

## Licensing Fees

*Does not include one-time implementation fee*

*License level has a set number of users and more can be purchased.*

| License Level | Annual Fee        |
|---------------|-------------------|
| Go            | £12,886-£20,729   |
| Pro           | £20,720-£31,748   |
| Enterprise    | Starts at £31,748 |

An annual price increase may apply. Any increase will follow a transparent and pre-notified review process

## Invoicing Frequency

All licensing fees are on an annualised billing model and paid upfront either at the beginning of the calendar year or your fiscal year.

## Features

*Please note that additional features may incur additional fees.*

## Product Plans

**Go**  
For foundations with standardized grant making processes that value full CRM and reporting capabilities.

**Pro**  
For Foundations with multiple teams and/or grantmaking processes.

**Enterprise**  
For data-driven Foundations with multiple teams & higher touch grantmaking processes.

| Grants Management                                                                        |          |          |           |        |
|------------------------------------------------------------------------------------------|----------|----------|-----------|--------|
| Customizable Payments and Approvals Dashboards                                           | ✓        | ✓        | ✓         | ✓      |
| Compliance - Tax Status Verification (US/UK/AU)                                          | ✓        | ✓        | ✓         | ✓      |
| Compliance - Grant Requirements Dashboard                                                | ✓        | ✓        | ✓         | ✓      |
| Compliance - Organization Financials                                                     | ✓        | ✓        | ✓         | ✓      |
| Batch Operations and Record Management                                                   | ✓        | ✓        | ✓         | ✓      |
| Grant Renewals Management                                                                | ✓        | ✓        | ✓         | ✓      |
| Fiscal Sponsorship                                                                       | ✓        | ✓        | ✓         | ✓      |
| Subsidiary Management                                                                    | ✓        | ✓        | ✓         | ✓      |
| Workflows                                                                                |          | ✓        | ✓         | ✓      |
| Docket Management                                                                        |          | ✓        | ✓         | ✓      |
| Regranting Tracker                                                                       |          | ✓        | ✓         | ✓      |
| Matching Gifts                                                                           |          | ✓        | ✓         | ✓      |
| Grant Amendments Management                                                              |          | ✓        | ✓         | ✓      |
| Rule-based Request Code Assignment                                                       |          |          |           | ✓      |
| Applications & Grantee Reporting                                                         |          |          |           |        |
| Unlimited Grantee User Accounts                                                          | ✓        | ✓        | ✓         | ✓      |
| Open Grant Applications                                                                  | ✓        | ✓        | ✓         | ✓      |
| Invited Grant Applications                                                               | ✓        | ✓        | ✓         | ✓      |
| Grantee Reports                                                                          | ✓        | ✓        | ✓         | ✓      |
| Branching Logic (Forms)                                                                  |          | ✓        | ✓         | ✓      |
| Grantee Initiated Forms                                                                  |          | ✓        | ✓         | ✓      |
| In-Form Comments                                                                         |          | ✓        | ✓         | ✓      |
| Batch Import of Applications & Reports                                                   |          | ✓        | ✓         | ✓      |
| External Reviewers Portal                                                                | add on   | add on   | add on    | add on |
| Constituent Relationship Management (CRM)                                                |          |          |           |        |
| Contact Management                                                                       | ✓        | ✓        | ✓         | ✓      |
| Interactions Dashboard (e.g., e-mails, meetings, site visits, phone calls)               | ✓        | ✓        | ✓         | ✓      |
| Gmail Extension/Add-in                                                                   | ✓        | ✓        | ✓         | ✓      |
| Outlook Add-in                                                                           | ✓        | ✓        | ✓         | ✓      |
| Native E-mail                                                                            | ✓        | ✓        | ✓         | ✓      |
| Batch E-mails                                                                            |          | ✓        | ✓         | ✓      |
| Contact De-duplication and Merge                                                         |          | ✓        | ✓         | ✓      |
| Contact Import (request level only)                                                      |          |          |           | ✓      |
| Financial Management                                                                     |          |          |           |        |
| Customizable Payments and Approvals Dashboards                                           | ✓        | ✓        | ✓         | ✓      |
| Multi-year Forecasting                                                                   | ✓        | ✓        | ✓         | ✓      |
| Budget Manager                                                                           | ✓        | ✓        | ✓         | ✓      |
| Payments Import                                                                          | ✓        | ✓        | ✓         | ✓      |
| Scenario Planning                                                                        |          | ✓        | ✓         | ✓      |
| Bank Account Information Collection & Management                                         |          | ✓        | ✓         | ✓      |
| Expenditure Responsibility Management                                                    |          | ✓        | ✓         | ✓      |
| Multi-currency*                                                                          |          |          |           | ✓      |
| Bill Integration                                                                         | add on   | add on   | add on    | add on |
| *Multi-currency will be turned on for all international customers regardless of package. |          |          |           |        |
| Document Management                                                                      |          |          |           |        |
| GivingData Cloud Native Document Management                                              | ✓        | ✓        | ✓         | ✓      |
| Document Linking (Google Drive, OneDrive, Dropbox)                                       | ✓        | ✓        | ✓         | ✓      |
| Super Docs (GivingData Native Document Format)                                           |          | ✓        | ✓         | ✓      |
| Premium Document Management Integration (One Drive, Box)                                 | add on   | add on   | add on    | add on |
| Business Intelligence and Reporting                                                      |          |          |           |        |
| Grantee 360                                                                              | ✓        | ✓        | ✓         | ✓      |
| Quick search                                                                             | ✓        | ✓        | ✓         | ✓      |
| Super Search (Saved searches, Customizable search result views, search results charting) | ✓        | ✓        | ✓         | ✓      |
| Report Builder with Report archive and schedule-driven report generation                 |          | ✓        | ✓         | ✓      |
| Database Replica for integration with BI Tools (e.g., Power BI or Tableau)               |          |          |           | ✓      |
| Custom Fields                                                                            | Up to 10 | Up to 50 | Up to 250 |        |
| Outcome Tracking and Learning (MEL)                                                      | add on   | add on   | add on    | add on |
| Integrations & APIs                                                                      |          |          |           |        |
| Demographics via Candid (DEI)                                                            | ✓        | ✓        | ✓         | ✓      |
| APIs - Grants Data for Website Publishing                                                |          | ✓        | ✓         | ✓      |
| APIs - CRM Data                                                                          |          |          | ✓         | ✓      |
| APIs - Payment & Accounting Data                                                         |          |          | ✓         | ✓      |
| Adobe Sign, DocuSign (E-signature)                                                       | add on   | add on   | add on    | add on |
| Lexis-Nexus (Bridger Insight (OFAC Risk Management)                                      | add on   | add on   | add on    | add on |
| Bill (Accounting/Finance)                                                                | add on   | add on   | add on    | add on |
| Add-on Services                                                                          |          |          |           |        |
| Staging Site                                                                             | add on   | add on   | add on    | add on |
| Long-term Data Retention                                                                 | add on   | add on   | add on    | add on |

\*Multi-currency will be turned on for all international customers regardless of package.

\*Plans effective for new clients as of Sept. 2024, subject to change.