GRANTBOOK

INSIDE

Certified
B
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

49 PROJECTS

Founded: February 2012
Toronto, NYC, & Vancouver based team

Financing through:

Alterna Savings   CENTRE FOR SOCIAL INNOVATION   BDC

Case Studies & Testimonials Available

Grand Challenges Canada / Grands Défis Canada — BOLD IDEAS FOR HUMANITY.

FONDATION TRUDEAU FOUNDATION

TRICO

THE J.W. McCONNELL FAMILY FOUNDATION — LA FONDATION DE LA FAMILLE J.W. McCONNELL

EVERGREEN

THE ONTARIO TRILLIUM FOUNDATION

Innoweave

COMMUNITY FOUNDATIONS OF CANADA — all for community.

TIDES canada

ATKINSON

BILL & MELINDA GATES foundation

Everyday Democracy — Ideas & Tools for Community Change

CEGN — Canadian Environmental Grantmakers' Network / Réseau canadien des subventionneurs en environnement — RCSE

Our inspiration for developing GrantBook Inside

IVEY foundation

The Counselling Foundation of Canada

LAIDLAW FOUNDATION

Max Bell Foundation

METCALF FOUNDATION

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

Our Solution

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
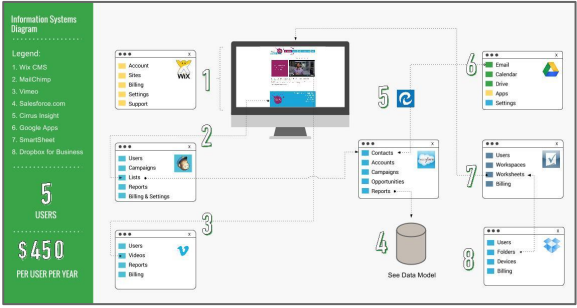
2 Process Maps
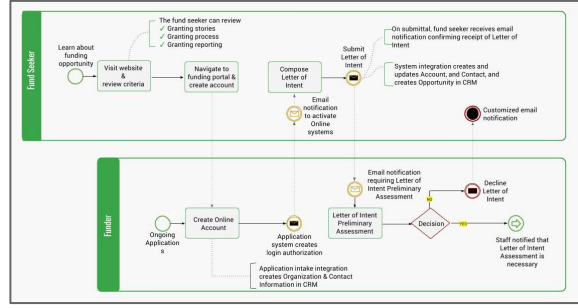
3 Data Models
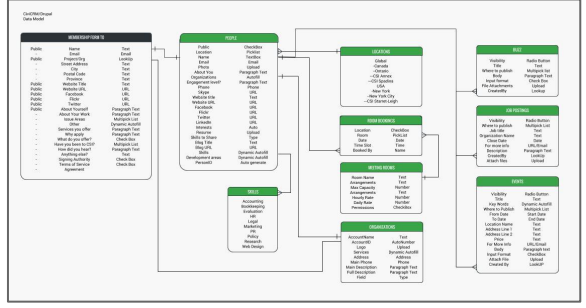
The GrantBook Advantage

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

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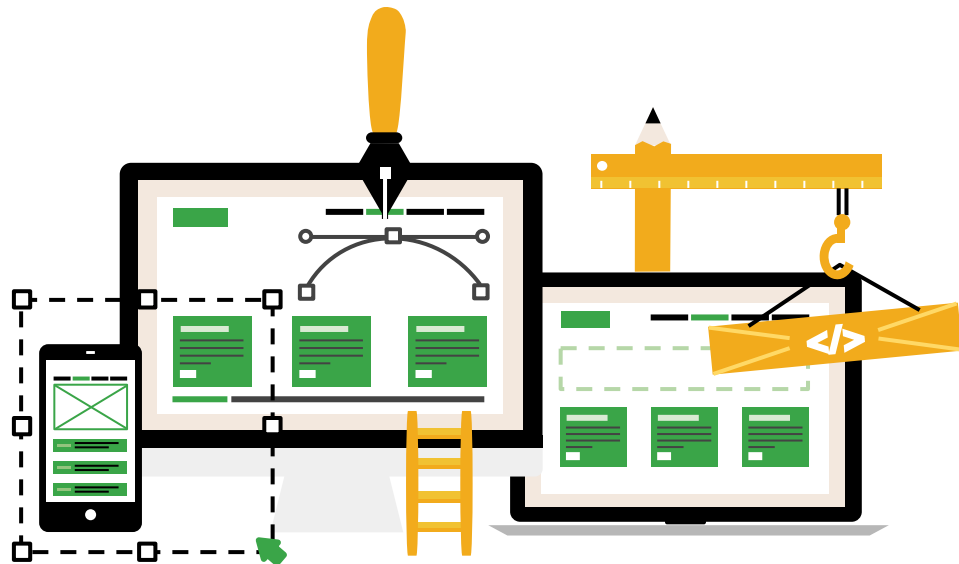
If you spent approximately 1 hour per week tweaking your website with updates and resources, you would save 48 hours for other tasks.

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

Pricing

	ITEM		UPFRONT
1	QUICK START	Audit, process maps, one or more quick wins, and initial recommendation of vetted & right-sized tools	$7,800 USD
2	SET-UP & TRAINING	Based on our analysis of your current systems and future requirements	Varies
3	DATA MIGRATION	One time fee dependent on quality and number of data sources / records	Varies

	ITEM		ONGOING
4	SOFTWARE LICENSES	Monthly charge with no mark-up, based on our recommended suite of tools	$0 to $125 per user per month
5	SUPPORT SERVICES	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 or (647) 775-8150, Ext. 1