

GRANT CATALOG PLANNING QUESTIONS

Use this document to guide internal planning meetings before setting up a grant catalog in CommunitySuite.

If you are launching the Grant Catalog for the first time, contact [Support](#) before doing any setup and request to connect with a Support Consultant to schedule a workflow setup discussion. It is recommended to start with a CommunitySuite only grant catalog first. If you are interested in an integrated grant catalog between CommunitySuite and GLM, contact Support first and do not set it up on your own.

It is also recommended to build and test a grant catalog in your Sandbox site before setting it up in your Live site. This allows your team to explore catalog settings, preview the donor and fund advisor experience, and work through the setup process without affecting your Live site.

DEFINE PURPOSE, GOALS, AND AUDIENCE

Defining the purpose of your catalog shapes every subsequent decision, including which funds or grantees to include, how grant request amounts are structured, and how success will be measured.

CATALOG PURPOSE AND GOALS

A catalog focused on growing agency endowment funds is structured differently than a public crowdfunding catalog or a private fund advisor giving event. Starting with a clear purpose helps determine which CommunitySuite settings and workflows best fit your organization's goals.

PLANNING: CATALOG PURPOSE AND GOALS

What is the primary purpose of your catalog?
Is the goal to grow agency funds exclusively?
What focus area, initiative, or project will shape your catalog?
Will the catalog be a blend of both funds and grant projects?
How will you measure success? What metrics will you track to measure the catalog's success?
How will you evaluate the catalog's impact on your foundation's visibility in the community?
How and where will you document lessons learned for future catalogs?

DONOR AND GRANTEE AUDIENCE

Whether the catalog is public or private determines which CommunitySuite visibility settings to configure and how the catalog will be promoted.

- A public catalog open to all donors appears on the Grant Catalog tab of the Giving Hub.

- A private catalog can be hidden from public view and shared only through a unique URL or QR code with a special, invited group.
- Fund advisors access the catalog through the Fund Management tab of the Portal.
 - For organizations that want to limit catalog access to a specific subset of fund advisors, the Grant Catalog tab can be enabled selectively within Fund Advisor permissions. This approach provides a way to offer a private catalog experience without publishing the catalog to all fund advisors, though it requires manual permission management for each fund advisor.

PLANNING: DONOR AND GRANTEE AUDIENCE

Will it be a public or private catalog?
Will the catalog be restricted to a specific group like your donor advised fundholders?
Who do you want to participate as potential donors to the catalog?
Are you targeting a specific demographic or community group?
How will your audience shape your marketing strategy for both known and unknown potential donors?
Which funds or grantees will be included?
If focusing on agency endowments, which organizations with endowed funds will participate?
How many organizations do you want to include?
Are you opening it to all grantees regardless of focus?
Will you limit participation to only those organizations within your geographic service area?
Should participating grantees align with your foundation's focus areas or initiatives?

BULK SETUP OF GRANT REQUESTS

The Nonprofit Directory in CommunitySuite can significantly reduce catalog setup time. Information included in the Nonprofit Directory can be pulled directly into grant requests in bulk with just a few clicks, eliminating the need to send invitation emails, set up request forms, or wait for grantees to submit their own requests. Auditing Nonprofit Directory content and confirming that default grant types and images are set on grantee profiles and fund records before catalog setup can save considerable time and effort.

PLANNING: BULK SETUP OF GRANT REQUESTS

Will you use bulk CommunitySuite tools to assist with grant request creation?
Do you currently use the Nonprofit Directory? Statements and descriptions in the Nonprofit Directory can be used to fill the short and long description fields when creating grant requests in the catalog.
Does the Nonprofit Directory need further maintenance before using it to populate requests?

PLANNING: BULK SETUP OF GRANT REQUESTS

How recently have organizations updated their information?
Are fund records and grantee profiles set up with default grant types? Would default grant types need to be audited first in preparation for grant catalog use?
Are fund records and grantee profiles set up with a default image or logo? Images already in the Nonprofit Directory can be pulled directly into the grant catalog during bulk request creation.

MARKET THE CATALOG TO DONORS AND GRANTEES

Marketing strategy differs significantly between public and private catalogs. Each grant request has a unique URL and QR code that grantees can share directly with their own supporters. Private catalogs shared only with fund advisors or a select donor group rely on direct communication and targeted outreach rather than public promotion.

MARKETING STRATEGY AND BUDGET

PLANNING: MARKETING STRATEGY AND BUDGET

What is your marketing strategy and budget?
For public catalogs, how will you promote it to raise awareness about your organization and the community needs it will support?
Will you use radio, newspaper, online ads, or other advertising? How would this impact a planned budget for these outlets?
Will you hire designers to create social media assets and promotional materials?
For private catalogs, how will you promote the catalog to fund advisors or a private list?
How will you communicate with fund advisors that do not log into the Portal? Some foundations like to send print catalog communications to certain fund advisors.
How will you support participating grantees?
How will you help grantees market the catalog effectively?
Will you provide marketing resources to participating grantees?
What tools will you give them to promote their catalog listing? QR code or unique URL for their grant catalog funding request?
How will you coach them on effective catalog marketing?

PLANNING: MARKETING STRATEGY AND BUDGET

Are you integrating with Giving Tuesday?
How will you leverage grantees sharing your catalog link on their own platforms?
What additional promotion will you do for Giving Tuesday specifically?

PLAN CATALOG OPERATIONS AND SETUP

Operational decisions made before the catalog launches affect how smoothly setup, grant processing, and post-catalog wrap-up will go.

GRANT CATALOG AND PORTAL MANAGEMENT

Grantees can view fundraising progress through the grant catalog on the Giving Hub. Donor information becomes available to grantees once the grant has been posted, at which point grantees with Portal access can export donor information and manage their own thank you communications without staff involvement. For grantees without Portal access, establishing a plan for sharing donor information is recommended.

PLANNING: GRANT CATALOG AND PORTAL MANAGEMENT

How will you manage a large catalog?
If you have more than 100 requests or participating grantees, will you need further segmentation like separate grant catalogs?
Can the Grantee and Nonprofit areas of the Portal reduce operational effort?
How many grantees are set up to log in via the Portal? Does it make sense to get more included that are going to participate in the grant catalog?
If you are focusing on agency endowments, are organizations with endowed funds set up to log in to the Portal? Are those organizations' profiles up to date, is the contact person still accurate?

DEDICATED GRANT CATALOG FUND

It is recommended to create a dedicated fund for grant catalog activity before setting up the catalog record. This fund serves as the pass-through fund for all donations coming in and grants going out and should start and return to zero when the catalog closes. Populating the Fund field during initial catalog setup also enables bulk action processing after the catalog closes.

If matching grants will be included, a separate and distinct matching fund is also recommended, as the match grants functionality in CommunitySuite requires the matching fund to be different from the default grant catalog fund.

PLANNING: DEDICATED GRANT CATALOG FUND

Do you currently have a fund dedicated for Grant Catalog activities?
If not, what operational decisions and/or approvals are needed to create the fund for the next grant catalog?
Will there be matching grants for this catalog? If so, will you have a separate matching fund? It is recommended to have a separate fund created for the purpose of matching grants with a grant catalog.

GRANT REQUEST STRUCTURE AND AMOUNTS

Grant request structure affects both the donor experience and post-catalog processing. Grants with set amounts stay in the Unfunded bucket until fully funded and require the grant amount to be edited to match actual donations received if not fully funded or if overfunded at close.

Zero-dollar grant requests do not have a preset cap, move to the New bucket as soon as any donation is received, and can be paid out for whatever amount was raised without adjustment, but must be placed on hold manually to prevent accidental payout while the catalog is open.

The thermometer feature requires grant amounts to be set, Hide Request Amounts to be unchecked, and Hide Funded Amounts to be unchecked. It is not compatible with zero-dollar requests.

PLANNING: GRANT REQUEST STRUCTURE AND AMOUNTS

How will you structure grant request amounts?
Will you set zero-dollar grant requests or populate requests with an amount?
What is your minimum and maximum request amount? (e.g., \$500-\$10,000 range)
Will you set caps?
Are you trying to spread funds across many groups or focus on fewer organizations? This decision can be informed by the goals set for the catalog.

CREDIT CARD FEE COVERAGE

CommunitySuite includes an Adjust Net of Fees bulk action that automatically reduces grants by their associated credit card fees after the catalog closes. It only reduces grants and never increases them, even if a donor's fee contribution exceeds the actual fee. Deciding in advance who will cover credit card fees determines how this tool will be used during post-catalog processing.

PLANNING: CREDIT CARD FEE COVERAGE

Will donors have the option to cover the credit card fees?
Will your foundation absorb all credit card fees? These can add up, especially with a lot of donations.

GIVE DAY FUNCTION

The Giving Day (Force Everything Here) setting redirects all online giving links in CommunitySuite to the grant catalog, including Giving Hub fund donations, fund advisor grant requests, and Nonprofit Directory donation links. This can be used strategically to maximize giving at the start or close of a campaign rather than leaving it on for the full catalog duration.

PLANNING: GIVE DAY FUNCTION

Will you use Grant Catalog Giving Day functionality? The Giving Day function, when activated, is a global option that redirects all donate links to the grant catalog. This includes all Giving Hub, fund donation links, fund advisor grant requests, and Nonprofit Directory donation links.

If yes, will you have it on for the duration the catalog is open? Or just activate it at the beginning and end of the catalog?

PLAN YOUR CATALOG LAUNCH AND REVIEW TIMELINE

The length of time the catalog remains open and the method chosen for creating grant requests both affect how much preparation time is needed before launch.

CATALOG TIMELINE

The length of time the catalog remains open affects marketing strategy, staffing, and post-catalog processing timelines. Catalogs that invite grantees to submit request forms need additional time built in for coaching grantees, reviewing submissions, quality-checking images and descriptions, and completing backend preparation before the catalog goes live.

PLANNING: CATALOG TIMELINE

How long will your catalog remain open?

Will you run it for 4 weeks? 8 weeks? Longer or shorter?

Are you using this for memorial funds or agency funds that might require the open period for the catalog to be longer?

GRANT REQUEST SUBMISSION AND REVIEW

If grantees are submitting their own request forms, account for the full review cycle including coaching time, quality control, and backend preparation. Using CommunitySuite bulk tools to create requests from Nonprofit Directory content can eliminate this period entirely, allowing the catalog to launch more quickly.

PLANNING: GRANT REQUEST SUBMISSION AND REVIEW

Will you require grant requests to be submitted by organizations?

If requiring grant requests, how long will organizations have to submit their requests?

PLANNING: GRANT REQUEST SUBMISSION AND REVIEW

How detailed is the grant request information you plan to require from nonprofits?
Are you prepared if organizations submit all requests at the same time, or in the final week?
What staffing resources do you need for reviewing and proofreading requests?
How will you ensure quality control for images and content?
Have you allowed for adequate time for coaching grantees and backend preparation?
What is the grant catalog launch date and does it allow sufficient preparation time?
Will your catalog promote only Agency funds? If so, you will not need grant request due diligence factored into the catalog launch.

MANAGE THE CATALOG DURING AND AFTER LAUNCH

Planning ahead for how your team will maintain momentum while the catalog is live and wrap up operations after it closes helps ensure a smooth experience for donors, grantees, and staff.

CATALOG OPEN PERIOD

While the catalog is open, grantees can view fundraising progress through the grant catalog on the Giving Hub. A plan for sharing donor information with grantees should be established before the catalog launches, as grantees may request this information both during and after the catalog.

Once the grant has been posted, grantees with Portal access can export donor information and manage their own thank you communications without staff involvement, reducing operational overhead.

PLANNING: CATALOG OPEN PERIOD

How will you maintain momentum while the catalog is live?
Will you create social media content featuring different organizations? This could be a good opportunity for quick live videos featuring participating organizations.
Are you planning local TV or radio spots?
How will you encourage grantees to actively share the catalog?
Will you use billboards, mailings, or other promotional methods?
How will you handle partially funded requests if not starting with zero-dollar requests?

PLANNING: CATALOG OPEN PERIOD

For grantees that do not have a login to the Grantee Portal, how often will funding progress updates be provided? Will you provide updates at the halfway point, at the end, or both?
For organizations that do not have a login to the Grantee Portal, how will you share donor information for thank you letters and relationship building?
For organizations that do not have a login to the Grantee Portal, what donation reports will you provide (excluding anonymous donors)?
How will you keep donors engaged throughout the campaign? Will you share progress updates publicly?
What communication schedule will you follow?
How will you encourage fund advisors to participate? How will you share progress updates?

POST-CATALOG WRAP-UP AND REPORTING

Planning ahead for post-catalog processing helps your team move efficiently from catalog close to grant payout. Key steps after the catalog closes include editing partially funded or overfunded grant amounts, removing holds on zero-dollar grants, adjusting for credit card fees, applying matching grants if applicable, and posting and approving all fully funded grants.

Donor lists can be provided to grantees either by exporting the Donation Report from the grant catalog record and filtering by Grant ID, or by directing grantees to export their own donor information from the Portal.

PLANNING: POST-CATALOG WRAP-UP AND REPORTING

What happens when the catalog is closed?
How quickly will you distribute funds to organizations?
How will you survey participants for feedback?
What donor information will you share with organizations?
When and how will you announce your next catalog?
How will you maintain transparency?
What timeline will you provide for fund distributions?
How will you communicate final results to all stakeholders?
What reports will you generate for your board and community?