

Grant Management Software Needs Assessment Checklist

As grant management professionals seek to maintain compliance, generate revenue and increase capacity in their organizations, technology is one solution offered up for consideration.

But grant management technology is a major investment of time and money. Use this checklist to identify the features and functionality that are important to your organization. Mark whether each feature would be nice to have, or is necessary for management and compliance.



Tip: Map your current processes, define your future state and calculate your budget to help define your feature list.

Once complete, you'll be ready to research and compare grant management software solutions with confidence.

Image source: picbasement.com

Related: [Download our Public Sector: Grant Software Vendor Requirements](#) for features necessary for federal award compliance. These features are also designated below by a purple check box.

Program Data and Tracking

- Create, assign, track and measure non-financial performance goals (percentage change, percent achieved).
- Capture all elements as data throughout the grant ecosystem.
- Delegate portions of goals to specific projects or initiatives.
- Fully manage organization projects or initiatives including tasks, deadlines, data and communications.
- Assign performance goals and budget line items to responsible party.

Data Security and Users

- Implement role-based security privileges to designate levels of access.
- Execute redundant server management and robust data backup processes.
- Encrypt data transmission to ensure secure information transfer and reporting.
- Add unlimited users and grants to the system.

Project Management

- Create fund distributions, containing one or more grants.
- Track budget and performance for fund distributions.
- Link multiple grants to one project.
- Segment grants into multiple projects, including splitting budget and performance activity data.
- Sync shared calendar with external systems.
- Manage all documents and files.
- Single sign on integration with a robust grant research directory.
- Manage and track grantor communications.
- Create, assign and monitor tasks, including approvals.

Sub-Recipient Management

- Manage sub-recipients through financial and programmatic performance expectations assignment.
- Report on each sub-recipient's achieves and expenses, as well as variances.
- Roll up grant budget and performance activity data into one project.

Competitive Award Management

- Manage RFP and funding opportunity parameters and awarding criteria.
- Build and publish online applications.
- Manage applications with competitive scoring and workflow integration.
- Approve and create awards for selected recipients.
- Easily post funding opportunities directly to Grants.gov.

Reporting

- Access the full grant data repository with configurable reporting.
- Configure standard and custom reports (e.g. budget spend down, sub-recipient performance completion), and output reports to screen, PDF and Excel.
- Control grant reporting tracking intervals.

Fund Data and Tracking

- Differentiate budget allocation spread by year and month over the grant's life.
- Differentiate budget allocation spread inside performance goals.
- Track staff time with supervisor approval, and time and effort certification.
- Import actuals from accounting system and gross salary from HR/payroll system.
- Create and manage organization funds, manage funding sources, and track cash receipts.

In addition to specific features and functionality, consider simplicity of the user interface, flexibility and pricing structure (by user, by subscription license, by annual grant revenue; first year cost vs. recurring costs).

To discuss your organization's unique challenges and grant management software readiness, contact us today.

Contact Us

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