

## **Comparing and Selecting the Right Salesforce Grant Management System For Your Nonprofit or Foundation**

2024



# Contents

Salesforce Introduction	3
Overview of Salesforce Grant Management Systems	3
Exploring the Three Salesforce GMS Routes	4
Understanding the Comparison Tables	5
Table 1 : GMS Basic Architecture Comparison	5
Table 2 : GMS Core Functionality Comparison	6
Table 2 Continued : GMS Core Functionality Comparison	7
Table 3 : Applicant Experience & Management	8
Table 4 : Grantee Experience & Management	9
Table 5 : Reviewer Functionality	10
Table 6 : Impacts, Reports, Analytics	11
Succeeding with a Salesforce Grant Management System	12
Next Steps	13
Additional Resources	13



# There's a reason why nonprofits and foundations continue to choose Salesforce as a premier Grant Management System (GMS).

Salesforce's flexible, platform-based approach to data management helps grantmakers streamline and manage the entire grant lifecycle, from application to disbursement. This means having access to fully customizable reports and dashboards, grantee and reviewer portals, time-saving apps, and much more.

Sounds great, right? We think so! However, things can get a bit complicated when it comes to choosing the right solution. That's because Salesforce currently has three different grant management systems that customers can utilize. Each option has unique pros and cons, and **matching the solution to your organizational needs will help ensure long-term success with Salesforce.**

## Overview of Salesforce Grant Management Systems

Currently there are three GMS routes for foundations and other grant-making organizations to choose from: Outbound Funds Module, Nonprofit Cloud for Grantmaking, or a custom Salesforce Solution. Each option has unique pros and cons, and it's important to note that there is no one size fits all route that will work for every organization. Goals, strategy and processes will differ, but no matter the route you choose, a Salesforce GMS can become a database-of-record that streamlines workflows, provides an improved UX, and is a reliable source of lasting institutional intelligence.



## Exploring the Three Salesforce GMS Routes

Below is an overview of the three Salesforce GMS routes. Keep in mind that no matter the chosen solution, each route will include a combination of Salesforce + Apps + Configuration, with optional Custom Development.

### Outbound Funds Module (OFM)

[Outbound Funds Module \(OFM\)](#) is an open-source GMS, developed by the Salesforce community and **designed for flexibility**. OFM is supported by Salesforce, and has the largest install base of any of the three options. OFM is a “lite” framework that offers a balance of prescription vs. customization. With OFM, the Salesforce Platform is enhanced to provide a data model specific to grantmaking. This allows foundations and other grantmakers to align with their peers on the structure of Salesforce, while retaining flexibility to configure the system around their values and way of working. With OFM, annual costs are relatively low due to fewer license fees and the fact that the core grant management functionality is available at no-cost via the open-source license.

### Nonprofit Cloud for Grantmaking

Nonprofit Cloud for Grantmaking (Grantmaking) is **Salesforce’s newest GMS option**, rolled out in mid-2023. Built on Nonprofit Cloud, Grantmaking differs from past GMS solutions in that it requires the use of the “person account model” and the Salesforce Industries platform, which comes with additional functionality previously only available to businesses on the industry side of Salesforce. Because it’s a newer offering, Nonprofit Cloud for Grantmaking has less use case examples to draw from, and there may still be system bugs that need to be addressed. That said, it’s a robust offering that is certainly worth considering.

### Custom Salesforce

A Custom Salesforce option is **the least prescriptive GMS route** that offers the most flexibility to users. It also requires the most active involvement in the product development process, because organizations will be building their solution from the ground up with guidelines developed from staff experience and Consultant expertise.

### foundationConnect

FOR REFERENCE ONLY. foundationConnect is a managed package solution for Grants Management that was acquired by Salesforce in 2019. This product is no longer available for purchase and will be fully retired January 31, 2026, with subscriptions no longer renewable after January 31, 2025. We share it here as a reference for the many organizations who are currently using foundationConnect, and will need to plan for the upcoming [transition to a new GMS](#).



## Understanding the Comparison Tables

The tables included in this document compare the different Salesforce GMS routes by assigning the mixture of tools required to achieve the desired goal. In the tables we are only highlighting the most common ways that specific feature needs are met. If the existing options don't match your exact organizational needs, it's always possible to build your own features within the Salesforce platform.

When it comes to configuration, keep in mind that any of the three options will require a certain amount of configuration. For example, additional fields might need to be created to capture questions or data points that are important to an organization's work. When configuration or custom development is cited in the table, this means it is necessary in order to meet the core requirements of the feature represented.

**Table 1 : GMS Basic Architecture Comparison**

SALESFORCE GMS ARCHITECTURE COMPARISON	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Salesforce Base Architecture	Salesforce Platform	Salesforce Industry Cloud	Salesforce Platform	Salesforce Platform
Integration-ready	Via Salesforce Standard API	Via the Salesforce Industry Cloud architecture & API. Limited to Apps that work with the architecture	Via Salesforce Standard API	Via Salesforce Standard API
Requires Expert Implementation	Yes	Yes	Yes	Yes
Requires Salesforce Administration & Governance practices	Yes	Yes	Yes	Yes
Support provided via....	Consulting Partner or Salesforce Premier Support (limited)	Consulting Partner or Salesforce Premier Support (limited)	Consulting Partner or Salesforce Premier Support (limited)	Consulting Partner or Salesforce Premier Support (limited)

## Table 2 : GMS Core Functionality Comparison

SALESFORCE GMS CORE FUNCTIONALITY	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Store information on Organizations and Contacts	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Track Tasks, Deadlines and Reminders	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Collaborate & Communicate on Stored Information, Process, Next Steps	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Integrate with Guidestar for due diligence (requires Guidestar subscription)	Custom Development (Lightning Web Components or Apex)	Custom Development (Lightning Web Components or Apex)	Custom Development (Lightning Web Components or Apex)	Included with fC
Integration with IRS Charity Checker for due diligence	Custom Development (Lightning Web Components or Apex)	Custom Development (Lightning Web Components or Apex)	Custom Development (Lightning Web Components or Apex)	Included with fC
Document generation (mail merge)	Salesforce AppExchange	Included with NPC	Salesforce AppExchange	Salesforce AppExchange
Create Online Forms	Included with OFM or available on Salesforce AppExchange	Included with NPC or available on Salesforce AppExchange	Core Salesforce Functionality, with Customization or Configuration, or Salesforce AppExchange	Included with fC

Chart continues on the next page.

## Table 2 Continued : GMS Core Functionality Comparison

SALESFORCE GMS CORE FUNCTIONALITY	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Appropriate for Scholarship Management	Included with OFM	Included with NPC	Requires Configuration	Included with fC
Applicant/Grantee Portal	Included with OFM, or Core Salesforce Functionality with Customization or Configuration	Included with NPC or Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Included with fC
Reviewer Portal	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Included with fC
Automate Grant Management Processes	Core Salesforce Functionality and Included with OFM	Core Salesforce Functionality and Included with NPC	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality and Included with fC
Produce Data for Decision Making	Core Salesforce Functionality and Included with OFM	Core Salesforce Functionality and Included with NPC	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality and Included with fC

## Table 3 : Applicant Experience & Management

SALESFORCE GMS APPLICANT EXPERIENCE & MANAGEMENT	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Published, Customizable, Submission Guidelines & Requirements	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Pre-qualification Quiz form(s)	Included with OFM, Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Included with NPC, Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Included with fC
Private Grant Invitations	Core Salesforce Functionality with Customization or Configuration	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Hosted, Configurable Application Form(s)	Included with OFM, Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Included with NPC, Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange	Included with fC, Core Salesforce Functionality with Customization or Configuration, or Salesforce AppExchange
File Management	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Application Statuses, Outcomes	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Application Review Processes (see "Reviewer Functionality" table below)	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Reports & Analytics	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Automate Communications and Processes (as desired)	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality



# Table 4 : Grantee Experience & Management

SALESFORCE GMS GRANTEE EXPERIENCE & MANAGEMENT	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Recipient Notification	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
Disbursement Schedules	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Grant Status, Outcomes	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Configurable Grant Reporting Schedules and Requirements	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Payment Provider Integration to Distribute Funds (via ACH)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)
Budget Management	Core Salesforce Functionality with Customization or Configuration	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
Storytelling: Capture and Report on Beneficiary Stories	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
Program Management	Core Salesforce Functionality with Customization or Configuration	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
Grantee Portal	Included with OFM or Core Salesforce Functionality with Customization or Configuration	Included with NPC or Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Included with fC
Reports & Analytics	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality

## Table 5 : Reviewer Functionality

<b>SALESFORCE GMS REVIEWER FUNCTIONALITY</b>	<b>Outbound Funds Module</b>	<b>Nonprofit Cloud Grantmaking</b>	<b>Custom Salesforce</b>	<b>foundationConnect</b>
<b>Reviewer Portal</b>	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Included with fC
<b>Side-by-side Application Review</b>	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)
<b>Reviewer Dashboard to Track Deadlines</b>	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
<b>Easy Access to Review Status</b>	Included with OFM	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Included with fC
<b>Access to Files Without Downloading (via Reviewer Portal)</b>	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)	Custom Development (Lightning Web Components, Apex)

## Table 6 : Impacts, Reports, Analytics

SALESFORCE GMS IMPACT, REPORTS, ANALYTICS	Outbound Funds Module	Nonprofit Cloud Grantmaking	Custom Salesforce	foundationConnect
Capture Impacts	Core Salesforce Functionality with Customization or Configuration	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
Report on Impacts per Grant, per Program	Core Salesforce Functionality with Customization or Configuration	Included with NPC	Core Salesforce Functionality with Customization or Configuration	Core Salesforce Functionality with Customization or Configuration
List Reports	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Summary Reports	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Matrix Reports	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality
Dashboards	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality	Core Salesforce Functionality



## Succeeding with a Salesforce Grant Management System

### Select the Right GMS to Meet Organizational Needs

Choosing the right GMS tools to match your organizational needs is **the first (and most important!) step on the road to a more streamlined grant management solution**. Although the selection process can take several months, you'll be glad you spent the time on due diligence to ensure the chosen GMS is the right fit for how your organization works. Once you've made your selection you'll be ready to start planning for implementation and ongoing support. We suggest hiring a [trusted consulting partner \(like North Peak Solutions\)](#) to guide the GMS selection process. A consultant will have deep technical knowledge of all three GMS options, plus know-how when it comes to developing requirements for vetting the various options.

### Prepare for the Implementation

**Setting aside enough time to prepare for a new GMS implementation can actually save you time and money down the road, and will help ensure you have a smooth transition from your old GMS to the new one.** We advise clients to keep organizational strategy and values front and center throughout the process. The system can be adapted to meet your needs- but your team has to be clear on what those needs are. Keep in mind that Salesforce implementations are transformational initiatives that elevate how organizations work by improving their relationship with technology. Ensure you have staff and leadership buy-in, and communicate often to help everyone feel heard. Make sure you have enough resources (staff + budget) set aside to support the implementation, and set a realistic implementation timeline. Lastly, spend time on data cleanup and review, and be prepared to change workflows and processes in order to get the most out of the new GMS tools. Ready to learn more? Check out our recent [blog post](#) for a deeper dive on [preparing for a Salesforce implementation](#).

### Plan for Ongoing Support

Once the implementation process is complete (keep in mind it can take anywhere from 3-12 months, depending on project complexity) staff are trained, and the new system is running smoothly, you can **solidify the plan for ongoing stewardship of the new GMS**. This will look different from one organization to the next, but includes some key elements like Admin support and troubleshooting issues that may arise with integrations, updates or additional customization needs. Some organizations choose to have a [full or part time staff person in a Salesforce Admin position](#). This person is generally charged with the daily care and maintenance of the GMS, and depending on their time and skill level, they may also handle more complex issues that might arise. Other [organizations choose to outsource this Admin role to a consulting firm](#), such as North Peak. The benefits of this route are many. Rather than investing in a new staff member, you'll be able to choose the level of advanced admin support that fits your team needs. You'll also have a team of experts available to help manage any database issues that arise, and if you plan to hire or up-skill someone to the role of Admin, your consultant can help develop training plans and answer questions as they arise.



## Next Steps

Transitioning to a new GMS is a big undertaking, but with a commitment to planning and preparation, organizations can ensure they're ready to embrace all the opportunities that Salesforce's flexible, cloud-based technology offers. Whether you choose Outbound Funds Module, Grantmaking or a custom Salesforce solution, we're ready to guide qualifying grantmaking organizations along the path to success with Salesforce Grant Management Systems. [Contact us today to get started.](#)

## Additional Resources

- [Outbound Funds Module 101](#)
- [New Grant Management System Improves Workflows for the Bush Foundation](#)
- [Moving the Heckscher Foundation for Children to Outbound Funds Module for Grant Management](#)
- [How to Prepare for the Transition from foundationConnect](#)
- [Salesforce Foundation User Group](#)
- [Technology Association of Grantmakers](#)
- [2022 State of Philanthropy Tech Report](#)

