

Submittable 

THE NEXT EVOLUTION OF

Grants Management Software

A buyer's guide for grantmakers ready to embrace the future



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An introduction to the moment

Over the past few years, the one consistent theme in the world of philanthropy has been *disruption*. The COVID-19 pandemic coupled with economic volatility, social injustice, and cascading natural disasters have reshaped community needs and transformed how grantmakers and nonprofits approach their work.

The upside is that reactions to these crises have been remarkably collaborative and innovative. Foundations, nonprofits, and corporations became more responsive. Partnerships formed. Organizations began to pivot away from the outdated technology and practices that held them back. Now that the metaphorical dust has settled, it's time to make sure the positive changes born from these crises stick for the long term.

At the heart of today's grantmaking is a new ethos focused on sharing power. Rather than dictating strategy and imposing restrictions upon community organizations as they often have in the past, grantmakers are now prioritizing relationship

building and community feedback. As it turns out, this collaborative way of operating is not just effective in the midst of disaster, it's the best way to support and empower communities over the long term. Grantmakers who are in direct conversation with community members have a deeper understanding of community needs and are poised to respond quickly as needs change.

During the COVID-19 pandemic, as organizations scrambled to work remotely, distribute funds digitally, and rapidly create new grant programs, software helped teams overcome the chaos. Now, as we look forward, technology will be key in helping us hang onto the rapid progress we've made.

The right grant management software (GMS) is essential. It underpins every aspect of grantmaking—from relationship building to application review, funds distribution, and beyond. The right solution for you will be purpose-built to support the new collaborative and responsive ethos of today's grantmaking.



Putting the grantees at the center

A new imperative emerged over the past few years: *grantee-focused philanthropy*.

Recent events have tested the top-down, hierarchical structure of traditional grantmaking. Many community members already understood the downsides of this approach. But funders, even if they grasped the issues in theory, rarely adapted their practices to center the community members. That is until things reached a tipping point.

When multiple crises converged, grantmakers could no longer cling to their old habits. As community needs surged, nonprofits got clear with funders about what it would take to be effective: faster capital with fewer restrictions and less administrative burden. Grantmakers rose to the challenge, working to address the root causes that made it so difficult for nonprofits to thrive.

One of the main roadblocks for funders looking to evolve was old, outdated technology. Unfortunately, much of the grant management software on the market was built to support the top-down way of doing things. It wasn't designed to prioritize

the applicant experience or ensure accessibility. It was built for big grantmakers who had the resources to dedicate whole teams to learning and operating complex software. Because of this, many legacy GMS solutions are designed to *enable* complexity, not reduce it. And as funders and grantees teamed up to reimagine their relationships to each other, they found themselves held back by the very technology that was supposed to empower them.

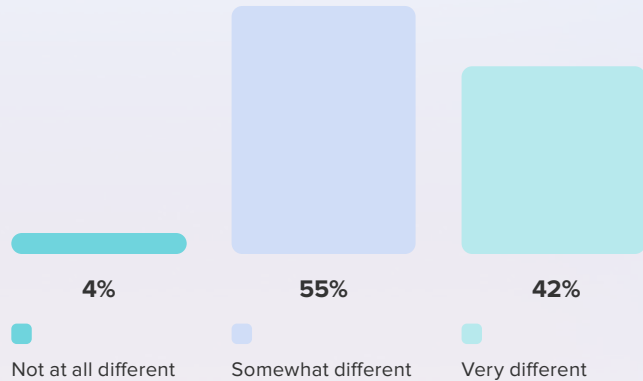
With this realization, organizations looked to adopt new software that was built to support collaboration and transparency. Grantmakers found solutions that would streamline their processes and improve the applicant experience.

Now, we've reached a pivotal moment as grantmakers look to make the shift from funder-focused to grantee-focused permanent. We all need to be proactive about holding onto the gains made over the past three years. To do that, you need to empower your team with the right technology. Specifically, the *right* grant management software (GMS).

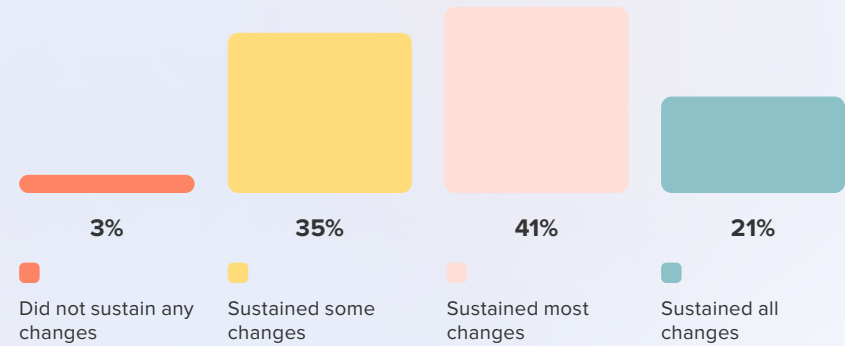


The challenge of making change permanent

In response to heightened need, most funders changed how they worked with grantees, but as early as 2021, those changes began rolling back.



Extent to which foundations reported that their work with grantees in 2020 was different from their work prior to the COVID-19 pandemic.



The extent to which foundations sustained the changes to their work with grantees into 2021.

This guide is intended to provide a new way of thinking about technology, and how it can better support your team, partners, and mission. It frames philanthropy’s work differently, focusing on *outcomes*, *mission*, and *values* rather than listing individual features and functions out of context. In fact, an excessive focus on functionality, without proper regard for the people behind the work of grantmaking, was a major source of problems to begin with.

Philanthropy is evolving towards a new ethos, aiming to level the playing field for nonprofits. [Grantmakers must look through a new lens](#) when considering how technology can support their work. Three themes articulate the most important ways in which grantmaking will continue to evolve, and provide a new frame for choosing grant management software that supports the future of philanthropy.

Grantmaking of the future is:  **Equitable**  **Collaborative**  **Data-informed**



Philanthropy's evolution: Three trends shaping the future

As much ground has been gained over the past few years in terms of centering the grantee and prioritizing equity, there is still more work to do. It's time to codify the progress we've made and then look for ways to push this new ethos further.

These three trends will shape the future of philanthropy. They are not a departure from what's already been put in motion. In fact, they are built upon the movements that spurred change such as [trust-based philanthropy](#) and [#FixtheForm](#).

1. Equitable grantmaking

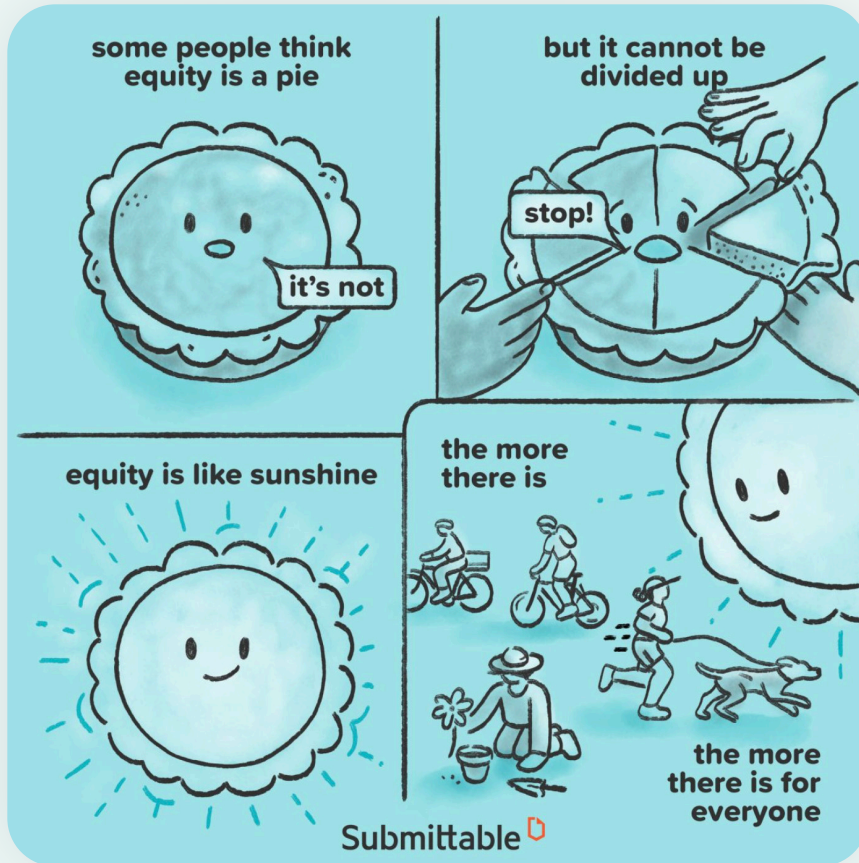
Perhaps the most important trend to gain momentum recently in philanthropy is *Diversity, Equity, Inclusion, and Belonging*, or DEIB. Philanthropy has taken a hard look at its own history of controlling the funding process, and committed to making things more fair and inclusive for nonprofits and their constituencies. Many funders are introducing new programs to tackle social exclusion and racial injustice. And they are implementing new work processes, guidelines, and safeguards to ensure more equitable access to capital among the nonprofit sector.

Analysis of demographic data from programs and communities continues to provide new insight on the equity of grantmaking. Many organizations are using this data to assess the distribution of their funding, and taking action to seek out new grantees that have been overlooked or excluded from the process. Expanding the “tent” to include equal opportunities for diverse and marginalized people and organizations is a key tenet of the new ethos driving philanthropy.

As the [voices calling out funding discrepancies got louder](#), many grantmakers made intentions around DEIB. But intentions aren't enough. Now it's time to start gauging how intentions have translated into tangible outcomes.

[One report from the Center for Effective Philanthropy](#) found that although many nonprofits reported that funders were more more flexible and responsive during recent crises, nonprofits led by women and serving certain communities (including Asian, Asian, Pacific Islander, Middle Eastern, and Native American communities) did not experience the same level of trust as other nonprofits. This is a reminder of how important it is to [keep equity centered](#) as processes continue to evolve.





Again, technology is a key factor in helping philanthropy achieve greater equity. Grant management software must collect the data funders and communities need and provide flexibility with regards to keeping the data confidential during the review process. It must also empower insights and intelligence needed to enable learning and make better funding and partnership decisions. The use of automation tools and a system designed to facilitate transparency will ultimately lead to fairer and more equitable outcomes.

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Key features for equitable grantmaking

Tools that help you run an equitable process include those that empower applicants, facilitate objective reviews, and deliver insights.

- ✔ High accessibility standards as determined by a Voluntary Product Accessibility Template (VPAT)
- ✔ Support for diverse file types, including image, video, and audio
- ✔ Review rubrics and dynamic scoring options for a more objective process
- ✔ Anonymization tools to reduce bias by concealing certain applicant responses, such as demographic data
- ✔ Permission levels to ensure confidential reviews
- ✔ Advanced reporting to evaluate your progress toward DEI goals and increase transparency

2. Collaborative grantmaking

One of the most important lessons grantmakers learned over the past few years is that **the people closest to a problem know best how to solve it.**

The traditional model of philanthropy, in which a funder dictates how nonprofits can spend grant funding, constrains the very people who need to be empowered. In response, grantmakers are embracing a more collaborative approach. Many are shifting away from program-specific grants to unrestricted funding, which allows nonprofits to decide how to best allocate their resources.

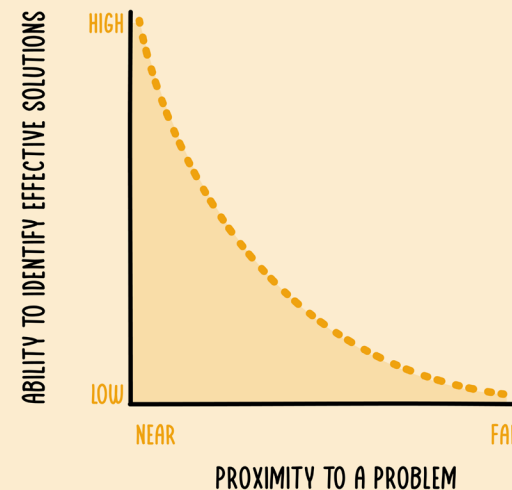
Many grantmakers discovered that establishing stronger partnerships with the nonprofits they fund is the [key to achieving positive, long-lasting outcomes](#). This means inviting partners and community members to be heard in the planning, decision-making, and funding processes. [Participatory grantmaking](#), an approach that prioritizes community members' perspectives, helps rebalance the dynamic among funders and grantees.

Recent events have also exposed the need for funders to form a more open line of communication with community partners. That communication needs to move both ways. Community

organizations must be able to ask for what they need from funders, and the funders need to listen.

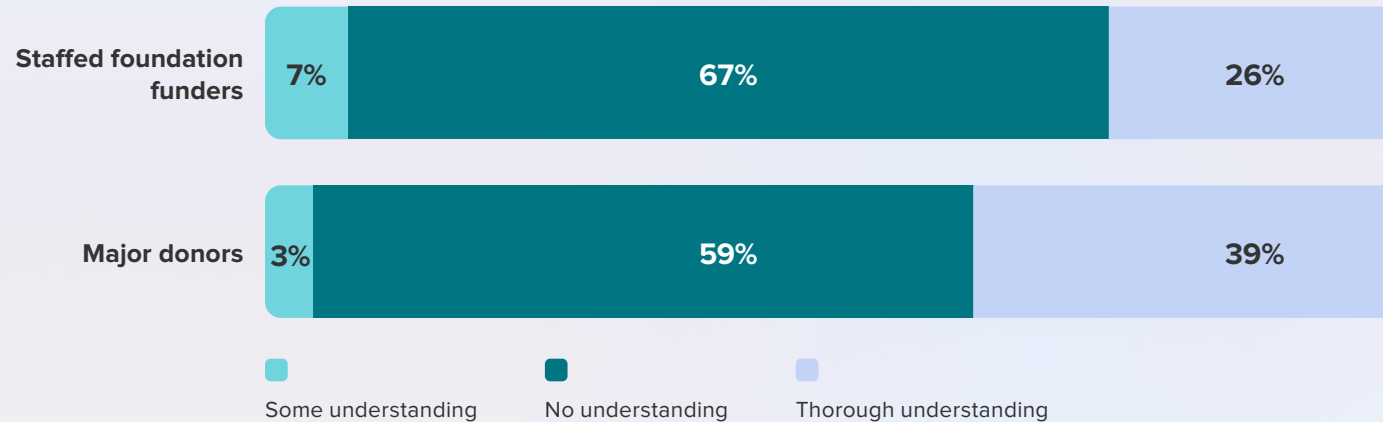
Collaborative grantmaking enables funders to be much more proactive in providing assistance, as community members don't have to wait for funders to take notice of an issue. Instead, community members can request and direct help when and where it's needed.

WHY IT'S IMPORTANT TO CENTER COMMUNITY VOICES



Funder understanding

Many nonprofits don't feel like their funders have a thorough understanding of what the organization needs.



Percentage of respondents who say their foundation funders and major donors have no, some, or thorough understanding of what they need at this time.

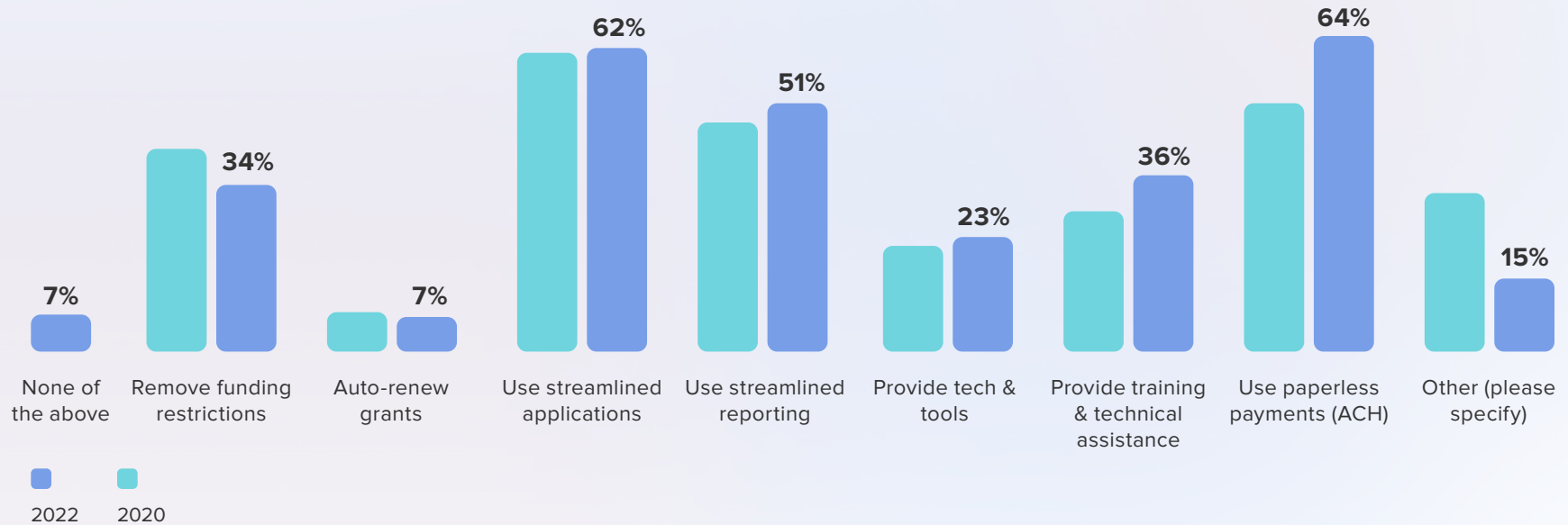
For many people doing social impact work, one of the big revelations of the past few years is that we can no longer be siloed. The issues we seek to address intersect and overlap. Efforts to make change need to be coordinated between corporations, nonprofits, community members, and government entities. That's the only way we'll solve the biggest problems we face as a society.

Technology provides the necessary connection point between organizations and community members. Grant management software must put everyone on equal footing and make communication seamless. It must facilitate and support long-term relationships, while being agile to fit the needs of everyone involved.



How organizations continue to support nonprofit partners

Many grantmakers continue to prioritize streamlined processes to support nonprofits.



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Key features for collaborative grantmaking

The features to look for when it comes to collaboration include those that facilitate transparency and center people.

- ✓ Real-time collaboration tools to empower administrators, reviewers, and applicants to work together
- ✓ Permission levels that enable key stakeholders and subject matter experts to participate while maintaining privacy and reducing bias
- ✓ In-app communication tools so you can build relationships
- ✓ Follow-up communication, additional forms, and progress reports to manage your unique process year over year



3. Data-informed grantmaking

For grantmakers, good data is reliant on strong relationships. Community members' perspectives are invaluable in helping funders understand how data fits into the context of their real-life experiences. It's only with trust and collaboration that grantmakers can collect accurate data and have the insight they need to interpret it.

Some [critics of the trust-based ethos](#) have posited it as diametrically opposed to data-informed grantmaking. This is an outdated way of looking at things. In reality, the [two approaches work best in tandem](#). Collaborating with community members gives you the best chance of understanding community needs and designing programs that will actually work. Data enables you to dig in and really understand how you're making an impact over time.

The *right* data can help funders unlock insights [about how their work contributes to real-world outcomes](#), shine a light on gaps in funding, and make connections between programs. Plus, data is at the heart of any effort focused on diversity, equity, and inclusion, as it provides a clear reflection of how DEI efforts translate to real change.

Technology plays a big role in empowering grantmakers to leverage their data effectively. Grant management software must enable funders to collect, anonymize, analyze, and report on the data all in one place. Your software needs to be secure and accessible, and it cannot be siloed, separate from the other tools you use. Funders should be able to combine data from their GMS with other sources such as public databases or other internal platforms like a customer relationship management system. When grantmakers can combine data from multiple sources, they can be much more dynamic in their decision making.

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Key features for data-informed grantmaking

The features to look for allow you to collect and analyze both qualitative and quantitative data.

- ✓ Impact reporting that gives you a clear picture of how your program makes change
- ✓ Anonymization and concealable questions to protect sensitive information
- ✓ Integration with your existing data ecosystem to leverage all your data
- ✓ Data imports from existing spreadsheets and tables to make your reporting more dynamic



Evaluating Grant Management Software

Grant management software is foundational for grantmaking organizations. It enables every aspect of the work—from creating and submitting grant proposals to reviewing and selecting applications. It’s how you manage program budgets, distribute financial awards, and capture data to reveal the impact of your work. Now the software must help us navigate the changing values and workflows that are redefining philanthropy.

In the not-too-distant past, philanthropy was more transactional than collaborative:

- Grant applications grew in length and complexity, and required major time and effort from staff, stakeholders, and applicants, even for simple proposals.
- The funding process got overly complex, slow, and restrictive.
- The voices of the grantees working to improve communities were sometimes unprioritized and often went unheard.

Legacy grant management software, in turn, was purpose-built to facilitate this kind of grantmaking. Rather than simplifying, this legacy software often complicates processes for grantmakers and exacerbates the burden on grantees. It requires hundreds of data elements that nonprofits must dutifully supply. Budgeting is restrictive and slots every dollar a nonprofit receives into a category, requiring extensive tracking and updating (postage, really?).

These legacy systems are so convoluted that it takes many months, staff members, and consultants to get through a basic implementation. Simple changes take days, and often require technical support assistance. The user experience is frustrating and unintuitive. Truth be told, grantmakers have been using these legacy solutions because they didn’t have a choice.



Yesterday's grant management software simply doesn't align with philanthropy's new ethos:

- Speed and agility
- Transparency and accountability
- Outcomes and impact
- Trust and partnership
- User experience

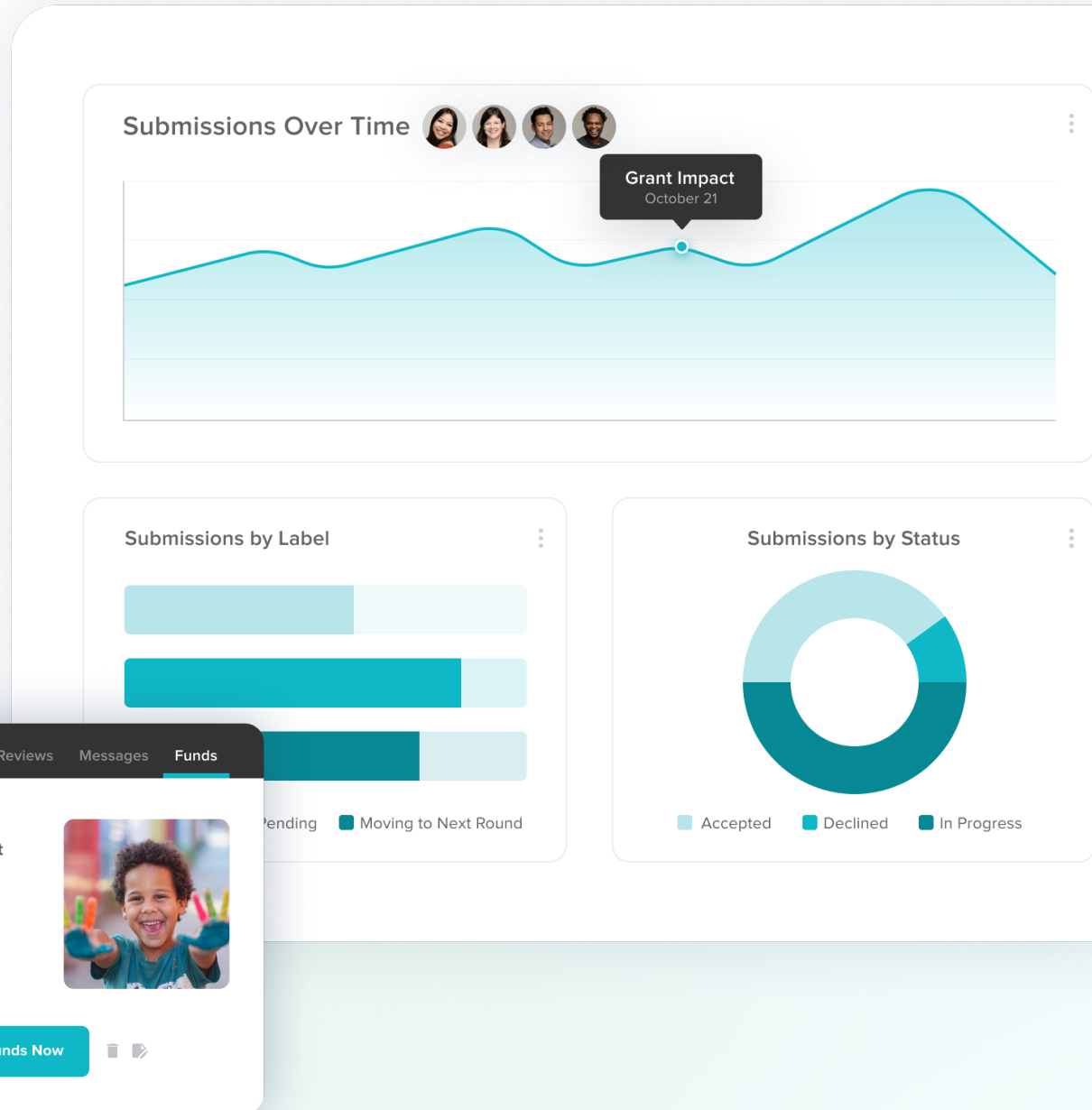
Philanthropy demands more from technology, and buyers should expect grant management software to reflect these new values and ways of working.



10 key features to look for

As they embrace a grantee-focused approach, many organizations are taking a hard look at their grant management software and asking how it can support new ways of working. They're discovering that most systems are not designed for simplicity, collaboration, transparency, and equity.

As the world of philanthropy evolves and embraces new ideas, here are 10 key features to consider when evaluating new grant management software:



This is a mobile app-style card for a grant. It features a navigation bar with tabs for "Activity", "Reviews", "Messages", and "Funds". The card displays the following information:

- Fund: **Arts Grant**
- Status: **Awarded**
- Amount: **\$20,000**
- A photo of a smiling child with colorful handprints.
- A prominent teal button labeled "Send Funds Now".
- Small icons for a list and a share function.



1. Intuitive and accessible application forms

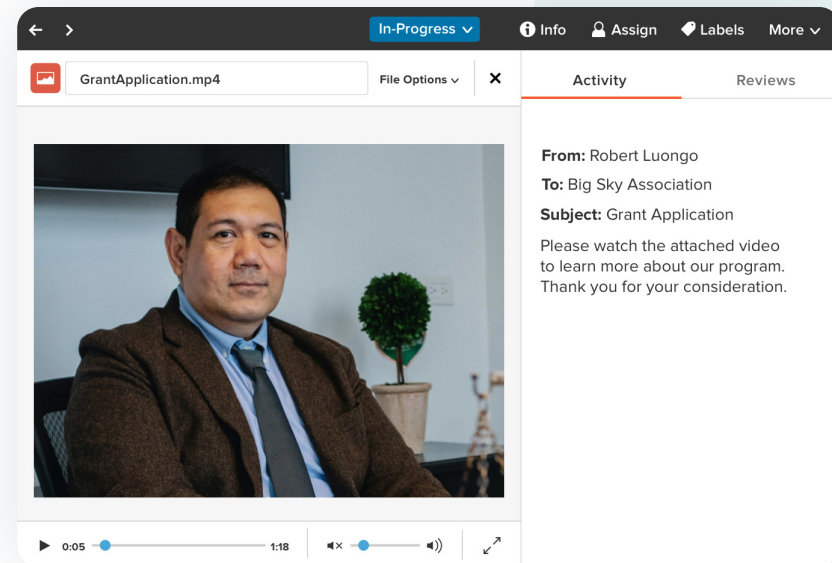
Forms need to be intuitive and accessible for both external applicants as well as your internal staff and any other stakeholders who may be involved in the process.

Drag-and-drop form building, a modern user interface, and intuitive design elements are must-have features. These ensure that non-technical staff can maintain the system without the help of an IT staff or consultants. Beware of systems that began life as on-premises installed software and are continually trying to adapt to a cloud-based world.

Look for software that enables you to be agile throughout the program lifecycle. For instance, if you need to make an adjustment after a form is live, someone on your team should be able to do that without looping in technical support or disrupting the applicant experience.

Video-based applications and progress reports incorporating photos and other images are replacing traditional forms in today's grantmaking. A modern grant management solution must support diverse communication styles by allowing applicants and grantees to tell their stories using videos, photos, and audio in addition to text.

Further, grant management software should have a VPAT (Voluntary Product Accessibility Template) which affirms that it is accessible to users with a wide range of disabilities. Be wary of platforms that have had a VPAT but do not share the results, and feel empowered to ask for these results when vetting a potential solution.



2. Reduced applicant burden

Focusing on the applicant experience is a core tenet of today's philanthropy. Branching logic and intelligent applications eliminate unnecessary data collection by allowing grantees to skip irrelevant sections or questions.

Eligibility screening ensures applicants won't waste valuable time on an opportunity they do not qualify for (as well as save time for your review team).

Moreover, movements like #FixtheForm highlight the fact that funders must enable applicants to preemptively access all application questions in order to appropriately and conveniently prepare.

Grant management software should also provide reasonable, customizable character limits, and enable applicants to save their work or auto-save a draft for them.

Finally, grouping and linking forms reduces the need for applicants to provide the same information multiple times.



501(c)(3) organizations located in Montana are eligible for a grant of up to \$10,000.

IRS EIN Number

-

In which Montana county are you located?

Have you been a recipient of this grant in the past?

Yes

No

How long ago were you awarded this grant?

Over three years ago

Three years ago or fewer



3. Security and fraud prevention

Grantmakers are often collecting sensitive data from community organizations and individuals such as personal and financial details. That information must be secured. A spreadsheet saved to someone's hard drive won't cut it. Look for grant management software that has strong security certifications which require a third-party audit such as a [SOC 2 Type 2 certification](#).

Ensure that the security capabilities of the software align with the type of information you collect and from whom. For instance, if you collect any information related to applicants' health, you need a platform that is [HIPAA compliant](#). If some of your applicants are located in the European Union, the software you use must meet [GDPR requirements](#).

When you're distributing funds, you also want to know that the money reaches the intended recipients. But you don't want to create an extra burden for applicants. Look for software that has [built-in fraud prevention tools](#) that don't add friction to the application process. This could look like personalized knowledge-based authentication quizzes, which require applicants to answer a few short questions about their personal and private history, or identity verification tools that match selfies taken in real time to government-issued IDs.



5. Tools for objective and streamlined review

Grant management software must promote diversity, equity, inclusion, and belonging through smart tools for review.

Confidential review processes that can be supported through various permission levels avoids undue influence and bias among teams.

Concealing applicant demographic data reduces bias while still gathering essential data for reporting and assessment.

Review rubrics ensure fair evaluations, while also giving administrators tools to identify outliers who may need additional training.

Your reviewers' time is valuable. Look for a software that streamlines their work. They must be able to view all application materials within the platform, including images, videos, documents, spreadsheets, and audio files. If they have to download and open each file, they'll waste time and likely run into technical challenges if their computers can't support certain types of media.

The screenshot displays a software interface with a dark navigation bar at the top containing the following menu items: Review Workflow, Form Designer, Assignments & Notifications, General Settings, and Gallery View. A modal window is open in the foreground, titled "You have selected 2 submissions" with a close button (X) in the top right corner. The modal contains three input fields for email configuration:

- Email Template:** Award Funding Letter
- Email Subject:** RE:[[Organization Name]][Title]
- Email Message:** Dear [SubmitterFirstName],
Congratulations! This message confirms that we would like to award you a grant of [AwardAmount]. An additional email will be sent to you to collect your banking information to streamline funds distribution, and provide a direct deposit in to your account.
Sincerely,
[StaffFirstName][StaffLastName]
[OrganizationName]

At the bottom of the modal are two buttons: "Cancel and Close" and "Send Message(s)".

In the background, a table is partially visible with the following columns and data:

NEW FORM	AUTO-ASSIGN REVIEWERS
Applicable	Virginia Rodriguez
nd 2 Review	Multiple Team Members
Applicable	Not Applicable
nd 2 Review	Lynn Tanner
Applicable	Multiple Team Members



6. Comprehensive collaboration

Grant management software must help facilitate teamwork—both for applicants and grantmakers—to enable communication, collaboration, and transparency. Multiple applicants should be able to work together on their grant application in real time. Key outside stakeholders, such as references or subject matter experts, should be able to contribute their portion easily and without seeing an applicants' personal details.

Reviewers, staff, and administrators should be able to communicate seamlessly with one another and with applicants through in-app messaging to keep everyone on the same page—without having to toggle over to their email inbox.

Permissions for reviewers should automatically assign roles and tasks based on their level. As we touched on before, these permission levels should also anonymize or restrict access to confidential information to reduce bias and ensure equity.

The screenshot displays a grant management software interface. At the top, there is a navigation bar with tabs: "In Progress" (highlighted), "Information", "Assign", "Labels", and "More". Below this is a secondary navigation bar with tabs: "Activity", "Reviews" (highlighted), "Messages", and "Funds".

The main content area shows a list of grants:

- 4 Big Sky Art Center** (Missoula, Montana) with 4/8 Reviews and a dropdown arrow.
- 2 After School Program** (Seattle, Washington) with 2/3 Reviews and an up arrow. Below this entry are thumbs up/down icons and the text "Average vote score: 1.00".
- 1 River Cleanup Crew** (Bozeman, Montana) with 1/8 Reviews and a dropdown arrow.

An "Initial Form Grant" modal is open, showing details for "Big Sky Art Center" (Submitted on 04/25). It includes a section for "Additional Form" with a button labeled "Q2 Quarterly Impact Report". A circular inset image shows a woman and a child working together at a table with art supplies.

7. Additional forms

Communication with applicants doesn't end once the application is submitted. In fact, that's often the beginning of the relationship. Look for software that supports ongoing communication through additional forms.

Additional forms allow you to send and receive information from grantees beyond their initial application. For instance, if you need to collect banking details to transfer funds or you want to request progress reports, additional forms enable you to do so. Keeping this communication in one place, rather than moving to email, allows you to harness the security and efficiency of the software throughout your relationship with grantees. Plus, you'll have everything in one place so you can guarantee access and responsiveness even if people change roles or responsibilities.

Software should allow you to send additional forms with all the capabilities of an initial application form, including dynamic questions, the option for file uploads, and reporting functions. Look for software that allows you to schedule forms to be sent in the future or set deadlines, so that you can ease your administrative burden, and seamlessly keep communication on track.

Utilizing additional forms also takes some burden off applicants. Grantmakers can build their initial application to ask only what they need to make a funding decision. Then they can circle back with selected grantees to collect additional details.

The screenshot displays a grant application form interface. On the left is a dark sidebar with icons for user profile, location, phone, email, calendar, list, and link. The main form area is enclosed in a dashed teal border and contains the following elements:

- A question: "What best describes your grant project?"
- Three radio button options: "Philanthropy", "Community service", and "Education" (which is selected).
- A section titled "Additional instructions" with a rich text editor toolbar (bold, italic, underline, bulleted list, numbered list, link, unlink).
- A text area containing the instruction: "Please leave a detailed description of your grant project that includes your able organization eligibility form."
- A "Please upload any supporting documents" section with a "Choose File" button and a circular image of a family.
- A list of "Acceptable file types": .csv, .doc, .docx, .odt, .pdf, .rtf, .txt, .wpd, .wpl, .gif, .jpg, .jpeg, .png, .svg, .tif, .tiff



8. Funds distribution and tracking

A grant management solution should provide funds tracking, so that you and your team have one source of truth when it comes to the budget. The tool should break down how much of your budget you've awarded and delivered, with easy-to-interpret visualizations.

Software must also be capable of sending electronic grant payments directly from the system in order to expedite funding and eliminate the work associated with issuing paper-based checks. Electronic payments can shave days or weeks off of the time it takes to get funding to a grantee.

The screenshot displays a software interface for grant management. At the top, there are two tabs: "All Funds" and "Transactions". Below the tabs, there are two dropdown menus: "2022 Grant Fund" and "Awarded". A table lists transactions with columns for "AMOUNT" and "FUND". A modal window is open over the table, showing details for a "Relief Grant" with a status of "Awarded" and an amount of "\$50,000". The modal includes a "Send Funds Now" button and a trash icon.

AMOUNT	FUND
\$20,000.00	2022 Grant Fund
\$35,000.00	2022 Grant Fund
\$50,000.00	2022 Grant Fund

FUND	STATUS	DESCRIPTION
2022 Grant Fund	Awarded	COVID Relief
2022 Grant Fund	Awarded	Economic Prosperity

Activity | Reviews | Messages | **Funds**

Fund
Relief Grant

Status
Awarded

Amount
\$50,000

[Send Funds Now](#)

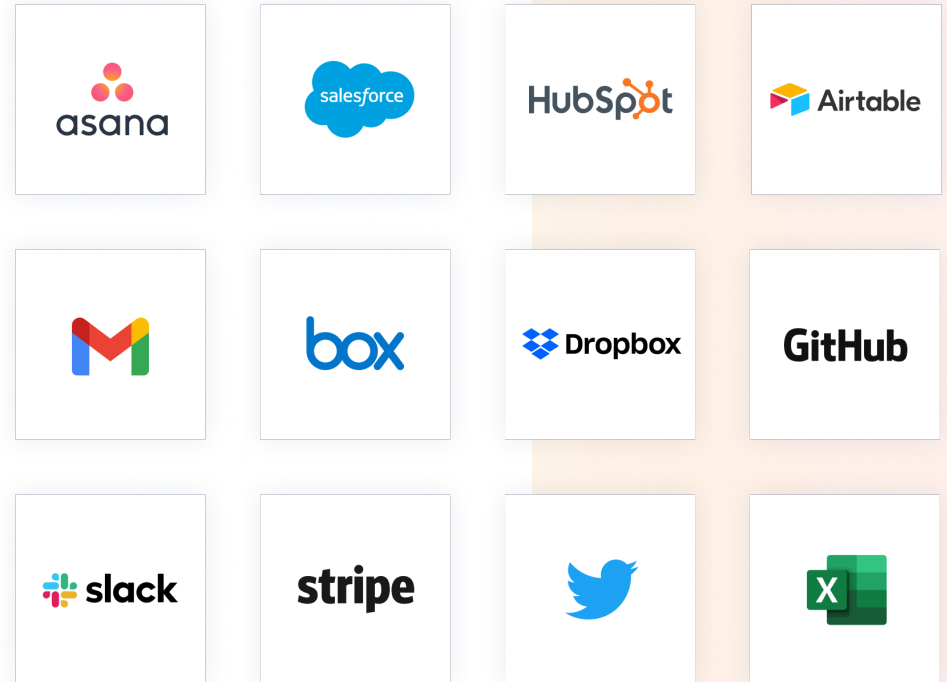


9. Robust integrations

An API that allows grant management software to send or receive data from other software or databases in real time is a key requirement. Older systems tend to have outdated APIs that only provide access to a fraction of the data within the platform. And many rely on clunky overnight file transfers to update critical information.

Seek out software that has strong two-way integrations. A two-way integration allows you to import and export data in whatever way you uniquely need to make data-driven decisions.

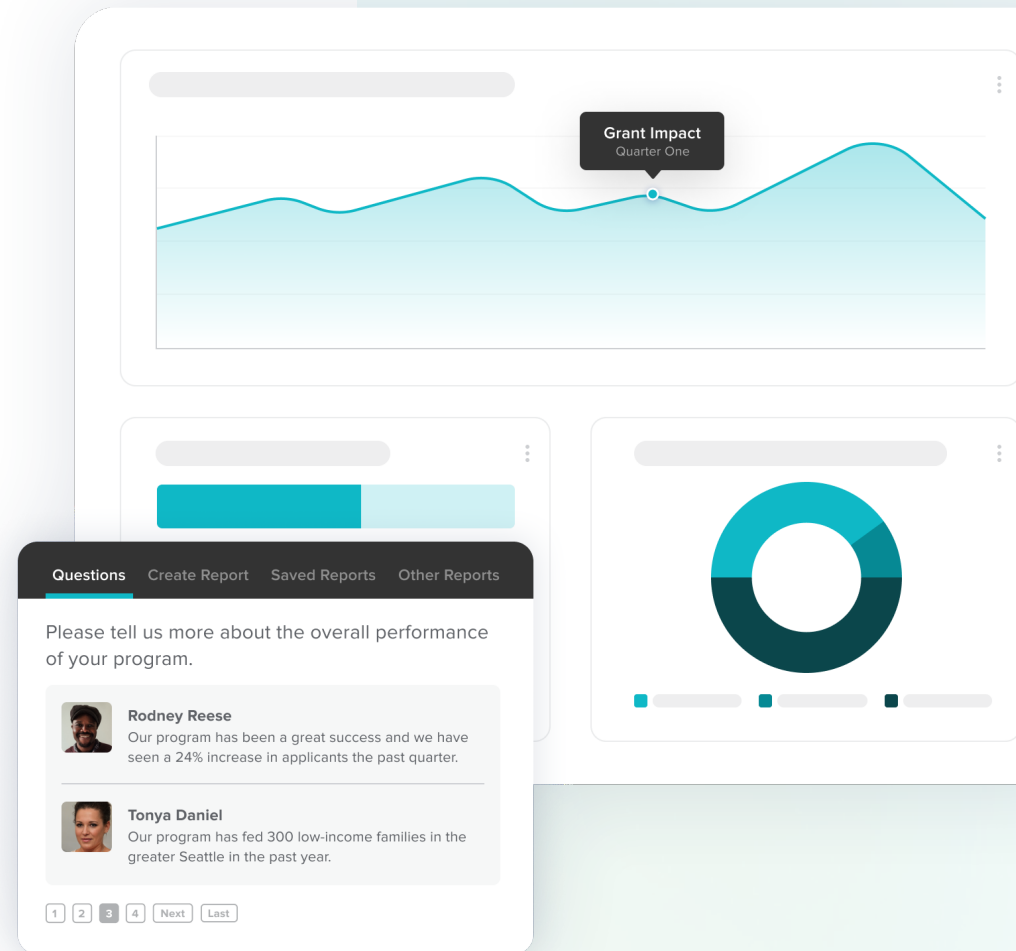
Integrations with databases such as Candid empower grantmakers to harness data that other organizations have already collected. For instance, the [Demographics by Candid](#) initiative aims to provide funders with information they need about nonprofit staff demographics without burdening the nonprofits to report that data to every grantmaker they work with. An API allows funders to bring this data into their grant management software and leverage it as they make funding decisions.



10. Impact reporting

Impact reporting is one key to establishing trust-based relationships and leveraging data. Grant management software must allow grantees to play an equal role in defining and describing the impact of their work. And, it must allow grantmakers to quickly and easily create reports and visualizations to review and assess the data they are collecting.

Impact reports must allow for diverse storytelling and encompass both qualitative and quantitative data, and lead to micro insights and action regarding individual awardees, as well as macro trends and learnings across the entire grantmaking program.



A solution for philanthropy's next era

Grantmaking and philanthropy look fundamentally different in 2023 than they did just a few years ago. A new ethos aimed at sharing power, expediting access to capital, and streamlining processes has taken hold. Grant administrators, program officers, and executive directors are pausing to examine the software and data used to facilitate the complex work of grantmaking. In many cases, the old systems simply aren't designed to accommodate the new values and ways of working.

Most foundations and nonprofits have evolved. Many even discovered better ways of working. Now it's time to collectively align with technology that is purpose-built for the next era of philanthropy. We wish you the best of luck in your search for grant management software, and we're happy to show you how Submittable can help.



ABOUT THE AUTHOR

Sam Caplan is the Vice President of Social Impact at Submittable. Inspired by the amazing work performed by grantmakers of all stripes, at Submittable, Sam strives to help them achieve their missions through better, more effective software. Sam has served as founder of New Spark Strategy, Chief Information Officer at the Walton Family Foundation, and director of technology at the Walmart Foundation. He consults, advises, and writes prolifically on social impact technology, strategy, and innovation.



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