

# FOUNDATION SOURCE RESULTS™

## You Made the Grant—But Did You Make a Difference?

Monitor your impact, collect progress reports, and track performance metrics—all from a web-based platform.

If you are like many philanthropists, you put enormous amounts of research and energy into selecting grant recipients. But after you make a grant, do you get the information you need to assess its impact? If you want to understand the results of your foundation's grantmaking but are reluctant to generate piles of paperwork in order to do so, *Foundation Source Results* can help.

*Foundation Source Results* enables you to monitor your foundation's impact, collect progress reports, and track key performance metrics—all from your foundation's online dashboard.

- How your grant funds were spent
- Whether goals have been met and what progress has been made
- What worked/what didn't
- Unexpected challenges
- Lessons learned

### Don't Make Decisions in the Dark

Harness the power of *Foundation Source Results* and see exactly what your grants have achieved. It's never been easier to get monitoring reports from your grantees.

*Results* organizes and automates the process of collecting follow-up reports from your grantees, saving your foundation time and effort.

<span>Filters</span> <span>Actions</span> <span>Columns</span>						
Result Due Date: <span>Previous Fiscal Year</span>						Displaying 11 of 11 results (Displaying All)
	Result Due Date	Grantee	Payment Amount	Result Form	Result Status	Action
<input type="checkbox"/>	09/21/2017	4 PAWS 1 HEART	\$15,000.00	Final Report	Past Due as of 09/21/2017	Cancel
<input type="checkbox"/>	10/01/2017	BARTLETT ARBORETUM ASSOCIATION INC	\$5,000.00	Final Report	Past Due as of 10/01/2017	Cancel
<input type="checkbox"/>	11/27/2017	HOPE FOR HAITI INC	\$500,000.00	Progress Report with Request Detail	Submitted	Delete
<input type="checkbox"/>	11/30/2017	1 MILLION DOORS	\$50.00	Progress Report with Request Detail	Waiting for Payment	Cancel
<input type="checkbox"/>	12/05/2017	SAVE THE CHILDREN FEDERATION INC	\$5,000.00	Progress Report with Request Detail	Waiting for Payment	Cancel
<input type="checkbox"/>	12/05/2017	2ND CHANCE ANIMAL RESCUE	\$500.00	Final Report	Submitted	Delete
<input type="checkbox"/>	12/11/2017	1 MILLION DOORS	\$10,000.00	Final Report	Submitted	Delete
<input type="checkbox"/>	12/11/2017	THE METROPOLITAN MUSEUM OF ART	\$8,000.00	Final Report	Past Due as of 12/11/2017	Cancel

## Key Features

**Flag for Results:** Set the timetable for your grantees' progress reports, both financial and narrative, at the time you make the grant and then forget about it. Results will take care of the entire follow-up process.

**Reminders:** Automated reminders go out to your grantees letting them know when their progress reports are due, so you won't need to stay on top of them to meet their deadlines.

**Submission Alerts:** Email notifications alert you when your grantees have submitted their progress reports, eliminating the need for endless checking and re-checking.

**Overdue Alerts:** Automated notices let you and your grantees know when their report is overdue.

**Batch Requesting:** In a matter of seconds, you can request monitoring reports from all organizations on the board's docket that were approved for funding.

**Cross-Cutting Review:** Export results from multiple organizations to understand the collective impact of your grantees.

## Advantages

**Simplicity:** The formerly time-intensive challenge of scheduling, receiving, and tracking grantee reports becomes effortless.

**Accountability:** Hold grantees accountable for agreed-upon achievements. Their proposed activities and deliverables can be easily transferred from their original request for funding to the monitoring documents for reporting purposes.

**Control:** For multi-part grants, you can require progress reports to be submitted prior to approving the next grant payment for processing.

**Historical Archive:** Provides an online record of each grant, from application to final report, so you can revisit past results when making future grant decisions.

**At-a-Glance Comparisons:** Easily do an "apples to apples" comparison across multiple grantees by asking grantees to provide their information in the same format.

 **As our foundation's grant manager, I can say that the Results function of the platform has been a huge timesaver! We have been able to customize our templates to meet our unique requests to our grantees, and the 'Flag for Results' button has further helped to ensure that important follow-ups are not missed."**

– Amelia White, Cultures of Resistance Network

## ABOUT FOUNDATION SOURCE

[www.foundationsource.com](http://www.foundationsource.com)

Foundation Source is the nation's largest provider of comprehensive support services for private foundations. Our complete outsourced solution includes foundation creation (as needed), administrative support, active compliance monitoring, philanthropic advisory, tax and legal expertise, and online foundation management tools.

Now in our second decade, Foundation Source provides its services to more than 1,400 family, corporate, and professionally staffed foundations, of all sizes, nationwide. We work in partnership with wealth management firms, law firms, accounting firms, and family offices as well as directly with individuals and families. Foundation Source is headquartered in Fairfield, Connecticut.

Have a question? Call 800.839.0054 or send us an email at [info@foundationsource.com](mailto:info@foundationsource.com).

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