

GrantStream Quarterly

Sharing knowledge, insights and experience

From the editor

this issue

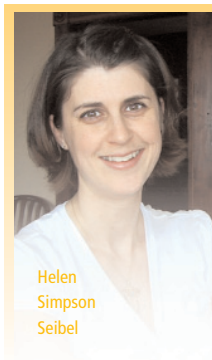
Recent upgrades
and new features
for GrantRight®



The Community Quiz
to see if your CI program
needs attention



The numbers
reveals the impact
of GrantStream
companies on Canadian
community investment



Helen
Simpson
Seibel

CORPORATE RESPONSIBILITY is in the news all the time, coloured by the opinions of a cynical media. It challenges us and our companies to think about the impact of our community actions.

As stewards of your company's community strategy, understanding the passion of today's empowered, community-active and technology-savvy public is important. This is the time of MySpace, YouTube, and Wikipedia. When "YOU" are Time's Person of the Year. In this

environment, there's tremendous opportunity to be rewarded for doing good and an equally tremendous possibility of being reprimanded.

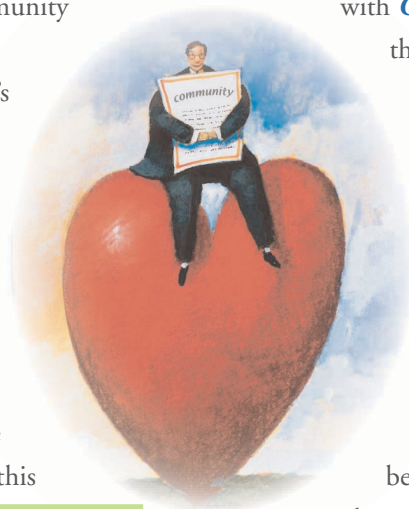
Finding the time to stay on top of the news and identify what's relevant to you is difficult. We are trying to make it a bit easier. In January, we became a syndication partner with **CSRwire**. Now, you can access

the latest **CSRwire news** listings on the GrantStream website.

We will also continue to send out **GrantStream Recommends** emails to profile valuable articles, as we did with Michael Porter's HBR article in December 2006.

Networking and sharing best practice information is also a key part of staying in the know.

GrantStream recently sponsored **Companies & Causes** a day-long workshop put on by **Imagine Canada**. With 45 people in the room, the discussion truly got animated when the panel of 4 Canadian companies shared their experiences and advice. The panelists exemplified Canadian leadership in this area and represented a good cross-section of programs ranging from smaller to larger, more commercial to more philanthropic. If you attended and have feedback or want to learn more about the day, please let us know. □



Green Tip

Hot hot hot!

Getting to know your water heater could save you some money. Many water heaters can be adjusted. So turn it down to 54°C — hot enough to kill bacteria and still save energy. If you leave the house for a few days, turn it down even more. Pad those pipes and if your tank is more than 7 years old, give it a nice wrap as well.*

*Taken from "Green Tips: How to save money and the planet" compiled by Gillian Deacon.

Helen

The Community Quiz

Fever hot or frozen? Take the temperature of your CI program

Answer these five questions to test the vibrancy and effectiveness of your community investment program. Fever hot is where you want to be...

☀️ Are you invited to speak about your CI programs at conferences and professional development events and/or do your peers call you for advice and information?

 Yes

 No/
Don't know

☀️ Do your colleagues stop you in the hall or send you emails praising your CI program and asking how they can get involved?

 Yes

 No/
Don't know

☀️ Does your program differentiate you from your competitors? Does it make your company stand out?

 Yes

 No/
Don't know

☀️ Are your CI programs mentioned in corporate speeches and media interviews conducted by your senior executive team? Do people "talk it up?"

 Yes

 No/
Don't know

☀️ Do you have at least two metrics that measure unequivocally, if your CI program is making a difference in the community and/or for your company?

 Yes

 No/
Don't know

ANSWER KEY

5 yes answers = ☀️ FEVER HOT

You are doing a **great job** at managing your CI program and maximizing its benefit to your company and your community. Your company is definitely a leader in this area.

2-3 yes answers = 🌬️ TEMPERATE

You should **take some time to look at your program**. How relevant is it for your community and your company? How does it compare to what your competitors are doing? Some realignment or perhaps some fresh communication will revive its effectiveness for your company.

1 yes answer = ❄️ FROZEN

You need to **seriously consider an audit or evaluation** of your program. It's not doing what it could for your company or your community. Talk to people in and outside your company, look at what your competitors are doing, and look at how you're engaging your employees or how you're applying your company's assets.

Check out *Lost that lovin' feeling: How to keep your CI program vibrant* in Fall 2006 issue of GrantStream Quarterly for advice and best practice examples. Or contact [Richard](#) or [Helen](#). ☐

Canadian News & Events

Great new Resources on Employee Volunteerism

A series of **new** fact sheets on employee volunteerism explore the benefits, the impact and the types of support companies provide. Available at [Knowledge Development Centre](#).

A new study on Business Contributions to Canadian Communities

The first stage in a multi-year project that will survey more than 2,500 companies across Canada about their corporate citizenship activities. Visit the [Imagine Canada](#) website for more information.

Looking for training & professional development opportunities?

The Center for Corporate Citizenship at Boston College will deliver two courses in Toronto this May. Visit [the Center's website](#) for more information or contact [Helen](#).

Kudos to GrantStream Client Manulife Financial

A winner in the 2007 Imagine Canada Business & Community Partnership Awards!

Technology Focus – Recent Upgrades & New Features

The upgrades and enhancements we develop are often in response to your comments or anticipated needs. Here are some of the most recent upgrades and new features available. Some you may have already noticed; others will be rolled out throughout the year. □

Recent Upgrades

UPGRADED SEARCH PAGE

Two new changes make the search page more user-friendly and effective

1. SAVING YOUR SEARCH CRITERIA

Making it even easier to produce regular, customized reports

The ad hoc reporting function in the GrantStream system allows you to create unique reports, on the fly. With this new upgrade, you can save your search criteria, give your search a title and run it again and again. Your saved searches can be visible to you alone or shared with all users. Saving your search criteria will save you time and ensure that your reports are consistent.

2. SINGLE PAGE SEARCH SCREEN

Input all request criteria on one page

Before this upgrade, inputting search criteria was a two-page process. Now, all the search criteria, including options for ordering and grouping your ad hoc reports, are on one page. Simplifying the process a little bit further.

AUTOMATIC VERIFICATION & LINKING OF ORGANIZATIONS

Smarter technology to improve the accuracy of your data

Linking organizations in the database has always been a challenge. Applicants may not provide a CRA number or may vary the spelling of their organization name slightly.

With this new upgrade, the system automatically does a “smart” comparison of the name and/or business number of each application against your database. If a definite match can be made, the system makes it automatically. If the system identifies a potential match, a MATCH icon appears next to the entry, giving you the opportunity to view and approve the link. The result: cleaner data and a more accurate picture of your historical giving.

Many of our technology clients are surprised to hear that GrantStream also provides consulting services. Thinking about developing a signature program or looking at your CI strategy? Call [Richard](#) or [Helen](#).

These upgrades will be rolled out to all clients at **no charge**. Please note: these are significant upgrades. We are scheduling them to be rolled out to all clients throughout 2007. If you have any questions, please contact [Monique](#).

New Features

Over the past few years, GrantStream systems have become more comprehensive, a direct result of the new ways they are being used by clients. Tracking sponsorships and table requests; introducing balanced scorecard evaluation features; incorporating United Way programs; managing different funds and projects; differentiating between donations and sponsorships. One size definitely doesn't fit all. And the flexibility and dynamic nature of our technology allows us to change and evolve our systems to suit our clients' needs.

DYNAMIC EMAIL CONTENT for GRANTRIGHT®

Personalize the content of your automated emails

More of our clients are starting to use GrantStream to manage different programs — like community-specific funds — or to manage both donation and sponsorship requests. This new feature allows you to change the content of automated email messages based on virtually any criteria. If an applicant identifies itself as a health organization, your email text can include health-related messaging. If an applicant submits a request for a sponsorship, the message could include specific sponsorship language. As your programs evolve to be more targeted and strategic, your communication can also be targeted.

If you need to enhance the customization of your automated emails, please contact [Matthew](#) to learn more and get an estimate for development.

For the number lovers...

So what was the total value of grants and sponsorships processed through GrantStream management systems in 2006? And who received it? We've run the numbers.

- **27,000** The total number of applications entered into the system
- **13,000** The total number of applications APPROVED
- **\$143,000,000** The total amount of funding committed
- **\$1,900,000** The total amount of employee-match grants committed
- Health & Education organizations are the most common recipients

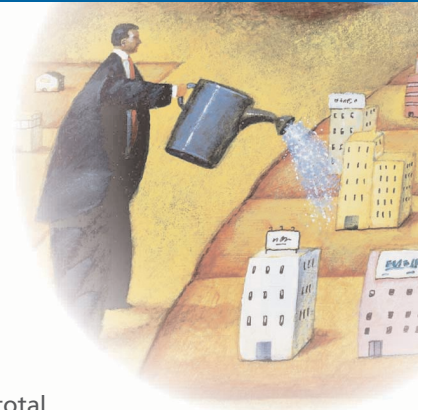
What does this all mean?

Donations and sponsorships from GrantStream clients represent **5%** of total revenue received by Canadian charities & nonprofits.* This is serious commitment.

We're proud to be able to support the work you do build stronger communities across Canada and around the world.

Please note: this is aggregate data. GrantStream does not disclose individual company figures.

*Rough estimate based on total GrantStream 2006 client contributions of \$145 million against 2003 estimate of total business contributions of \$2.8 billion from 2003 NSNVO survey. Please call [Helen](#) if you have any questions.



The Inside Scoop

Josh Davis is a Senior Software Developer at GrantStream. He received his BSc in Computing from

the University of Western Sydney in Australia where he was team lead in developing a wireless application for parking meter attendants. Parking tickets in Penrith City Council are now issued through a PDA — a handheld computer like a Palm Pilot or Blackberry. Because PDA's have limited memory, the code had to be written extremely efficiently.

But Josh is a lot more than just a skilled programmer. He is extremely organized, tracking his projects by writing

everything down (where's your PDA, Josh?); but laid back and unbelievably cool under pressure. (Yes, there is sometimes pressure in the GrantStream office.) He is also a keen fisherman, a rock climber and captain of his local Ultimate Frisbee team. A jack-of-all-trades, you're as likely to find Josh taking apart a computer circuit board as laying a wood floor at home.

One of the first to arrive and often the last to leave, Josh always has a smile and a "hey, how are ya?" when you walk in the office. And if you've recently received a parking ticket while visiting Penrith, there may be something we can do... ☐



Want to get in touch? Here's who & how:

GrantStream Quarterly Editor: Helen Simpson Seibel
(905) 339-3852 ext. 34 hseibel@grantstream.com

Technology Services: Matthew Fawcett
(514) 481-5700 mfawcett@grantstream.com

Consulting Services: Richard Pringle
(905) 339-3852 ext. 24 rpringle@grantstream.com