



# **PhilanTrack® Online Grants Management System**

Overview and Features

# Overview

Nonprofits can keep track of all funder and grant information and create proposals and reports with PhilanTrack.

With PhilanTrack for Nonprofits, you can store and easily reuse all relevant grant proposal and report information, eliminating needless repetition and significantly reducing data entry time.

## **MANAGE GRANT AND FUNDER INFORMATION ONLINE**

Keep track of your grant information - not only which grants you've received, but also prospective funders, the proposals you've submitted, and the reporting requirements for each of your funders. Store information about all of your funders and prospective funders, and create proposals and post-grant reports - all from a secure, centralized location.

## **FIND NEW FUNDERS**

Research new funders and grant opportunities using GrantStation data which is continually updated to provide the most current research available.

## **CREATE PROPOSALS AND REPORTS TO ALL FUNDERS EASILY**

Complete forms online and submit them directly to funders using PhilanTrack. Even if your funders are not using PhilanTrack, you can still use all of PhilanTrack's features to prepare a proposal or report, then generate a document that you can email or print and send to the funder.

## **USE CONSISTENT LANGUAGE WHEN APPLYING TO MULTIPLE FUNDERS**

Create a standard template with the language that presents your organization and its programs in the best light, and easily reuse that information. You can tailor your proposals and reports to meet each funder's specific requirements.

## **BUILD INSTITUTIONAL MEMORY FOR YOUR ORGANIZATION**

Easily see all grants, potential grants, funders, and prospective funders in one location. PhilanTrack's Software as a Service (SaaS) solution means that you can easily find the original proposal your organization submitted before writing a progress report, and always see your organization's history with your funders.

## **SAVE MORE TIME AND MONEY AS MORE OF YOUR FUNDERS USE PHILANTRACK**

Time and money not spent on grants administration can be redirected towards service and program delivery, and additional fundraising. PhilanTrack provides a way for you to do more with the resources you have, and can help you free up resources.

# System Features

PhilanTrack® for Nonprofits is a secure web-based grants management system that streamlines the grants management process and enables nonprofits to easily view and manage grant-related information. PhilanTrack helps nonprofits manage grants efficiently from initial proposal through final progress report, saving time and money that can be redirected to the organization's programs and services.

PhilanTrack's features include:

- Streamlined Funder Management:
  - Easy access to funder information;
  - View updated funder information;
  - Activity history with a given funder for all grants awarded, proposals and progress reports submitted;
- Complete Proposal Management:
  - Prepare grant proposals online;
  - Easily reuse information rather than creating proposals from scratch for each prospective funder;
  - See when proposals are due, and which proposals are outstanding;
  - Include organization, program, and financial information, as well as any electronic attachments to submit to funders;
  - Submit proposals online to PhilanTrack for Foundations users, or generate PDF or Word-compatible documents to submit to funders;
- Efficient and Thorough Progress Reporting:
  - View when reports are due, and which reports are outstanding;
  - Receive automated email reminders when reports or updates are due;
  - Prepare progress reports online;
  - Easily reuse information rather than creating reports from scratch for each prospective funder;
  - Include organization, program, and financial information, as well as any electronic attachments to submit to funders;
  - Submit reports online to PhilanTrack for Foundations users, or generate PDF or Word-compatible documents to submit to funders;
- Convenient Document Library:
  - Store current copies of your organization's IRS determination letter, audited financials, annual report, and other documents to send to funders;
  - Easily include documents in proposals and progress reports submitted to funders.



## 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 hold this certification.

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