



## Choosing a Grant Management Technology Provider

*Factors to consider when selecting a technology provider*

Factor	Considerations
Budget management:	Can the technology assist you in managing budgets? Are there additional costs for this feature? Can it easily be adapted to your budget codes, identifiers, etc? Can you use different currencies?
Community Investment (C.I.) expertise:	Does the provider possess both practical community investment experience as well as technology expertise?
Clients and references:	Who are the other client companies? Are they satisfied with their experience? Can you speak to other customers directly?
Compatibility / integration with corporate IT infrastructure and / or users' computers:	Is the software or system compatible with the company's current (and future) IT platforms? Will it be an exception to corporate technology standards? Will servers / computers need to be upgraded with additional memory or faster processor speeds?
Cost:	What is the total end-to-end cost? Does the quoted price include set-up, training, upgrades, tech support, budgeting, etc.?
Customer service:	How responsive is the supplier to your needs? Can they add value over and above typical service requests?
Data entry and other administrative tasks:	How are time-consuming admin tasks (such as data entry, applicant follow up and document preparation) handled? Will this approach reduce or eliminate these tasks and enhance productivity?
Flexibility / adaptability:	How flexible is the technology solution? Can it be adapted or customized to fit your needs?
Integration with other processes:	Can the system integrate with existing corporate processes and technologies?
Language capability:	Is the technology offered in both French and English? Can it be adapted to other languages if need be?

## Choosing a Corporate Community Investment Technology Provider

Nationality / location:	Is the company Canadian? Do they possess practical insights into the unique features of Canada's community investment landscape?
Need for in-house IT support:	What kind of demand will it place on your corporate IT resources for set-up / installation and ongoing usage? How will upgrades be managed? How much internal IT support will be required?
Productivity, efficiency and effectiveness:	Will the technology reduce administrative tasks and enhance productivity and efficiencies? Is the technology "friendly" enough to be used on a regular basis?
Range of services:	Does the technology provide budget-tracking solutions? Does it allow for collaboration? Can it handle gift-matching and volunteer grants? What are the cost implications?
Remote Access:	Can users access the system from remote locations? If so, does it require VPN access? Can they do so with reasonable download speeds?
Tech support:	What kind of support does the provider offer? What is the response time? Are there costs associated with tech support service?
Technology upgrades:	How will product upgrades be rolled out? Will it require IT staff intervention? What are the costs?
Training:	How long does it take to train a user? Is in-house training included in the acquisition cost? If not, how much will it cost?
Transitioning to the new technology:	Can you transfer historical data? Who will manage / support the transfer to the new technology? What is the cost?
User friendliness:	How complicated is the technology? Is it easy to learn and use for a person with average computer skills?

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