

FULL CHECKLIST

Features to look for in a grant management software

Use this checklist to help you identify the right grant management software for your team and your applicants. This is not meant to be comprehensive, use it as a starting point as you begin to evaluate your options.

Communication that builds strong relationships

- In-app communication tools
- Automated follow-up communication
- The ability to send follow-up forms and progress updates
- Permission levels that maintain privacy and reduce bias

Agility and ease of use so you can move quickly

- No-code and intuitive drag-and-drop form builder
- Robust, yet easy-to-tweak review workflow builders
- Auto-labeling applications
- Autonomous feature suites
- A customer support team that can step in and help when needed

Thoughtful AI tools that prioritize equity

- Clearly articulated responsible AI principles
- A natural language AI assistant
- A browser extension that saves a library of common answers
- AI-assisted translations
- Document parser
- Deep research into how AI can affect decision-making



Data access for a clear view of what's happening

- Two-way API connections
- Data sharing capabilities with databases and data warehouses
- Reporting tools that allow you to modify the data to meet your storytelling needs
- A customer success team that deeply understands data security and compliance

Collaboration features to keep everyone on the same page

- In-app communication tools for reviewers, admins, and applicants alike
- Multi-level user permissions
- Collaborative applications, where applicants can work together in real-time
- Multi-stage review programs
- Custom review logic and workflows to route the right application to the right reviewers
- Simple yet robust labeling and sorting features

Accessibility built-in from the ground up

- Mobile-friendliness
- Check that they follow Web Accessibility Guidelines
- Autosave
- The ability to add dyslexia-friendly typefaces
- Screen-reader compatibility
- The ability to accept many different file types
- The ability to include granular instructions at the organization, project, and form field level



Strict security and compliance to keep everyone safe

- SOC 2 Type 2 compliance
- GDPR compliance
- CCPA compliance
- FERPA compliance
- HIPAA compliance
- Single sign-on (SSO) support
- Multi-Factor Authentication (MFA)
- Robust admin controls to limit access to sensitive information

Psst...

Submittable checks all these boxes. Schedule a demo at submittable.com/demo to learn more.

