



Tool: Guidestar for Grant Applications

<https://learn.guidestar.org/products/resources/guidestar-for-grant-applications>

Organization:

GuideStar USA, Inc.

<http://www.guidestar.org/>

Why Use This Tool?

The GuideStar for Grant Applications API can be integrated with your Grants Management System to automate pulling detailed information about the grantee from the GuideStar nonprofit database directly into the grant applications. This can save time for the foundation and nonprofit staff, and help ensure the grant application has the most complete and accurate information available.

Benefits and Beneficiaries

The G4G API benefits include:

- Saves Time & Money - The G4G API helps to save time by reducing the amount of time spent by nonprofits filling in the same information across multiple grant applications, as well as the time spent by grantmakers coordinating the gathering of detailed information needed for the grant application.
- Increases Accuracy of Data - G4G increases the accuracy of data because the data is coming from a consistent source which is kept up to date by the nonprofit in a central system. This helps eliminate the possibility that different staff within a nonprofit will provide different and out-of-date information on different grant applications.
- Improves Completeness of Data - By pulling the data from a central source which includes several data fields designed to capture more detailed nonprofit information than might otherwise be available on or required by different grant applications from different grantmakers, G4G helps ensure that the data available about the nonprofit is as complete as possible, regardless of the context in which it is used.

The beneficiaries of using the API include:

- Nonprofits - Nonprofits benefit by being able to manage their information in one central location, and have that information transmitted directly and automatically to

the grantmakers, without having to copy-paste that information each time into separate grant applications. While this may not be as convenient as a true universal grant application, efforts at such in the past have not been successful, and this approach offers a compromise which provides many benefits of reusable data to the nonprofits while still allowing grantmakers to use grant applications suited to their unique needs and program activities.

- Grantmakers - Grantmakers benefit by quickly and easily getting the most accurate and complete information available about the nonprofits whenever a grant application is submitted.

Process Improvements

The G4G API can improve the process within the Grants Management Life Cycle where detailed information about the grantee is gathered and transmitted to the grantmaker. This obviously includes the grant application process, where the API can be used to automatically fill in fields within the application just by identifying the grantee using the Tax ID, but any other processes which the grantmaker wished to have more detailed info available could also benefit. For example, if a grantmaker wished to gather more extensive information about a potential grantee when a Letter of Inquiry was submitted, but didn't wish to burden the grantee with sending that information before it was established whether they were a good fit for the program, the G4G API could help provide more detailed organizational info that could help program staff decide whether to invite the nonprofit to submit a full grant application.

Licensing and Other Costs

The licensing costs for the G4G API have caused some confusion, and are in the process of changing. We are working with Guidestar and the GMS Vendors to clarify the situation and communicate the details to all affected parties.

The current licensing model varies, depending on your GMS vendor and situation. Some vendors have obtained a blanket license that allows all their clients to use the API without having to pay GuideStar. In those cases, the vendor may or may not charge a fee for using the API. For other vendors, or if you use a custom GMS, you must obtain a license to use the API directly from GuideStar, which costs \$750/year per organization.

We are working to compile a more complete list of the different licensing arrangements with different vendors, and will be adding that information to this document in the near future. For now, here is our current information about G4G licensing for the different GMS vendors:

- MicroEdge - Some clients currently have direct licenses with GuideStar. Our understanding is that MicroEdge already has or will soon have a blanket license which covers all clients.
- Foundant - Our understanding is that Foundant has a blanket license which covers all clients.
- Fluxx - We do not know the current status of API licensing for Fluxx clients.
- SmartSimple - We do not know the current status of API licensing for SmartSimple clients.

- roundCorner - We do not know the current status of API licensing for roundCorner clients.

For clients of commercial GMS systems, the grantmaker needs to allocate staff time to mapping the fields in the API to their applications, or paying a consultant to do so. For foundations with custom GMS systems, they will need to pay for software development time to integrate with the API.

Tool Description

The G4G API is meant to ease the burden of filling in grant applications by auto-filling extended grantseeker information when submitting the application from data stored centrally in the GuideStar database. For this to work, the nonprofit needs to complete their extended profile within GuideStar, the GMS vendor needs to integrate with the G4G API, and the funder needs to map the G4G fields to their grant applications within their GMS. Once these of these pieces are in place, when a nonprofit begins to fill in an application online, and once they enter their EIN, the appropriate fields within the application will be auto-filled using the data stored at GuideStar.

The types of information available through the G4G API include:

- Organizational information
- Mission and impact statement
- Demographic coding
- Financial information
- People/contact information
- Uploaded documents
- IRS information
- Diversity data

Implementation Details

The implementation of the G4G API depends on your GMS vendor, but while it can be different for different vendors, the process is substantially similar in each case.

To implement the API and use the data fields within any of the products from participating GMS vendors, a customer needs to contact the vendor and let them know they want to use the API, so that the vendor can do whatever configuration is needed within their system to turn it on for that customer. Once the API is turned on, the grantmaker needs to map the fields from the API to the fields within their grant applications. This user experience for this process is different from system to system, but in each case, it is necessary to identify the specific field within the G4G API you wish to map, identify the field within the grant application you wish to receive the data from the API field, and create the connection between the API field and the field within your grant application. We are working with the GMS Vendors to provide more comprehensive documentation about what this process looks like, hands on, within the different software systems.

It is also possible to implement the G4G API within a custom GMS, and we are aware of at least one foundation which has done so. In this case, it is up to the foundation to decide

how to best implement the API, and what the user experience should be like. In the example we know of, the grantmaker chose to create a user interface which displayed both what was available about the nonprofit through the G4G API, as well as the data about that nonprofit which was previously stored within the GMS, and let the program staff select which version of the information to use. Such a custom approach obviously requires the ability to perform custom software development.

Some technical details about this API, as well as other GuideStar APIs, can be found here:

- <https://community.guidestar.org/docs/DOC-1779>

Participating Vendors

The following vendors have committed to implementing the G4G API within their GMS Software:

- MicroEdge - MicroEdge currently has the most clients utilizing the G4G API. They implemented the API within their GIFTS Alta and GIFTS Online offerings. The licensing status of using G4G within MicroEdge products is currently unclear, but MicroEdge is working with GuideStar to obtain a license which will allow any of its clients to utilize the API with no costs to the grantmaker. Our understanding is that there are still MicroEdge client who have licensed the API directly from GuideStar, and we are working with GuideStar to clarify the licensing status and consolidate information about how current and new clients should approach this. MicroEdge implemented the 1.0 version of the API, which does not allow as many fields to be mapped to applications as the current 2.0 version does. They are currently evaluating when they will be able to update their integration to include the 2.0 API version and data fields.
- Fluxx - Fluxx has stated they have implemented the G4G API within their product. We do not know the status of the licensing agreement between Fluxx and GuideStar, and what clients should expect. We also do not have current information about the level of integration between Fluxx and G4G. Some foundations have reported to us being told that a very limited number of fields are available for mapping to applications, and we are currently researching the details.
- Foundant - Foundant Technologies reports that they have fully integrated the G4G API within their Grant Lifecycle Manager product (see <https://trust.guidestar.org/keep-it-simple-initiatives-to-eliminate-busywork-and-save-time>). Our understanding is that Foundant has obtained a license which will allow all customers to utilize the API without additional costs to the grantmaker.
- SmartSimple - We are still gathering information about the specifics of SmartSimple's support for the G4G API.
- foundationConnect - We are still gathering information about the specifics of foundationConnect support for the G4G API.

Adoption Levels

Around 40 grantmakers currently utilize the data available through the G4G API to automatically populate at least some grant application fields within their GMS. We know that hundreds of grantmakers are aware of the tool, but adoption has been slow. Confusion among both grantmakers and GMS vendors over licensing costs and implementation details

has made implementation challenging, and we believe this has hindered adoption. We are currently working directly with GuideStar and the GMS vendors to clear up the existing confusion, as well as to provide additional documentation and information which will help foster adoption.

Related Tools

The G4G is implemented as part of the GuideStar Exchange API (see more information at <http://simplifynow.org/tool-profile-guidestar-exchange-api/>).

The data available through the G4G API is driven by the GuideStar database of nonprofit information. Nonprofits can manage this data directly, ensuring more accurate and complete information, on the GuideStar website (see <https://learn.guidestar.org/update-nonprofit-report>).

History

The GuideStar for Grant Applications (G4G) API was originally called the Simplify API, and was a joint effort of the Technology Affinity Group and GuideStar to create a system which allowed for the central collection of common data from nonprofits and the automation of providing that information within different grant applications used by different foundations.

The idea behind the API was to identify common data points which were often gathered by grantmakers across different types of grant applications within different organizations, and create a central repository of data about nonprofits which would be used to automatically populate those data points within the applications, thus saving time and hassle for all parties. Previous efforts to create a universal grant application had not been successful because different grantmakers had different needs which could not be met by a single application format, but this new approach allowed for grantmakers to continue using their own individual application forms, while also taking advantage of the many common data points across those forms.

The project was conceived on in November 2011. In December 2014, GuideStar launched the API, integrating it into its GuideStar Exchange API. At this point the API was renamed to GuideStar for Grant Applications (G4G) and GuideStar completely absorbed the project. TAG is no longer directly involved in this project, but the API is one of the central tools being promoted and supported as part of the new version of the Simplify Initiative.

Document Status

This document was last updated on May 9th, 2017. There is currently an ongoing effort to gather more information about the specifics of licensing and integration details with the different GMS vendors who already support this tool, and we expect the document to be updated again in the near future.