



Request for Proposal

Grant Management CRM Solution

August 13, 2009

The information contained within this document is proprietary and confidential. The purpose is to request a product and solution proposal. It will not be used as a commitment to procure such software or services, and release of this RFP should not be construed as such a commitment or as authorization to incur cost for which reimbursement would be required or sought. Submissions to the Cal Ripken, Sr. Foundation (CRSF) become CRSF property and will not be returned.

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1. SUMMARY

The Cal Ripken, Sr. Foundation (CRSF), Programming and Grant Management department is accepting proposals to design, develop, integrate and host CRSF's grant and fund management CRM. This will be a concept to completion production. The purpose of this RFP is to provide a fair evaluation for all candidates and to provide the candidates with the evaluation criteria against which they will be judged.

The existing grant management CRM solution, PORTICO GRM, was originally developed and hosted by MicroEdge, Inc (www.microedge.com). As of June, 2009, the sync application between the CRM application and the backend MicroEdge Access database ceased functionality and CRSF was forced to discontinue use of the product and find a new solution to meet our needs and the needs of our grant and program recipient organizations.

2. PROPOSAL GUIDELINES & REQUIREMENTS

This is an open and competitive process.

Proposals received after 12:00pm/noon EST, Wednesday, September 9, 2009, will not be considered and will be returned unopened.

The proposal must contain the signature of a duly authorized officer or agent of the company submitting the proposal. If you wish to submit alternate solutions, please do so. For instance: it is ok to submit good, better, best solutions for price scope and review.

The price you quote should be inclusive. If your price excludes certain fees or charges, you must provide a detailed list of excluded fees with a complete explanation of the nature of those fees.

Provisions of this RFP and the contents of the successful responses are considered available for inclusion in final contractual obligations.

If you have any questions regarding this RFP, please contact:
Leslie Dubuc- phone: 410-823-0808 x154 or email: leslie@ripkenfoundation.org

3. CONTRACT TERMS

CRSF will negotiate contract terms upon selection. All contracts are subject to review by CRSF legal consultants, and a project will be awarded upon signing of an agreement or contract, which outlines terms, scope, budget and other necessary items.

4. PURPOSE, DESCRIPTION AND OBJECTIVES

Purpose

CRSF went through the product procurement, implementation, deployment and integration of a CRM solution one year ago and was moderately satisfied with the results of the product until the relationship between the host corporation and the application engineers dissolved. We are currently seeking a replacement CRM application that encompasses all of the features and functionality critical to our grant management processes as well as some added features that,

while not mission critical, would enable the application to grow with CRSF as a long-term solution. An opportunity thus exists to re-engineer the previously developed application concept to better reflect our objectives and vision, keeping in mind that product simplicity and usability are of great importance.

Upon completion of the development of the site, CRSF requests full rights to the application, its data and information stored therein. After implementation, integration and training has been completed, CRSF would like full responsibility for the applications content management and full administrative capabilities.

Description

Create a flexible, informative CRM application that is easy to maintain by non-technical users and mid-level application and database administrators. We must develop a user-friendly application that can display constantly changing grant information, and collect information from our clients, or in our terms, or grantees. In addition to designing a user-friendly application with an intuitive interface, we must also develop a web-based, database-driven administration tool that allows multiple user groups and key management personnel to easily update content, create web forms, change data collection fields and page parts without directly accessing source code. The administrative tool must also be intuitive and user-friendly.

CRSF plans to maintain our current MicroEdge Gifts- Microsoft Access database as our backend data storage system. Thus, the CRM solution must be able to integrate seamlessly with the data structure contained within. This sync application can either be automated or manually controlled by CRSF. (For more information on the current technical environment and specifications, please see Section 9: Current Environment.)

To be effective, our CRM application must be:

- Easy and intuitive
- Visually pleasing
- Safe and secure
- Flexible
- Integration compatible with Microsoft Access
- Quick to load and operate

Objective

Streamline grant and program management process from application phase to financial reimbursement to grant close-out, while strengthening relationships with community partners, donors, program participants and internal staff.

Our Vision

- Maximize web-based technologies
- Provide one central point of contact & focused web-based solution
- Enhance partner relationships
- Improve program delivery and service
- Increase staff efficiency & leverage human capital

- Improve accuracy in reporting

Specific Strategies

- Increase awareness of CRSF's program objectives and promote enhanced involvement at all levels of our partner organizations.
- Present comprehensive information and resources in a user-friendly portal interface
- Collect only necessary data on applications and forms
- Creation of user-friendly administrative interface
- Easy to use report functions for administrators
- Integration with current grant management workflow
- Optimization of user-specific views and permissions
- Integration with current grant management database solution and subsequently integrating with the financial accounting system
- Integrate CRSF brand imaging and messaging

Make it Easy

Design the application to deliver intuitive navigation, a user-friendly graphical user interface, and easy-to-find content organizer.

Make it Effective & Efficient

CRSF will not benefit from extra features that do not align with our objective or vision. We are trying to improve the grantee experience, and streamline processes and internal data management.

5. TIMELINE

- This RFP is dated August 13, 2009.
- **Proposals are due no later than 12:00pm/noon EST, Wednesday, September 8, 2009**
- Proposals will be evaluated immediately thereafter. During this time we may require interviews, product demos, and additional product information before September 25, 2009. You will be notified if this is requested.
- The company who has been selected will be decided on or about October 1, 2009.
- Negotiations will begin immediately with the successful candidate and should conclude no later than Oct. 16, 2009.
- All other candidates will be notified no later than Oct. 19, 2009.
- Product implementation and testing to be completed no later than December 11, 2009.
- CRM live date no later than December 18, 2009.

6. BUDGET

Please provide more than one cost proposal to accomplish the scope outlined below. The budget must encompass all design, production, customization, software acquisitions, and training costs

necessary for development, integration, and service and maintenance of the CRM site.

Hosting will be addressed separately and costs for hosting are not included in the budget for this project.

List pricing for:

- Phase I: Discovery, Requirements Planning & Application Definition
- Phase II: Application Development
- Phase III: Integration, Testing and Deployment
- Hosting: We have not yet made a decision to host on or off-site. Discussions during the discovery phase and your input and advice will help us make a decision in this regard. If you offer a hosted solution, we would like this cost listed as well.

The Cal Ripken, Sr. Foundation has not yet allocated a set price for this project. The project budget, number of internal CRSF users and the number of client (grantee) users is contingent upon 2010 funding. If your pricing is based on a per user cost, please use the following as a starting price point:

- 1 Administrator
- 5 Concurrent CRSF Users
- 100 Client/ Grantee Users

CRSF is a 501 (c) 3, non-profit, organization. If discounts apply for non-profit clients, please include these discounts in your proposal.

7. BACKGROUND OF ORGANIZATION

Our Mission

The Cal Ripken, Sr. Foundation helps to build character and teach critical life lessons to disadvantaged young people residing in America's most distressed communities through baseball and softball themed programs.

Programming Operations

CRSF is working throughout the country with Boys & Girls Clubs, P.A.L. centers, inner-city schools, and other organizations serving America's most distressed communities. We are a supporting partner to those organizations who, on a daily basis, play such a critical role in developing, inspiring, and saving young lives.

CRSF provides funding, equipment and character education curriculum grants, as well as training, technical assistance and support to hundreds of deserving after-school organizations to run a year-round baseball or softball and character development programs. These programmatic partners are referred to as 'Grantees' throughout this RFP.

Grant Management Workflow

This grant management CRM would be used to communicate important grant and program-related information between our program managers and grantee staff, at all stages- from their

application submission through to their grant close-out. Please contact CRSF directly to discuss their grant management workflow process if desired.

8. AUDIENCE

CRSF is focused on developing a relationship management CRM. The primary audience group is our grant recipient partner organizations, with our secondary audience group being our CRSF program managers and staff.

Primary- User Interface:

Grant recipient partner organization- Boys & Girls Clubs, Police Athletic Leagues, law enforcement agencies, city parks and recreation departments, other after-school non-profit organizations.

Secondary-Administrative Interface:

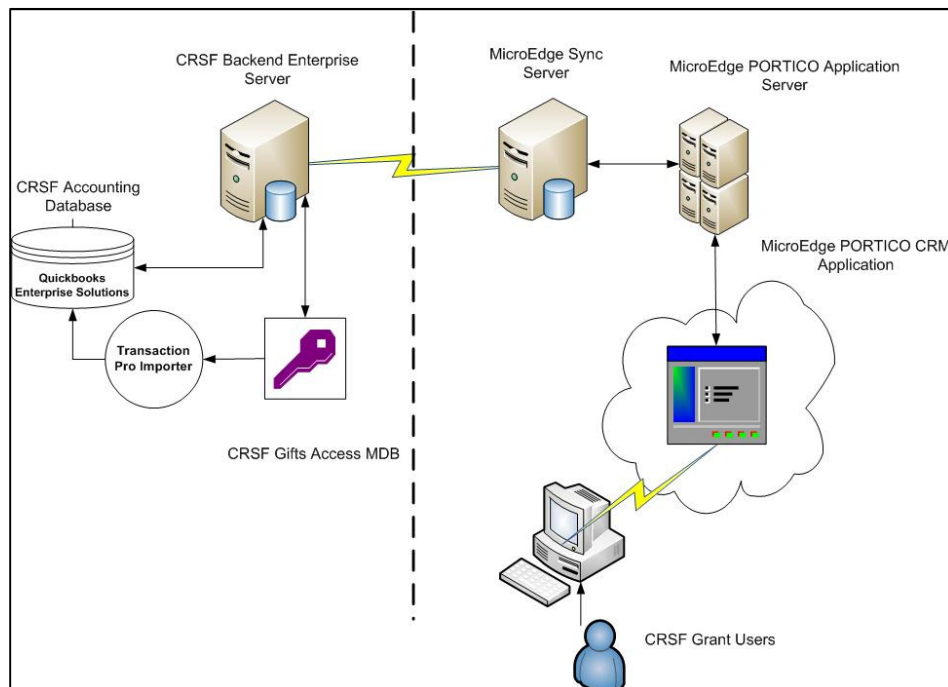
CRSF program managers, directors, accounting staff and site administrators

9. CURRENT ENVIRONMENT

Current Product Environment

The previously used CRSF CRM, PORITCO, was hosted by MicroEdge, Inc., the same software company that developed and maintains a service and maintenance agreement with CRSF's database, MicroEdge Gifts. The following section details the data storage, application and software integration of the current environment.

Relational Model:



Data Storage- Gifts Database:

The CRSF grant management & programming database- MicroEdge Gifts – is an Access database (32 MB mdb file). It resides on the CRSF's Microsoft server in the Baltimore, MD office. Back-up servers are located at the Aberdeen, MD office, data storage room. MNS Group, Inc., an outsourced IT firm, provides networking, software and CIO solutions for CRSF and maintains data security plans, service and support, recovery planning and related services to ensure the Gifts files are maintained.

The Gifts SDK data structure will become available to the CRM vendor of our choice and will contain the MicroEdge Gifts software in object code form, including the application program interface ("API") and also including any updates provided to CRSF by MicroEdge. This information will be used for the sole purpose of the CRM application to Gifts database integration.

Gifts Technical System Info:

Product Version- 6.2

Back End- Access 2002

MDB File Size- 31.7MB

Database Location- F:\Gifts\gifts.mdb

Operating System- Microsoft Windows XP

No. Processors- 2

Memory Available- 1,904,880 KB FREE

User Licenses- 5 concurrent

Modules- Document Manager, Customizer, AP Import/Export

Former CRM Application- PORTICO GRM Application:

The PORTICO GRM, CRM, is hosted and supported by MicroEdge. The product was developed by a third-party software vendor, on top of their platform, VE, that is advertised as an end-to-end application development using only visual models -- not a single line of Java™, C++, C#, or JavaScript code required to produce highly scalable n-tier applications. However, the product is a java script application. Built on top of Java 2 Enterprise Edition (J2EE), VE-based applications can be deployed on a wide variety of operating systems and hardware platforms. MicroEdge or their developers would need to be contacted for technical specification and system information.

CRSF serves as the CRM administrator, by creating our own forms, page layout, content and managing our own syncs.

Integration- PORTICO GRM Syncer:

The sync application between PORTICO and Gifts was a MicroEdge product, designed and supported in-house. The sync Server was hosted by MicroEdge and the sync file still resides on the CRSF Microsoft server. This is the portion of the MicroEdge CRM Application that stopped functioning by MicroEdge's undisclosed or undiscovered technical issues.

Integration- Gifts to Intuit Quickbooks:

CRSF has created a link between the grant management database, Gifts, and the financial accounting database, Intuit's Quickbooks Enterprise Solutions. This link enables grant payment

information to be transferred between the two departments, to reduce data entry, errors in payment and to notify program managers when payments are received from grantees and checks are sent. In maintaining the Gifts database, CRSF plans to maintain this link and workflow.

10. AVAILABLE TECHNOLOGY RESOURCES/INTEGRATION ISSUES

Available Technology Resources/Integration Issues

- We will use our MicroEdge Gifts- Microsoft Access Database so the CRM application will have to be integrated.
- Gifts database currently resides on a Microsoft Server with 1.35 TB available space.
- A testing environment and technical assistance with testing, along with system administration availability is available for project deployment.
- The site will link to our organization's website: www.ripkenfoundation.org

11. REQUIREMENTS BY FUNCTIONALITY

The Foundation uses the following grading scale to prioritize the current CRM requirements:

- **High:** We must have this and absolutely cannot live without it.
- **Medium:** Effectiveness of the application would be limited without it.
- **Low:** Nice to have functionality.

The following requirements are all client/grantee portal functionality requirements.

Account Management

- Individual user accounts for each grantee and/or program partner – High
- Self-creation of user name and password by user - Medium
- New users can activate and create their own accounts – Medium
- Check for duplicate accounts per organization - Medium
- Check new organization 501 c3 status against IRS registry– Low
- Capture background organizational information & demographics – High
- Capture organizational address, phone, fax & email - High
- Capture contact information and associate unlimited contacts to an organization – High
- Creation of individual account log-ins for each organizational contact – Medium
- Ability for users to re-set their own account passwords – High
- Eligibility quiz enables access to account creation & prevention of competitive grant process – Medium (if not quiz, scheme to deter ANY organization from creating an account if site is published to CRSF website)
- Administrative ability to re-set account info and passwords – High (passwords are forgotten often)
- Assign a Primary Contact to the organization's account – High (required for db structure)
- Ability to edit organizational information at anytime – High
- User ability to view historical grants and events – Low

Contact Management

Contact management is one of the highest priorities, along with the following requirements section – Applications & Web Forms

- Allow contact to be associated with an account - High
- Allow contact to have no association to account - Medium
- Capture first and last name of contact – High
- Capture title & role in the organization of each contact – High
- Capture individual contact information : phone, fax, mailing address – High
- Ability to associate the contact with another primary organization than the one for which the account is associated – Medium
- Associate unlimited number of contacts to a new grant request record –High
- Ability to assign a Primary Contact to a grant request record – High (required for db structure)
- Allow users to edit contacts, edit associations to organization records and delete contact associations – High
- User ability to view, sort and email organizational contacts – Medium

Application & Web Form Management

- Ability to auto-fill database contact record info on applications and forms – Medium
- Ability to create unlimited amount of new contact records per web form – High
- Capture customized field data – High
- Pre-populate view-only fields using request, requirement and contact database fields – Medium
- Capture date of submission – High
- User ability to attach documents or all types-[pdf, Word, Excel, jpg, tif] (up to 3 MB size)- High
- Capture date the form or application was accessed by user & status [opened, saved, submitted, etc]- Low
- Edit and view status of requests and requirements – High
- Allow unlimited amount of application and form submission – High
- Limit the ability of users to access available applications – Low
- Creation of viewable and printable version of form to save in database – High
- Capture form authorization – High

Event Registration

While Event Registration via the CRM is not a required function, if it is included in the pricing structure, CRSF would like to see this as future add-on functionality.

- Users to create unlimited new contact records – High
- User to edit current contact records – High
- Contacts to pre-fill existing database contact record fields – High
- User ability to check the status of registration – Medium
- Allow users to register a group of registrants at one time to streamline the event registration process – Medium

- User ability to edit contacts, after registration submission and approval – Medium

Reimbursement/Payment Management

- Capture reimbursement request form financial and budget detail information – High
- Capture form authorization – High
- Enable calculated ‘form fields’ as read-only on form– High
- Capture data in currency, number and long text format on form – High
- User ability to view detailed payment history - High
- User ability to view current balance –High
- User ability to create new payment record by submission of reimbursement request – Low

Support (Case and Service Order Management)

- Assign Priority of a Case – High
- Change Priority of a Case –High
- Allow re-assignment of a Case -High
- Access to a Knowledge Base /Support documentation - High

General/ Administrative

- Adopt look and feel of current CRSF website: www.ripkenfoundation.org with original banner specs, color and fonts - Medium
- Ability to automate correspondence templates for: submission of forms, new passwords, update organizational information – High
- Ability to generate manual correspondence to account contacts – Low
- Preferred no hosting agreement between application developers and services - Medium
- License agreement with full rights to product – High
- Access to application from all web browsers available – High
- Complete access to data for future CRM implementations and migrations – High
- Minimum hardware requirements – please see Section 9- Current Environment for further details – High
- Seamless Integration with MicroEdge Access database-High
- Ability to convert export CRM files into compatible import format – High
- Ability to automate sync application process -High
- Full administrative rights to post content, create online forms & manage accounts -High
- Minimal HTML knowledge needed to for administrator to create and modify applications & forms- Medium
- Training and assistance for CRSF on administrative site- creating forms, syncing and maintaining data – High
- Administrative ability to preview and edit all data submitted before sync to database – High
- Administrative ability to post html attachments, word documents, pdf documents, pictures and external web links for download - Medium
- Secure server and database environment – High
- Duplicate record-checking functionality – High

Reporting

Reporting directly from the CRM is less crucial to CRSF than the ability to pull sync all user data from the CRM to the database and query data from our database for reporting. However, the following would be sample queries and/or preset reports that would assist CRM administrators.

- Query for user Id and passwords
- Query for user contacts and respective contact information
- Report for form completion status, including submission dates
- Report for average grant amount requested
- Report of missing/overdue grant requirements

12. STAFF RESOURCES

For this project, activities within the Foundation will be driven by the following two key roles:

Project Manager: Responsible for keeping the project on schedule and within the budget. Maintains relationships with outside stakeholders. Maintains communication between other team members and direction and experience with current technology resources. – Leslie Dubuc, Cal Ripken, Sr. Foundation

Technology Manager: Responsible for advising on technical decisions and system environment issues related to the project. Available to assist with testing environment. Will also assist Project Manager in providing project steering.
– David Toothe, MSN Group

Steering Lead: Responsible for sign-off on key decisions, providing direction and maintaining relationships with internal stakeholders and executives.
– Jane Rodgers, Cal Ripken, Sr. Foundation

13. QUALIFICATIONS

- Describe your experience in producing sites for non-profit and/or grant-giving organization projects.
- Provide current reference information for 3 current non-profit, government or grant-giving organization clients as attachments to your proposal.
- Briefly describe your organization's capacity to produce our CRM application (staff, equipment, software, office location, etc.)
- How many full-time staff does your company employ? Please include a copy of your company's organizational chart.
- Provide company profile, length of time in business and core competencies.
- What type of team will be assigned to this project? What will each person's role be? Please provide background summary for each key staff member assigned to this project.

- Briefly describe your company's project management process.
- Please discuss any planned IPOs, mergers or acquisitions.
- Please discuss any hardware/software vendor partnerships.
- Please describe your testing and support plan.
- Please explain your service level agreement (SLA) structure.
- Time frame for completion.
- Additional terms and conditions.

14. FORMAT FOR PROPOSALS

Please use the following format as a guideline to format your proposal:

Length and Font Size:

Please use fonts no smaller than 10 point. Maximum proposal length including title page, proposal, qualifications, and budget should not exceed 35 pages. (not including Hosting Attachment information).

Title Page:

Cal Ripken, Sr. Foundation, Grant Management CRM System Request for Proposal, your company name, address, web site address, telephone number, fax number, email address and primary contact person.

Proposal:

Discuss your proposed solution, including the features, benefits and uniqueness of your solution. You will need to show ability to integrate your solution with our current technical environment. You should also touch on your ability to deliver the project in the timeframe noted in Section 5 (3-10 pages).

Qualifications:

Provide the information requested in section 12.

Budget and Fees:

List budgets as required above. Identify staff you anticipate working on the project and their hourly rates for work that may be needed for the different Phases of the project.

Attachments:

References – Provide at least three current non-profit, government or grant-giving organization references for which you have performed similar work.

Project Team Staffing – Include biographies and relevant experience of key staff and management personnel. Describe the qualifications and relevant experience of the types of staff that would be assigned to this project by providing biographies for those staff members.

Company Overview – Official registration name, Dun & Bradstreet Number, Primary and secondary SIC numbers, address, main telephone number, toll-free numbers and fax number. Provide brief history, including year established, number of years your company has been

offering CRM applications, parent companies and or subsidiary companies.

Hosting options/information-

- Do you provide hosting? If so, please provide answers to the following questions:
- How often do you backup?
- How often do you have down time?
- How often do you upgrade software/hardware?
- Please describe your technical support.
- Please describe your security.
- Do you have a high-speed, direct connection to the Internet?
- Please describe your methodology and service level agreements.
- Pricing, terms and conditions.

15. SCREENSHOT OF CURRENT CRM

The following are screenshots of the CRM developed by MicroEdge and used through June, 2009. The grantee user portal was designed based on the CRSF website: www.ripkenfoundation.org

Grantee User Login Screen:

Cal Ripken, Sr. Foundation: ... User Login

Cal Ripken, Sr. Foundation

[LOG IN](#)

User Login

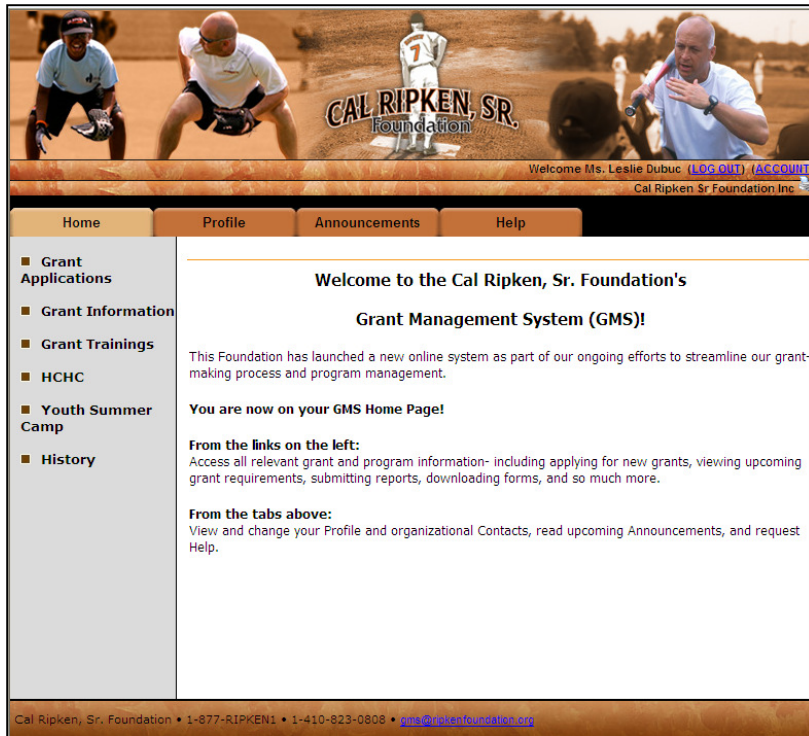
User ID

Password

If you don't have an account, [please click on this link to register.](#)
If you already have an account but forgot your password, [please click here to be emailed a new password.](#)

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Grantee User Portal:



The screenshot shows the home page of the Cal Ripken, Sr. Foundation's Grantee Management System (GMS). The header features a banner with four photos of baseball players and the foundation's logo. Below the banner, a navigation bar includes links for Home, Profile, Announcements, and Help. A sidebar on the left lists menu items: Grant Applications, Grant Information, Grant Trainings, HCHC, Youth Summer Camp, and History. The main content area welcomes Ms. Leslie Dubuc and provides instructions on how to use the system, including links to grant information and announcements.

Cal Ripken, Sr. Foundation

Welcome Ms. Leslie Dubuc ([LOG OUT](#)) ([ACCOUNT](#))

Cal Ripken Sr Foundation Inc.

Home Profile Announcements Help

- Grant Applications
- Grant Information
- Grant Trainings
- HCHC
- Youth Summer Camp
- History

Welcome to the Cal Ripken, Sr. Foundation's Grant Management System (GMS)!

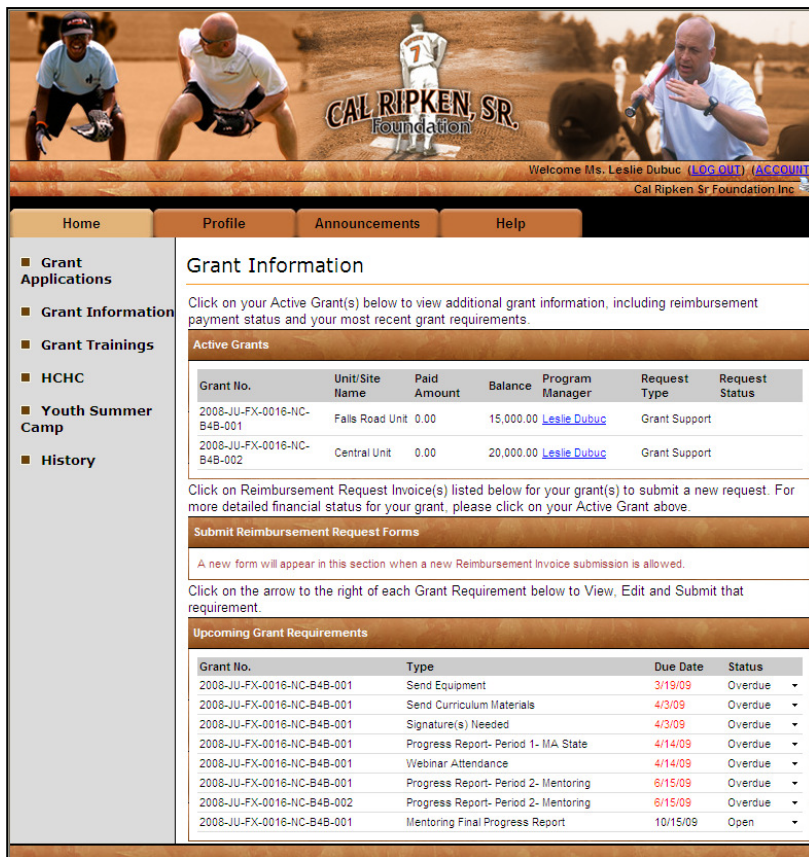
This Foundation has launched a new online system as part of our ongoing efforts to streamline our grant-making process and program management.

You are now on your GMS Home Page!

From the links on the left:
Access all relevant grant and program information- including applying for new grants, viewing upcoming grant requirements, submitting reports, downloading forms, and so much more.

From the tabs above:
View and change your Profile and organizational Contacts, read upcoming Announcements, and request Help.

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The screenshot shows the 'Grant Information' page of the Cal Ripken, Sr. Foundation's Grantee Management System (GMS). The header and navigation bar are identical to the home page. The sidebar menu is also the same. The main content area provides instructions on how to view grant information and lists active grants. Below the active grants table, there is a section for submitting reimbursement request forms and a table of upcoming grant requirements.

Cal Ripken, Sr. Foundation

Welcome Ms. Leslie Dubuc ([LOG OUT](#)) ([ACCOUNT](#))

Cal Ripken Sr Foundation Inc.

Home Profile Announcements Help

- Grant Applications
- Grant Information
- Grant Trainings
- HCHC
- Youth Summer Camp
- History

Grant Information

Click on your Active Grant(s) below to view additional grant information, including reimbursement payment status and your most recent grant requirements.

Active Grants

Grant No.	Unit/Site Name	Paid Amount	Balance	Program Manager	Request Type	Request Status
2008-JU-FX-0016-NC-B4B-001	Falls Road Unit	0.00	15,000.00	Leslie Dubuc	Grant Support	
2008-JU-FX-0016-NC-B4B-002	Central Unit	0.00	20,000.00	Leslie Dubuc	Grant Support	

Click on Reimbursement Request Invoice(s) listed below for your grant(s) to submit a new request. For more detailed financial status for your grant, please click on your Active Grant above.

Submit Reimbursement Request Forms

A new form will appear in this section when a new Reimbursement Invoice submission is allowed.

Click on the arrow to the right of each Grant Requirement below to View, Edit and Submit that requirement.

Upcoming Grant Requirements

Grant No.	Type	Due Date	Status
2008-JU-FX-0016-NC-B4B-001	Send Equipment	3/19/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Send Curriculum Materials	4/3/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Signature(s) Needed	4/3/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Progress Report- Period 1- MA State	4/14/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Webinar Attendance	4/14/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Progress Report- Period 2- Mentoring	6/15/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-002	Progress Report- Period 2- Mentoring	6/15/09	Overdue ▾
2008-JU-FX-0016-NC-B4B-001	Mentoring Final Progress Report	10/15/09	Open ▾

Administrative Site:

The screenshot shows the Portico GRM Administrative Site. The browser window has a single tab titled "Overview". The page has a blue header with the Portico GRM logo and a navigation bar with links: HOME, SETUP, FORMS, GRANTEES, SUBMISSIONS, and REPORTS. A user greeting "Welcome Leslie Dubuc" with links for (LOG OUT) and (ACCOUNT) is on the right. A left sidebar contains an "Overview" link. The main content area is titled "Overview" and includes a welcome message, a "Main Menu" section with links to SETUP, FORMS, GRANTEES, SUBMISSIONS, and REPORTS, and a "Need Help?" section with contact information for GIFTS, FIMS, and FoundationPower. A footer bar at the bottom reads "MicroEdge Portico™ GRM" and "LB4.4".

Portico GRM

HOME SETUP FORMS GRANTEES SUBMISSIONS REPORTS

Welcome Leslie Dubuc (LOG OUT) (ACCOUNT)

Overview

Welcome to the Administrator module of Portico GRM. Use the main menu bar above to access the following functionality:

Main Menu

SETUP
Create and manage your portals here. Customize the pages and data that your grantees will see. Configure e-mail templates, Portal language, image and file resources, etc.

FORMS
Create and manage all your Portico GRM Forms, including Application Forms, Eligibility Quizzes, Requirement Forms, Registration Forms, Profile Forms, Record Forms, and Administrator Forms. Use the Form Editor to select fields and format your Forms.

GRANTEES
Control grantee user access to the system. View uploaded grantee organizations, decide which contacts should have Portico GRM access, edit grantee user accounts, and assign Sponsors.

SUBMISSIONS
Screen any changes your grantees submit via Portico GRM, including contact updates, applications, and requirements. You can review each submission, make updates, check for duplicates, and ultimately decide whether or not the data should be downloaded to your grants management system.

REPORTS
Run reports to see how your grantees are using the system - how often are they logging in, what forms are they filling out, how are they responding to the Eligibility Quiz, etc.

*If one of these menu items does not appear, you do not have permission to access this functionality

Need Help?

You can access online documentation at any time by clicking the ? above.

Technical support can be reached by email or phone:

GIFTS
[Online Support Request](#)
HelpDesk@microedge.com
877-704-3343

FIMS
Please contact Kevin Nason.
KNason@microedge.com
603-224-6766

FoundationPower
Please follow your standard procedure for contacting your support representative.

MicroEdge Portico™ GRM LB4.4