Selecting a new grant management system

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Libby Hare & Mark Luckins

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processes, people and technology

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INSTITUTE OF CONSULTING
RECOGNISED PRACTICE

Agenda

14.00   Welcome and introductions

14.10   What do you need a GMS to do?

14.20   What can a GMS do?

14.30   What GMS options exist in the UK market?

14.45   How to select a GMS system

15.00   Questions and Discussion

15.15   End

Common strategic drivers to buy a GMS

01
Enhance experience for grantees and applicants

02
Improve ways of working – including integration with other systems (particularly website)

03
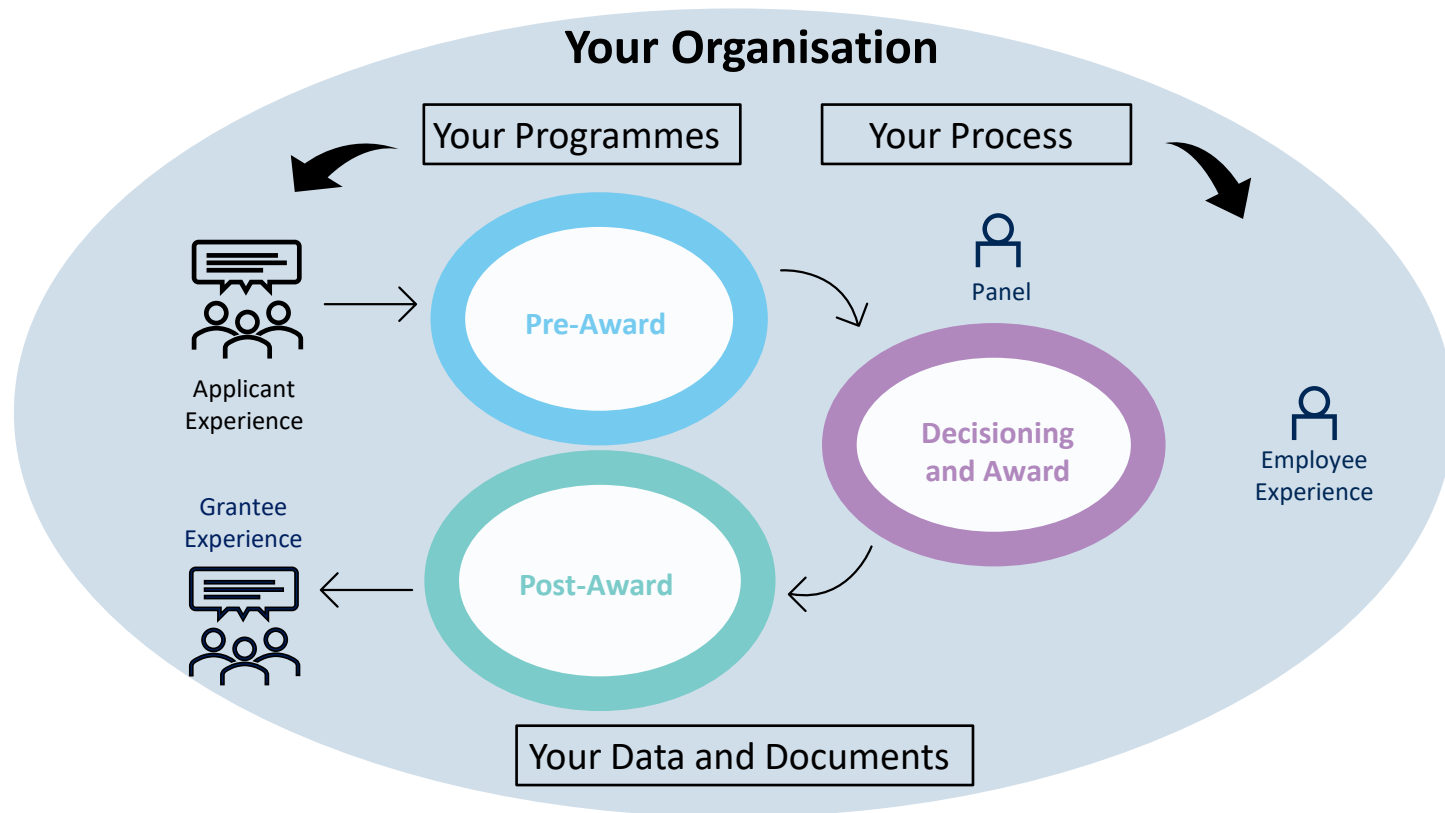Provide better information for decision-making and reporting on impact

04
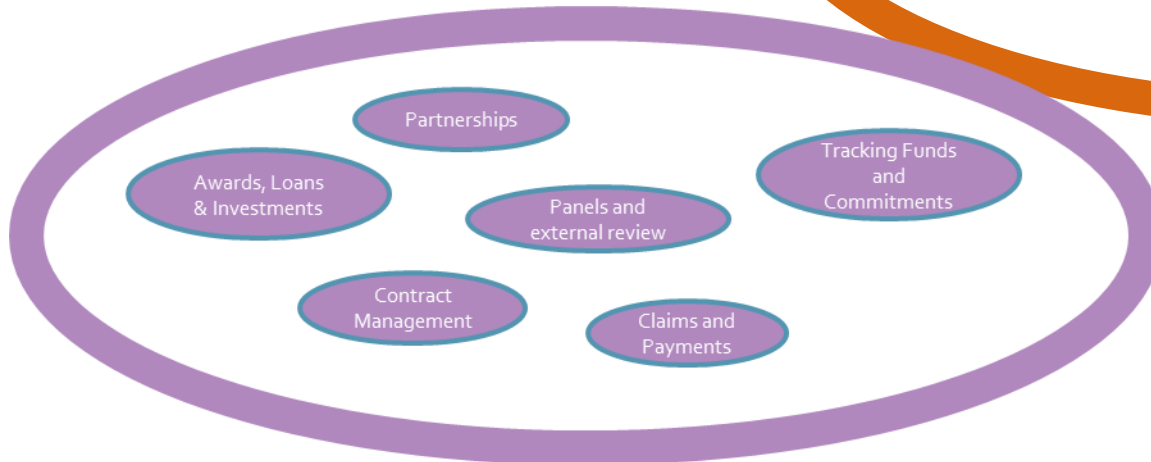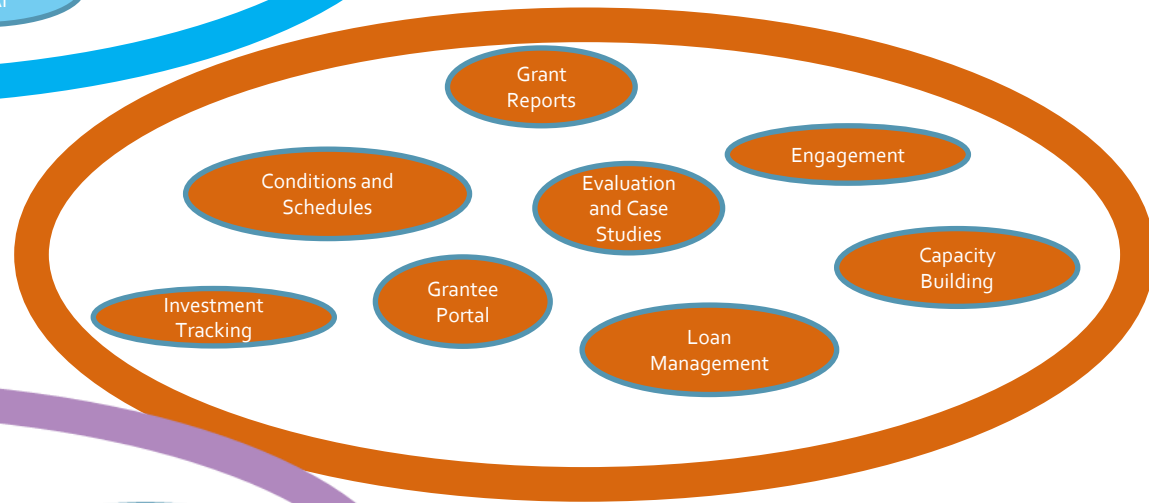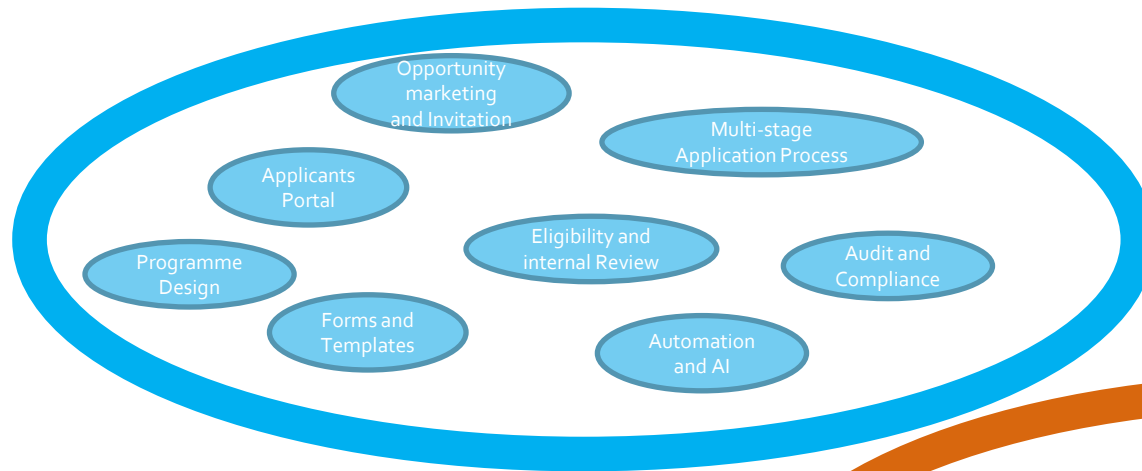Support wider stakeholder, community, partner or other "CRM" management.
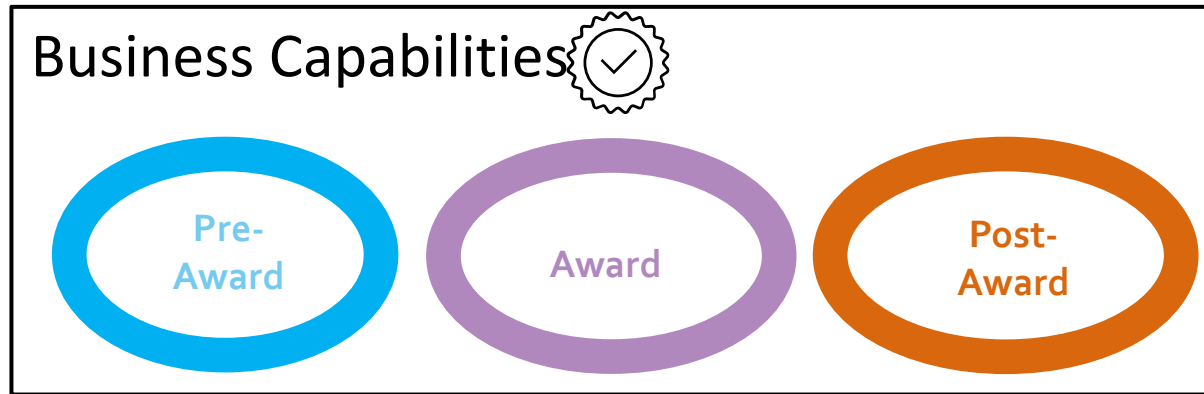
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What do you need a GMS solution to do?

What major business activities do you need a GMS to support?

What type of grant making functionality do you need the solution to support?

Opportunity marketing and Invitation

Multi-stage Application Process

Applicants Portal

Programme Design

Eligibility and internal Review

Audit and Compliance

Forms and Templates

Automation and AI

Grant Reports

Engagement

Conditions and Schedules

Evaluation and Case Studies

Capacity Building

Investment Tracking

Grantee Portal

Loan Management

Partnerships

Tracking Funds and Commitments

Awards, Loans & Investments

Panels and external review

Contract Management

Claims and Payments

What type other technical features will you need?

Business Capabilities ✓

Pre-Award | Award | Post-Award

Technical Capabilities

- Reporting and Analysis
- Configurability
- International & Accessibility
- Document Management
- Branding and white label
- Security and Audit Management
- Relationship Management & Communications
- User Experience, Collaboration & Search
- Analytics
- Pre-Built/IaaS Integrations (eg Zapier; Teams; CopyLeaks)
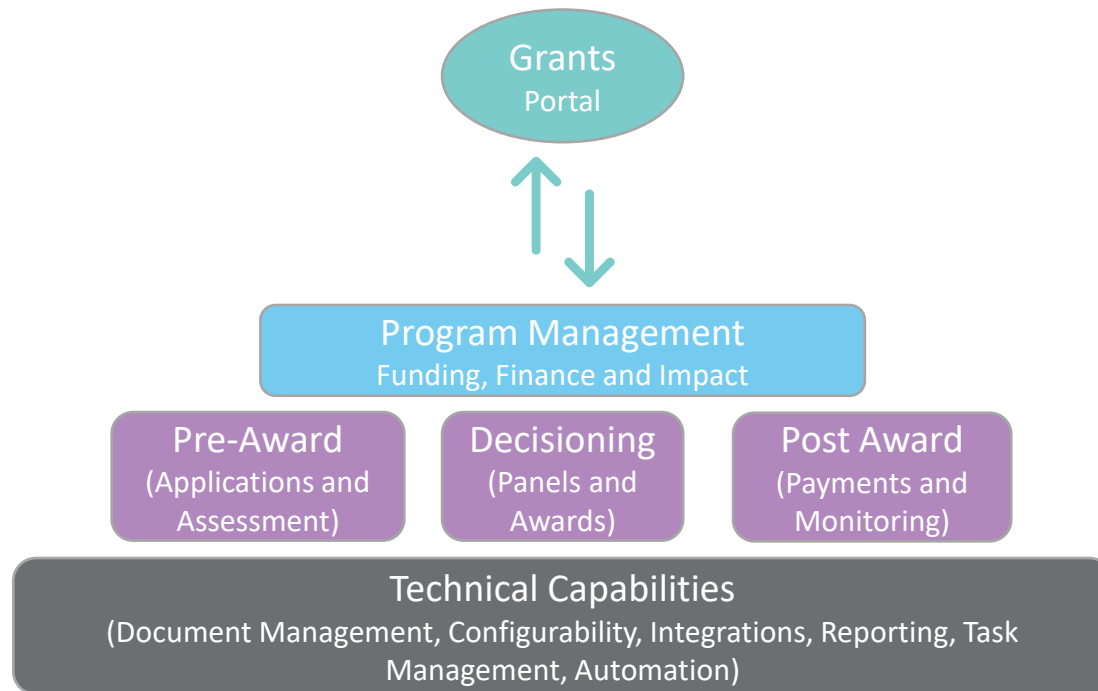- Custom Integrations
- Tasks and SLA Management

Is there anything else you need a GMS for?

What do GMS systems do and how are they evolving in the market?

Core capabilities of a modern GMS platform

Grants
Portal

Program Management
Funding, Finance and Impact

Pre-Award
(Applications and Assessment)

Decisioning
(Panels and Awards)

Post Award
(Payments and Monitoring)

Technical Capabilities
(Document Management, Configurability, Integrations, Reporting, Task Management, Automation)

Emergent capabilities of a modern GMS platform

EXTERNAL

Portal and Engagement
Stakeholder Digital Experience

Programme Impact Hub
Grantee and granter data and
analysis platform.

CORE GMS
Internal business system
for staff

Automation and AI
Agile grant giving
AI assisted
grant management

INTERNAL

LOWER BUSINESS
IMPACT

HIGHER BUSINESS
IMPACT

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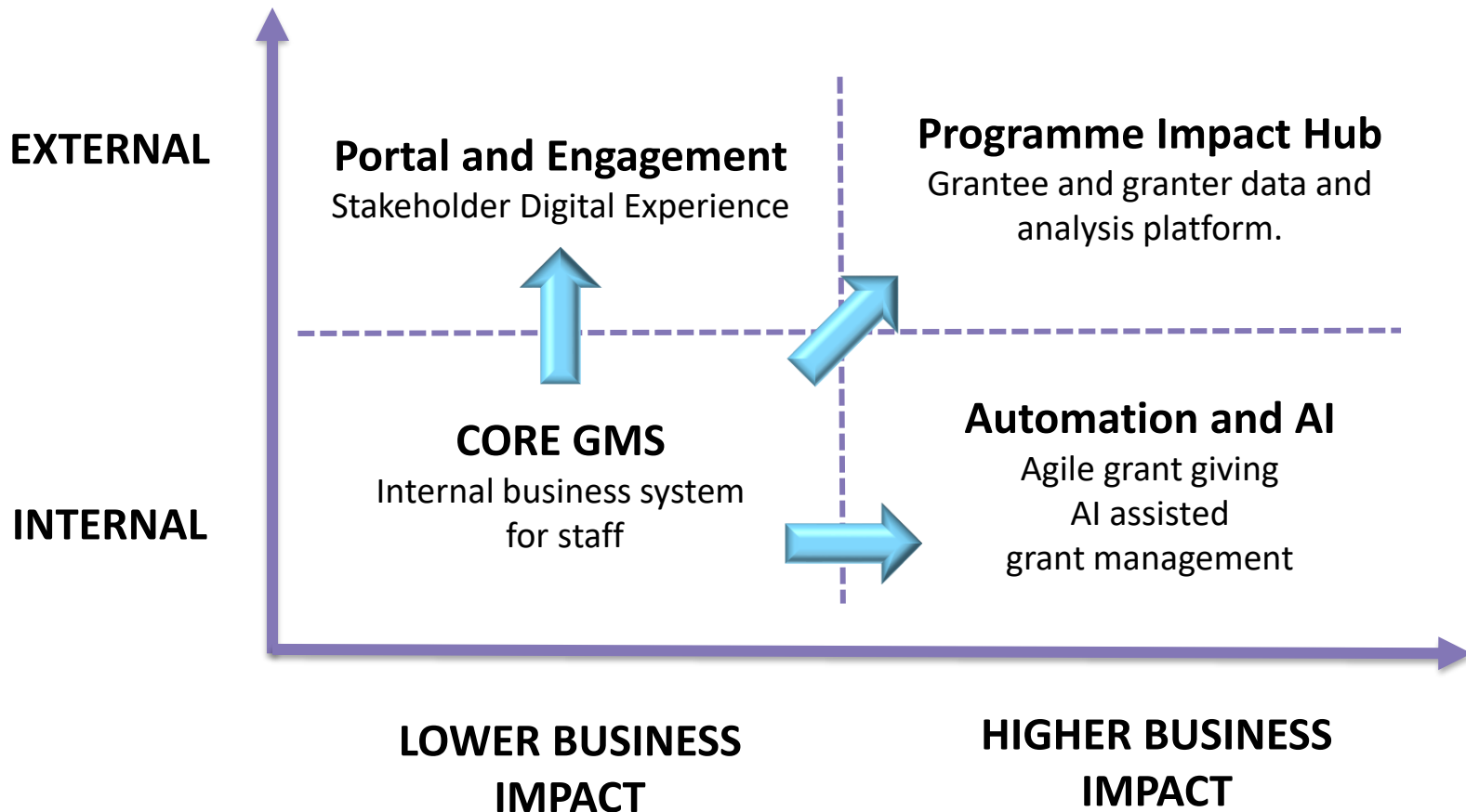
The rise of AI Assisted Applications

Futurepedia

LAUNCHING 28th March
Charity Excellence FRAMEWORX
Charity Excellence Bid-Writing Service
Use our **free** service to help you write your funding bids
www.charityexcellence.co.uk

Fundwriter.ai

Grantable

AI Productivity Tools
Personal Assistant (293)
Research (241)
Spreadsheets (55)
Translator (24)
Presentations (43)
Show all AI Productivity Tools

AI Text Generators
Prompt Generators (107)
Writing Generators (284)
Paraphrasing (16)
Storyteller (78)
Copywriting (195)
Show all AI Text Generators

AI Image Tools
Design Generators (259)
Image Generators (266)
Image Editing (197)
Text To Image (36)
Show all AI Image Tools

AI Art Generators
Cartoon Generators (7)
Portrait Generators (26)
Image To Image (32)
Drawing (21)
Avatars (90)
Show all AI Art Generators

Misc AI Tools
Fitness (35)
Religion (16)
Students (22)
Fashion (22)
Gift Ideas (26)
Show all Misc AI Tools

AI Video Tools
Video Enhancer (11)
Video Editing (88)
Video Generators (106)
Text To Video (20)
Show all AI Video Tools

AI Business Tools
Website Builders (39)
Marketing (209)
Finance (98)
Project Management (88)
Social Media (237)
Show all AI Business Tools

Automation Tools
Workflows (95)
AI Agents (68)
Show all Automation Tools

AI Audio Generators
Audio Editing (71)
Text To Speech (75)
Music (105)
Transcriber (120)
Show all AI Audio Generators

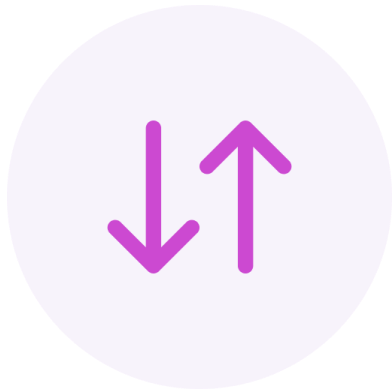## AI Code Tools
Code Assistant (144)
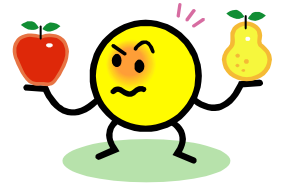Low-Code/No-Code (198)
SQL (45)
Github (32)
Show all AI Code Tools

Are there other features or functions you expect from a GMS?

What options exist in the GMS UK market today?

Overview of systems…
some ways to look at the choices

- Types of grant awarded and support: individuals, organisations, social investment, in kind, capacity building

- Small / community / larger / corporate / international

- CRM systems with grant-making functionality added on

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North America mainly
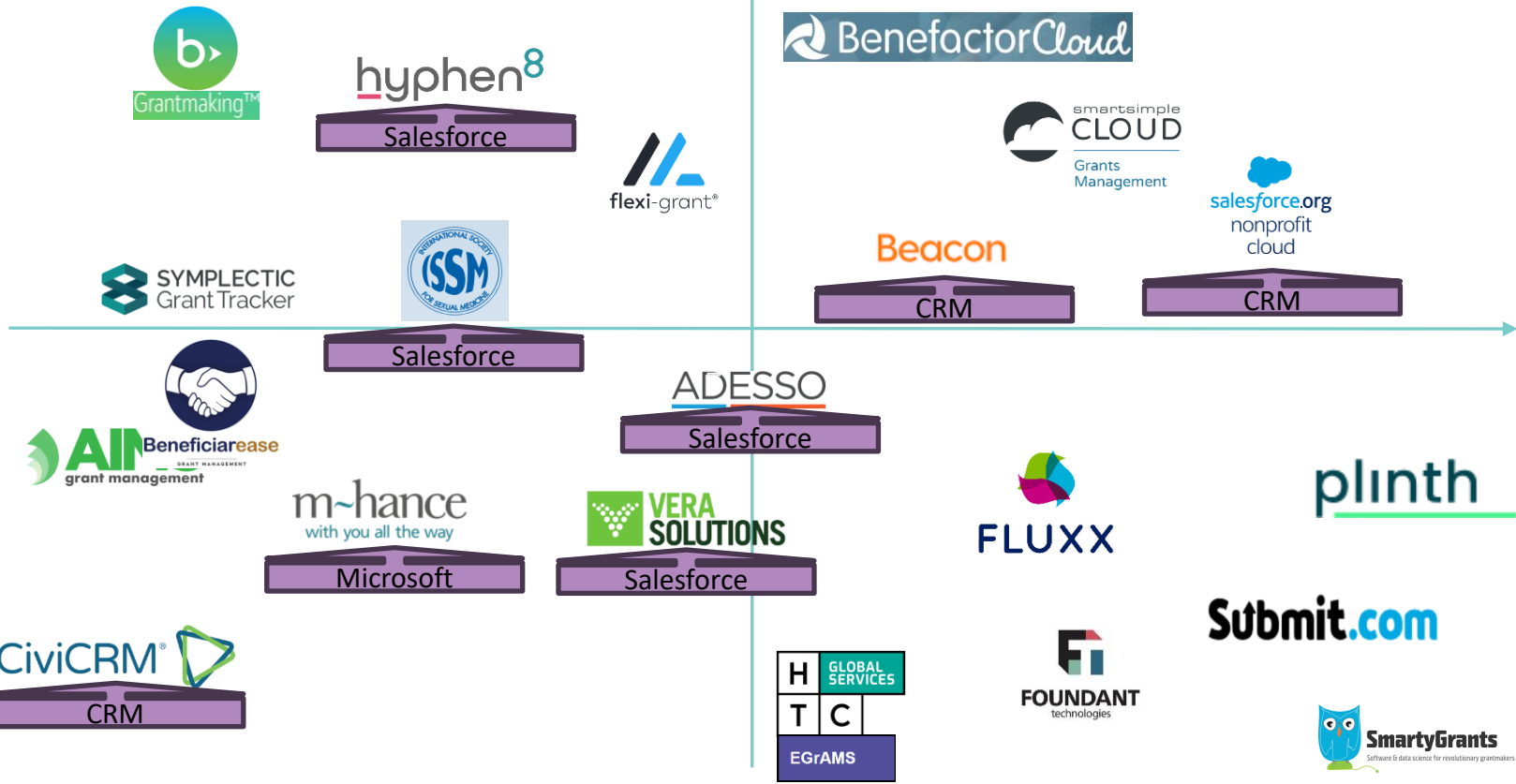- instrumentl
- Bonterra
- GOOD GRANTS
- Submittable
- Apply™

Higher Adoption in UK

Lower Adoption in UK

Established Vendor

Recent UK Market Entrant

- b Grantmaking™
- hyphen8 — Salesforce
- flexi-grant®
- BenefactorCloud
- smartsimple CLOUD Grants Management
- salesforce.org nonprofit cloud
- SYMPLECTIC Grant Tracker
- ISSM International Society for Sexual Medicine — Salesforce
- Beacon — CRM
- CRM
- AIM grant management
- Beneficiarease grant management
- ADESSO — Salesforce
- m-hance with you all the way — Microsoft
- VERA SOLUTIONS — Salesforce
- FLUXX
- plinth
- CiviCRM® — CRM
- HTC GLOBAL SERVICES EGrAMS
- FOUNDANT technologies
- Submit.com
- SmartyGrants Software & data science for revolutionary grantmakers

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? Are there any solutions you are aware of we have not mentioned?

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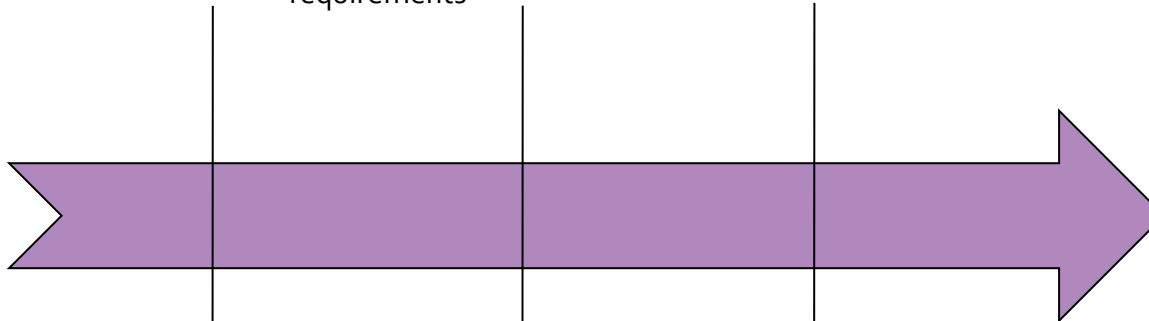# How do you select a GMS solution?

Selection approach

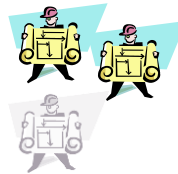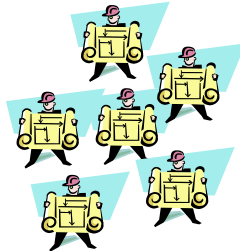Governance, options and an honest business case

Review of options, key processes, user journeys and requirements

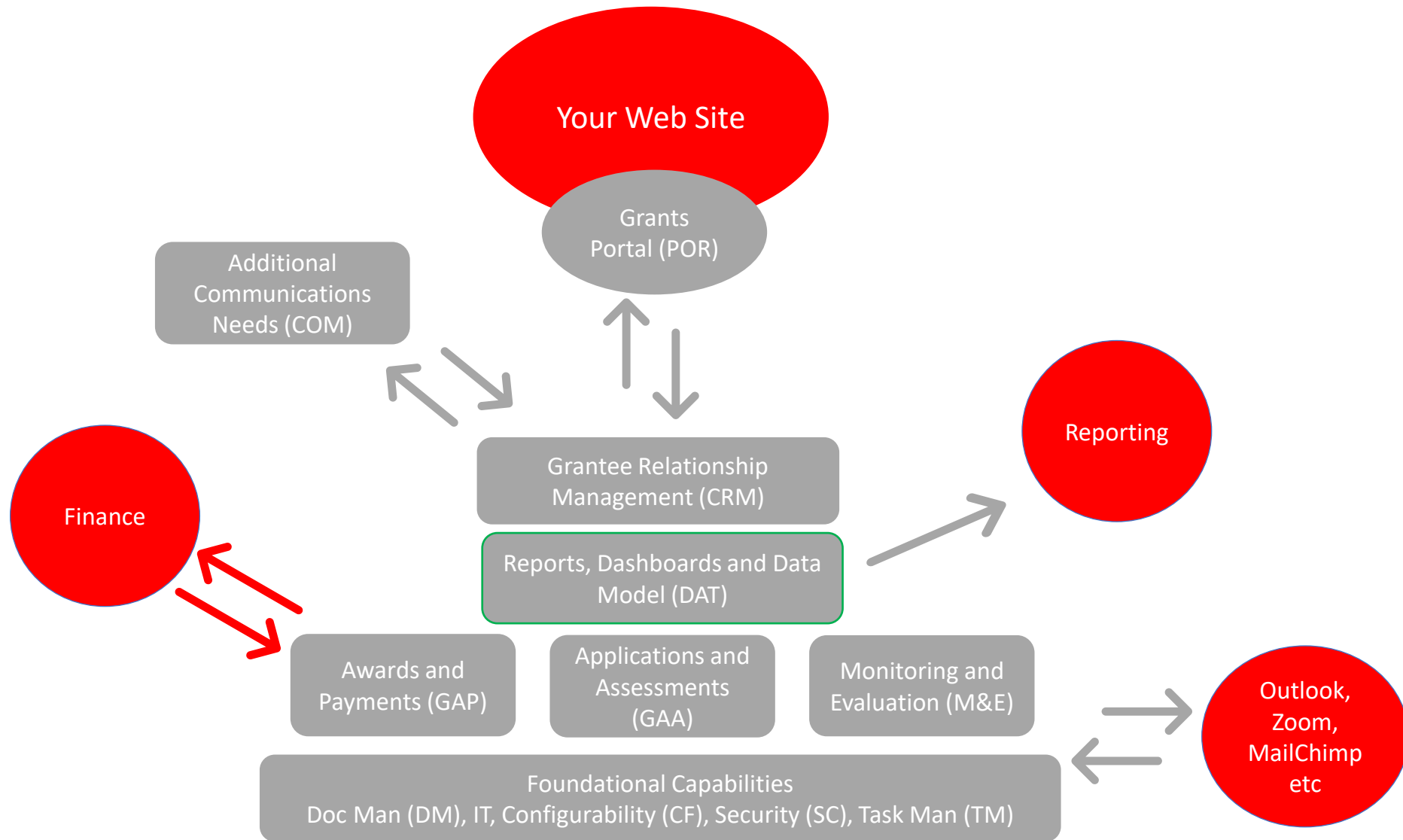Tender, tailored presentations and other selection activities

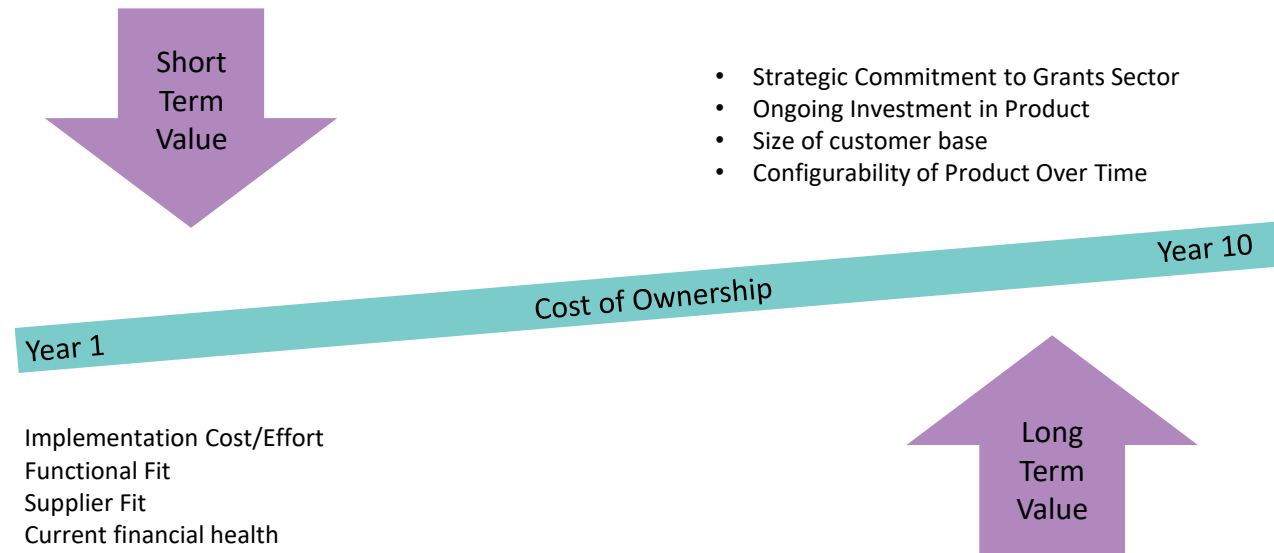Discovery – technical specification and contract

What the org. really needs and can achieve

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What your RFP/procurement process needs to cover

Short Term Value

- Strategic Commitment to Grants Sector
- Ongoing Investment in Product
- Size of customer base
- Configurability of Product Over Time

Cost of Ownership

Year 1

Year 10

- Implementation Cost/Effort
- Functional Fit
- Supplier Fit
- Current financial health

Long Term Value

Internet Resources

In general supplier information is provided by suppliers so descriptions etc are broadly accurate. Reviews are another matter.

If you only use one use this. Not quite as information rich as G2 but reviews are verified; it also is the most "country aware" – make sure you use the UK version.

Biggest, information rich site but reviews are barely vetted. Trust the reviews here as much as you might do on Amazon…

Gartner owned, less information and far less reviews but what there is usually well informed….

Final Q&A

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processes, people and technology

help@adaptaconsulting.co.uk
www.adaptaconsulting.co.uk

Adapta Consulting, 5 St John's Lane, London, EC1M 4BH
020 4558 8070