

Allies in Your Digital Transformation

Service Subscription

Ongoing Access to Strategic Tech Advisory & Implementation

grantbook°



PHILANTHROPY-TECH ALLIES IN YOUR CORNER

When Your Grantees Need You Most

From GMSs to office productivity, CRMs, donor portals and beyond, let Grantbook tackle your most urgent technology issues as well as help you develop a strategic tech roadmap so you can serve your grantees through the most challenging of times.



STAY AGILE. When the World Changes Your Tech Can Too

We'll get to know your tech ecosystem so you can pivot quickly when you need to.

STAY RESPONSIVE. Calm and Continuity for Your Grantees

We'll augment your team with ideas and expert action so you can provide stable, consistent support to your grantees..

STAY RESILIENT. Progress on Tech Goals Even Amidst Chaos

We'll help you make gains in your tech goals, nudging you forward to a flexible digital infrastructure that allows you to thrive when change is the only constant.

Subscribe!

Ongoing strategic tech advisory & implementation to guide you through your digital transformation.

Looking for a holistic approach to your “giving stack” so your team can devote more time to world-changing? Our service subscription—specifically designed for grantmakers, DAF-based organizations, and foundations—will help you manage the constellation of software systems and applications that enable you to make the most impact in the world. Partnering with Grantbook ensures that you’re keeping pace with the best practices in people, technology, and processes transforming grantmaking.

If you are looking...

- For a long-term tech partner with philanthropy-tech expertise and deep knowledge in grantmaking best practices
- To build resilience and redundancy into your IT or grants management team
- To set your digital priorities and make headway along your tech roadmap

Sign up for...

Grantbook’s service subscription: philanthropy-tech strategy, support, implementation, and training on an ongoing basis.



“The COVID-19 crisis has been a wake-up call to people and organizations across the globe, no more so than the vulnerable populations the philanthropic sector serves. The needs are acute and immediate. It has caused our foundation to rethink our systems to provide support that is as quick and efficient as possible while still being able to practice good stewardship of our resources.

We worked with Grantbook to redesign our systems to provide rapid response grants, convert project support grants to general operating support, renew previous grants without new proposals, streamline the grant approval process, and move future payments forward, with minimal effort for our staff and practically no effort from our grantees. It allowed us to free up time and get resources to our grantee partners in days, and sometimes hours. The project was lightening fast, taking just a few days to complete the redesign. We could not have done this without the help of Grantbook, and our grantees and those they serve are the ultimate beneficiaries of their hard work.”

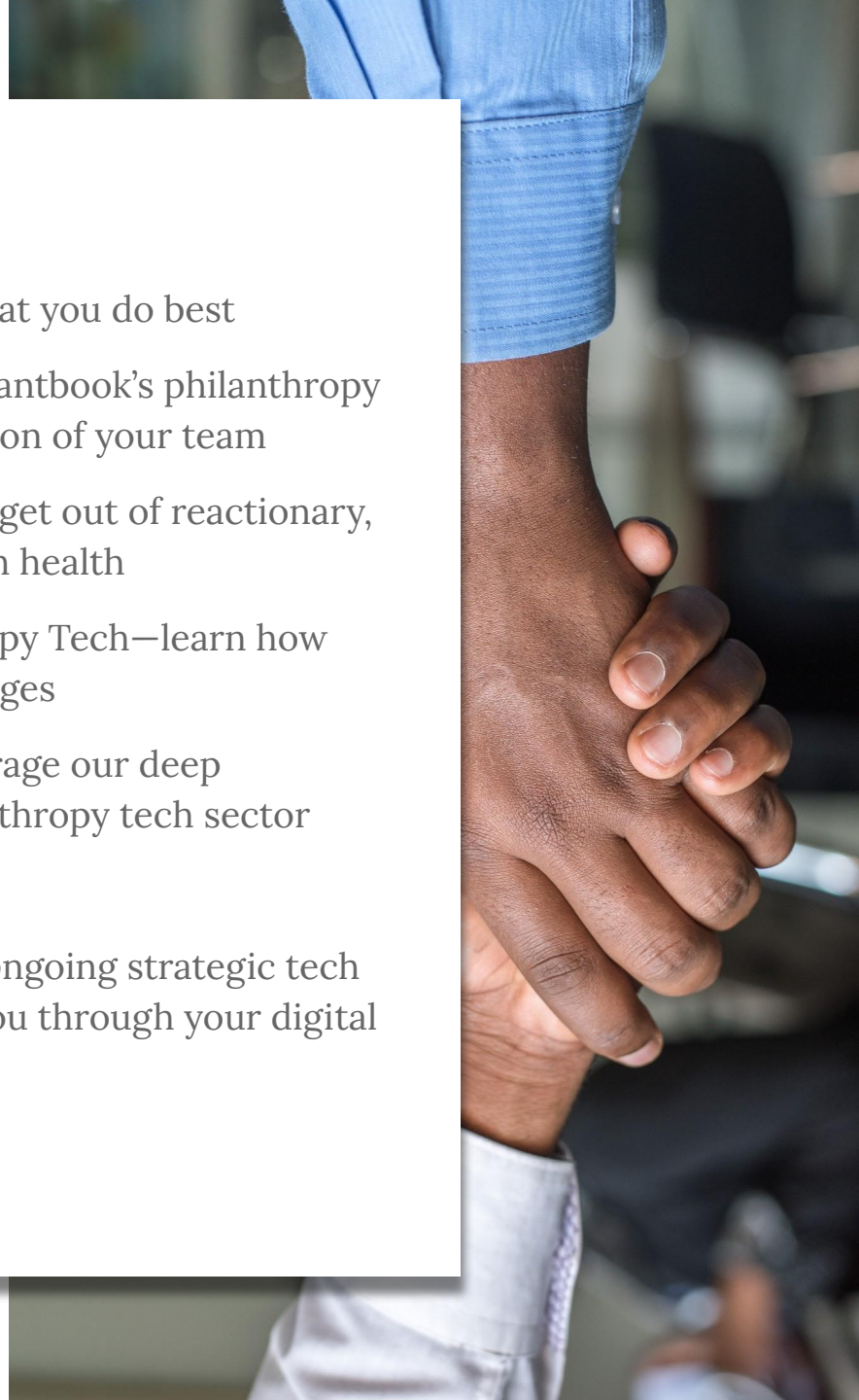
—Jonathan Goldberg,
Director of Learning and Grant Operations
Surdna Foundation



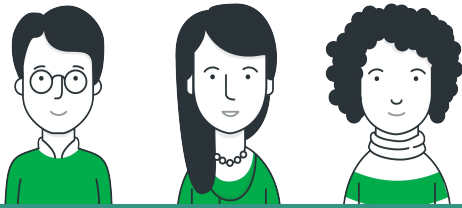
Why Subscribe?

- ✓ More time for your why: focus on what you do best
- ✓ Peace of mind and resiliency with Grantbook's philanthropy tech experts onside as a reliable extension of your team
- ✓ Proactive and preventative solutions: get out of reactionary, repair mode, and into building your tech health
- ✓ Access to best practices in Philanthropy Tech—learn how leading peers are solving similar challenges
- ✓ Improved Vendor Management—leverage our deep relationships with vendors in the philanthropy tech sector

Grantbook's Service Subscription offers you ongoing strategic tech advisory and implementation help to guide you through your digital transformation.



What You Get When You Subscribe...



Dedicated Grantbook Team

A dedicated team of 2-3 Grantbookers to help shape your digital strategy and prioritize your annual tech goals. You also have access to our broad bench of experts on specific systems, tools and tactics as needed.

Grantbook Service Subscription

Address your **tactical needs and strategic activities** all in one service

- Responsive & Tactical Improvements
- Proactive and Strategic Improvements
- Digital Strategy planning and execution
 - Build, Configure, Maintain
 - Training & Adoption
 - Testing
 - Best Practices
- A Team of Tool and Integration Experts

Traditional Support Model

For responsive, tactical improvements

(e.g. form building, password, small workflow changes)

What You Get When You Subscribe...

A dedicated team of Grantbookers to help shape your digital strategy and prioritize your annual tech goals. You also have access to our broad bench of experts on specific systems, tools and tactics as needed.

Strategic Planning

- Annual **Philanthropy Technology** strategic planning and roadmap
- Quarterly reviews to track progress towards technology goals
- Weekly, Bi-weekly, or Monthly check-ins as appropriate to monitor progress and support tickets, and to plan sprints

Services Overview

- Systems Analysis and Advice: Review of Philanthropy Technology Toolkit (includes GMS, CRM and adjacent tools integral to grantmaking)
- Tech Roadmap (identify, sequence, and plan your larger technology projects)
- Annual Workshop(s): (eg Digital Values, Strategic Project Prioritization, Grantmaking Blueprint, Digital Maturity assessment)
- Integration(s): analysis, advice and roadmap
- Data Maintenance (advisory on data best practices)
- User Reports
- Documentation
- Vendor Management (Working with the vendor(s) to describe and escalate issues if solution demands vendor/developer attention)
- Business Analysis, Project and Change Management

Configure, Build, Maintain

- System(s) Maintenance (includes GMS, CRM and adjacent tools integral to impact strategy)
- Configuration: designing, building, and testing of new features and solutions
- Troubleshooting: tackling issues and answering questions as needed

Training & Adoption

- Admin and End-User Training: orienting new staff to the platform, providing ongoing and advanced training for staff to ensure high and continued adoption

Testing

- Pre-release review of new system features (demos and end-to-end testing)

Best Practices

- Advisory: sharing of best practices in philanthropy tech (includes best practices in people, processes and technology)
- Access to Grantbook content (tips and tactics, models and strategies for ongoing optimization)

Hi Grantbook Team,

We've been just blown away by how amazing your team has been in general, but in particular over the past few weeks as we stood up our rapid response form and the new amendments process.

I know we still have work to do together on these projects, but I wanted to share and celebrate a important win with you: Over the past 24 hours, **we've used the new rapid response form to facilitate more than half a million dollars to 53 of our smallest grantees** who have the least flexibility in their budgets to deal with unexpected events. We've already received amazing feedback from our grantees who are so appreciative of the additional resources at this time.

Thank you so much for your continued support in getting us to this point—we couldn't have done any of this without you as a partner!

—KELLY REED

Deputy Chief Operating Officer, Grants & Finance
Democracy Fund



Pricing

Subscribe!

	Average Monthly Hours	Monthly Subscription Costs	Annual Subscription Costs
XS	~10	\$2,250	\$27,000
S	~15	\$3,375	\$40,500
M	~20	\$4,500	\$54,000
L	~25	\$5,625	\$67,500
XL	~30	\$6,750	\$81,000

Based on your organization and team's size, the complexity of your technology needs and where you are at in your digital evolution, we can suggest which tier makes the most sense.

Thank You!

CONTACT US WITH QUESTIONS

Nikki Barrett

MANAGING DIRECTOR

nikki@grantbook.org

[Book a call](#)

Certified



Corporation