

Legacy  
software and  
processes

3

Require  
opportunities for  
training and  
skills  
development

GRANTBOOK



# Our Solution

GRANTBOOK

Invite us to become **PART OF YOUR TEAM** and we'll:

- ✓ Set up systems that improve with time and are easy to learn
- ✓ Streamline your grants management processes
- ✓ Create new forms of fund tracking and impact reporting
- ✓ Eliminate the need for “shadow systems” & “stop-gap” procedures
- ✓ Guidance as your needs change



# Your Trusted Partner Because...

GRANTBOOK



A

+

B

+

C

We recommend  
**RIGHT-SIZED  
TOOLS**










We ensure  
**THESE TOOLS  
WORK TOGETHER**

We negotiate  
**DISCOUNTS ON  
SOFTWARE LICENCES**



# Tool Agnostic: Sample of Popular Tools We Test

Explosion of software and productivity tools for grantmakers and their networks

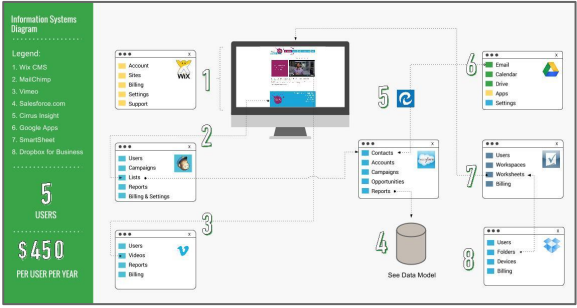
	Event Registration
	Application Intake & Review
	Collaboration
	Contact & Grants Management
	Donor Management
	Website Management
	Office Productivity
	E-newsletters
	Accounting & Reporting

# Assistance with Digital Documentation

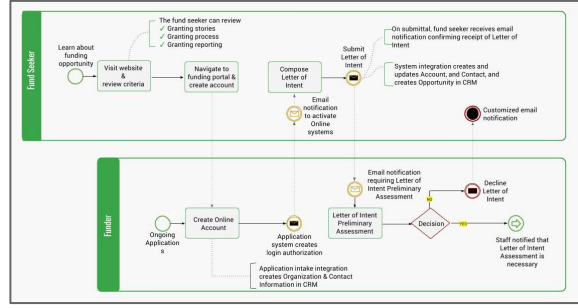
We excel at philanthropy-related Information Systems Diagrams, Process Maps, and Data Models Diagrams.

Not dissimilar to how a well-practiced graphic designer can take data and turn it into an infographic, GrantBook can assist in collecting, curating and presenting back stunning and interactive documentation. With sound documentation, GrantBook can further identify and recommend areas for streamlining and/or enhancements to your philanthropic work.

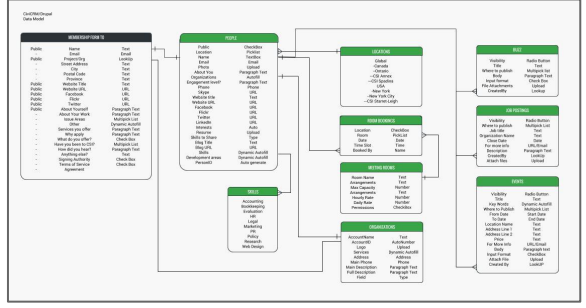
## 1 Information Systems Diagram



## 2 Process Maps



## 3 Data Models





# The GrantBook Advantage

GRANTBOOK



You & your grantees  
regain as much as:

850

hours per year

Reduce the administrative  
burden by up to:

50%

while improving the  
overall user experience



# Our Services Include

## CORE MONTHLY PACKAGE

- ✓ Application Intake & Review
- ✓ Board Package Preparation
- ✓ Contact and Grants Management
- ✓ Onboarding/Offboarding
- ✓ Productivity Systems

## COMMUNICATION & ACCOUNTING ADD-ONS

- ✓ Website Development & Maintenance
- ✓ E-newsletters & Impact Reporting
- ✓ Fundraising Campaigns
- ✓ Leveraged & Matching Grants
- ✓ Accounting & Bookkeeping



# GRANTBOOK

SERVICE AGREEMENT

GrantBook inside service engagement will reach into your organization to assist with core IT and communication services

<b>Organization Name</b>	XYZ Foundation	<b>Start Date</b>	
<b>Contact</b>	Lisa Buffet	<b>Renewal Date</b>	
<b>Position</b>	Board Chair	<b>Billing Cycle</b>	
<b>Phone</b>	(555) 415-5555	<b>Core Users</b>	
<b>Email</b>	lisa@xyzfoundation.ca	<b>Anticipated Annual Bill</b>	
<b>Client # (CRA)</b>	89843 1203 RR0001	<b>Subscription Type<sup>1</sup></b>	
<b>Contract #</b>	2014-0129	<b>SaaS Billing Preference<sup>2</sup></b>	

<sup>1</sup> Select the page to view your SaaS (SaaS) or Pay Per Month (Fixed) fee.  
<sup>2</sup> Please refer to Appendix B in a list of the key features for the IT Operations and Communication Add-ons you have selected.  
<sup>3</sup> Software As A Service Billing Preference (SaaS) - we can switch back and forth at any time.  
<sup>4</sup> On Our Card: All charges to this card will be applied to your card, and you are responsible for making payments.  
<sup>5</sup> On Our Card: We pay on our credit card; you get an itemized quarterly bill for all your Software as a Service charges.

**Our Understanding of Your Needs**

Based on the survey you filled out and the discovery conversation you had, the following table captures the key activities that defines the annual rhythm.

Annual Rhythm	Notes
# of Applications	150 applications reviewed annual → 25 Approval
# of Intake	One in Fall; One in Spring   Environment + Arts +
Reviewer Criteria	Two external review committees; 60% prefer paper
Applicant Benchmark	65% of respondents 'strongly agree' application &
Fundraising	<input type="checkbox"/> You are involved in annual fundraising campaign
Bookkeeping	<input checked="" type="checkbox"/> You have a third party Bookkeeper who maintains
Events	<input type="checkbox"/> You manage events and conference planning
Members	<input checked="" type="checkbox"/> Your organization has annual membership meetings

720 Bathurst St, Suite 301 | Toronto ON | M5S 2R4

GRANTBOOK  
INSIDE

MANAGED  
SERVICES

**PLANNED USAGE**

Our billing plan is right-sized to your operational and communication needs for the next 12 months as outlined on the previous page. You will receive a monthly report on how hours are used. There will be no under-utilized hours because our accounts team will be constantly fine-tuning your system. If you sign-off on major upgrades (e.g. new website halfway through the year, we scope the work and add the hours on top of your service package)

220 Hours  
\$33,500

Month	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
(A) Planned Hours	10	20	40	20	10	10	10	10	20	40	20	10
(B) Service Hour (\$)	1,500	3,000	6,000	3,000	1,500	1,500	1,500	1,500	3,000	6,000	3,000	1,500

**STEP 1: DISCOVERY**

Our billing plan is right-sized to your operational and communication needs for the next 12 months as outlined on the previous page. You will receive a monthly report on how hours are used. There will be no under-utilized hours because our accounts team will be constantly fine-tuning your system. If you sign-off on major upgrades (e.g. new website halfway through the year, we scope the work and add the hours on top of your service package)

Pricing Highlight	Link to Pricing Plans
\$5/user/month	<a href="http://www.google.com/enterprise/apps/business/pricing.html">www.google.com/enterprise/apps/business/pricing.html</a>
\$15/user/month	<a href="http://www.box.com/pricing/">www.box.com/pricing/</a>
Free 1st 10 Users	<a href="http://www.salesforce.com/power-of-us/">www.salesforce.com/power-of-us/</a>
\$10/month	<a href="http://mailchimp.com/pricing/">http://mailchimp.com/pricing/</a> → Pricing based on subscribers
\$50/month	<a href="http://www.submitable.com/submissions">http://www.submitable.com/submissions</a> → Pricing based on submissions
\$30/user/month	<a href="http://www.cimusight.com/pricing/">www.cimusight.com/pricing/</a>
\$100/year	<a href="http://www.wix.com/upgrade/website">www.wix.com/upgrade/website</a>

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MANAGED  
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# Example 1: Application Intake and Review

If you have four meetings a year where five volunteers assist with making decisions, we can help ensure 80% Strongly Agree the process was great while saving you 20 hours in administration

## You focus on...

- Getting the right Grant Review members
- Establishing clear criteria for scoring
- Getting the right proposals in front of your GRT

## We take care of...

- Provisioning accounts & contacts
- Providing training & support
- Technical assistance during meetings

Further examples available upon request



## Example 2: Website Development & Maintenance

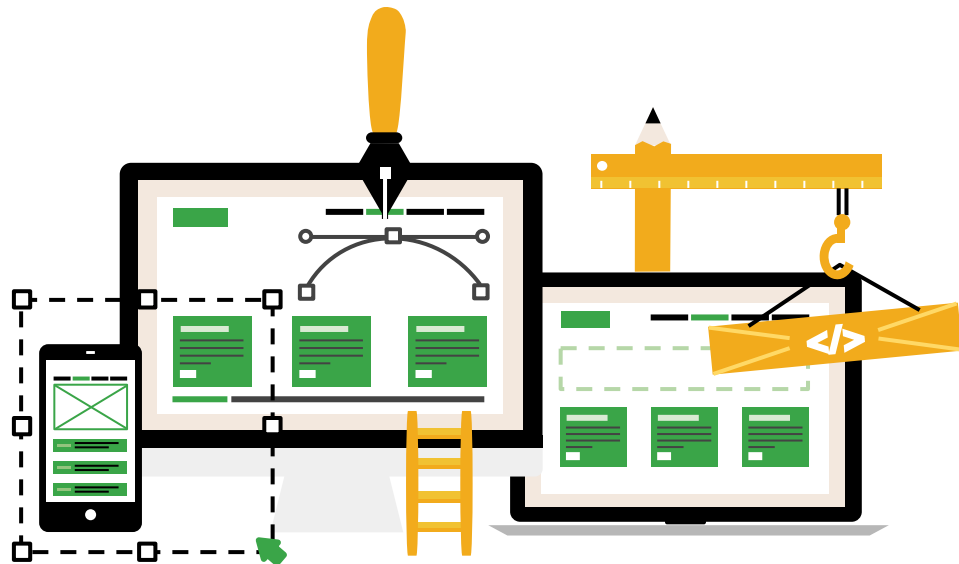
If you spent approximately 1 hour per week tweaking your website with updates and resources, you would save 48 hours for other tasks.

### YOU FOCUS ON...

- General content generation
- Overall look and feel
- Direction on FAQs

### WE TAKE CARE OF...

- Search engine optimization
- Site updates & future design ideas
- Benchmarking comparisons



Further examples available

# GrantBook Inside: Quick Start

IN **45** DAYS, WE WILL PROVIDE YOU WITH:

- ✓ Audit of current state and gap analysis
- ✓ Process maps and annual rhythm illustrations
- ✓ One or more quick wins won
- ✓ Recommendation of vetted and right-sized technology

GET STARTED IN **20** MINUTES OR LESS

1. Complete our simple intake forms
2. Confirm your availability and select preferred start date
3. Schedule initial kick-off meeting

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# Pricing

ITEM			UPFRONT
1	<b>QUICK START</b>	Audit, process maps, one or more quick wins, and initial recommendation of vetted & right-sized tools	\$7,800 USD
2	<b>SET-UP &amp; TRAINING</b>	Based on our analysis of your current systems and future requirements	Varies
3	<b>DATA MIGRATION</b>	One time fee dependent on quality and number of data sources / records	Varies
ITEM			ONGOING
4	<b>SOFTWARE LICENSES</b>	Monthly charge with no mark-up, based on our recommended suite of tools	\$0 to \$125 per user per month
5	<b>SUPPORT SERVICES</b>	Monthly service bundles reflecting with the needs of your organization at different times of the year	Varies

~ THANK YOU ~



**For more information**  
[hey@grantbook.org](mailto:hey@grantbook.org) or (647) 775-8150, Ext. 1