Blackbaud Grantmaking Townhall

DECEMBER 2018

Blackbaud Grantmaking formerly GIFTS Online

Blackbaud Grantmaking Townhall Agenda

- Introductions
- Blackbaud Grantmaking Updates
- What's new in Blackbaud Grantmaking and Blackbaud Outcomes
- What's next in Blackbaud Grantmaking and Blackbaud Outcomes
- Updates & Reminders
- Q&A

Webinar Hosts

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Blackbaud Grantmaking Updates

Blackbaud Grantmaking Updates

1) Rollout of Blackbaud Grantmaking in SKY timing

2) Blackbaud Grantmaking MAC Users accessibility

3) Blackbaud Grantmaking reported slowness

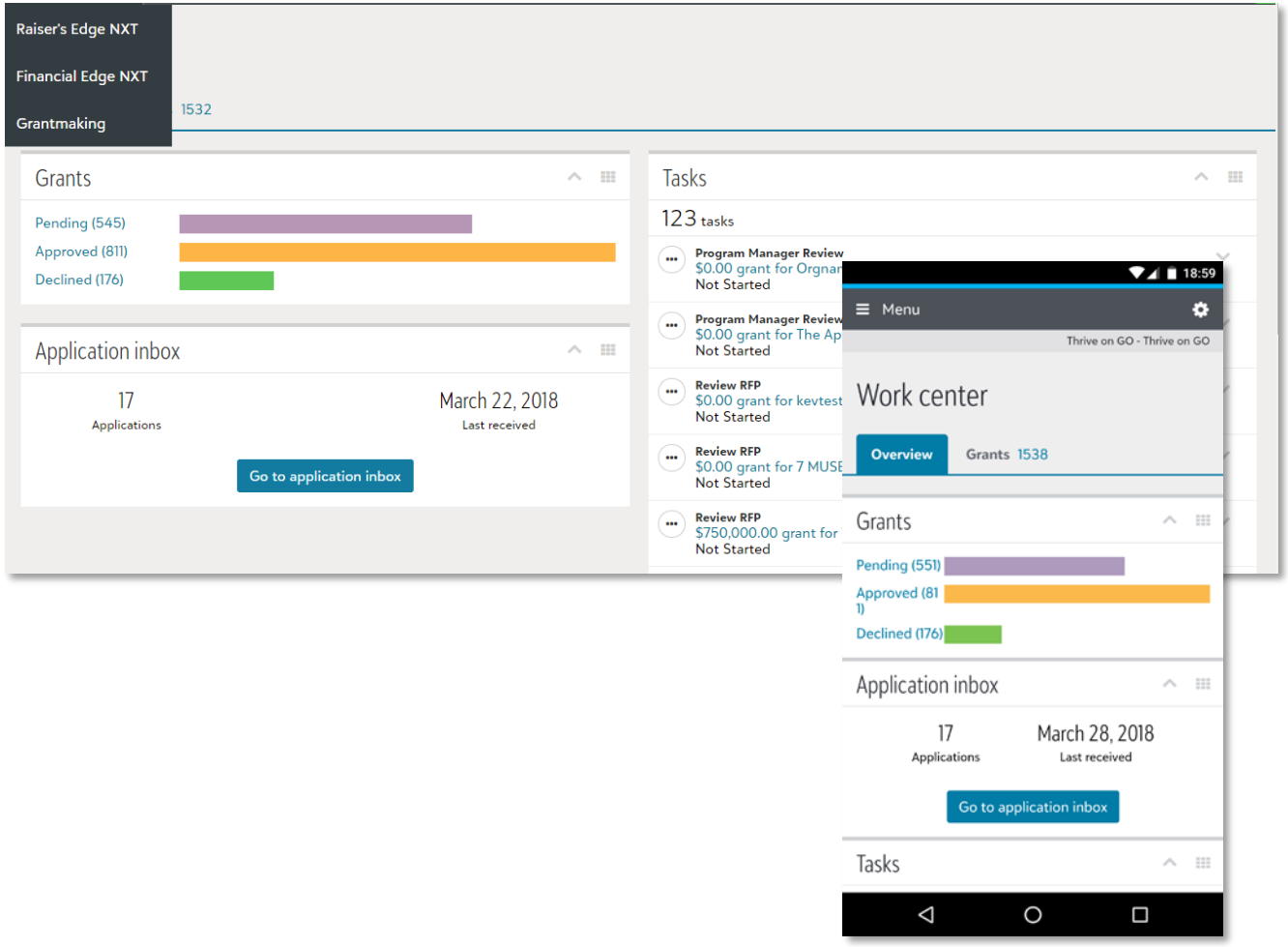
What's New

Blackbaud Grantmaking and Outcomes

STRENGTHEN COLLABORATION

Transitioning Blackbaud Grantmaking to SKY

Available Now!

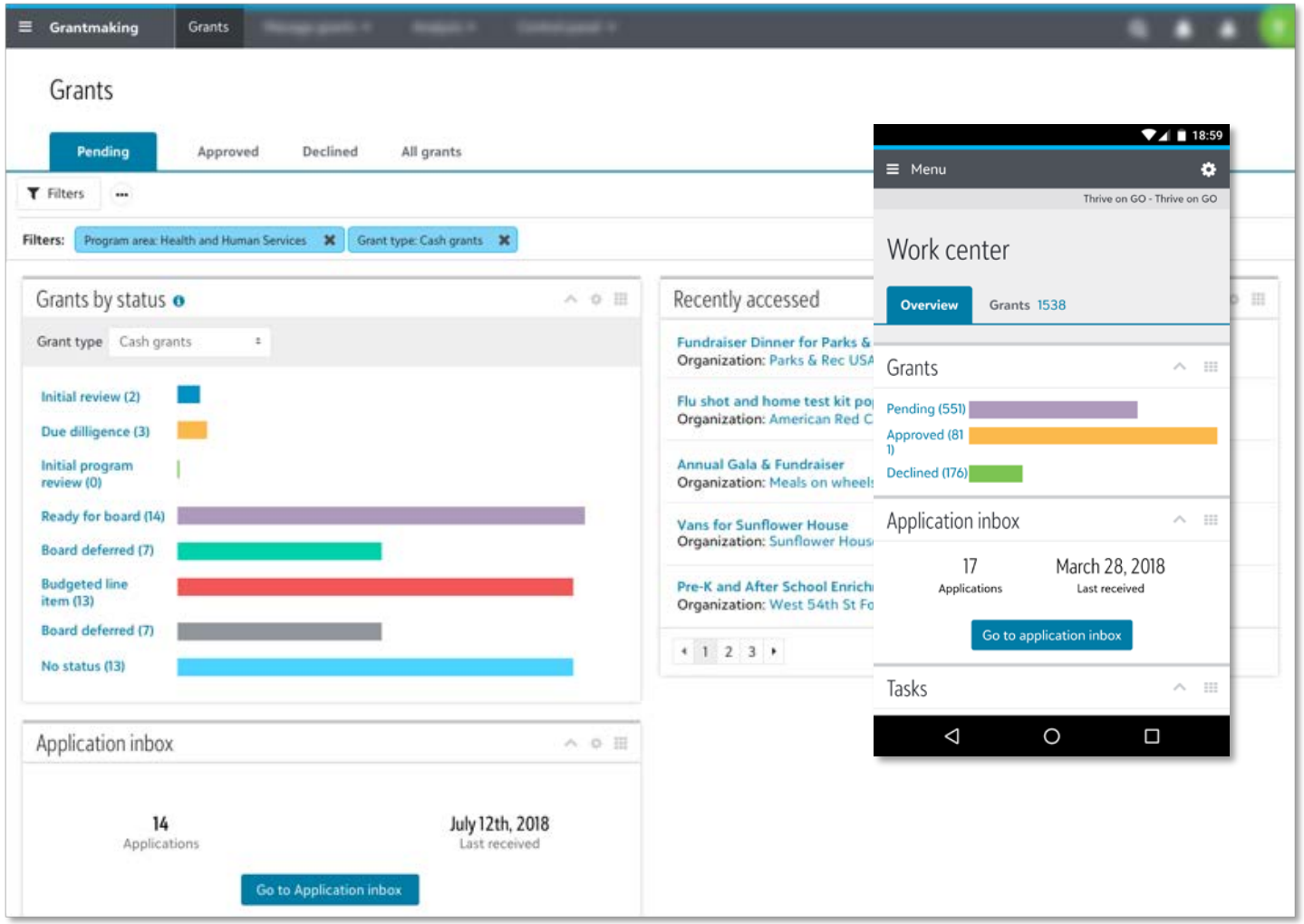


- Dashboards driven by your workflow
- Application inbox
- Admin user and permissions management
- Any browser, any device

What's New

TRANSFORM YOUR EXPERIENCE

Blackbaud Grantmaking SKY View
Available Now!

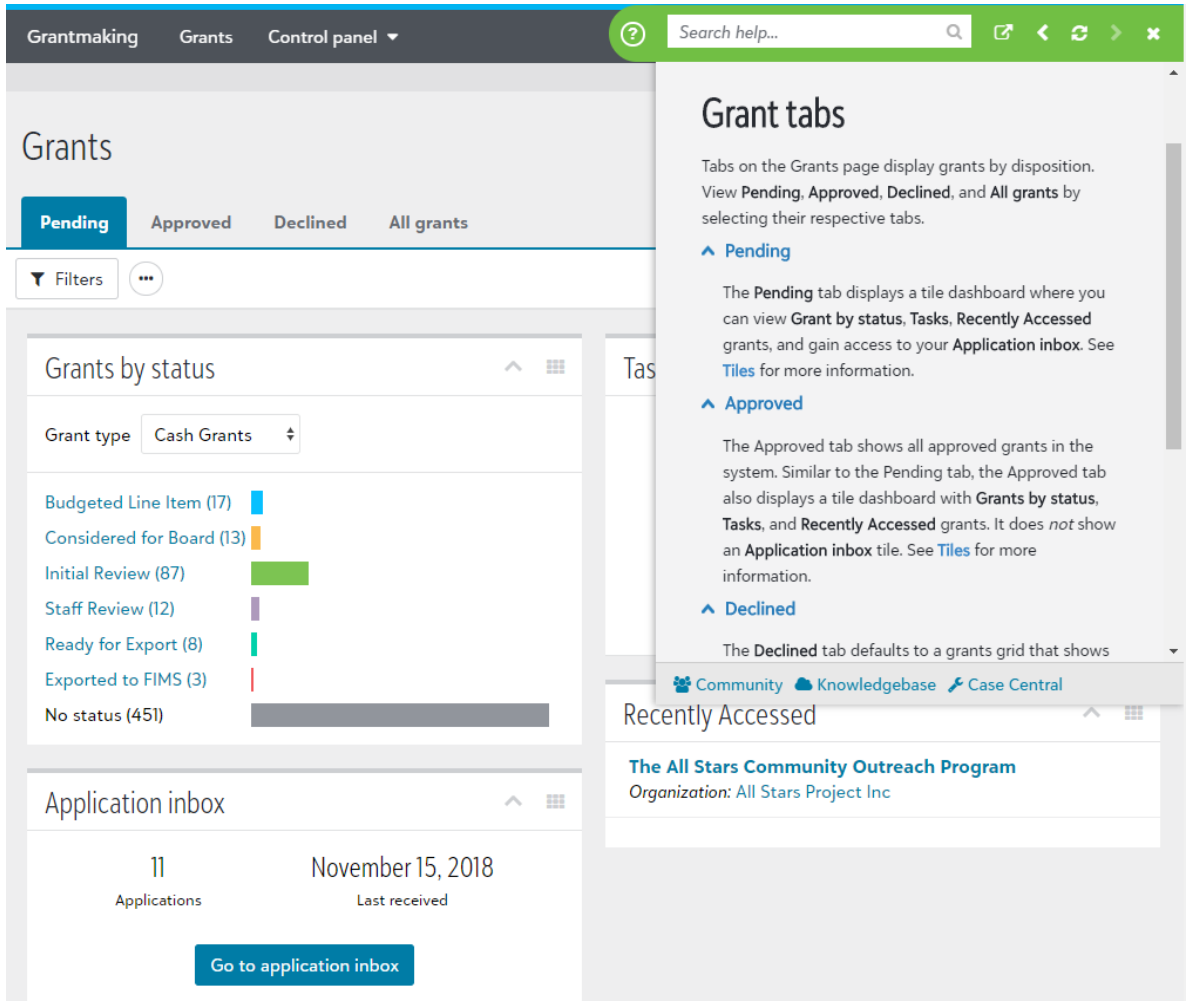


- Personalize your home screen with saved filters
- Easily find your Pending, Approved, and Declined grants
- Find any grants in "All grants" with powerful filter options
- Quickly return to "Recently accessed" grants

What's New

INCREASE EFFICIENCY

Blackbaud Grantmaking SKY View Available Now!



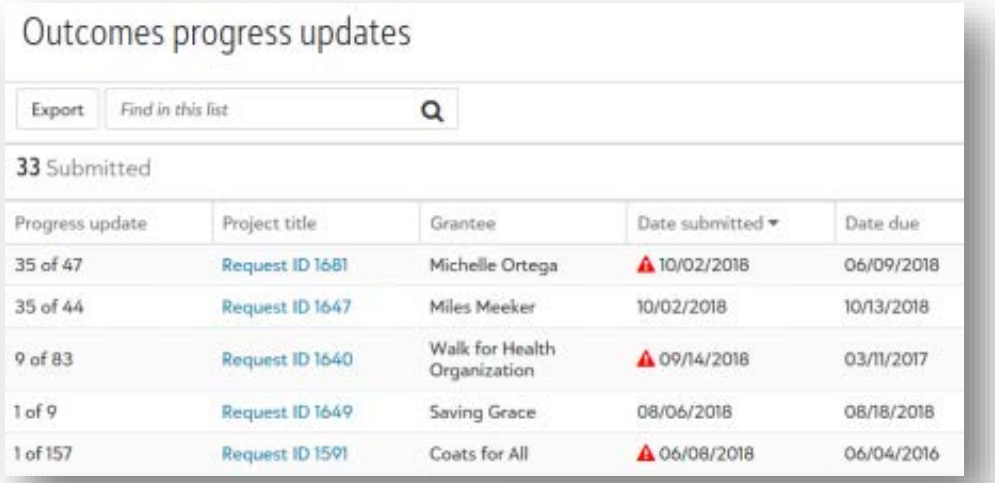
- New contextual Help content, when you need it
- Guided tour to help your staff get started on Blackbaud Community

https://community.blackbaud.com/products/grantmaking/resources

What's New

MEASURE YOUR IMPACT

Blackbaud Outcomes
Available Now!



- On-demand data export from Dashboards
- Late warning icon added to progress updates dashboard
- Sky UX update for latest look and feel

What's New

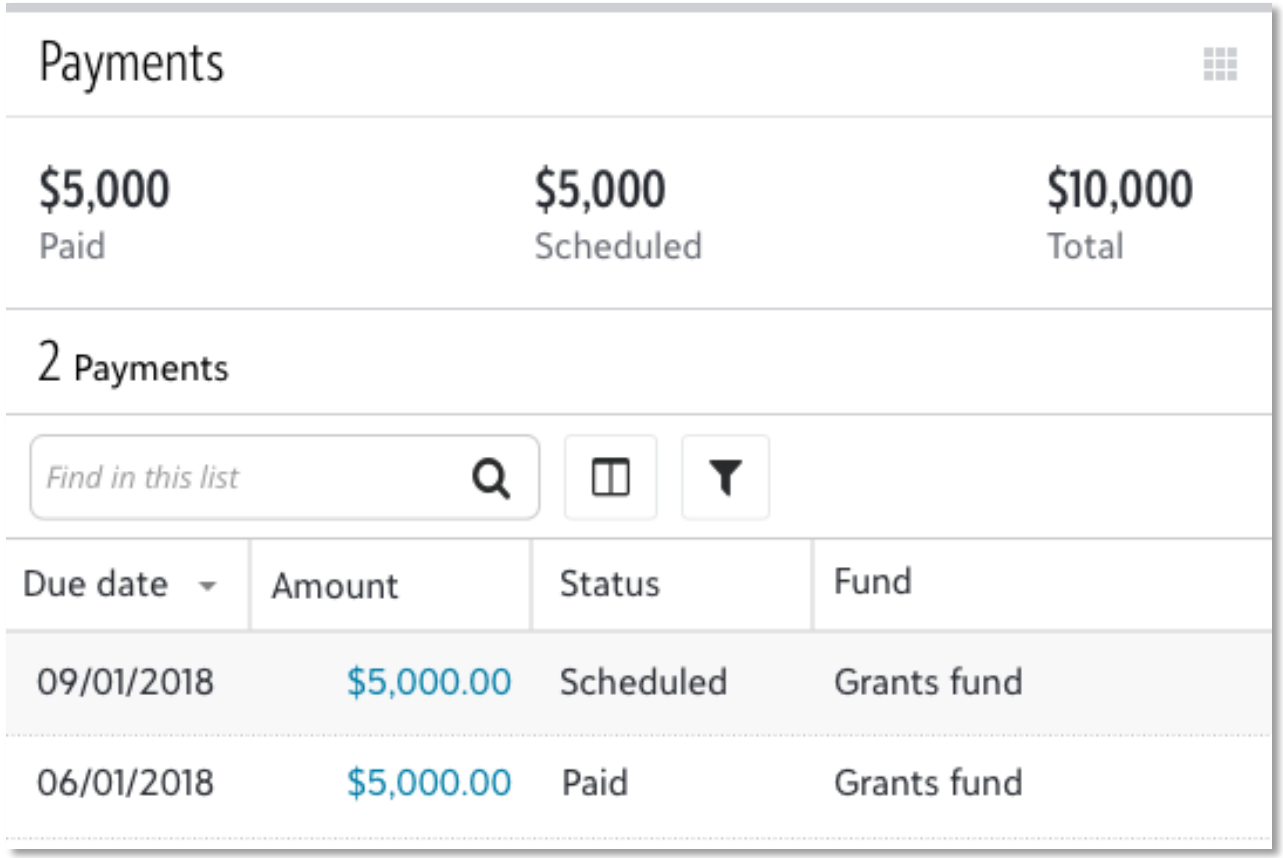
What's Next

Blackbaud Grantmaking and Outcomes

TRANSFORM YOUR EXPERIENCE

What's Next Blackbaud Grantmaking to SKY

Coming Soon!



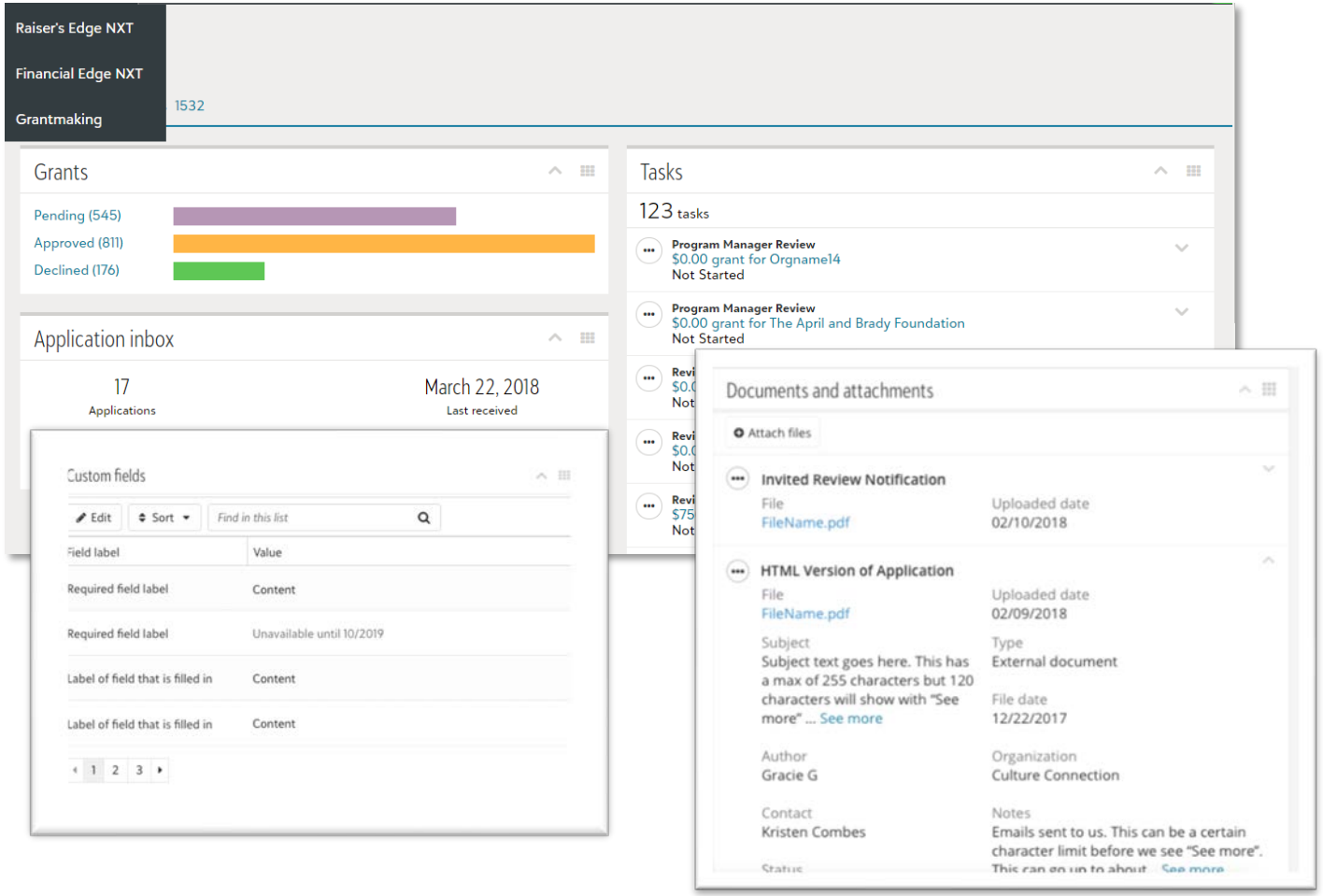
- Financial Management in SKY
- See status of payments at-a-glance for any grant
- Manage upcoming payments
- Accounts payable process
- Interoperability with FE NXT for faster payment processing

What's Next

INCREASE EFFICIENCY

What's Next Blackbaud Grantmaking to SKY

Coming Soon!



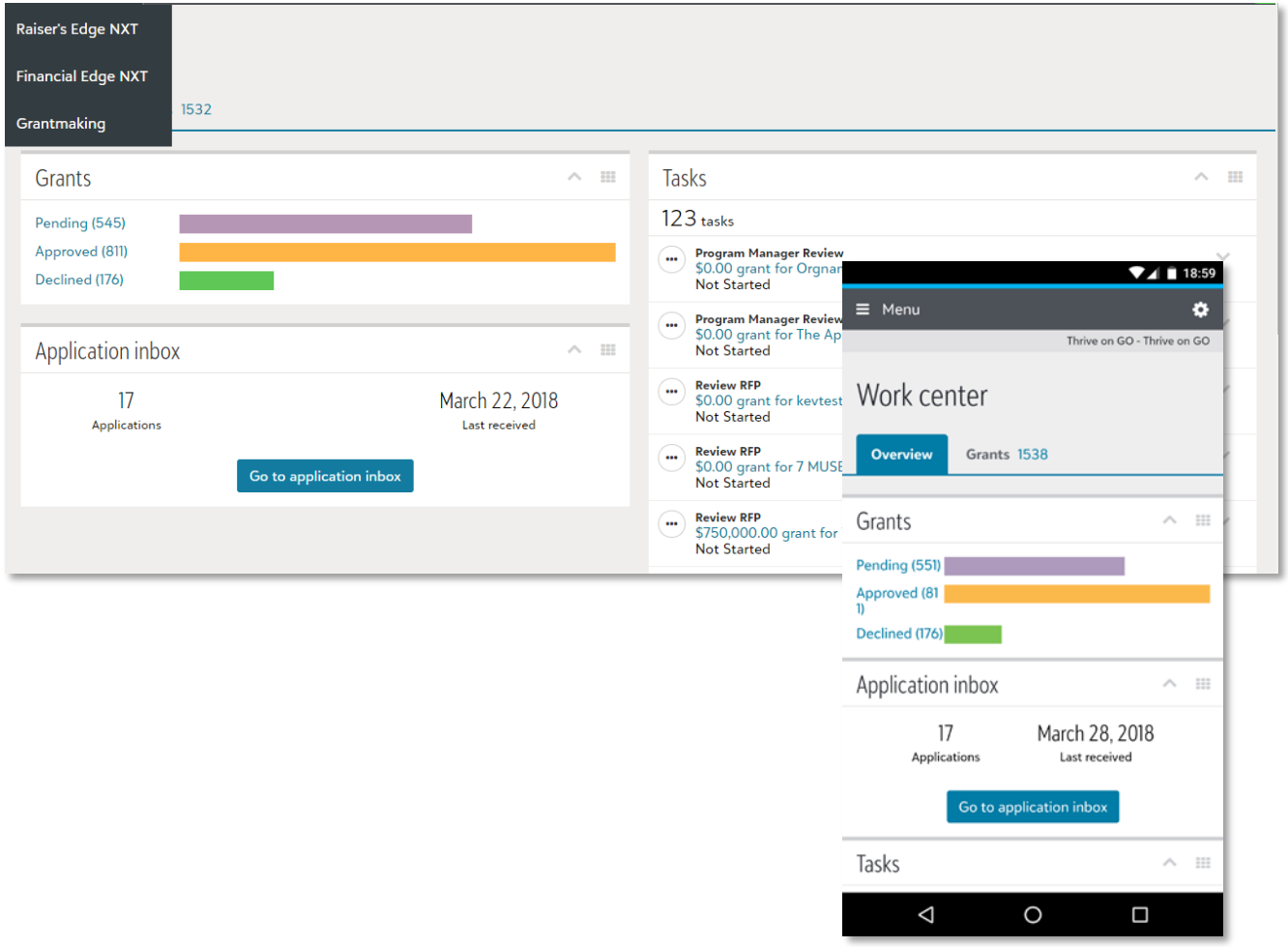
- Full view of a grant on one page
- All related documents and attachments
- Custom fields

What's Next

STRENGTHEN COLLABORATION

What's Next Blackbaud Grantmaking to SKY

Coming Soon!

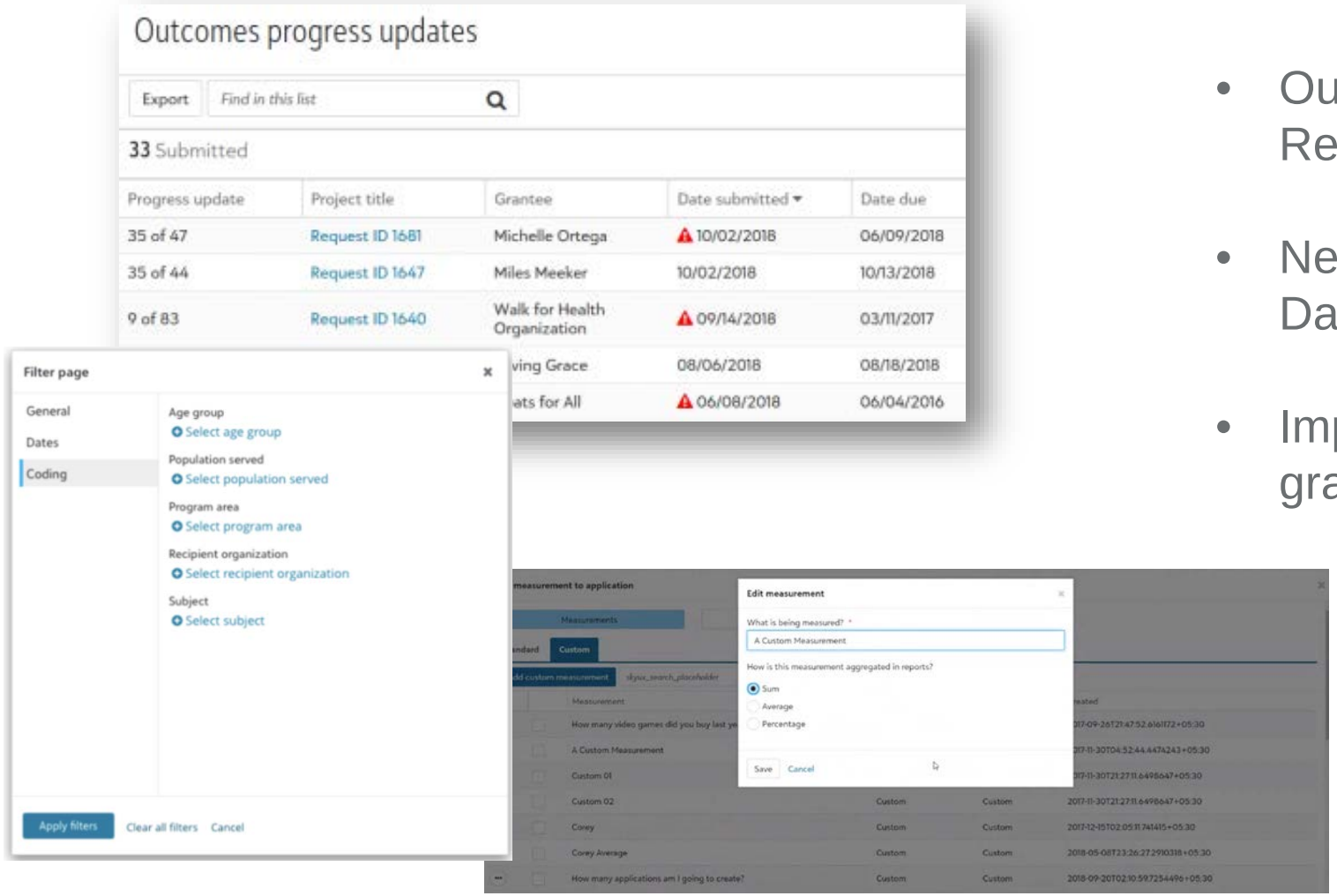


- Invite other users to Grantmaking in SKY
- Manage users and permissions

What's Next

MEASURE YOUR IMPACT

Blackbaud Outcomes
Coming Soon!



- Outcomes available to Reviewers
- New filters on the Summary Dashboard
- Improved portal experience for grant partners

What's Next

{Grantmaking}

Rollout Plan

Q3 2018

Early Access Program (EAP)

- Additional waves of EAP customers onboarded
- Many volunteers, but limited spots in EAP. Thank you for your interest!
- Collecting feedback from EAP participants and discovery calls.

Q4 2018

Admin Access – All Customers

- Admins will receive emails when SKY View is available for your organization
- No disruption to your staff – Classic View keeps working, SKY View becomes available at a new page
- Admins control the roll out to rest of staff

1H 2019

Casual User Milestone

- Ideal for light-touch users: program staff, board members, and read-only users
- Easy to learn, easy to access
- All their data available – for work, analysis, and reporting

FUTURE

Admin User Milestone

- All users able to use SKY View for their daily work, including
- Admins, grants managers, and other power users have all needs met in SKY View
- Frequent updates – you decide when to use SKY View, and when to use Classic View

{Grantmaking}

Roadmap

Q3 2018

Rollout
- 50 customers live on Early Access Program

Grantmaking Efficiency
- Home screen with Tiles
- Grant List filters
- Ease of onboarding users

Data & Analytics
- Audit trail

Outcomes & Impact
- Issue Resolution

Q4 2018

Rollout
- Delivering access for admin users

Grantmaking Efficiency
- Home screen personalization
- Recently accessed grants
- Help and Getting Started content

Data & Analytics
- Home screen tile improvements

Outcomes & Impact
- Outcomes Data Extraction / Availability

Q1 2019

Rollout
- Delivering access for admin users (continued)

Grantmaking Efficiency
- International Availability
- Custom fields for grants
- Manage documents
- Approve / Decline Grants

Financial Management
- Payments
- Accounts payable process
- Interoperability with FE NXT

Data & Analytics
- SKY Reporting

Outcomes & Impact
- Reviewer Access to Outcomes data

FUTURE

Rollout
- **End of 1H 2019:** Casual user milestone. Program officers, read-only users, etc. using SKY View
- **End of 2H 2019:** Admin user milestone. All users using SKY View.

Grantmaking Efficiency
- Cross system searching
- Manage Grant Requirements, Reviews
- Generate Documents, Activities
- Manage Scholarships

Financial Management
- Budget Management / Forecasting

Data & Analytics
- Cross solutions SKY Reporting

Relationship Management
- Contacts interoperability w/ RE NXT
- Search for non-profits, by Outcome
- Grantee Portal updates

Legend: Market Ready | In Progress | Proposed | Under Consideration

Blackbaud Updates & Reminders

Updates/Reminders

- Blackbaud Grantmaking Support # is changing on Dec 10th to 1.800.468.8996

- Reminder: Create your BBID
  - How to invite a user to create a BBID (on kb.blackbaud.com)

Upcoming Events

Upcoming Webinar.
@Thursday Dec 6 at 2pm
Measuring Impact with Blue Cross® and Blue Shield® of Louisiana

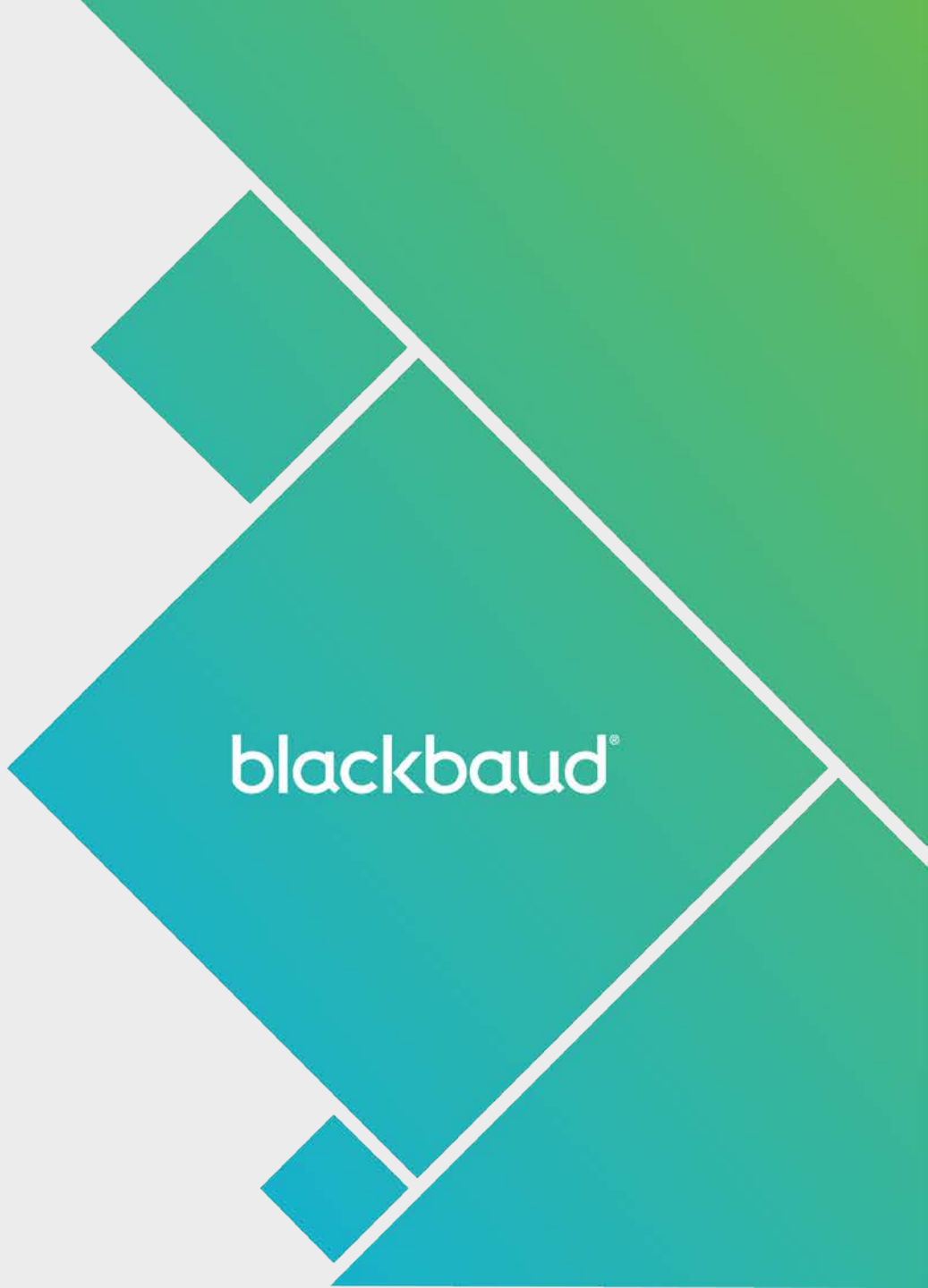
Upcoming Event Sign-up
https://community.blackbaud.com/events
<select> **Blackbaud Corporations and Foundations**

Blackbaud Corporations and Foundations Hub
https://foundations.blackbaud.com/
User Stories, White Papers, Webinar Recording

Q&A

blackbaud®

Thank you!

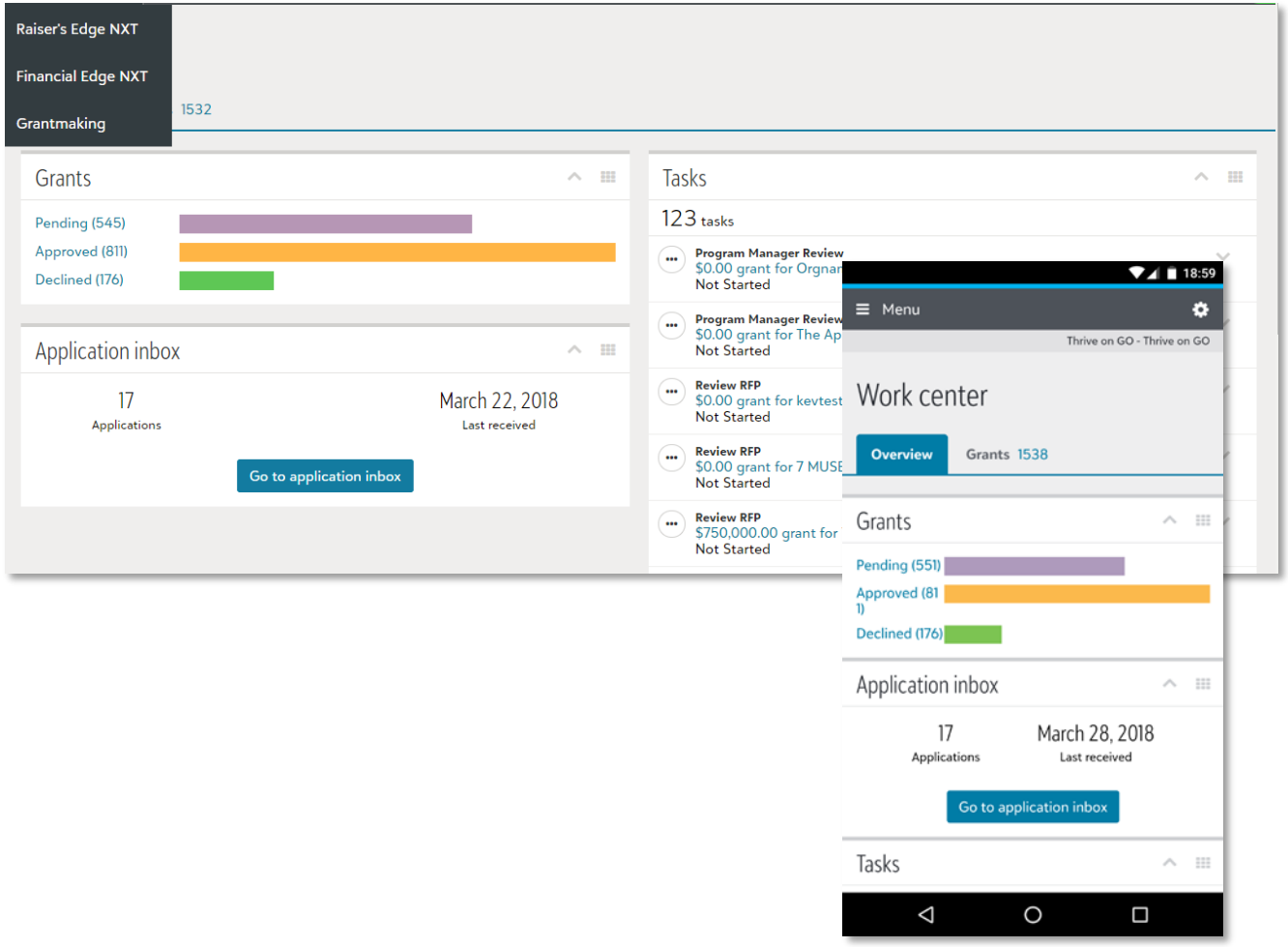


Appendix

What is Blackbaud Grantmaking SKY View?

INCREASE EFFICIENCY

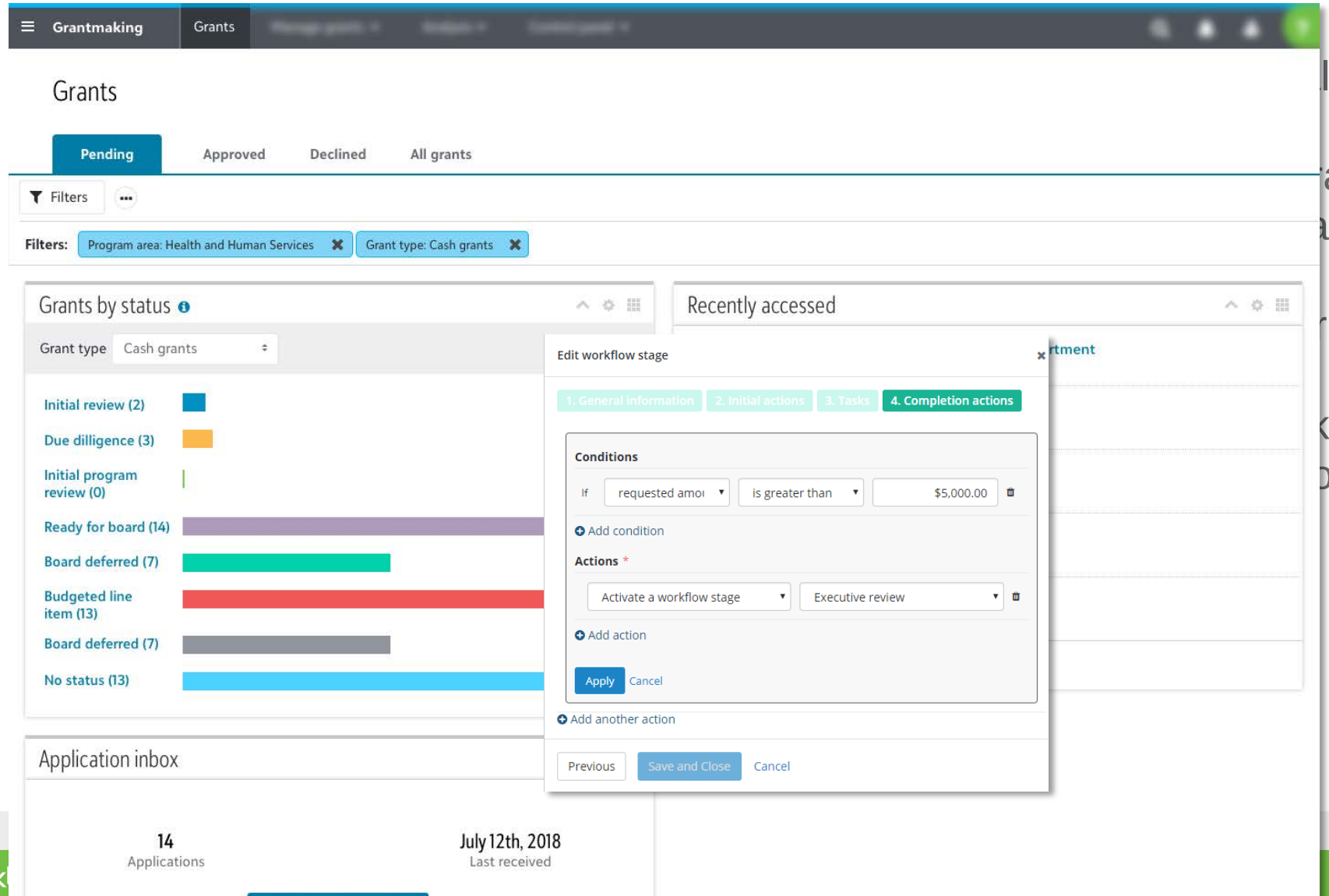
Any device, any browser



- Access your data from any device, in any browser
- Same features and design on your computer, tablet, and phone
- Adapts to your screen size
- No browser plug-ins

INCREASE EFFICIENCY

Personalized for your workflow



lized work center

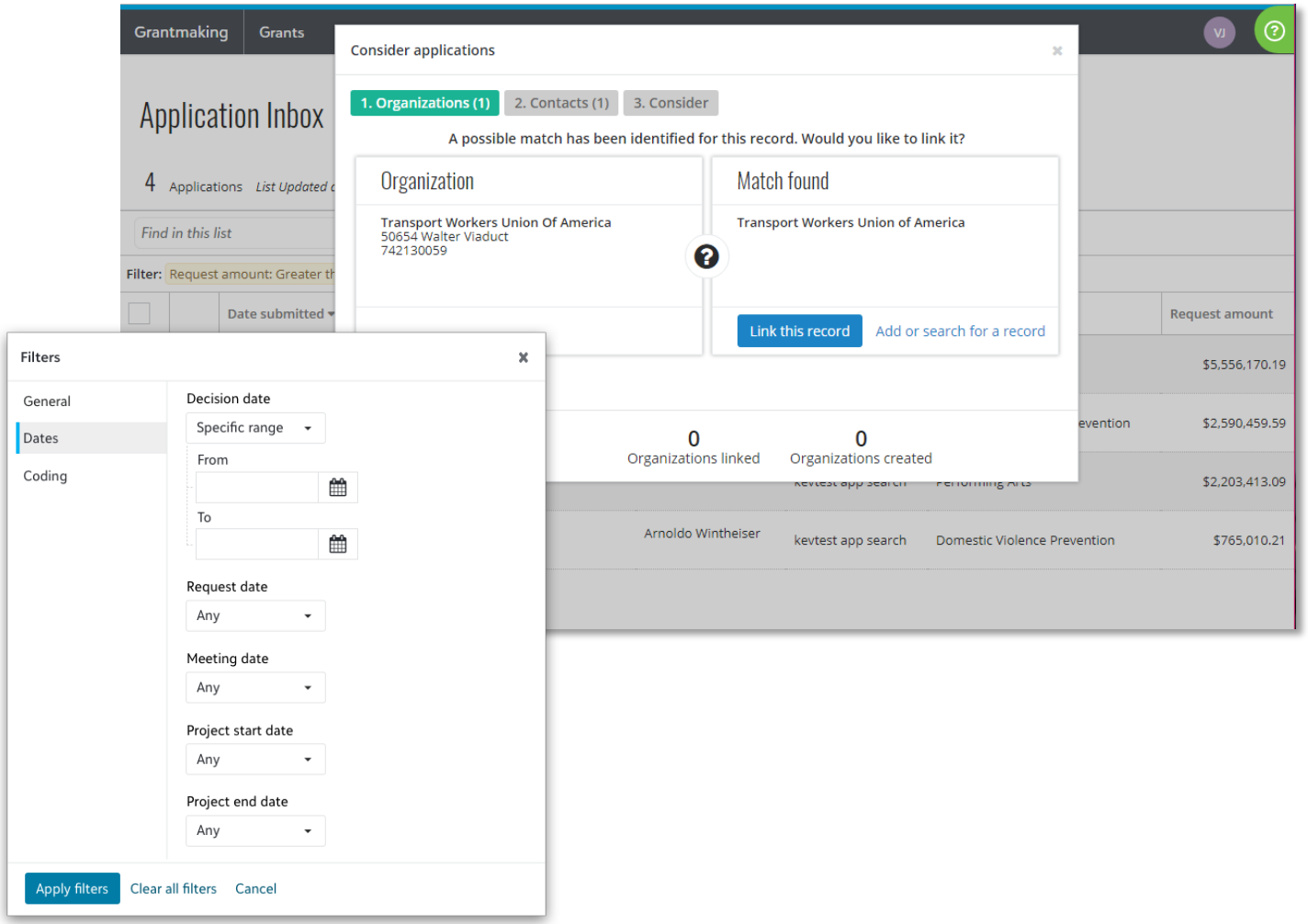
able workflows to
sk reminders

esume recent work

know “What do I need
on today?”

INCREASE EFFICIENCY

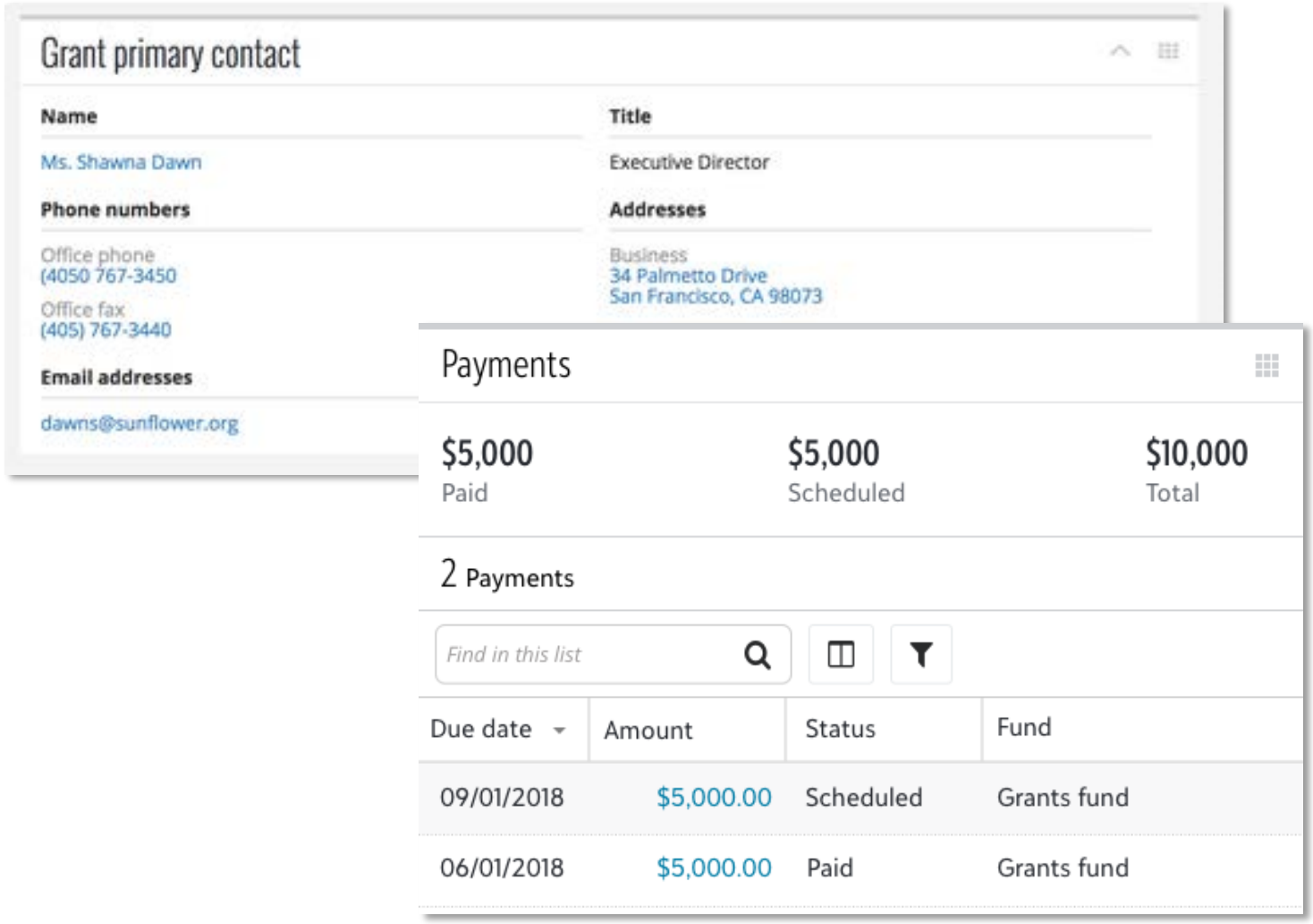
Work smarter and faster



- Process grant applications quickly with the new application inbox
- Smart recommendations help you avoid duplicate contacts and messy data
- Search, sort, and filter any list while you're working

INCREASE EFFICIENCY

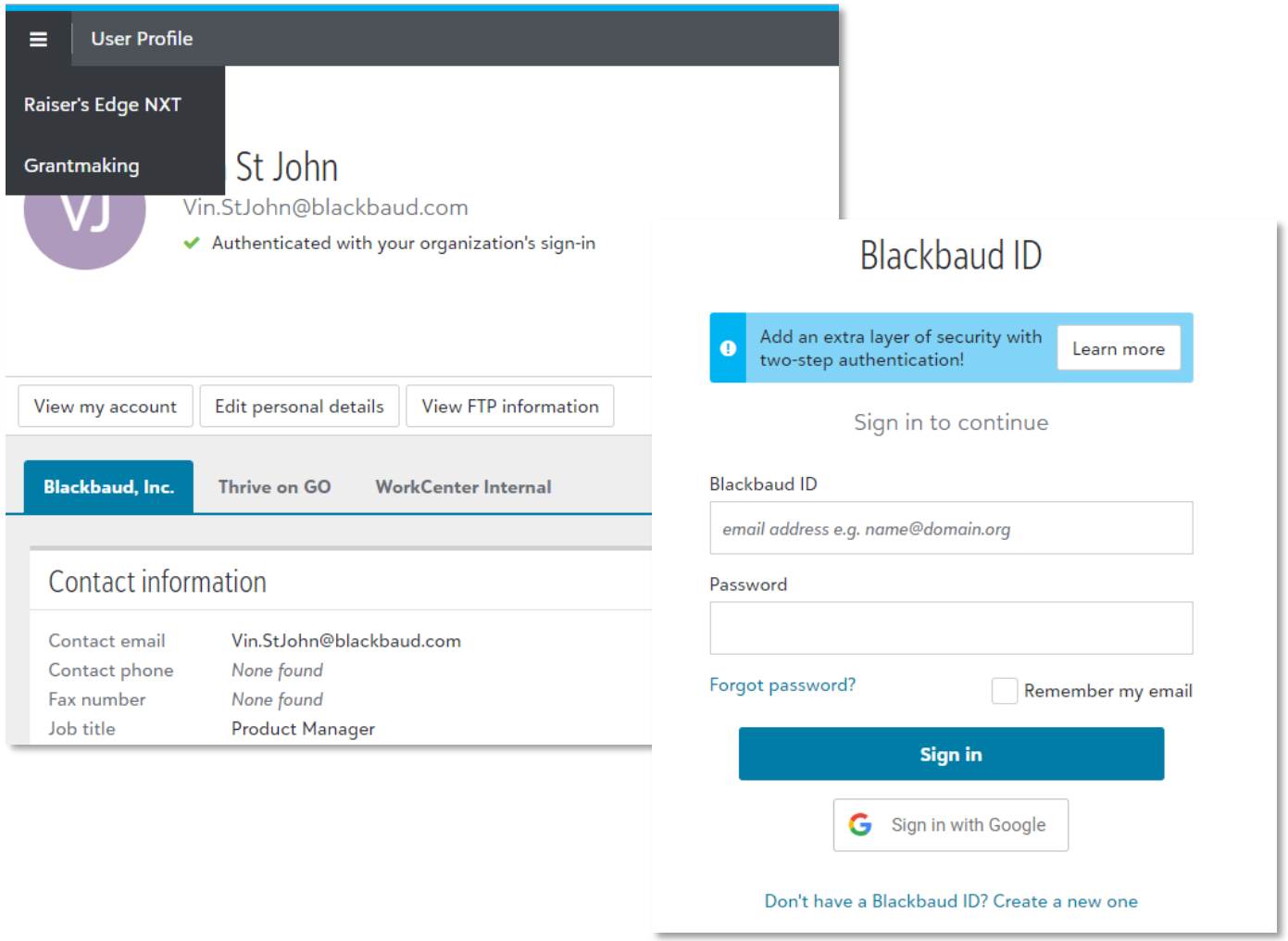
Information at your fingertips



- Quickly look up grants, organizations, contacts, and payments
- Call or email a contact with one click
- Look up directions on your way to a site visit
- Quick summaries of an organization's grants, upcoming payments, and more

INCREASE EFFICIENCY

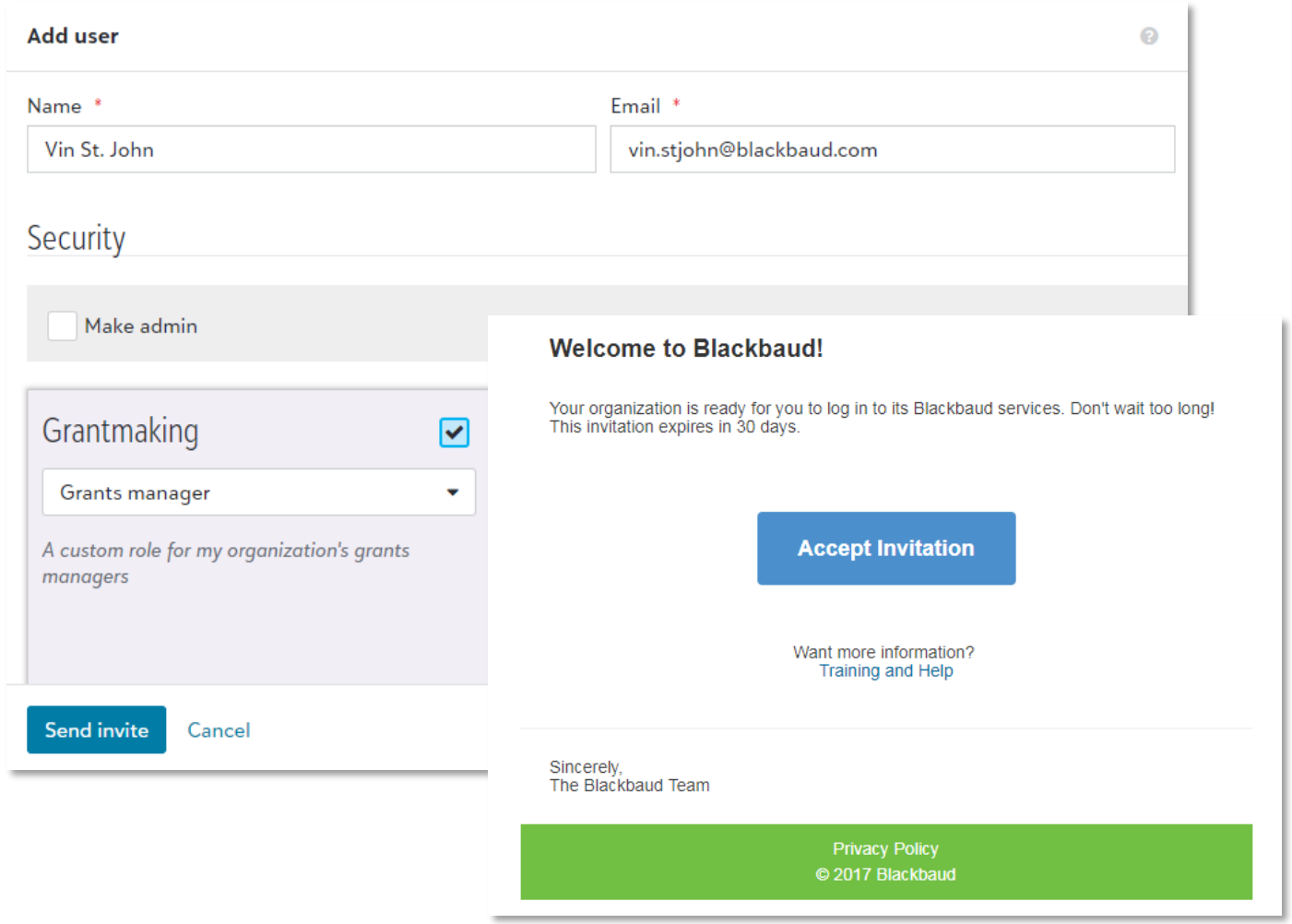
Intuitive and familiar



- Consistent experience across Blackbaud solutions
- Blackbaud ID: One login for grantmaking, fundraising, financials, Blackbaud Community, and more
- SKY UX: Shared design language across Blackbaud solutions

INCREASE EFFICIENCY

Designed for your whole team

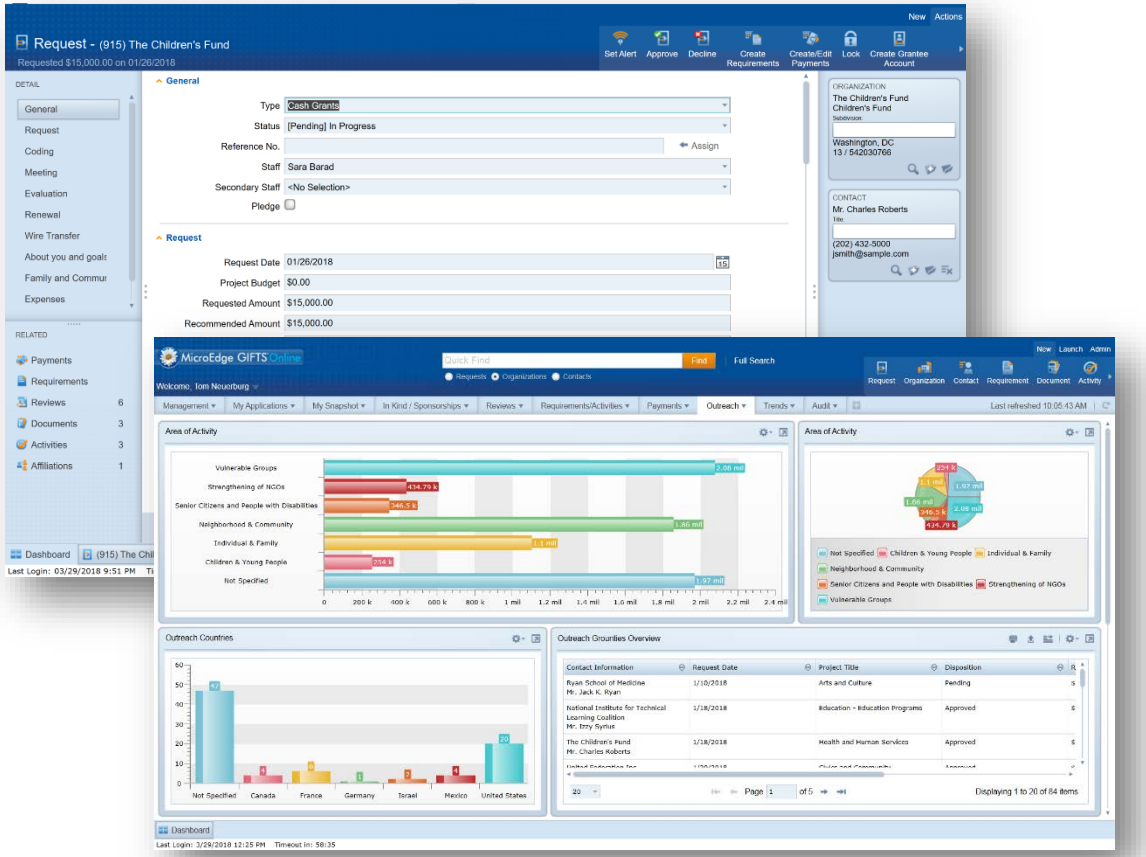


- Getting started guide and online help
- Admin controls to roll out access to your staff
- Approachable design tested with experts AND newcomers
- Supplements your existing experience in Classic View

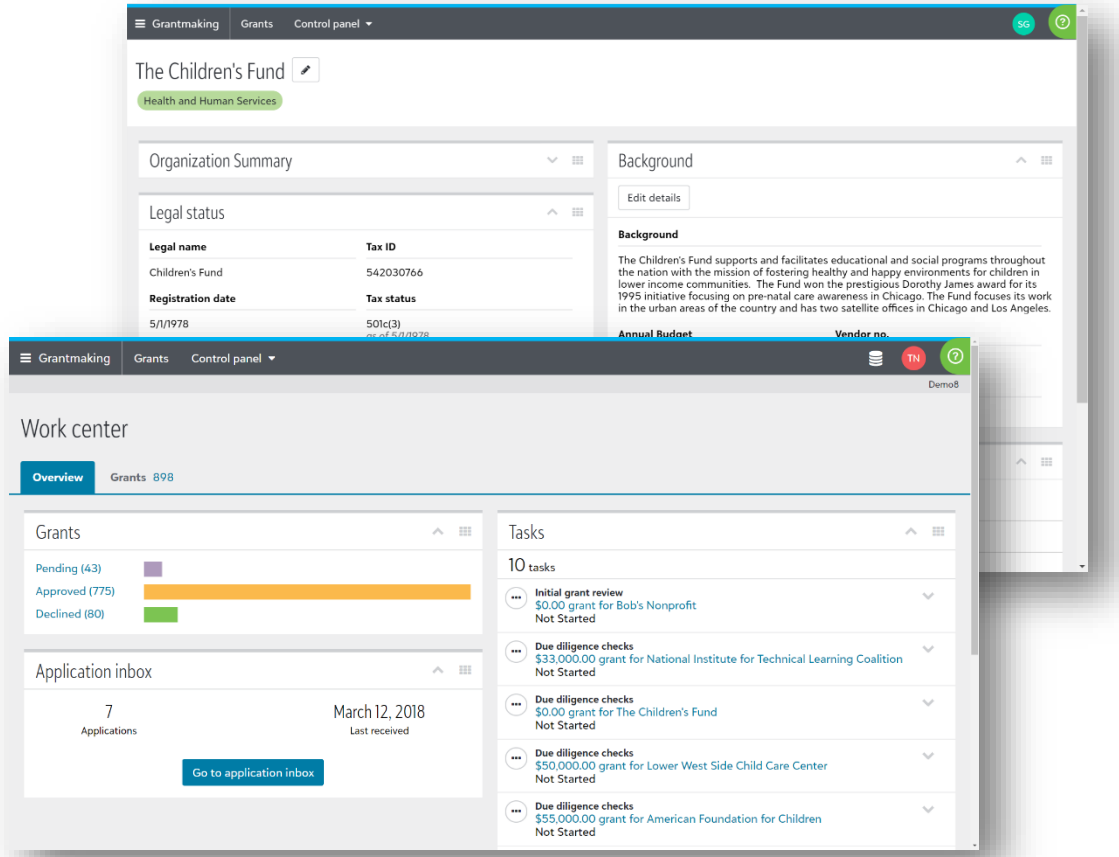
Blackbaud Grantmaking *Experience*

One Dataset, Two Views

Classic View



SKY View



Blackbaud Outcomes

Outcomes Available Now

New Details on Email Reminders

Group Management in Blackbaud Outcomes™

Flexibility to Require Measurements

Measurement Validation in Applications

Progress Dashboard w/ Grantee Names

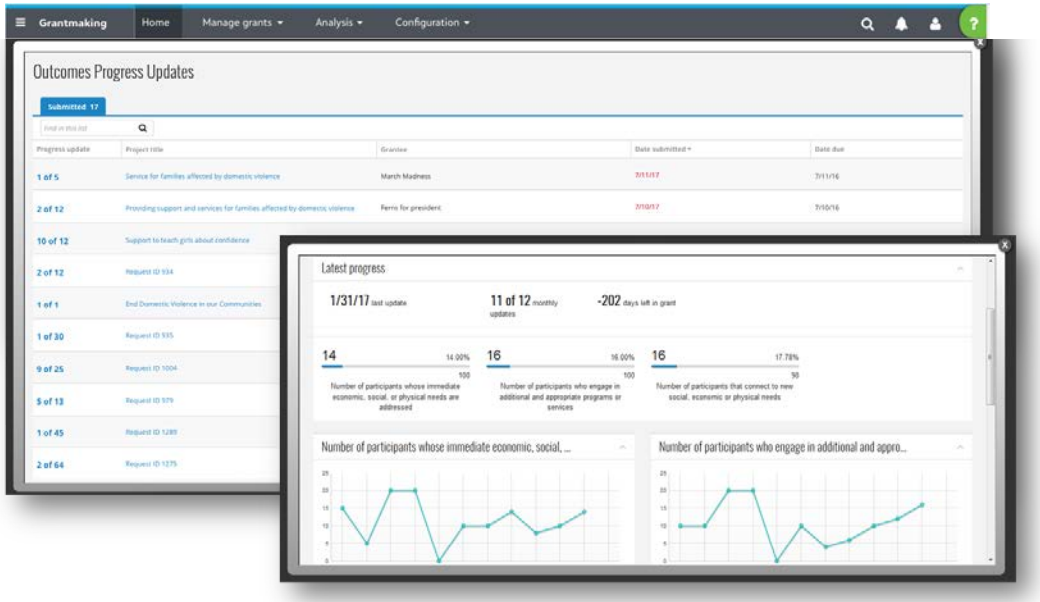
Maintenance Updates

Align Progress Updates with Grant Dates

Impact Measurement

Legend: Market Ready

Outcomes Roadmap Q3 2018



Data Export from Dashboards

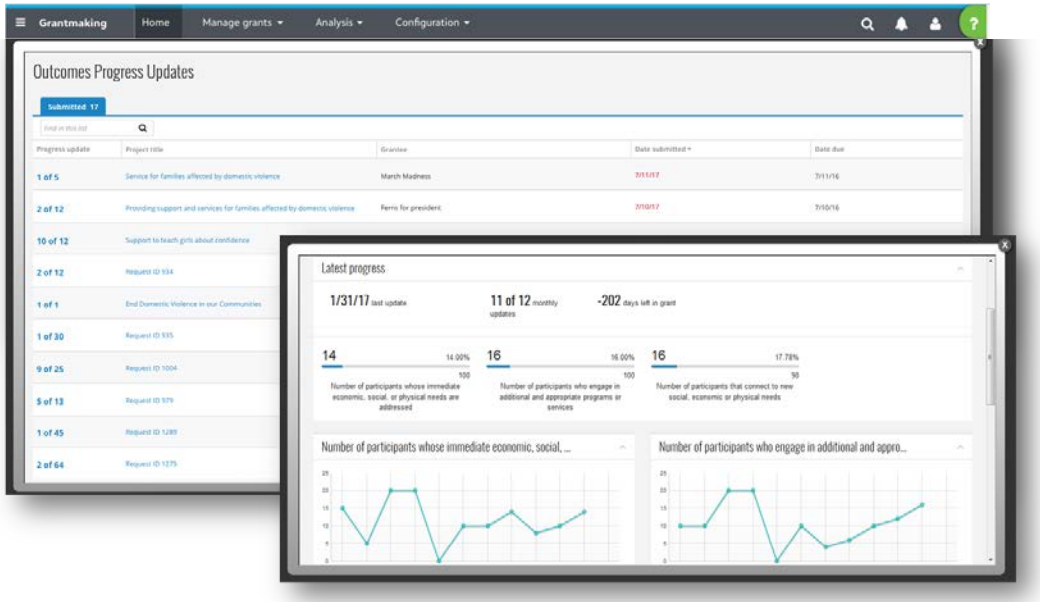
New Data Filters on Dashboards

Maintenance Updates

Impact Measurement

Legend: In Progress

Outcomes Roadmap Q4 2018



Outcomes Available to Reviewers

Transition all Applicants to the Grant Portal

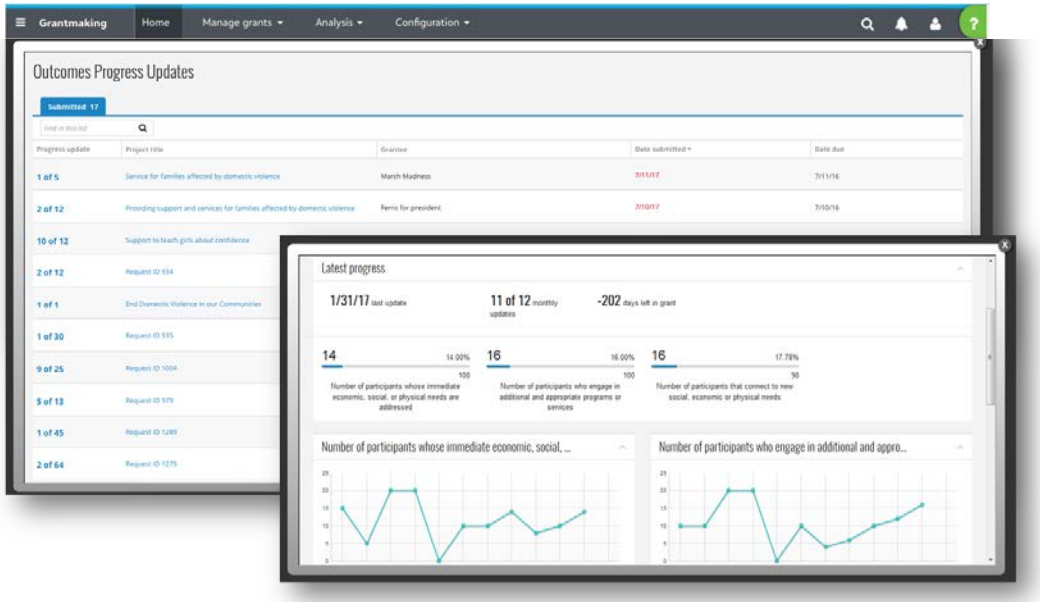
Transition Outcomes to SKY 2.0

Outcomes Reporting Updates

Impact Measurement

Legend: Proposed

Outcomes Roadmap Future



Outcomes in BB Grantmaking SKY View

Taxonomy enhancements Outcomes Search

Data Extraction 2.0 from Dashboards

Org Profile and Outcomes Tracking for Grantees

Impact Measurement

Legend: Future

Where does Product Marketing fit in?

Product Marketing can help when:

- You need positioning help against competitors
- You need pricing help especially when dealing with multi product deals or high user counts
- You have ideas about how we can better package or bundle a solution for a prospect or customer or better yet, a group of customers
- You have questions about published road map items
- elizabeth.marenakos@blackbaud.com

bbcon 2018

OCTOBER 9–11, 2018 | ORLANDO, FL

The Premier Tech Gathering for Social Good

Join thousands of fundraisers, marketers, administrators, executives, and industry thought leaders from across the social good community to push your practice, get inspired by today's trends and tomorrow's tech innovations, and become part of a community like no other.

Register at bbconference.com

BBCON 2018 Grantmaking Sessions of Interest:

- Blackbaud Corporate and Foundation Solutions bbcon Kickoff and Super Session
- A Holistic Approach to Grantmaking: Blackbaud Foundation Solutions
- How the Global Philanthropy Environment Impacts You
- Solution Roadmap for Foundations
- Managing Disaster Relief: Interactive Panel Discussion
- Blackbaud Grantmaking Tips and Tricks
- The 990 A Public Document: What You Need to Know Now
- How Blockchain Can Impact Your Data
- Blackbaud Grantmaking and Blackbaud Outcomes: Tips and Tricks
- Collaborative Grantmaking Practices
- Customer Round Robin: Blackbaud Grantmaking

Blackbaud Grantmaking Townhall Recap

- Review Grantmaking Townhall and bbcon Roadmap slides
- Check out the Grantmaking FAQ, Ask questions
- Start using Grantmaking in SKY
- Connect with the CSM team on Blackbaud.com
  - Visit the Knowledgebase (http://kb.blackbaud.com/)
  - Create a Case via Blackbaud.com via Support>>Case Central
  - Review How-To-Documentation on our website (https://www.blackbaud.com/howto/)
  - Check out the product Community websites (https://community.blackbaud.com/home)
- Connect with our team members, Provide feedback on our development

Meet Your C&F Customer Success Team

Blackbaud C&F Customer Success Team

When Should I Involve Customer Success?

Customer escalations

Product best practices

Industry trends

Customer needs help with a non-technical or billing issue

What Can't Customer Success Help With?

Invoice/billing questions

Technical problems

Sales support

RFP assistance

Contacting Customer Success

CorpFoundationsCustomerSuccess@blackbaud.com

Technical Questions?

Access Knowledgebase, Support Chat, and other support resources online at: blackbaud.com/support

Billing Questions?

If you need help with an invoice, you can call 1.800.468.8896 Option 4, sub-option 2 or email: BlackbaudAccounts.Receivable@blackbaud.com

Training Questions?

If you need help with Blackbaud University Training, you can call 1.800.468.8896 Option 3 or email: TrainingHelp@blackabud.com

GRANTMAKING

Increase staff, stakeholder engagement

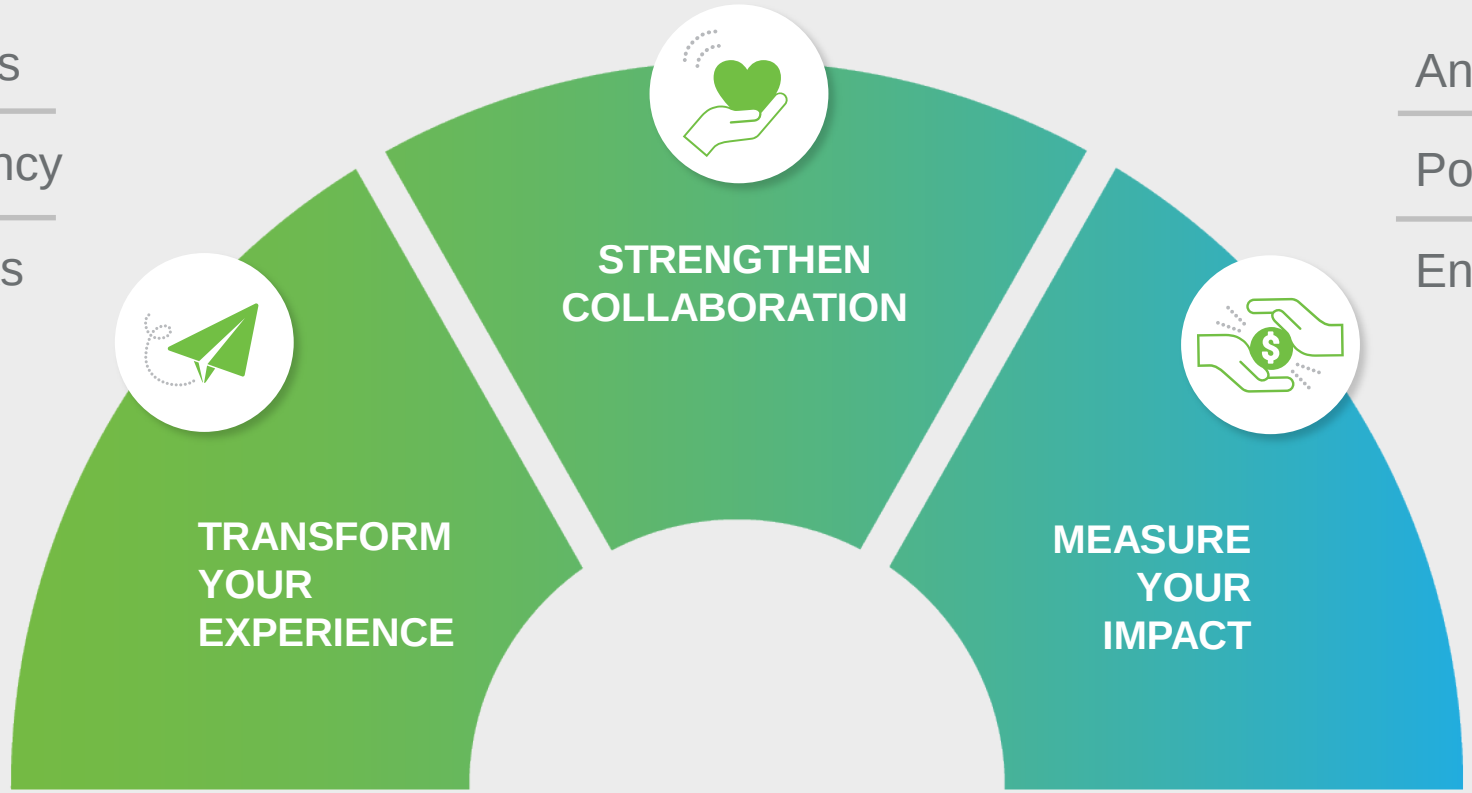
Drive effective communications

Better-quality grant partner interactions

Streamline processes

Increase your efficiency

Quick access to tasks



Analytics at your fingertips

Power your outcomes

Enable grantee outcomes

AMERICAN DIABETES ASSOCIATION

"It's like being on grant application management cloud nine. We have the system configured to our unique research application review and reporting needs, and we use it all day, every day,"

MAGDA GALINDO
Director of Research Programs

American Diabetes Association®