Tactiv™ | LEADING SOFTWARE SOLUTIONS

GUIDE

Choosing a Grants Management System

Everything you need to
take into consideration

How to choose a grants management system?

There are many factors to consider when choosing a grants management system that will be suitable for your organisation's needs. What kind of functionality is most important to your organisation will largely depend on a variety of factors. This could be the number of different grant programs it operates simultaneously, the scale of these programs, the application process and the level of impact reporting required for funders and stakeholders.

Regardless of your organisation's specific needs, there are some features to always be on the look out for when choosing a grants management system. Qualities such as configurability, ease of use and the ability to integrate other applications with the system, are important functionalities to have in any purpose-built grants management System. Let's dive deeper and guide you through the functionalities a suitable grants management system should have.

Step 1: Think about your current process

Consider whether you need data migration, have simultaneous programs, the scale of your programs, application complexity and your impact reporting needs.

Step 2: Align functionalities

Your needs will depend on your process and your team. What features are important to you based on your organisational needs and will you need training and support?

Step 3: Consider general usability

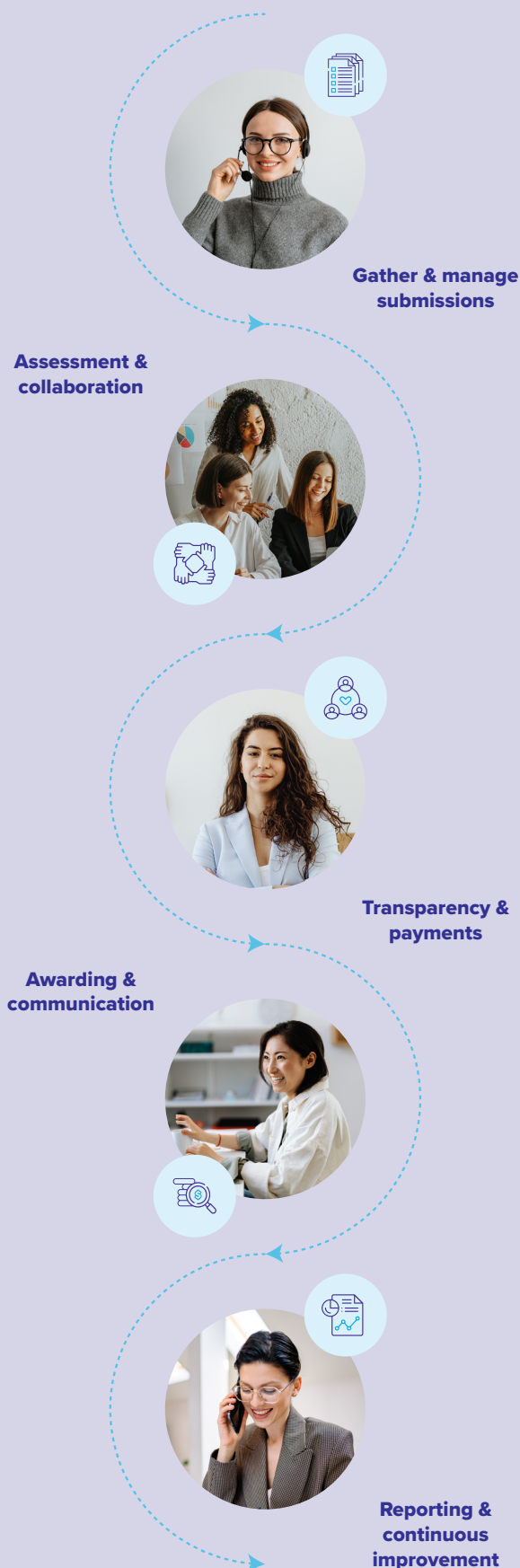What is important to you and your audience in terms of configurability, ease of use and integrations?

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Full Lifecycle Management

The starting point would be that a solid grants management system should support the functionalities to manage the entire grant lifecycle. For most grant programs, the assessment and approval of an application is only the first step of an ongoing contract that can take months or years to reach its conclusion. Grants management systems that can create calendars for deliverables and milestones, manage financials and outgoing payments, as well as collate information for the creation of comprehensive impact reports, are invaluable for many organisations, especially those that manage larger grant programs.

Additionally, a grants management system becomes much more valuable and insightful when the entire grant lifecycle is managed in one central place. When all data is linked and can be reported on, insights will come forward that wouldn't have been visible were they managed in separate systems.

Gather & manage submissions

Assessment & collaboration

Transparency & payments

Awarding & communication

Reporting & continuous improvement

Ease of Use

There are several benefits that come with having a grant management system that is easy to use. First and foremost, a system that is easy to use is easy to learn, minimising the amount of time your organisation will need to spend on training to utilise its new grant management system, especially when migrating from another application that they might have become accustomed to. Furthermore, for all but the most tech savvy of management teams, it is essential your organisation chooses a grant management system with low coding to no coding requirements.

This allows for your management team to utilise the software on a day-to-day basis without the assistance of a limited number of IT specialists, allowing your organisation to be agile and avoid becoming bogged down in the technical difficulties that come from using obtuse software solutions.

- **Quick adoption of the software**
- **Self-configuration for increased responsiveness**
- **Efficient collaboration between team members and with external stakeholders**

Configurability

Perhaps the most important attribute for a good grants management system to possess is a high degree of configurability. Between multiple grant programs, funding rounds and ongoing contracts, the need for customisable application forms, impact reports and documents is an essential one. Additionally, it's best if the grant administration team can make these changes without having to depend on the vendor.

This will occur costs and can be a timely exercise. Grants management systems that do not easily allow for management staff to create or edit forms, documents and templates are often not agile enough to cope with the changes that come with situations such as beginning a new funding round or creating a new grant in response to a real-world crisis.

Highly configurable
Grant systems that are highly configurable are better equipped to accommodate multiple programs and contracts, enabling customised forms and reports to suit your unique process.

Independence from vendors
The ability for grant teams to make changes and configurations autonomously results in reduced costs, increased responsiveness and a more tailored process.

Agility and adaptability
Systems allowing staff to edit forms and documents ensure adaptability, crucial for responding to new funding rounds or emergencies.

Responsiveness
A configurable grant system allows the team and process to adapt to evolving grants needs enhancing the effectiveness and speed to respond to urgent circumstances.

> **Opting for an easy-to-use grant management system, characterised by its intuitive interface and minimal training requirements, not only enables efficient day-to-day operations for management teams but also fosters seamless collaboration among team members and stakeholders, enhancing productivity, teamwork, and transparency within the organisation.**

Additionally, an easy-to-use grant management system promotes efficient collaboration among team members. When the system is intuitive and user-friendly, team members can easily navigate the platform, share information, and collaborate on projects without facing unnecessary obstacles. This seamless collaboration not only improves productivity but also fosters a sense of teamwork and camaraderie among employees.

Moreover, an accessible system encourages greater participation from various stakeholders, including grant applicants, reviewers, and decision-makers. This inclusivity ensures that everyone involved in the grant management process can engage effortlessly, leading to more effective and transparent decision-making. In essence, choosing a grant management system that prioritizes usability not only saves time and resources but also enhances the overall effectiveness and collaborative spirit within your organisation.

Scalability

A system that can grow with your organisation's needs without requiring significant changes is important in the current grants landscape. Demand, regulations and opportunities can change rapidly. It's essential to be able to scale up and down according to your organisation's needs at that time. In some cases responsiveness is critical, in cases of disaster relief. In other cases costs efficiencies can be a main reason to scale according to your needs. Scalable grants management software is of great importance to be at the forefront of the dynamic environment right now.

How a scalable grants management system helps you navigate the ever-evolving grant landscape

- Easily adjust the application process
- Adapt to comply with new regulations
- Manage dynamic grant relationships
- Balancing workload and capacity
- Respond rapidly to urgent needs
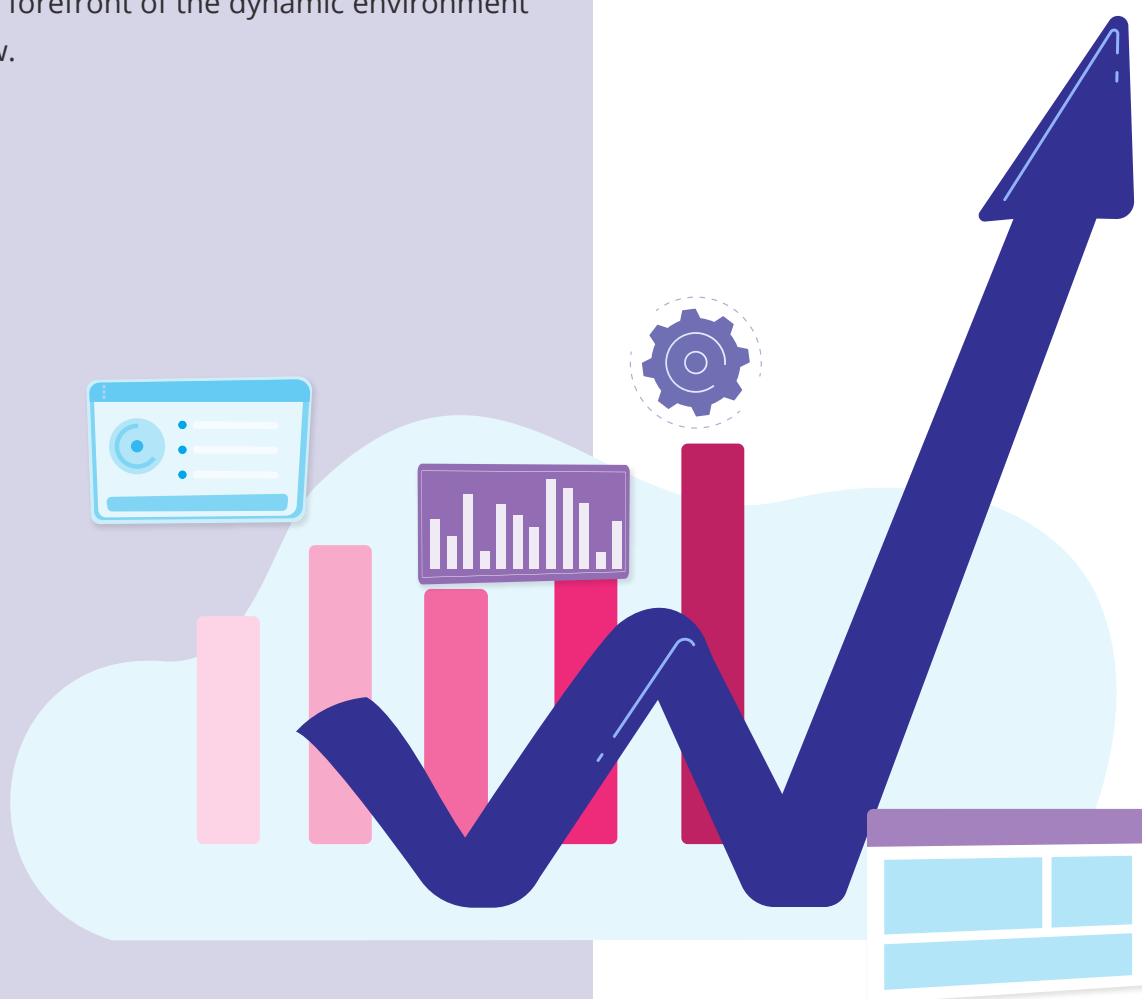
Reporting

When choosing a grants management system, reporting capabilities are a crucial factor to consider. Effective reporting ensures that you can track grant performance, comply with reporting requirements, and make data-driven decisions. There are a few key aspects of reporting to consider.

Perhaps the most obvious one – reporting should not be complicated. It's not your core business and should be done with minimum effort to get actionable insights and to inform stakeholders. You are looking for the right balance between functionality and usability – get the information you need without complicated processes.

Directly connected to this is an important one; report customisation. To create reports exactly how you want them, it's essential you can report on all relevant information in the system.

And this is different for everyone – so customisation and flexibility is key. Reporting across different objects, include financial information, CRM data and milestones is often what is needed at a minimum. Enquire's vertical hierarchy allows reporting across the portfolio - program – project level for rich insights. Additionally, being able to export raw data is a valuable capability to look for in a grants management system. It opens up a range of possibilities as to how to organise and interrogate the data.

The ability to schedule and automate reporting is a feature often looked for to make reporting easier and less time consuming. Especially recurring reporting tasks are made easier with this functionality. It's not rare to find this as part of a grants management system, so it's certainly one to look for as it can be a big time-saver.

As reporting is a major part of grants management, there are many other factors to take into consideration, such as ad hoc reporting, tracking KPIs, dashboards, filters and more. How advanced reporting needs to be is heavily dependent on the organisation and its requirements.

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- **Simplicity in reporting**
- **Customisation and flexibility**
- **Automation and scheduling**
- **Advanced reporting features**
- **Configurability and adaptability**

Getting started

Enquire's off the shelf platform offers a comprehensive solution with turnkey capabilities suited for organisations of all sizes. You can get started with little to no implementation, as out-of-the-box configuration is already available, ease to use and ready to go. In system-configuration is available to tailor the system, build e-forms and workflows tailored to unique business needs without compromising the 'purchase to launch' time.

If you run complex programs and have more complex needs, you can opt to customise Enquire to exactly fit those requirements. This results in a customised solution with unique capabilities to suit your organisation. You may opt to take more time, review, assess and iterate during the implementation stage to ensure full alignment of the system with your needs.
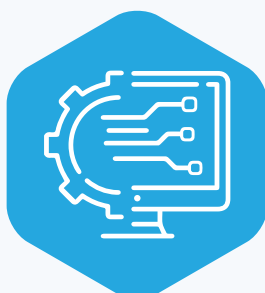
When choosing a grants management system, it's essential to consider the efforts to get started and to ensure a smooth transition and effective use of the system.

Enquire offers the best of breed solution that can be used off the shelf or easily configured to your processes

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Data migration

When implementing a new grants management system, it's important to research the data migration options it offers. Being able to handle your existing data properly, without losing history, is essential for reporting and auditability purposes. Data migration can often be seen as a major hurdle, but it doesn't have to be. Depending on the vendor, it can be taken care of and handled by your new vendor. Informing what data migration services a vendor provides can prevent large headaches in the future.

A proper data migration plan significantly reduces the barrier to adopting a new system. At Tactiv we take a step-by-step approach to introducing a new grant, contract or program management system that addresses your organisation's current and future requirements, resulting in a reliable, flexible solution mapped to your way of doing business. We assess your readiness and maturity to determine the best path to achieving a positive ROI and minimal change management impacts. This is all part of our philosophy of ensuring data-migration is a low-risk decision that allows your team to fully realise the benefits of digitising their business processes.

Data requirements
We advise you to start with a review of you data; what data do you have, what needs to be migrated, do you have offline data, and more. Start with listing your data assets and then determine the need and demand. his supports you to bring business process online in your new system faster, using priority data in support of management needs.
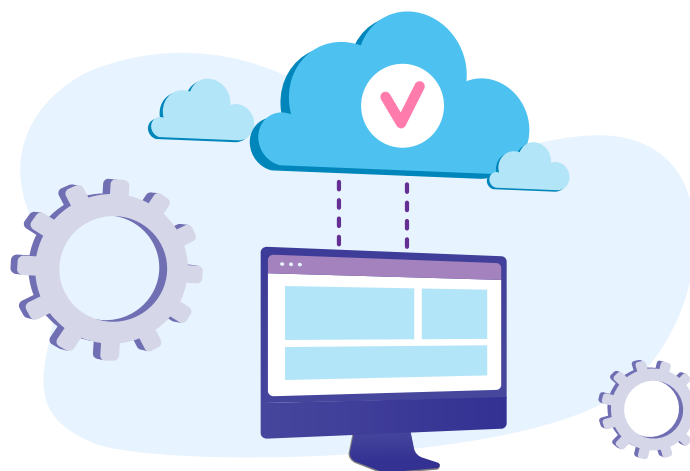
Administration and management requirements
Some data is critical to administrative and management requirements. Without this data migrated your organisation may be exposed to unnecessary risk, or compliance issues. We utilise a list of criteria to help you determine the importance of certain information. When in doubt, migrate first and make sure to back up any data from your previous system before decommissioning it.

Make the data work for you
When migrating data into your new system, it's beneficial to organise this in an advantageous way. This enables you to set up your new processes in the most efficient way using Enquire's optimally. Enquire features a range of business process workflows and automations that can take advantage of your pre-existing data, to streamline your work, save time and improve your outcomes.

Integrations

Having a grant management system that integrates easily with the other programs and applications your organisation uses can often be the difference between becoming mired in costly, time consuming workarounds and maintaining a smooth and efficient workflow. While there is always a degree of wrangling and finagling involved with getting any two systems to work together, most effective grant management systems should at least have direct compatibility with widely used programs, such as the Microsoft Office Suite and various email platforms.

Additionally, seamless integration fosters collaboration across teams, breaking down communication barriers and ensuring that critical information flows effortlessly between systems.

A well-integrated grant management system not only enhances efficiency but also reduces the risk of errors and data discrepancies that can arise from manual data transfers. Furthermore, compatibility with popular tools like Microsoft Office and email platforms streamlines document sharing, collaboration, and communication, enabling your organisation to focus on its mission without being hindered by technological constraints. An integrated system promotes real-time data synchronisation, providing stakeholders with up-to-date insights and facilitating informed decision-making. It also enhances transparency, allowing different departments to access relevant data in a unified manner, leading to a more cohesive and responsive organisational ecosystem.

A grants management system that suits your organisation

Choosing a grants management system is not easy and involves thorough investigation of the market. There are many solutions out there with ranging features and costs. The list in this guide is extensive and not every topic might be as important to you.

It's essential to know your business process and focus on what matters to you most. Compare systems that offer those functionalities and services, try their features and get in touch with vendors to find out there is a fit.

Let's recap

- Map your process. Do you require an end-to-end system?

- Is data migration part of the process?

- What features and functionalities are required to support your process? What reporting needs do you have?

- What are your general requirements in terms of usability, configuration and integrations?

- To what extent does your process and team require implementation and training?
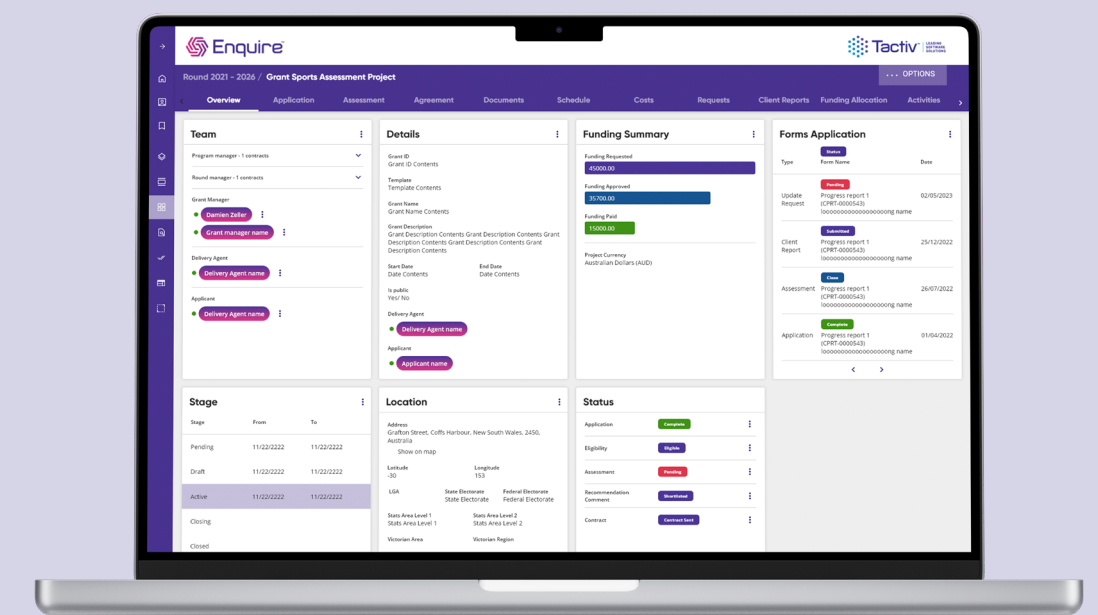
Enquire Grant Management Software by Tactiv

Enquire is a purpose-built grants management system offering **full lifecycle functionality**. Our roots in the public and philanthropic sector ensure **ease of use** for a wide range of users. Its **scalability, configurability and advanced reporting functionality** are developed with the dynamic grant management landscape in mind, allowing for a system tailored to your evolving organisational requirements.

Additionally, a wide range of integration options allows the software to **align seamlessly with your business process**, even across other areas. Enquire is a robust, complete and responsive solution; designed for impactful grant management.
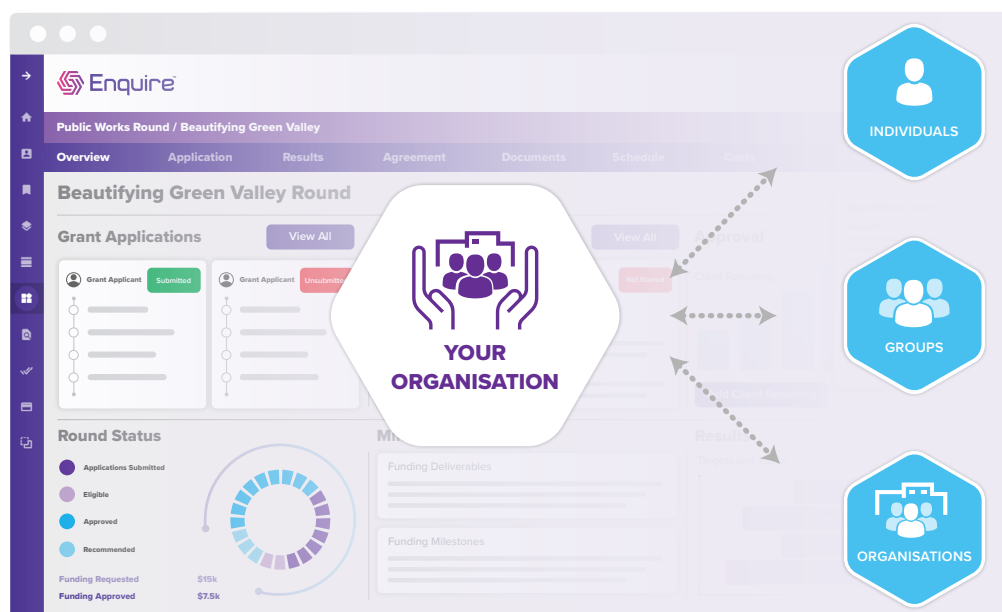
Next Steps

Want to find out more about Enquire and how it can provide a strong foundation for your grant management? Try Enquire's features and intuitive interface yourself or book a demo.

→ **Enquire product tour**

→ **Book a demo**

Resources

Enquire product tour

Play around in the system to experience Enquire's features, build an application form, go through the assessment process ore more.

Knowledge article

Read through our extensive library of knowledge articles to learn more about Enquire, grant management, impact reporting and more.

Book a demo

Want to see how Enquire can add value for you? We'll prepare a demo based on your needs and take you through it.

Explainer video

See and understand how Enquire works, narrated by one of our product experts, and get a sense of Enquire's capabilities and usability.

Tactiv™

Tactiv is a leading software solutions company and creators of the Enquire cloud-based software, supporting Australian, New Zealand and global public and for good organisations with grant, project and program administration since 2005.

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