Blackbaud Grantmaking – Transitioning Grantees to the new application/grantee portal

Your new application portal now allows your applicants to have a more updated experience when applying. This document details some considerations prior to moving to the new portal.

Plan a date and strategy to make the move.

It's important to establish a date to move to the new portal. Typically, you will want to switch over at the end of a cycle or when you have down time. If you leave your applications open year-round, you will want to advertise early and plan a time when you can take down your current applications and update the forms to the new system. You can create the new forms while leaving your current system up, then take down your current applications and activate the new links on your portal.

- Test before launching; submit applications and move them through all parts of your workflow before releasing to applicants/grantees
- Update existing onboarding materials including application FAQs
- Consider rolling out the new applicant/grantee forms and portal to a trusted cohort of applicants for testing and feedback.

Advertise the coming change to your applicants.

- Update the message on your current portal login page to notify users of the change by going to the **Forms Manager** > **Settings** > **Account Designer** > **Messages**, selecting **Account Login Instructions**. Update the message text on the right panel.
- Post messaging on your primary web site, if links are provided there, and specify the date you will be moving to the new grantee portal.
- If applications are sent out via invitation, update the notification email to include additional information on the transition.
- Consider setting up email templates that you can send out in a batch to applicants advising them of the upcoming changes.

Making the switch.

Once you have set up your new forms and published the links, post the links along with pertinent information about signing in with a new Blackbaud ID, if they don't have one, or using an existing Blackbaud ID if they use other Blackbaud products.

- The current forms manager will no longer be available as of August 2025 – Plan

ahead!

- You can create the new forms while leaving your current system up, then take down your current applications and activate the new links on your portal.

How does this affect my applicants?

The new portal will make the application process much easier! The new login will let applicants see all applications from ANY foundation using Blackbaud Grantmaking. They will only have one login to manage and if they use other Blackbaud products, such as Raiser Edge, they won't need to create a secondary login. Many of the new features in Grantmaking will allow the users to manage all their applications and requirements together, as well as adding additional users to forms.

- Be proactive in letting long term grantees know that their application history will be starting over in the new portal. They may want to download any previous applications and reports.
- Share that your applicants/grantees will now only have one account to manage for all funders using Blackbaud Grantmaking and will be able to manage forms from all funders in once consolidated portal.
- All applicants will be required to have a log in, programs will not be able to be set up to not require logging in in the new portal.

New Grantee Portal Recommendations:

- When creating Programs, enable the ability to **Allow applicants to add additional applicants to aid in completing forms.**
- Add text to new application forms encouraging applicants to add all additional applicants that should have access to the application and subsequent forms.
- Advise applicants/grantees to add noreply@yourcause.com to their safe senders list.
- Advise applicants/grantees to bookmark https://bbgm-apply.yourcausegrants.com/apply/applications to return and access forms.

Sample Communication Language for Applicants:

- While it's preferable for communications to your applicants to come from you, and in your 'voice', we recognize that a starting place for outreach can be helpful. To that end, we're happy to provide this language as a generic template for your communication. Please edit to your needs:

We are moving to a new Grantee and Applicant Experience starting on xx/xx/xxxx! The new portal will make the application process much easier. You will now have a single account to manage all funders using Blackbaud Grantmaking in one consolidated portal. If you already use a Blackbaud product, such as Raiser Edge, you won't need to create a secondary login. You will be required to securely sign in with a new Blackbaud ID, or use an existing Blackbaud ID if you use other Blackbaud products.

Please bookmark https://bbgm-apply.yourcausegrants.com/apply/applications to access and return to your applications and requirement forms and add noreply@yourcause.com to your safe senders list. We are encouraging grantees to add all additional applicants that should have access to the application and subsequent forms to enable sharing. Be advised that your application history will be starting over in the new portal. You may want to download any previous applications and reports prior to August 25th, 2025.

Questions? Reach out to the xxxxxxx grants team at info@xxxxxx.org.