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**Implementation Imperative:
Deploying High-Impact Grant Systems**

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GPC Competencies:

05: Knowledge of post-award grant management practices sufficient to inform effective grant design and development

07: Knowledge of practices and services that raise the level of professionalism of grant developers

Abstract

Enterprise-level technology transitions across industries are often complex and multifaceted, rarely following a straightforward trajectory. Transitioning from manual grant processing to automated grants management software is no exception. Recent industry research estimates that between 40% and 60% of non-profits and mid-sized public agencies still rely on manual spreadsheets and disconnected email workflows for post-award compliance and grant tracking (Hackler & Saxton, 2007). To help organizations navigate this shift, this paper explores best practices for deploying such software. It emphasizes the importance of a well-considered plan, provides guidance on phased implementation, offers strategies to enhance user adoption, and outlines key approaches to avoid common errors.

Introduction

A couple of years ago, a local organization implemented an automated grants management system for its operations. Due to budget constraints, they adopted a core solution focused on essential features—such as application management, reporting, financial monitoring, compliance, and document management—deferring advanced features to subsequent phases once additional funding became available and initial core workflows had stabilized. Prior to software implementation, the underlying business processes of these essential features were revisited and refined. In hindsight, this phased approach proved a sound strategy, boosting user adoption, improving processing efficiency, enhancing scalability, and establishing clear milestone indicators for evaluating future system enhancements.



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Rolling out a Grants Management System (GMS) is an important step for organizations of any size and sector to oversee the entire grant lifecycle—including grant research and application submission, tracking, post-award management, reporting, documentation, and closure (Hall, 2009; Ward, 2010). Modern platforms also enable vital integrations with existing enterprise tools, such as central finance and accounting systems. Even for a one-person grant department, a GMS converts vulnerable spreadsheet tracking into a centralized, audit-ready system, mitigating the risk of missed deadlines, lost documentation, and institutional memory loss when staff turns over. Although switching from a manual, labor-intensive process to an automated GMS should, in theory, lead to immediate improvements, this is rarely the case. This paper discusses essential guidelines for planning a transition to a GMS. Each guideline discussed below carries equal weight, and it is recommended that due attention be paid to each for the best possible outcome.

The Decision Compass

Improving the efficiency of manual business processes through a technology solution requires a careful, detailed evaluation of current operations, including what is working well, existing bottlenecks, and operational pain points. While overall grant management principles remain standard, specific nuances often arise when working across distinct sectors, grant types, and funding levels (federal, state, or local)—the specific regulatory details of which fall outside the scope of this paper.

The evaluation matrix—a tool for evaluating and prioritizing options by scoring them against key criteria and a key component of planning—helps organizations identify, document, and evaluate their needs, thereby informing subsequent phases of software implementation. During this initial stage of planning, organizations are encouraged to consider the following.

- What are the core functionalities to focus on? Identify core functional requirements from an operational workflow perspective rather than a software feature perspective.
- Do business functions need any refinement? System selection is the ideal opportunity to modernize inefficient processes rather than pouring old wine into new bottles (Davenport, 1998). For example, a grant-seeking department might currently rely on informal email approvals and manual spreadsheet tracking for pre-award proposal reviews. Transitioning to a GMS offers the chance to standardize these steps into a formal, automated routing workflow. However, if a needs assessment reveals fundamental procedural ambiguity or conflicting internal policies, organizations should pause the selection process to

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align on core business logic before moving forward.

- Which key stakeholder groups—such as Finance, Program Management, and IT—must be engaged during early pre-procurement discovery to ensure organizational alignment and seamless adoption post-launch?
- What functionalities are required in a GMS, and how should those functionalities be prioritized?

Table 1 summarizes a sample approach that addresses the key considerations before proceeding to the next stage.

Note: The matrix below is provided for reference only. It is neither exhaustive nor intended for use as is. Organizations will have to customize it to meet their needs.

Table 1. Sample Evaluation Matrix for a GMS Implementation

Grant Lifecycle Phase	Business Function	Refine Business Function?	Business Function Refinement Stakeholders	GMS Desirability (Must-Have /Nice-to-Have)	GMS Priority (Low/Medium/High)
Pre-Award	Manual search of grants	Yes	Grants Team	Nice to have	Medium
Post-Award	Budget amendments	No	No	Must have	High
Closure	Closeout report	No	Grants Team, Finance	Must have	Medium
Reports	Progress tracking	Yes	Grants Team, Executive Leadership	Must have	High
Documents	Integrated storage	Yes	All	Must have	Medium
Integrations	Integrate with the financial system	Yes	Grants Team, Finance	Must have	High
Others	e-signatures	Yes	Grants Team, Finance, Payroll	Nice to have	Low

Completing the evaluation matrix may seem time-consuming, but for most mid-sized organizations, the process typically takes 15 to 25 hours spread over two to four weeks, depending on the number of business functions to be revised. This upfront investment prevents costly rework and scope creep later in the procurement process. A well-thought-out evaluation matrix sets the stage for a high-quality GMS that serves the organization well in the long run.

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Benefits of a well-planned evaluation matrix include:

- Identifying “high value” functionalities (i.e., essential features) for prioritized rollout.
- Helping develop a strong Requirements Traceability Matrix (RTM) to track and manage detailed business requirements during software implementation (6Sigma.us, 2025). An RTM functions as a structured document that maps and monitors project requirements from their initial definition through to final delivery of the software.
- Setting expectations and establishing timelines for ongoing discussions with stakeholders.
- Moving ahead with clarity to select a GMS.

The Solution Scout

The next step is to narrow the GMS choices to those that meet or exceed the essential features (listed as “Must have” in the “GMS Desirability” column of Table 1) specified in the evaluation matrix. As the GMS market is saturated with products serving grantors and grantees, it is crucial to base product selection on the organization’s needs.

As a best practice, these important factors should be considered before finalizing a GMS: key features, available customizations to meet your needs, implementation cost (one-time) and ongoing costs (e.g., licenses), type of GMS (e.g., enterprise system on the cloud vs open source), security, ease of use, and scalability. Beyond evaluating the platform itself, organizations must rigorously assess the implementation vendors and system integrators responsible for customizations, data migration, and rollout. Vendors should be evaluated not only on technical competency, but also on grant-specific domain expertise, change management capabilities, and past performance in the public and nonprofit sectors (Niazi, 2015). Assessing vendors against these criteria ensures the partner understands the complex regulatory and operational realities of grant administration, thereby reducing deployment risk.

Benefits of a well-selected GMS include:

- Consolidates live grant statuses, financial tracking, and performance metrics into a central hub. This replaces department-level spreadsheets with a single, reliable view of data for all stakeholders.
- Providing an expandable platform to meet the future needs of the organization.
- Increasing operational efficiency and time savings.
- Enhancing compliance and audit readiness.

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The Stepping Stone Strategy

With planning and GMS selection complete, the next step is implementation. Among system deployment strategies, the best-suited approach for a well-defined evaluation matrix is a phased rollout, as it offers low risk and high control (Chandra, 2015). In this approach, implementation unfolds in functional modules based on the desirability and priority established in the matrix.

The 'GMS Priority' column in Table 1 provides a clear ranking of features for sequential rollout; for instance, core capabilities like Budget Amendments would be targeted in the initial phase. Because rules and regulations vary across grant programs, implementation should not be rushed. Organizations frequently adopt a two- or three-phase model—targeting high-priority features in Phase 1, followed by medium- and low-priority capabilities in subsequent phases—providing an optimal balance across technology, people, and processes.

Benefits of a phased approach include:

- Staggering the rollout of features so as not to overwhelm users.
- Providing adequate training and opportunities to become familiar with GMS.
- Navigating a steep learning curve.
- Allocating resources and time to fix issues/errors.

Skill Up

With GMS operational, it is necessary to sustain the pace of the new launch by ensuring that system users are adequately trained and familiar with the functionalities relevant to their roles within the organization. Through active participation in developing the evaluation matrix and selecting the GMS, users remained fully informed and kept abreast of all developments. Providing tailored training (live or recorded), software manuals, and step-by-step guides helps users become more comfortable with the GMS. In addition to system familiarity, this structured instruction accelerates overall operational efficiency. Beyond building familiarity with the system, users can spot potential improvements or issues for future maintenance. A structured, recurring feedback process demonstrates that user experience is important and tempers the urgency associated with minor system weaknesses.



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Benefits of continuous user engagement include:

- Strong participation from planning to rollout and beyond, thereby boosting project success.
- Modernizing business processes to improve efficiency and avoid rework.
- Faster adoption of GMS.
- Identifying issues/errors and any required enhancements.

Conclusion

A successful GMS rollout can improve an organization's compliance and overall grant management efficiency. By streamlining administrative workflows and automating routine tasks, organizations can shift their focus to high-value strategic outcomes.

While organizations should anticipate an initial adjustment period as teams adapt to new workflows, deliberate pre-procurement planning ensures these temporary lags yield substantial long-term gains. Since the organization mentioned in the introduction completed its GMS rollout a year ago, it has successfully decommissioned its legacy tracking systems, automated cross-departmental workflows, and reclaimed hundreds of staff hours previously lost to manual data entry.

By following the operational guidelines outlined in this paper, organizations can smoothly manage the software transition, making their GMS a lasting boost for more efficient workflows and stronger organizational skills.

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