



PhilanTrack® Online Grants Management System

Overview and Features

Overview

PhilanTrack® for Foundations is a secure web-based grants management system that streamlines the grants management process and enables foundations to easily view and manage grantee-entered information. PhilanTrack makes it easy to see how the foundation's grant dollars are being used and helps evaluate the impact those funds are having on the organizations and communities supported.

CUSTOMIZE PROPOSALS AND REPORTS

Collect information from grantees about their programs, activities, outcomes, and finances. PhilanTrack can be configured to ask any question you currently ask in a paper or email proposal or report - better, more easily, and with features that exponentially improve results.

MAXIMIZE GRANT DOLLARS

By helping grantees redirect resources away from grants administration and towards service delivery, PhilanTrack can help make the best use of grant dollars to achieve greater social impact.

LEARN AND USE IT EASILY

Search for information about a single grantee or a group of grantees at the click of a button. The design makes it simple for grantees to enter information about their organization, their programs, their finances, and the impact of the grant.

IMPROVE SHARING OF GRANT INFORMATION

Select information to share, and use PhilanTrack to compile a customized report to distribute to trustees. It is a fast and efficient way to gather and share information about grantees, and reduces the foundation's internal resources spent on compiling board materials. Customized documents that provide information about grantees, proposals, and reports can be taken directly from the system and provided to important stakeholders.

REDUCE PAPERWORK

Accepting grant applications and reports online eliminates data entry, reduces errors, and allows staff to focus more time and attention on other grant-related activities.

INCREASE TRANSPARENCY AND ACCOUNTABILITY WITHOUT COMPROMISING PRIVACY

PhilanTrack is a secure online tool that will allow you to gather information from grantees and see how grant dollars are being used while ensuring the safety and privacy of your information as well as that of your grantees.

System Features

PhilanTrack helps foundations manage grants efficiently from initial proposal through final progress report, saving time and money for both the foundation and its grantees.

PhilanTrack's features include:

- Streamlined Grantee Management:
 - Easy access to grantee information;
 - Automated verification of 501(c)(3) status and program eligibility;
 - View updated grantee information, as grantees enter and update their own information through our online interface;
 - Activity history with a given grantee for all grants awarded, proposals reviewed, and progress reports received;
- Complete Proposal Management:
 - Request and accept proposals online;
 - See when proposals are due, and which proposals are outstanding;
 - Tailor applicant questionnaires for thorough review;
 - Make informed funding decisions based on grantee responses and comparable information;
 - Review documents uploaded by grantees, including annual reports and audited financials;
- Efficient and Thorough Progress Reporting:
 - Enhance communications with grantees with online progress reporting;
 - Notification when reports are due, and which reports are outstanding;
 - Automated reminders sent to grantees when reports or updates are due;
 - Effectively and transparently collect information about grantee progress, and facilitate evaluation and impact measurement;
- Dynamic Report Generation:
 - Easily review and evaluate grant program impact with customizable reports that include summaries, graphs, and charts;
 - Aggregate grantee information for key staff, trustees, and other stakeholders with a couple of button clicks;
- Financial Analysis:
 - Evaluate the financial health and performance of applicants and grantees with PhilanTrack's innovative financial analysis tool.



COMPANY DESCRIPTION

PhilanTech, LLC is a mission-driven company dedicated to using technology to increase efficiency and impact in the social sector.

PhilanTech is committed to the same values our clients hold and is therefore a founding B Corporation. B Corporations are setting the standard for social and environmental responsibility. PhilanTech is the only grants management provider to be afforded this certification.

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