



Putting Benefits First:
**7 Organizational Needs that Require
Grants Management Technology**





In today's world, change is a constant. When it comes to technology, particularly grants management systems, the complexity of such changes can be overwhelming. The traditional bottom-up approach to selecting a system, based on features and functions, often leads to a misalignment between the technology solution and the true needs of the organization.

This paper aims to upend that approach, suggesting that we instead start at the top, by defining clear goals and identifying core needs. The goal is to place a primary focus on the WHY and WHAT your organization wants to achieve before determining HOW to solve it.

1 THE POWER OF WORKING TOGETHER IN ONE PLACE

Disparity is a universal challenge that affects everyone, making it difficult to work efficiently and collaboratively. When it comes to technology, people often jump from one system to another, causing errors and frustration. It's time to redefine collaboration by designing technology to mimic how we work. Grantmaking is not done in a vacuum; a grants management solution (GMS) should reflect that.

A GMS should break down silos and provide a singular, simple workspace that everyone can use simultaneously. It should be thoughtfully designed for how grantmakers work, not a generic platform that doesn't provide a foundation for productivity. A purpose-built GMS should connect people and processes to the work of grants management, providing one place to collaborate effectively. Technology should be a "meeting room" that brings everyone together to tackle problems directly and collaboratively.



BEST PRACTICE

Look for an essential platform/centralized hub where grantmakers live and get stuff done.

- It should have a set of comprehensive features and integrations with the primary goal of helping focus on grantmaking & complete tasks without switching to other tools or platforms.
- It should be able to manage programs, track progress, and streamline workflows - all in one place so the team can stay organized and focused on achieving goals while minimizing distractions and unnecessary steps.
- It should allow you to draft grantee letters and stay on top of emails without moving over to external systems
- Look for a user interface that is designed the way people work in real-life (similar to card-based tools like Trello or Asana).
- However, it shouldn't be a blank slate or a generic tool - look for a solution with foundational best practices for grants management, and let you configure it from there to meet your needs.

2 EVERY POSITION COUNTED, EVERY POSITION PRODUCTIVE

For a team to function cohesively, it's important to have a workspace that keeps everyone connected and working collaboratively. However, it's also important to recognize that each team member will have different roles and responsibilities within the organization. To maximize productivity, it's essential to have a system that allows individuals to have visibility and control over their tasks and responsibilities while maintaining the collaborative environment.

This is where the concept of role-based experiences comes in. Different roles within an organization will have unique processes and activities that they need to complete to fulfill their responsibilities. For example, a grants manager will have different tasks than a program manager, and an executive will want to see different details than an administrator. If a system doesn't provide a personalized and intuitive experience tailored to each role, it loses its value and becomes a generic shell.

When selecting a system or technology, personalization should be a hallmark of good user design. A system that allows for personalization allows individuals to customize their experience to their specific needs and tasks. This is crucial because each role within the organization works differently and has different responsibilities. By providing a role-based user experience, the system becomes more familiar and intuitive, ultimately resulting in increased productivity for the entire team.



BEST PRACTICE

Look for a solution that provides a unique user experience for all roles within the organization.

- Can the solution provide a workspace for grantees, grant managers, finance managers, program managers, the executive team & Board of Directors - each with their own view?
- Does the system consider the grantee experience and to reduce their administrative burden? Does it allow finance to set budgets and manage payments? Does it adhere to your mission strategy? Does it deliver the metrics your executive team wants to see?
- Look for role-based dashboards that include Grant operations, program budgets, incoming and outgoing payments, reporting & analytics, and similar workstreams.
- Make sure that, while each role has a unique experience, the workspace is unified in that information can be shared and collaborated on in a single system.

3 NOT ALL RELATIONSHIPS ARE CREATED EQUAL

Grants management requires a unique approach to building and fostering relationships that go beyond just tracking people and organizations. It's important to deeply understand their mission, experience, due diligence, eligibility, and more. Unfortunately, many technologies fall short in this area and treat philanthropy like business or other industries. To avoid this, it's crucial to look for a solution that is specifically built for grants management that focuses on grantee relationship management instead of customer relationship management.

The grantee experience is a critical aspect of building strong relationships. Creating a transparent, welcoming, and collaborative experience can foster better working relationships that encourage grantees to return. However, one bad experience can turn them away forever. That's why leveraging a system that provides a positive and transparent experience for your grantees is essential for long-term success.

Transparency and trust are key factors in building strong relationships with grantees. By giving them a clear view of the process and ensuring that they understand how decisions are made, you can establish trust that will ultimately lead to better outcomes. This is where a system that provides transparency and collaboration becomes critical. By leveraging technology that fosters a better working relationship with grantees, you can ensure that the relationships you make are long-lasting and beneficial for all parties involved.



BEST PRACTICE

Look for a solution that provides a GRM instead of a CRM - fostering relationships with grantees is vastly different from customer relationships.

- Grantmaking is about relationships, people, and organizational due diligence and eligibility. A true GRM should have 1) the ability to capture person-to-person interactions; and 2) the ability to verify that the organizations and people you're working with are good partners
- A good GRM will not only build trust and provide transparency in the process but also enable you to conduct your due diligence. Ask yourself these questions:
 - Are you limited to capturing only emails and phone calls, or can you also track in-person activities?
 - Can grantees submit both oral and written reports?
 - Can you foster relationships with individuals as well as organizations?
 - Does it offer your grantees eligibility quizzes?
 - Does it integrate with OFAC, Candid charity checks, and similar tools?

4 DATA THAT HELPS YOU TELL A STORY

When using technology to improve grants management programs, it's important to demonstrate the positive changes that have been made. This goes beyond simple reporting and requires data visualization to tell a compelling story that can be understood at all levels of the organization.

Just as personalization is important in the workplace, personalization of data is crucial in data visualization. The system should be able to create visuals that each role can interpret and use to make decisions. Additionally, the system should be able to generate a board deck on command that can demonstrate impact in a single view. The ability to easily and quickly create visuals from data is essential.

To effectively tell the story of impact, the system needs to take complex information and distill it into a simple yet powerful narrative. This narrative should demonstrate the positive changes that have been made and show the impact of the grants management programs. By using data visualization to create a compelling story, you can effectively communicate the value of the programs and the positive changes that have been made to all levels of the organization.



BEST PRACTICE

Look for a solution with the best practices and tools to harness your data so that it's easy for you to use it better - e.g., to answer questions, tell stories, and generate reports for your team and Board.

- Make sure the solution has the data visualizations, the ability to track results over time, and connects all the data points in a simple but meaningful way
- It's important to think about how this will help you become better with your work. Ask yourself:
 - Will the solution enable you to prepare for Board meetings in minutes, not hours or days?
 - Do you have access to pre-built reports and dashboards that allow you to see immediate value?
 - Can you overlay 3rd party data with your grantmaking data and visualize it together?

5 WHY MEANINGFUL CONNECTIVITY MATTERS

Connectivity is a crucial element in ensuring that information is readily accessible within the grants management system. With a connected system, you can search for any information you need, from any point in the system, without switching between different tools or platforms. This seamless experience saves time and helps users to stay on task.

In addition to internal connectivity, it's essential to have an ecosystem of integrated systems that work together seamlessly. Grants management involves many different departments and teams, each with its own set of tools and data. To ensure that everyone has access to the right information at the right time, it's important to have integrated systems that connect data across the organization.

However, it's essential to integrate only the relevant systems at the right points in the process. Integration for the sake of integration can lead to information overload and confusion. For example, you don't need to involve your financial system until you're ready to connect payment information. Having the system provide integration when it's most meaningful and useful can improve the process, help you find what you need quickly, and make your work easier.

A connected grants management system integrated with other critical systems can help streamline the process, reduce errors, and ensure that everyone is working with the same up-to-date information. This can lead to a more efficient, effective, and transparent grants management process overall.

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BEST PRACTICE

Look for a solution that enables you to connect the work of managing grants with data from within the system and other systems (the GMS doesn't need to operate as an island - meaningful connectivity).

- Can you access all related information within the record itself, without ever leaving?
- Can you search within the system and find everything you need?
- Can you pull accounting details directly into your payment records, and automatically mark payments going out the door as paid?

6 BEING IN CONTROL OF YOUR JOURNEY

In the context of grants management, technology should function as an integral part of the team, capable of adapting and evolving as the team grows and changes. It's crucial to consider who is driving the technology change - is it an external technical resource or is it the process owners themselves? Many solutions are designed to prevent process owners from configuring the technology to meet their needs, but this is a significant disconnect that can have negative consequences.

Process owners should have the freedom and flexibility to change the solution as they see fit, without being dependent on external technical resources. After all, process owners are the most qualified individuals to adapt their processes to technology. This puts the process owners in the driver's seat, giving them the power to adapt and grow their grants management programs without being constrained by external limitations.

This flexibility to adapt and grow grants management programs through technology enables greater ownership over the grants management journey, promoting independence and long-term growth in the system. This allows for better integration of technology into the grants management process, and fosters an environment in which the technology serves the process owners and the team.



BEST PRACTICE

Look for a solution that enables you to evolve as an organization without dealing with a system (or vendor) that lags behind.

- As your needs change, does the system provide you the ability to make changes yourself instead of paying for services, hiring a consultant, or starting from scratch with a new system?
- Will it let you define new processes, groups, and workflows yourself - and give you the ability to make quick edits to them?
- Can you create new forms, processes, and reports on your own?
- Can you handle a large infusion of funds?
- Are you prepared to undergo increased scrutiny around risk management accountability?
- Can you launch new programs and send bulk communications to inform potential applicants?
- Can you change funding decisions in the post-award stage?

7 TRANSFORMING PAPERWORK FROM BURDEN TO BENEFIT

In a good grants management system, administrative tasks should be seamlessly integrated into the platform, removing the need for users to switch between different tools and systems constantly. These administrative tasks can include the creation of agreements, documents, and other “paperwork” necessary for the smooth operation of the grants management process.

One of the key benefits of integrating these administrative tasks into the grants management system is the ability to automate them. Rather than manually creating documents in a separate program and then uploading them to the system, a good grants management system should allow users to generate and populate templates within the system automatically. This saves time and ensures that all necessary data is accurately reflected in the documents.

Another key benefit of integrating administrative tasks into the grants management system is the ability to track the progress of these tasks in real time. Rather than waiting for documents to be reviewed and signed offline, a good grants management system should allow users to track the status of documents and agreements within the system. This provides transparency and accountability throughout the process and helps to ensure that deadlines are met and nothing falls through the cracks.

Overall, integrating administrative tasks into the grants management system aims to streamline the process and make it as efficient as possible. By removing the need for users to switch between different tools and systems constantly, and automating as many tasks as possible, a good grants management system can save time, reduce errors, and improve the overall experience for all users involved.



BEST PRACTICE

Look for a solution that makes it quick, easy, and seamless to generate important documents.

- It should have native MS Office integrations, so you can draft grant letters from within the tool either ad-hoc or from templates
- It should have the ability to work with electronic signature platforms, such as DocuSign, to enable faster time to sign agreements and move through the process
- Ultimately, you want the system to take the common tools used for paperwork, integrate them, automate them, and make it easy to access without leaving your GMS



CONCLUSION

In the quest for a grants management solution, remember that it's crucial to prioritize your fundamental needs above the available features and functionalities. Your ideal solution should emulate grantmakers' workflow, eradicate operational silos, and cater to each role's unique needs within your organization. It should transcend basic tracking, focusing instead on fostering grantee relationships for long-term success. The system should champion transparency and collaboration - essential ingredients for improving outcomes. Finally, the technology you choose should conform to your processes and your people rather than requiring your operations to adapt to it.

Look for a grants management solution that starts with the grantmaking and ends with the technology, not technology created for technology's sake. It has to align with your process and people, not the other way around.



ABOUT FLUXX

Fluxx is the cloud platform that powers impact in philanthropy. Fluxx connects givers and doers, creating capacity, increasing visibility, and improving collaboration for organizations throughout the philanthropy ecosystem. Hundreds of the world's largest foundations and tens of thousands of nonprofits rely on Fluxx to streamline their funding processes, get data-driven insights, and drive more impact.

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