

# Grantmaker's Guide to Cloud-Based Software



# What is the Cloud?

## You Already Love the Cloud

Believe it or not, you're already floating in the cloud!

Have a Gmail account? Your web-based email lives in the cloud. Share work documents with colleagues via Dropbox? Do you like sharing or viewing photos on social media? Enjoy unwinding with movies on Netflix or Amazon Prime? Yep, those are all in the cloud, too.

These companies don't offer cloud services but they rely on the cloud to operate.

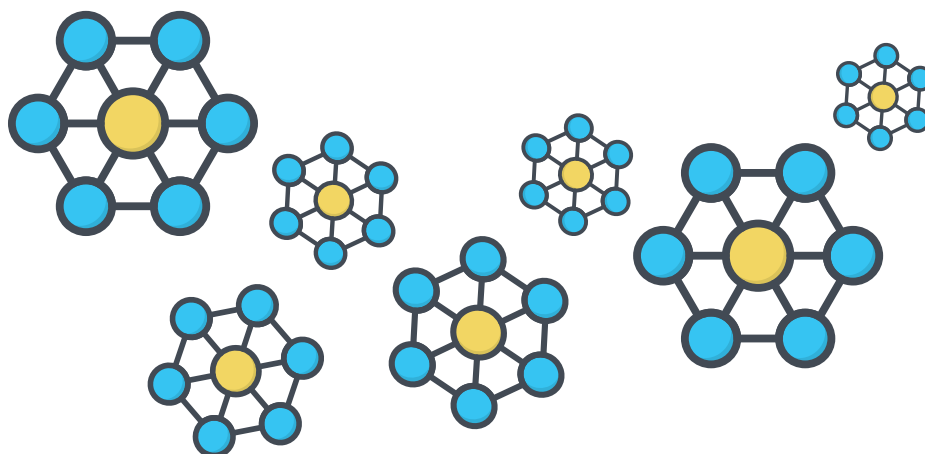
The cloud is a global network of computer servers. Yet, as the examples above show, you don't need to know how the cloud works on a technical level to use and enjoy the cloud.

# What are the Benefits of the Cloud?

## The Cloud's Sprawling Growth

You don't need to know about the staggering growth of the cloud, either, although that's interesting, too. An International Data Center (IDC) report in 2016 projected the cloud's economic value at \$203 billion by 2020. The IDC anticipates a growth of 11.7% a year!

All you really need to know is that you can harness the cloud for personal and professional use. This guide will show you how grantmakers can benefit from cloud-based software.



# Cloud Advantages for the Grantmaker

As a grantmaker, cloud technology offers unparalleled advantages compared to previous workflows.

## Collaboration

Cloud-based software facilitates collaboration at every step of the grant process. No more shuffling papers or emailing documents. Cloud-based software allows all stakeholders -- from the funder, to applicant, to reviewer -- secure access their role in the grant-making process.

## Transparency

More of the grantmaking process is visible thanks to cloud-based software. That's because all the data lives in one virtual location (the cloud). Grant managers now have a real-time overview of the entire process. This facilitates a faster and smoother application and review process.

## Data Insight

Cloud-based software is very secure. It is also very flexible. Depending on organizational needs the grant manager can control which parties see what data. Capturing all this information in the cloud makes it easier to review data trends.

## Decision-making

Grant managers and other stakeholders can draw upon cloud-driven data to inform future decisions. This saves money. It also lays the groundwork for scaling as the organization grows, too.

## Remote work

Cloud-based software is available anywhere with internet access. All grantmaking parties can connect, from an office across the country or from their phone.

# Cloud-Based Software: Common Misconceptions

Commercial cloud-based services have existed for over a decade. Still, some organizations resist moving to the cloud. Here are four common misconceptions.

## "The cloud isn't secure"

The biggest fear about the cloud is actually the least true.

Cloud-stored data is constantly monitored, minute by minute, for protection against threats. Threats come in many forms, from sloppy practices (such as sharing passwords) to malicious actors (hackers), to man-made threats, such computer viruses.

Grantmaking organizations touch a lot of sensitive data. People with malicious intent choose the easiest targets. Locally-stored data is a far easier target than a cloud-based solution.

Consider any office. The biggest data risks are those that require the least effort to extract. That could mean unlocked doors in places that store paperwork. Or it could mean data stored on loosely guarded local computers.

For example, computers that use of weak passwords, out-of-date virus protection, or non-existent firewalls... well, alert your nephew. These are much easier to breach than professional cloud services. The best cloud-based software uses bank-level security protocols.

Using a cloud-based software solution can free your organization from the task and cost of keeping software updated, patched, and protected.

## "If I migrate our system there will be data loss and downtime"

Hardly! Cloud-based services (also called SaaS, or Software as a Service) companies compete for "uptime" stats. What's "uptime"? How many weeks, months, or years since someone's niece or nephew tried to break in and steal things. Usually, it's measured in years.

How to do SaaS companies keep this stellar year-over-year uptime records? Backups of backups. Not just *once-a-week-if-we-remember* backups. Backups are literally running several times an hour.

Let's imagine the unlikely event of a total, catastrophic data loss. In a worse-case scenario, your organization would lose only about 15 minutes worth of work. That's because the cloud system is built to boot up quickly and be back online....in the extremely rare event that it goes down at all.

To fear downtime is to disregard the security and productivity advantages cloud-based software provides.

### **"The cloud is not reliable"**

The cloud is more reliable than anyone on your team -- even you.

The cloud exists on many physical servers instead of a single location. Since the cloud is distributed it consists of powerful, redundant systems, and has built-in strength and resiliency.

Major outages are newsworthy because they are so rare. You'll be out of the office more than your cloud-based software is offline or unavailable. It never takes a vacation!

### **"The cloud is nice, but it isn't for us"**

Actually, most cloud-based services are custom-built just for you.

Cloud software vendors regularly configure systems to exact specifications. What does your grantmaking organization need? The rest of this guide will help you determine your needs.

Remember: no two cloud-based software systems are the same. What unites them is their location in the cloud. Most SaaS software uses AWS (Amazon Web Services) or Azure (Microsoft) as their trusted cloud. But, the mechanics behind the scenes matter very little.

The end result is what matters:

**Cloud software offers your organization greater efficiency, more security, and access to your projects from anywhere on Earth, 24/7.**

# 3 Steps to Select Cloud-Based Software for Your Organization

## 1. Inventory Your Needs

Take an inventory of the tools you already use to manage the grantmaking process.

Make a list and describe why you use a particular solution. For example, you might list “Google docs” and then add “because I can share a Google doc with anyone on the team.” Consider adding any drawbacks to the current solution, too. For example, “tracking multiple Google docs often confuses judges.”

- What kind of data do you track? What would you like to track?
- How frequently do you need to access historical data?
- What information do you share with stakeholders?
- How do you keep records on contacts, partners, and others?
- What are common deliverables in the grantmaking process?
- What parts of the process cause confusion or exhaust a lot of time or resources?

Listing what you already use is helpful because it will help you review the capabilities of the cloud-based software you select. Don't skip this step; otherwise, you could miss out on identifying opportunities to increase your productivity.

Ideally, the cloud-based software you choose will simplify your end-to-end process.

## 2. Crunch the Numbers

If you know what you're buying, cloud-based grant management software can dramatically increase your productivity and reduce costs.

To ensure you know what you're paying for, request detailed frameworks for what you pay, when you pay, and any subscription or other additional commitment costs. Ask questions!

- Does the software include onboarding or training?
- Does the software have customizations important to your organization?
- Can you speak to other clients to get their feedback on service?

One benefit of cloud-based software is that most services charge a flat subscription fee. This can be a significant savings over traditional, on-site software that typically charges a fee for individual users.

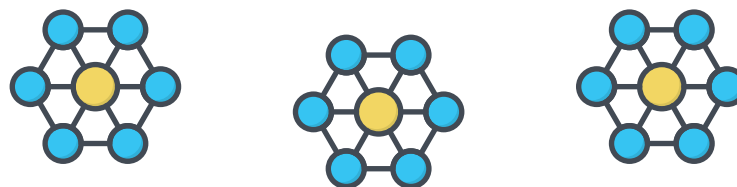
Another cloud benefit is cost savings in your IT department. Many organizations can reduce costs associated with on-site hosting, computer maintenance, and computer security. In exchange, organizations on the cloud can scale services without expanding IT department headcount.

### 3. Set an Implementation Timeline

Work with your selected vendor to put your grantmaking process on the cloud in a timeline that works for your organization.

If your organization has a “busy season,” avoid scheduling the transition during that time. Ask your onboarding team for implementation recommendations. Does it make more sense to transfer the entire process at once or in smaller pieces, for example?

Develop a timeline and a list of milestones. Don't forget to add time in for training, testing, and troubleshooting. Plan to involve the relevant stakeholder in the process. Get them excited about this transition! Highlight how cloud-based software will benefit everyone, from greater productivity to work based on their schedule thanks to remote access, 24/7.



**Shift to a grantee-centered, cloud-based service to manage your grantmaking process.**

**Eliminate unnecessary and repetitive processes so you can focus on your important mission.**

**We built OpenWater Grant Software to serve the people forging the path to a better tomorrow. Thank you for all you do!**



## Application and Review Software

Whether you're starting a submission and review process from the ground up or trying to accelerate growth for an established program, OpenWater can help you:

### Attract Applicants

Direct applicants to a website that retains your primary site's branding and is easy to use.



### Build Relationships

Make it easier for all parties to communicate before, during, and after the review process.



### Streamline the Process

Keep everyone engaged and on task through multiple rounds of review.



### Track and Report Results

Make it easier for all parties to communicate before, during, and after the review process.



[Request a Demo](#)



OpenWater software helps you and your team manage any **submission and review process**.

We help you **attract new applicants, streamline the management process, build meaningful relationships, and report on the results.**

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