

Salesforce for Grants Management

Built for the community, by the community



Salesforce gives foundations and nonprofits who disburse awards and grants a simple way to track, manage and deliver funding programs. Grantees can easily find and apply for grants through an additional grantee portal, engage directly with you and share outcomes. With the right technology, you can spend less time on tedious processes that bog you down and more time driving your philanthropic mission.

A flexible, community-driven grantmaking solution that is built off of the world's #1 CRM and evolves with you as your funding programs grow.

Community Built

Outbound Funds Module serves as the foundational layer for Salesforce.org's grantmaking product innovation. In an incredible show of sector collaboration, Outbound Funds Module was built by the Salesforce.org community of nonprofits, grantmakers, partners, and staff under the Salesforce.org Open Source Commons program. Salesforce.org adopted the free and open source Outbound Funds Module and continues to innovate alongside the community to take this product to the next level.



Funds Management

Provide visibility across the entire organization into the funding lifecycle and what stage each grant is in. Set application requirements, send private application invitations, view what funds have been requested and schedule disbursement amounts.

Relationship Tracking

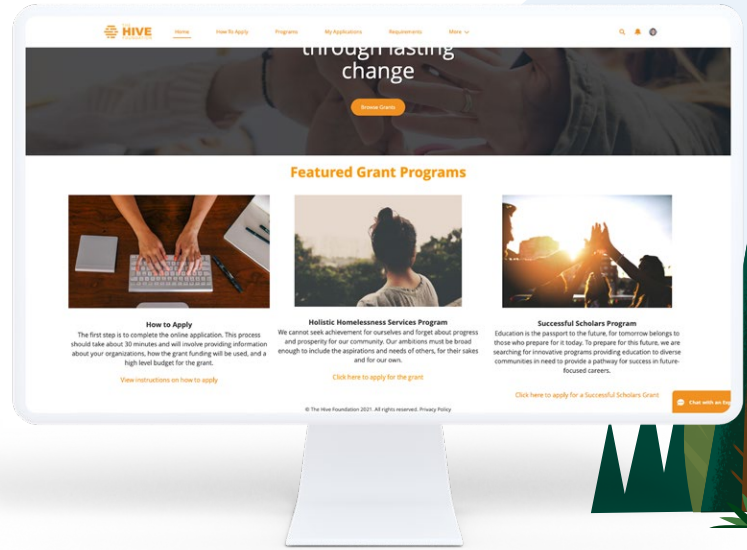
Better steward the relationships between your organization and the grantees you invest in by managing stakeholders and funding programs in one system. Track the main contact for a grant, portfolio managers, board members, reviewers, and more.

Grantee Portal

Improve the grantee experience by adding on a portal that is branded to match your organization’s look and feel. Grantees can find and apply for grants, view application status and submit ongoing progress reports.

Internal Review

Simplify and accelerate the application review process for staff. Grants Managers select which application sections and files are visible to internal reviewers allowing them to provide feedback specific to their role.



Grantee Portal

Program Management

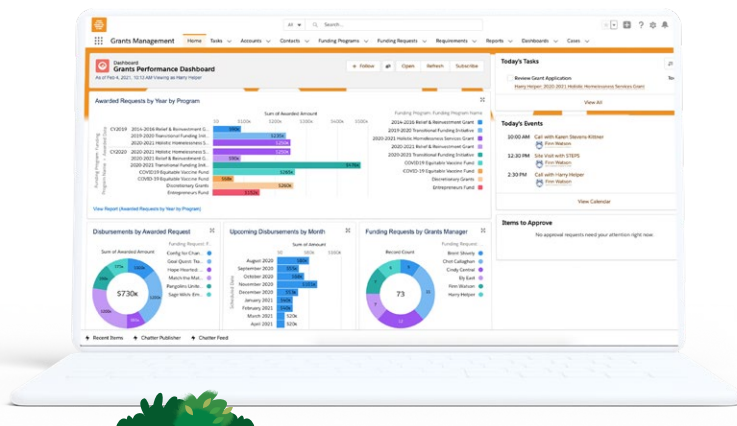
Connect programs and awards seamlessly to understand how they are driving your organization’s philanthropic mission. Gain a holistic view of any associated funding requests, how much has been allocated for each program and remaining balances.

Due Diligence

Choose from pre-configured templates that differ by program, grant size, budget and more. Past verification checks, including tax status validation, are stored automatically. So when a previous applicant applies, grants managers don’t have to repeat the process and have historical context as to why a partner was funded or not.

Reporting

With out-of-the box reports, you can gain a unified view of your funding programs. Run reports to see populations served, awards requested and total funding by year and program, grants with upcoming milestones and more all while laying groundwork for adding on more advanced impact measurement tools.



Reporting

Get in Touch: Visit us at www.salesforce.org to learn more.

About Salesforce.org

Salesforce.org is a social impact center of Salesforce focused on partnering with the global community of changemakers. We provide access to powerful technology, community partnerships, and impactful investments that empower changemakers to build a better world. As a social enterprise business unit dedicated to creating solutions for nonprofit, educational, and philanthropic organizations, we innovate on top of the world’s #1 CRM, channeling the philanthropic power of our employees, customers and partners to join our global movement for good. Visit www.salesforce.org for more.