

The Complete DAM Buying Checklist for Foundations

Your Strategic Guide to Selecting the Right Digital Asset Management Platform

Introduction: Why Foundations Need Purpose-Built DAM

The philanthropic sector operates differently than other verticals. Your digital asset management platform needs to handle:

- **Grant cycles** and initiative timelines with tight, non-negotiable deadlines
- **Foundation-wide** teams coordinating across grantmaking, communications, learning, and strategy
- **Massive visual libraries** with thousands of assets across multiple grant portfolios and focus areas
- **Complex rights management** for photographer contracts, grantee image releases, and media agreements
- **Multi-channel distribution** from official foundation websites to social to grantee and partner environments
- **Real-time collaboration** between program officers, communications staff, and board and trustee stakeholders

This checklist will help you evaluate DAM platforms based on what actually matters for foundation operations—not generic enterprise features that don't address your specific challenges.

How to Use This Checklist

As you evaluate DAM vendors:

- Check each requirement that applies to your organization
- Star critical must-haves that are non-negotiable
- Take notes on how each vendor addresses your specific needs
- Compare responses across platforms using this standardized framework

Scoring Guide:

- **Essential (Must-Have):** Platform cannot be considered without this
- **Important (Should-Have):** Strong preference, willing to compromise if other areas excel
- **Nice-to-Have:** Differentiator between otherwise equal platforms

SECTION 1: Foundation-Specific Asset Management

Grant Portfolio & Initiative Organization

- ☐ **Organize assets** by by grant cycle and fiscal year (Fall Grants 2025, Spring Initiative 2026, etc.)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Hierarchical categorization** (Foundation → Focus Area → Grant Portfolio → Initiative)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Link multiple assets** to a single grant or initiative (impact photography, site visit documentation, grantee stories, videos, awareness content)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Messaging and branding** variant management across focus areas and special initiatives

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Archive past grant** cycles while maintaining searchability

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Support** for site visit documentation, grantee reporting, and behind-the-scenes imagery

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Foundation-Specific Metadata

- ☐ Custom metadata fields for foundation-specific attributes:

- Focus area and grant portfolio
- Grantee organization name and consent status
- Geography and region
- Initiative name and grant cycle date
- Outcome or impact area
- Fiscal year attribution
- Funding strategy or pillar
- Ethical use and usage restrictions

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Controlled vocabularies** for consistent naming (e.g., "Education Equity" vs. "Education Programs")

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Grantee and subject information** tracking (organization name, consent status, usage terms, sensitivity flags)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Photographer/creative** credit management
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Grantee success story** and learning content tagging for donor-facing and trustee assets
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

Visual Search & Discovery

- ☐ **Visual** similarity search (find similar program moments, geographies, or compositions)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Color-based** search and filtering (brand colors, initiative palette variants)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Advanced filtering** by multiple attributes simultaneously (program + content type + region + campaign)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Saved searches** for frequently used queries (e.g., "Education Equity Fall2025 Impact Approved")
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have
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SECTION 2: Workflow & Collaboration

Multi-Department Coordination

- ☐ **Role-based access** control for different teams:
 - Communications (upload/edit capabilities)
 - Legal/Compliance (view/approve)
 - Grantmaking/Program Officers (approved assets only)
 - Executive and Trustee Staff (board-facing materials)
 - Regional/Field Teams (geography-specific assets)
 - Priority:** ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Focus area-level** permissions (give program officer staff access to relevant grant portfolios)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Asset approval** workflows with multi-level review (communications → program leadership → compliance)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Comments and annotation** tools directly on assets
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Version control** to track asset iterations (raw edit, final, audience-specific variants)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Campaign Launches & Deadlines

- ☐ **Project-based** asset organization (Annual Report Launch, Grantee Convening, Strategic Initiative Announcement, Learning Publication)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Scheduled publishing** for embargo releases (press, grantee, partner, public-facing content)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Deadline tracking** and reminders for asset
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Task assignment** for editing, translation, and regional/office adaptation
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Multi-Office & Partner Organization Support

- ☐ **Regional asset** variations (different messaging and branding by geography or focus area)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Institutional brand consistency** tools (approved logos, fonts, color palettes accessible to all program areas and offices)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 3: Digital Channel Integration

Website & Grantee Platform Integration

☐ Integrations with foundation and grantee engagement platforms:

- Fluxx
- Salesforce Nonprofit / Philanthropy Cloud
- Submittable
- Custom platforms via API

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Multiple document variants** per campaign (thumbnail, hero, gallery, impact story)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Automated file** resizing and format conversion for different digital channels

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Synchronization** with grantee and constituent databases

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Social Media & Public Communications

☐ **Direct publishing** to social platforms or integration with social management tools

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Grantee, fellow,** and strategic partner content management

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

CMS & Records Integration

☐ **Content management** system integration (Drupal, WordPress, etc.)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Grantee and program** data platform (grants management/PIM equivalent)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 4: Rights Management & Legal Compliance

Photographer & Creative Contracts

- ☐ **Contract attachment** to assets (photographer agreements, grantee and community subject image releases)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Usage rights** tracking (internal only, public-facing, grantee restrictions, time limits)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Expiration date** alerts for time-limited usage rights

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Automatic watermarking** for non-approved, restricted, or embargoed assets

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Brand & Compliance Protection

- ☐ **Unauthorized** use prevention (secure access, download tracking)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Embargo management** for pre-announcement content (grant awards, strategic initiative launches, leadership announcements)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Asset download** auditing (who downloaded what, when)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **External portal** for controlled sharing with media, grantees, and co-funding partners

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 5: Technical Requirements

File Format & Quality Support

- ☐ **RAW file support** (CR2, NEF, ARW, etc.) for original photography

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **High-resolution** image handling (100MB+ files)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Video format** support (MP4, MOV, broadcast formats for public meetings and events)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Design and document** file support (PSD, AI, INDD, PDF for official publications and signage)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Performance & Scale

- ☐ **Storage capacity** for your asset volume

- Current needs: _____ TB
- 3-year projection: _____ TB
- Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Upload speed** for large batch imports (daily site photos, drone surveys, scan data)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Search performance** with hundreds of thousands of assets across multiple active projects

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

- ☐ **Concurrent user support** (how ow many staff members can work simultaneously?)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Security & Compliance

- ☐ **Encryption** (in transit and at rest)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **SOC 2 compliance**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **GDPR/CCPA** compliance for jurisdictions with applicable privacy laws
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Two-factor authentication**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Single sign-on (SSO) support**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Regular security audits and penetration testing**
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Backup & Disaster Recovery

- ☐ **Automated backup** schedule and retention
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Geographic redundancy** (multiple data center locations)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Disaster recovery SLA** (recovery time objective/recovery point objective)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Document versioning and recovery** (restore previous drawing revisions)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 6: User Experience & Adoption

Interface & Usability

- ☐ **Intuitive interface** that non-technical staff can navigate without extensive IT support
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Mobile access** (responsive web or native app) for field staff and inspectors
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Bulk operations** (upload, tag, download, approve multiple documents at once)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Drag-and-drop functionality** for uploads and organization
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Customizable dashboards** dashboards by role/department
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Asset Sharing & Distribution

- ☐ **Shareable links with expiration dates** (for RFI responses, submittal reviews)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Password protection** for sensitive shares
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Branded portals** for external stakeholders (press, partner agencies, community organizations)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Lightbox/collection** creation for assembling asset packages
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Download format options** (original, optimized, accessible, print-ready)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Training & Support

- ☐ **Onboarding program** for implementation
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **User training** (live sessions, recorded tutorials, documentation)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Customer support hours** and response time SLA
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Dedicated account manager** or customer success contact
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
 - ☐ **Regular platform updates** and feature releases
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
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SECTION 7: Analytics & Reporting

Usage & Activity Tracking

- ☐ **Timeline** (asset download reports)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **User activity reports** (who's accessing what, when)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have
- ☐ **Asset lifecycle tracking** (from upload to archive)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 8: Cost & Business Model

Pricing Structure

☐ **Transparent pricing** (no hidden fees)

- Base platform cost: _____
- Per-user fees: _____
- Storage costs: _____

☐ **Scalability of pricing** as your needs grow

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Contract flexibility** (annual vs. multi-year, exit terms)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Implementation & Migration

☐ **Implementation timeline** (how long to go live?)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Migration support** from existing systems

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Data migration tools** (automated vs. manual)

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Metadata preservation** during migration

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Total Cost of Ownership

☐ **Initial setup costs**

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Ongoing maintenance** requirements and costs

Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Additional fees** (overage charges, add-on features)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Internal resource requirements** (IT support needed?)
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

SECTION 9: Vendor Evaluation

References & Case Studies

☐ **Foundation organization** references at similar size/mission scope

Requested references: _____

☐ **Case studies** demonstrating philanthropic sector success
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

☐ **Peer reviews** and industry recognition
Priority: ☐ Essential ☐ Important ☐ Nice-to-Have

Decision Matrix

Use this framework to score and compare vendors:

Foundation - Specific Features	%			
Workflow & Collaboration	%			
Digital Channel Integration	%			
Rights Management	%			
Technical Requirements	%			
User Experience	%			
Analytics & Reporting	%			
Cost & Value	%			
Vendor Stability	%			
TOTAL WEIGHTED SCORE	100%			

Next Steps

After completing this checklist:

1. **Schedule demos** with your top 3 vendors
 2. **Request live walkthroughs** of foundation-specific features
 3. **Talk to reference customers** in the philanthropic sector
 4. **Negotiate trial period** to test with your actual workflows
 5. **Involve key stakeholders** communications, program leadership, development, compliance, and IT
 6. **Calculate total cost of ownership** over 3-5 years
 7. **Review contracts** carefully (exit terms, data ownership, SLAs)
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About NetX

NetX provides enterprise digital asset management solutions trusted by leading foundations and philanthropic organizations worldwide. Our platform is built to handle the unique demands of grantmaking: grant cycles, global program teams, expansive visual libraries, complex consent and rights management, and seamless grantee and partner platform integration.

Ready to see NetX in action? Schedule a personalized demo focused on your specific foundation workflows and challenges.

This checklist is provided as a strategic resource for foundations evaluating DAM platforms. For more information about how NetX addresses these requirements, contact our team.