

Submittable 

**MAKING THE CASE TO INVEST IN**

# Grants management software for government employees

**BY NATALYA DEROBERTIS-THEYE**

Director of Product Marketing at Submittable



# Table of Contents

<b>Introduction</b>	<b>3</b>
<b>Setting the stage:</b> Articulate the urgency	<b>4</b>
<b>State CIO Top 10 Priorities</b>	<b>10</b>
<b>The painful present:</b> Paint the picture	<b>11</b>
<b>The unexpected upsides:</b> Illustrate the potential of grant management software	<b>13</b>
<b>Making the case:</b> Use data and get specific	<b>15</b>
<b>How to make your pitch for a grant management system</b>	<b>26</b>
<b>Conclusion</b>	<b>27</b>



# Introduction

As a government grant manager, you have a tough job.

You're tasked with providing vital funding that makes a real difference in constituents' lives. Whether it be emergency relief, an economic stimulus, or vouchers to fill a particular need, such as housing or childcare, public grants serve as a lifeline and an investment in a stronger future for communities.

Unlike private granting institutions, however, public sector programs face unique challenges. Compliance requirements are strict and often evolve with changing legislation. Expectations for speed and fairness grow higher with each passing year. All the while, public sector programs are under a spotlight, facing public pressure and strong ramifications if things go wrong.

Grant management software can be a transformative investment in light of these realities. The right solution can help government teams achieve key goals, like mitigating fraud and improving equity. It can also empower you to move more quickly, outsourcing tedious due diligence to technology so you can launch new programs and deliver funds in record time. Your grant management vendor can also serve as a strategic partner, helping ensure you meet

your goals and maintain compliance from program design through final close out.

Unfortunately, many government granting teams are not benefitting from what state-of-the-art grant management technology can deliver. Many are stuck with dated, in-house solutions, patched together with tedious work-arounds. Others don't have a system at all, and are stuck with various spreadsheets, email, or even paper applications.

The challenge for government grant managers is that, while they appreciate the need for a purpose-built grant management software, **they often don't have purchasing power**. Securing procurement can be as difficult as running the grant itself.

If this is the situation you find yourself in, this guide is for you.

We'll walk you through everything you need to make the business case to your superiors to invest in a grant management system and even provide a slide deck you can tailor for your use and a checklist to help in the buying process that we hope will follow.

Let's dive in.



# Setting the stage: Articulate the urgency

In making the case, you'll need to articulate the catalyst for your purchase now. In 2023, the world does not look as it did three years ago. It's helpful then to consider some of the larger trends that are influencing the need for this investment.

## Government grantmaking will only continues its growth

Even before the COVID-19 pandemic, the last century has been characterized by increases in federal grants to local government entities. As a [2019 Report by the Congressional Research Service](#) put it, over time, the American public has become “increasingly accepting of government activism in domestic affairs generally, and of federal government activism in particular.”

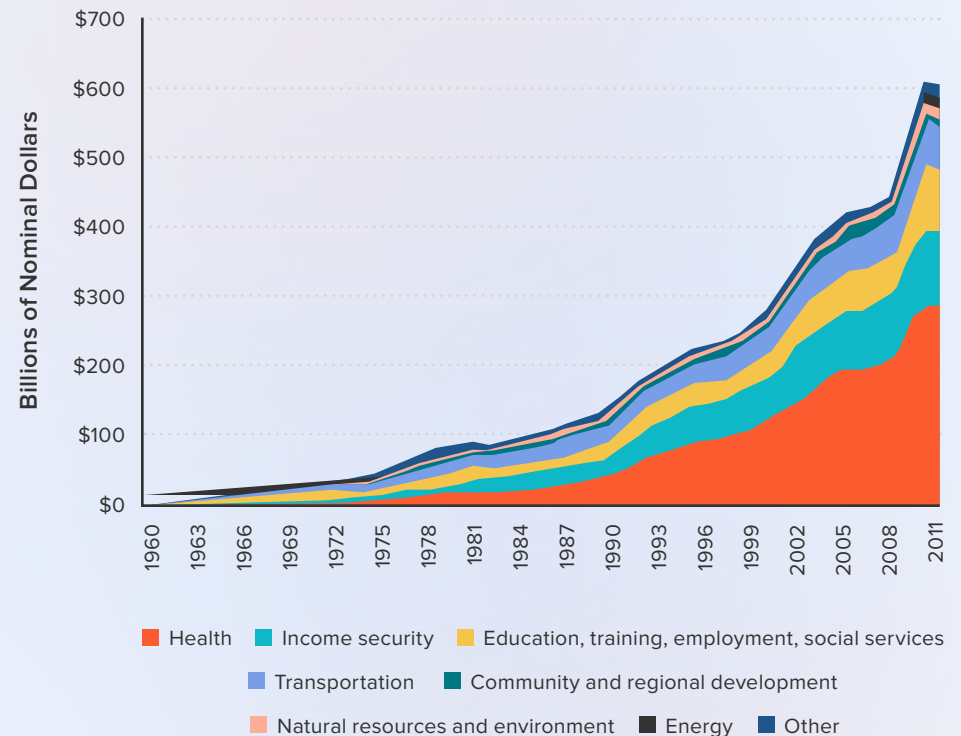
The report attributes this acceptance and, at times, demand as a reaction to:

- Industrialization and urbanization
- Modern communications technology, which has raised awareness around societal problems
- Economic interdependencies inherent to a global economy

Needless to say, these trends won't be reversing any time soon.

## Post-1960s Explosion of Federal Grants to State and Local Governments

By Function, 1960 - 2011



*The last century has been characterized by increasing acceptance of and demand for federal investments in state and local governments..*

Source: [Mercatus Center](#)



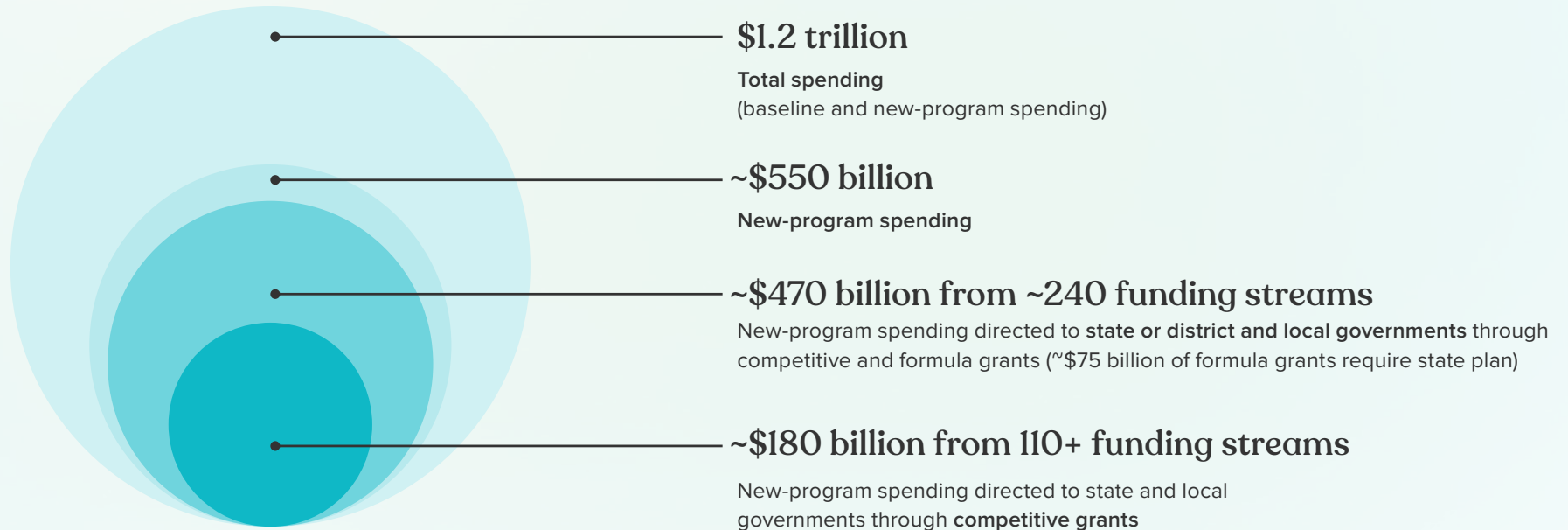
In recent history, we've seen:

- In response to **COVID-19**, the U.S. federal government spent **\$620 billion** in grants to local governments alone—not including direct payments, loans, or contracts.
  - The Bipartisan Infrastructure Law passed in 2021 will fund **\$470 billion** to state or district and local governments.
  - Billions of the \$733 billion **Inflation Reduction Act** of 2022 will be disbursed as competitive grants to state, local, and tribal entities.
- If the past is precedent, the future will bring more and more opportunities for government agencies, and you should be prepared.

## Competitive grants will account for approximately \$180 billion of Bipartisan Infrastructure Law Funding.

Overview of Bipartisan Infrastructure Law Funding

*Much of the Bipartisan Infrastructure Law funding will be regranting to state or district and local governments.*  
Source: [McKinsey & Co](#)



## Standards are higher—and so is accountability

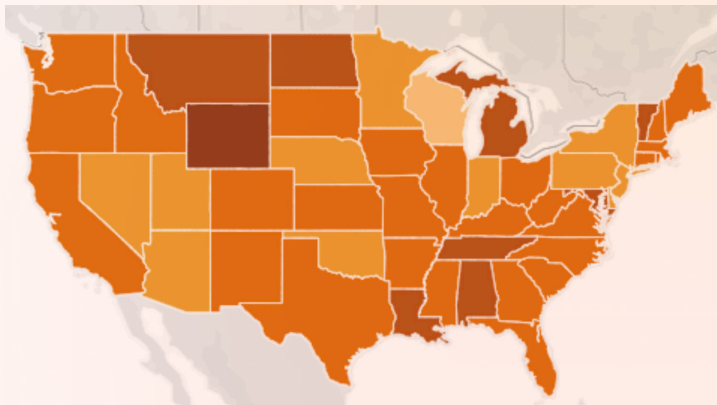
State, local, municipal, and tribal governments of all sizes are always accountable to constituents and taxpayers. And modern communication paired with increased awareness of social injustice means they are held to higher standards than ever before.

### Equity

The public demands that grant distribution be equitable. As just one example, the Latino Community Foundation and The California Endowment, working together as the Latino Power Fund, published [A Brown Paper on Movement Building & Collective Action To Leverage Historic Federal Funds for Enduring Social Change](#), a call to action to leverage the American Rescue Plan to begin to reverse historic disinvestment in Latino and Hispanic communities.

Governments must consider the needs of marginalized and underrepresented groups, such as people of color, low-income communities, and those with disabilities. It doesn't stop with ensuring that historically disempowered groups have equal access to apply for funding. They must be given the tools needed to be successful in their application, such as an easy-to-use, mobile-friendly system and access to technical support in multiple languages.

Beyond this, the money itself must be distributed equitably—which in some cases, does not mean equally. An equitable grant may be intentionally designed to achieve social aims, such as narrowing the racial wealth gap. Government employees must not only take all of this into consideration at every step in their process, they know that if they do not, the public will hold them to task.



*This map shows the inequitable distribution of IDEA grant dollars to children receiving special education. There is increasing public advocacy to demand that government grant money be distributed equitably. Source: [The Brookings Institution](#)*

## Urgency

Teams are under pressure to move faster. This particularly includes teams managing emergency relief funding, where a slow program could result in a missed opportunity to achieve the intended outcome. For example, in 2021 [The New York Times](#) reported that states had only disbursed 11% of the \$46.5 billion rental aid program intended to protect vulnerable people from being evicted during the pandemic. In early 2022, [an analysis by National Equity Atlas](#) found that 60% of approved applicants in the state of California had yet to be paid, with an average wait time from application to funding of 135 days and 70,000 people still waiting for assistance that would protect them from eviction.

## Integrity

It's now well-known the extent to which government grant programs, particularly for COVID-19 relief, have been victims of a staggering amount of fraud. At [least \\$250 billion](#). This is bad PR. But the true tragedy is that every dollar that goes toward a fraudster's new Ferrari is not going to someone who really needs it. Especially in the wake of this catastrophe, the public insists on programs that can operate with integrity and have sufficient safeguards.

## Transparency

All of what goes into a public grant program must happen in plain sight. People expect their elected officials and their staff to be able to prove, with hard numbers, reports, and audit trails, exactly how they fulfilled their obligations to quickly, equitably, and accurately distribute funds.



## The need to do more with less

These increased demands are falling on government teams that are simply short-staffed.

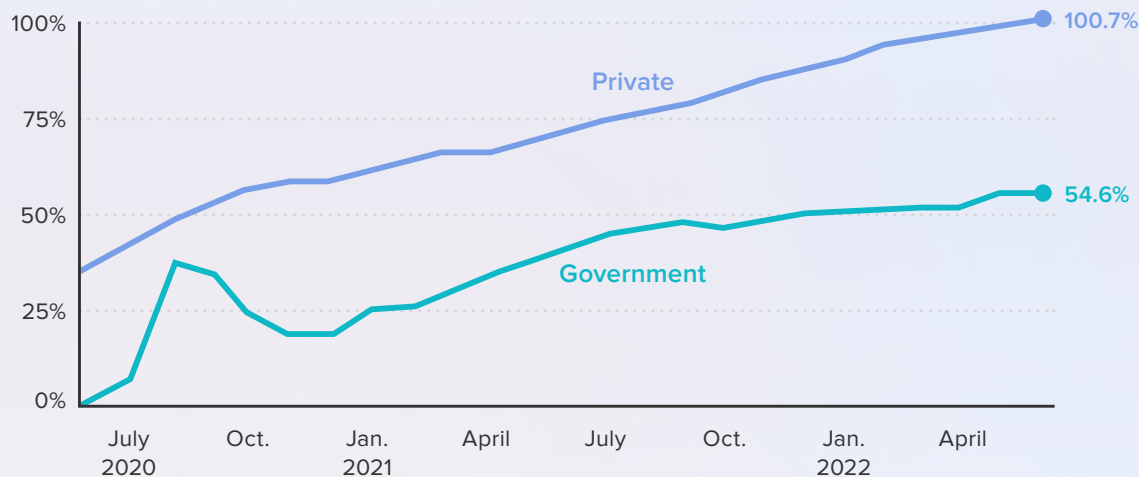
As a 2022 [Axios report](#) cites,

“While the number of private-sector jobs surpassed its pre-pandemic level, there are 664,000 fewer people employed in the public sector, according to the government jobs report.”

Without belaboring the point, more work required of a smaller team with fewer resources is an equation that only some outside factor— such as technology that can make processes exponentially more efficient, eliminating hours of work each week—can solve.

## Percentage of jobs lost at the start of the pandemic now recovered, by sector

Montly; June 2020 to June 2022



*Increasing demands for speed, equity, integrity, and transparency are falling on government teams that are short staffed. This chart shows how the public sector has fallen far behind the private sector when it comes to rehiring workforce that was lost during the pandemic. Source: [Axios](#)*





## Legacy systems are holding teams back

Many agencies and municipalities are managing grants using custom-built technology. The problem is the technology reflects a circumstance that no longer exists.

Just as laws regulating the use of horses and carriages would be insufficient to create safe streets filled with automobiles, so do these legacy systems simply no longer serve the lived experiences of public sector teams. Government employees have stretched them as far as they can go, supplementing them with outside processes such as email or spreadsheets and working around pieces of systems that are broken, irrelevant, or even harmful.

But these efforts are like bandaging a festering wound. They don't address the root cause of the harm.

## Cloud-based is the future

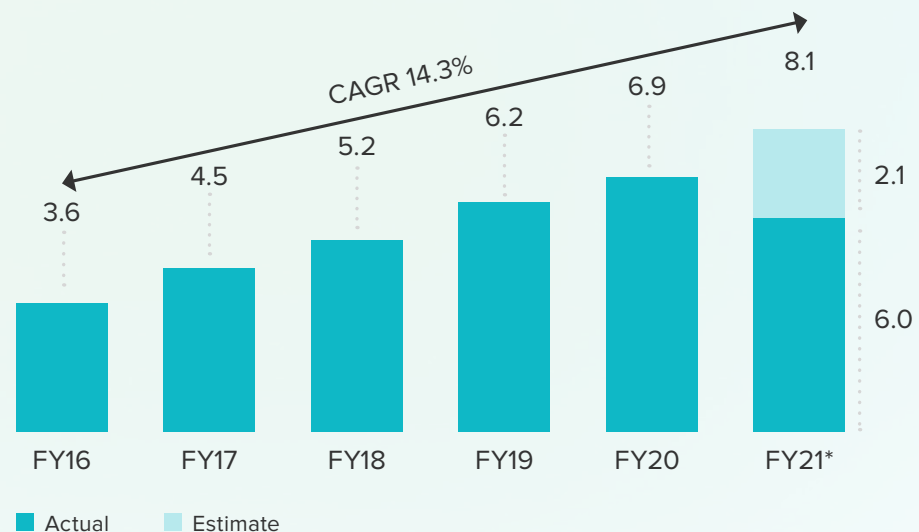
While the public sector does not have a reputation for being early adopters of cutting-edge technology, the pandemic forced many governments into the cloud era by necessity, both in order to adapt to a remote working environment and in response to an increasing and urgent demand for services.

This trend has been consistent across government sizes, and is also reflected in the top state CIO priorities as identified by National Association of State Procurement Officials (NASCIO).

## Steady growth of cloud spending shows recognition of the value of cloud

Total federal cloud spending by FY (US\$ billion)

Government investment in cloud technology has grown and is projected to continue growing at a significant rate. Source: [Deloitte Insights](#)



# State CIO Top Ten Priorities 2022

The following results are from [a 2022 survey conducted by the National Association of State Chief Information Officers \(NASCIO\)](#) regarding the top priorities of state CIOs.



## Cybersecurity and risk management

Governance; budget and resource requirements; security frameworks; data protection; training and awareness; insider threats; third-party risk



## Cloud services

Cloud strategy; selection of service and deployment models; scalable and elastic services; governance; service management; security; privacy; procurement



## Digital government/digital services

Framework for digital services; state portals; improving and digitizing citizen experience; accessibility; identity management; digital assistants; privacy



## Consolidation/optimization

Centralizing; consolidating services; operations; resources; infrastructure; data centers; communications and marketing “enterprise” thinking



## Workforce

Preparing for the future workforce and reimagining the government workforce; transformation of knowledge, skills and experience, more defined roles for IT asset management, business relationship management, and service integration



## Data and information management

Data governance; data architecture; master data management; open data; sustained access to government data; data portals; enhancing the role of data; information and intelligence, knowledge management; data integration; DataOps



## Legacy modernization

Enhancing, renovating, replacing legacy platforms and applications; business process improvement



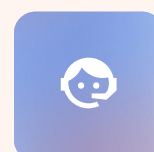
## Broadband/wireless connectivity

Strengthening statewide connectivity; implementing rural broadband expansion; 5G deployment



## Identity and access management

Supporting citizen digital services; workforce access; access control; authentication; credentialing; digital standards



## Customer relationship management

Internal customer service strategies; building customer agency confidence and trust; collaboration; service level agreements



*From unemployment assistance to housing vouchers, and from disaster relief to small business incentives, as government assistance programs continue to scale, to meet the moment, they need to do so in the cloud.*

# The painful present: Paint the picture

Abandoning a legacy system is a sunk cost—which is a hard pill to swallow. To overcome this and advocate for a grant management software, paint the picture of your team’s everyday working reality as you wade through all the obstacles in your way.

As a Deloitte study puts it:

*The burden of maintaining legacy systems, combined with government’s unique challenge of changing priorities which accompany new leaders or administrations, meant that it was easy for significant cloud investments to be outcompeted for finite budget resources. As the cost of maintaining legacy systems is baked into existing budgets, it is easy for agencies to consistently put off cloud investments year after year, effectively keeping organizations in this second era of perpetually considering cloud.*

The nature of budget structures can make it especially difficult to abandon a legacy system which is already “baked in.”

But for many government granting departments, it’s time to fish or cut bait. The cost of not adopting a modern system purpose-built for the needs and expectations for modern government grantmaking is too high.



Pain public sector grantmakers experience typically includes:

### **Lack of transparency and reportability**

A system that doesn't provide organizational transparency or insight as to the status of grants and payment during the end-to-end process does not inspire trust. This is compounded by the inability to easily create reports that stakeholders will find meaningful.

### **Trouble maintaining equity**

Even if employees want (or are indeed, mandated) to provide an easy, positive application experience for constituents and distribute funding equitably, they're often not equipped with the proper tools to do so. This can range from not having a mobile-friendly and accessible application system, to the inability to provide applications and technical support in languages that their constituents use, to lacking the relationships with organizations that can provide adequate outreach to the populations that the grant is intended to support.

### **Compliance risk**

Compliance risk can range from failing to maintain an audit trail and losing track of historical records due to relying on a combination of paperwork, email, and spreadsheets. It can also encompass the inability to keep track of, let alone comply with, changing legislation.

### **Wasting time**

Grantmakers are often forced to waste time—be it on tedious administrative tasks, dealing with an inefficient or outdated process such as spreadsheets, email, or paper applications, or fighting difficult-to-use software. Without good communication and collaboration tools, grantmakers are also wasting time trying to coordinate with review teams and answering questions from applicants.

### **Exposure to fraud**

Unfortunately, with the passage of time and increase in funding available, fraudsters are getting more sophisticated and brazen. And government employees are the ones responsible for protecting the integrity of their grant investments—typically without sufficient tools to do the job.

### **Moving too slowly**

Teams are under pressure to launch programs, review applications and make decisions, and disburse funds, all *fast*. Much faster than their systems typically can support without cutting corners that expose them to everything from fraud to compliance risk to inequitable consideration of applications.



# The unexpected upsides: Illustrate the potential of grant management software

After you've explained the realities of how the world has changed and the pain points your team experiences, you need to articulate why a grant management software is the right solution right now. Perhaps counterintuitively, this means you need to go beyond the painful present—beyond the considerable upside of improving day-to-day performance and workflow.

Show the long-term, human realities of running a modern grant program with software that's specifically designed for your team. The true impact of a grant management software isn't in the time it saves your team (though it will save you a lot of time), it's in the lives you change. Here's an overview of what you stand to gain.

## More funding dollars

Government grant teams that overperform are receiving more dollars as a testament to the fact that they are disbursing them responsibly.

For instance, in late 2021, the [U.S. Department of the Treasury announced](#) it would grant more than \$13 billion in

funding for the second wave of Emergency Rental Assistance (ERA2) specifically to “high-performing state and local government grantees.” Managing your program well today means more funds and more impact tomorrow.

## The Council for Native Hawaiian Advancement

Submittable customer the Council for Native Hawaiian Advancement was recognized as a high performer in administering the Rent & Utility Relief Program by the Department of the Treasury, which awarded them [an additional \\$2.4 million to expand their program.](#)



Photo courtesy of The Council for Native Hawaiian Advancement

## More time to tackle priorities

By saving time with a grant management software, you'll be able to execute your grants much faster. But saving time can mean much more. As it compounds, it's time public sector employees can spend on mission-critical work, such as:

- Outreach to ensure that all eligible, and particularly the most vulnerable, constituents know about and are applying to available programs
- Analyzing past performance to glean how future programs can improve
- Prioritizing key initiatives that never seems to move off the backburner due to time constraints

Put simply, **less time with busywork means more time with mission-critical work.**

## Retain workers

Given [worker shortages in the public sector](#), everything government teams can do to retain workers will help. A [2021-22 McKinsey study revealed](#) that 29% of workers who quit did so due to “unsustainable work expectations.” The promise of a grant management solution is to relieve

some of this burden, which can help you avoid the loss of overworked, burnt-out employees.

## Build public trust

Whether you're working for a local, state, tribal, or federal office, public trust is essential to effectively fulfilling your mission. Trust in government impacts the likelihood of voluntary compliance with everything from laws (reducing crime) to health mandates (keeping people healthy and protecting vulnerable citizens) to collecting taxes (funding the government). A well-executed grant program—one that citizens see as reliable and responsive—will naturally build public trust.

“How reliable and responsive do people view their governments' policies and public services? These concepts of reliability and responsiveness—key components of government competence—are important drivers of people's trust in public institutions.”

Source: [Building Trust to Reinforce Democracy: Main Findings from the 2021 OECD Survey on Drivers of Trust in Public Institutions](#)



# Making the case: Use data and get specific

So far, in this guide, we've covered:

- Understanding the catalyst for making the purchase now;
- The extent of present challenges; and
- The untapped opportunities that could be realized with a grant management software purchase.

Now, let's move on to the **specific benefits that a purpose-built grant management software** (GMS) can provide government teams. They are as follows:

- Save time
- Reduce fraud
- Improve equity
- Move faster
- Do more with less
- Provide a better constituent experience
- Have a partner in accountability

We'll recommend specific tools to look for, why they work, as well as detailed checklists that you can use to evaluate different systems. Let's get to it.

## Save time

Let's begin with saving time. This may be the most basic of expectations you would have from a GMS, but as your goal is persuasion, you want to prove it with data.

A Submittable customer [survey from late 2022](#) asked government customers how much time they save from using a GMS (in this case, Submittable). Of the respondents, 95% say they saved time. Specifically, they save time on:

- Review process and making decisions (78%)
- Communicating or coordinating with applicants (61%)
- Administratively launching the program or project (56%)
- Measuring and reporting on results or impact (54%)
- Managing applicant eligibility and program requirements (49%)

Now let's turn to how much time.

Over 40% of these customers say Submittable saved them 2-4 hours per week, per program administrator. Close to a third estimated time savings for a single administrator at 5-7 or 8 or more hours per week, and the remainder saved less than two hours per week.



## Time saved by Administrators using Submittable



■ Less than 2 hours per week   ■ 2-4 hours per week  
■ 5 or more hours per week

Review teams saw enormous savings as well, averaging over **2.5 hours per week per reviewer.**

### Top time-saving tools to look for:

- A drag-and-drop form builder
- Eligibility quizzes
- In-app communication with applicants
- Reviewer collaboration tools like notes and messaging
- Easy-to-build scoring rubrics
- Multi-stage review processes
- Comprehensive reporting tools
- Easy data imports and exports
- Automated audit trails
- Self-service editability and real-time updates





## Reduce fraud

The risk of fraud is real and scary. But government teams can mitigate it with modern technology.

**Purpose-built grant management solutions can prevent fraud** before it starts with fraud prevention tools that verify identities—**without creating a huge burden on your team or your applicants.**

One such tool is **Knowledge Based Authentication**, or KBA. KBA is a tool that industries like financial services have used for years at transaction points, such as in an application for a new credit card, to confirm that an applicant is who they say they are.

There are two types of KBA quizzes: static and dynamic. Static KBA quizzes consist of a series of questions about your history, to which the individual provided a correct answer ahead of time. This is a common step in many password retrieval systems.

A dynamic KBA quiz offers a higher level of security. It generates questions for applicants based on public and

private data sources, such as transaction histories, credit reports, or marketing data. The questions are designed in such a way that only the individual themselves would readily know the answer.

For instance, typical dynamic KBA questions could look like:

- Which of these phone numbers have you ever used previously?
- Which of these people is your relative?
- Which of the following addresses have you lived at?

Dynamic KBA quizzes often impose a time limit as an additional security precaution. This is to mitigate the risk of a fraudster attempting to research the answers to the questions.

Another top fraud prevention tool is referred to as **Identity Verification**. This is a highly sophisticated yet very easy-to-use technology that performs two functions:

- Verifies that a government-issued identification document is legitimate
- Verifies that a selfie the applicant takes in real time matches the photo on the government-issued photo ID

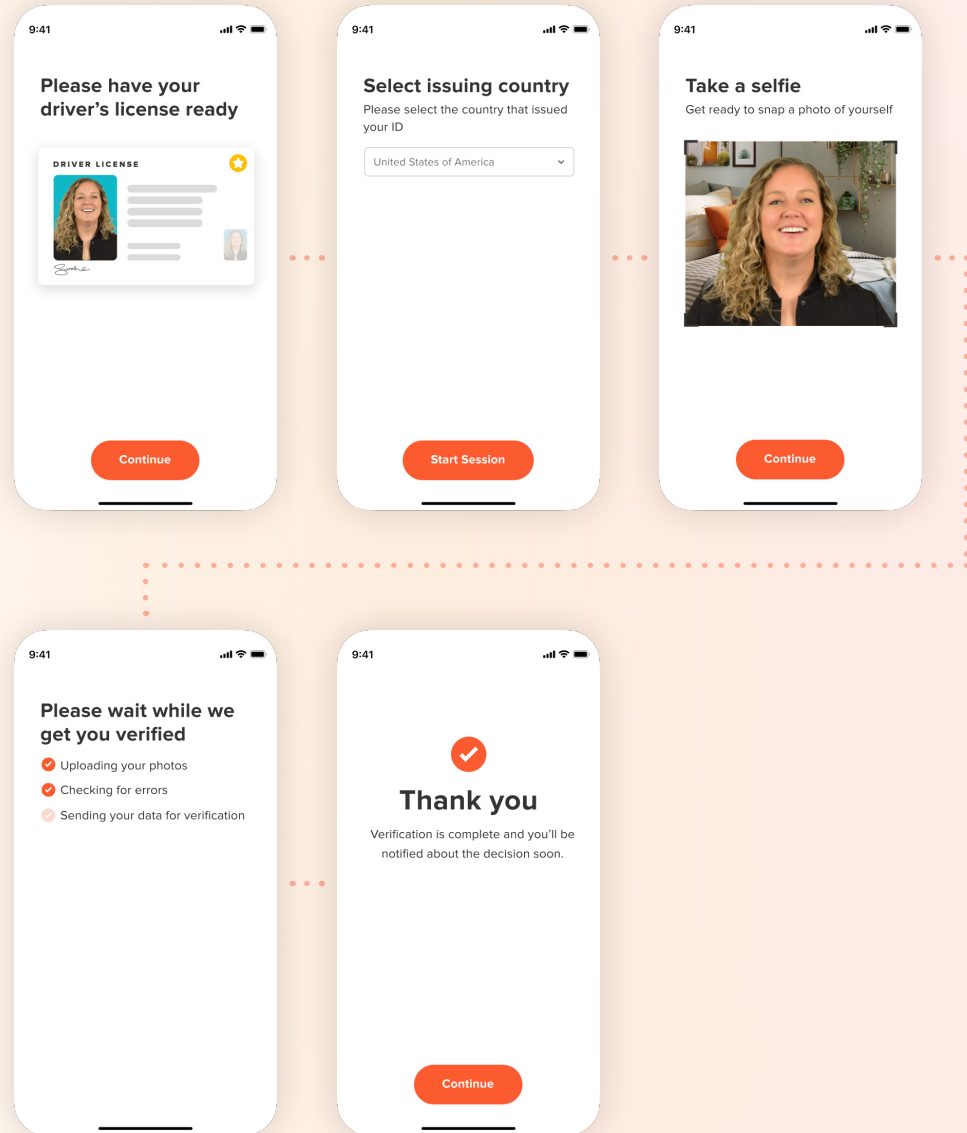


While this technology is relatively new, it's extremely simple to use and is becoming more prevalent for some consumer activities, such as booking a car-sharing service online. Applicants are walked through easy step-by-step instructions and are even prompted to fix issues, such as low lighting.

**Top fraud prevention capabilities to look for:**

- Embedded dynamic KBA quizzes
- An imposed time limit on KBA quizzes
- Verification of government-issued identification documents
- Real-time matching of selfies to photo IDs
- Auto labeling of fraud screening results

*A typical Identity Verification workflow will prompt the applicant to take a photo of their government-issued photo ID followed by a selfie taken in real time.*



## Improve equity

A [human-centered](#) grant program improves equity from beginning to end, in ways both subtle and obvious. Here, we'll just cover a few of the most compelling points.



### Easy-to-use

The platform must be easy-to-use for applicants, full-stop. Many applicants—especially, often, the most vulnerable or in need of grant assistance—are not deeply technologically sophisticated.

How can you evaluate ease of use? During the demo process, ask to see the applicant's point of view. Better yet, ask if you can go through a sample application yourself. If you run into anything tricky, that's a red flag.



### Mobile-friendly

Many applicants may not have access to a desktop computer or reliable internet, particularly those living in rural areas. The best way to accommodate these populations is to work with a GMS that is fully-optimized for mobile. This should be easy to test out for yourself during the demo process.



### Accessible

To run an inclusive program, you need a system that is accessible to those with a wide range of disabilities, including common conditions such as age-related or vision impairments.

Fortunately, there is an established standard to assess the accessibility of software called a Voluntary Product Accessibility Template or VPAT. Look for one that follows industry standards outlined in the Web Content Accessibility Guidelines (WCAG) 2.0 (maintained by the World Wide Web Consortium or W3C).

**Note: A VPAT is only an assessment, so it's essential to ask for the *results* of the VPAT.** Just as if your child told you that they took a test you wouldn't then know how they performed on the test, software claiming they completed a VPAT won't tell you whether the VPAT affirmed that it is accessible to applicants with a wide range of disabilities.



### **In-app collaboration**

In-app collaboration is a great way to be more inclusive of diverse populations of applicants, including those unfamiliar with using computers, speaking different languages, or in need of support filling out the application. It gives another person, such as a relative or social worker, the ability to help fill out the form with the applicant in real time, while the applicant maintains ownership. Look for a real-time tool that allows users to see where the other is throughout the form (similar to using Google Docs).



### **File uploads**

Many people do not prefer to communicate in written form. Where possible, allow applicants to communicate via their preferred method, such as over video. Look for a GMS that supports file uploads from many different file types. (Tip: make sure that the GMS also streams the diverse file types for your reviewers to avoid any headaches with file type compatibility down the line.)



### **Review tools**

The decision-making process is a key—maybe the key—moment to integrate equity into your program. Removing barriers to apply won't mean much if there isn't ultimately an equitable distribution of funds, or if eligible applicants are overlooked due to bias or another systemic failure. Luckily, review tools can help. Here's what to look for:

- **Concealed applicant information:** This is how you can conceal information that may introduce bias, such as demographic data or personally identifying information, from your review team.
- **Confidential review:** You don't want your reviewers to intentionally or unintentionally influence each other. Allowing for a confidential review helps each reviewer's assessment be more objective. Permission levels will not only empower you to set up confidential reviews, but will also give you as an administrator the ability to evaluate reviewers against each other to look for signs of bias or a need to correct for trends among differing reviewers (such as a tendency to score lower or higher than average).



### **Supportive of multiple languages**

If your constituents speak languages other than English, being able to provide your application and technical support in their native language is an important way to run an inclusive program.

### **Top equitable tools to look for:**

- Easy to use
- Mobile friendly
- Accessible as determined by results of a VPAT
- In-app collaboration
- File uploads
- Review tools to conceal applicant information
- Permission levels





## Move faster

When it comes to [executing programs on tighter timelines](#), it helps to take a step back and view the full end-to-end process. The right grants management tool will help you move faster in the three key phases where speed is key:

- Program launch
- Review and decision making
- Funds disbursement

Here's what to specifically look for in each phase.

## Program launch

An easy-to-use platform is the key to launching a new program quickly. It not only removes barriers the first time around (see link to the left for more on this), but every successive program can launch faster and faster as you become more familiar with the technology and can leverage time-saving tools like form and project duplication.

The other key piece is platform agility. Working with an agile software frees you to launch more quickly knowing that in case you made a mistake, such as omitting an important eligibility requirement, you'll be able to add it later and update your application form immediately.



### Review and decision-making

Of all the ways that technology can revolutionize your grants programs, an automated review is the most cutting-edge and, potentially, the most transformative.

Government programs are typically compelled to follow strict guidelines around, for example, funding eligibility that must be confirmed through specific documents such as 1099s and pay stubs to verify income. The reviewer, in this case, must request these forms from the applicant and check them to move the applicant along in the process.

Let's say each verification takes 2 minutes. If you receive 100 applications, no big deal. Done in an afternoon. But what if you get 1,000? That's over a week for a single person—assuming they did absolutely nothing else except this single verification step.

Now imagine 1 million.

It's easy to see how this one compliance need can quickly escalate into an excruciating bottleneck. Luckily, AI is here to help. Look for a GMS that offers [automated review](#) that can perform these tasks in seconds. As a bonus, they can also

mitigate the risk of human error, increasing your program's integrity.



### Funds disbursement

Some GMS vendors offer full, end-to-end funding distribution to awardees. Opting for this service means that your team won't write a single check—let alone, deal with returned checks in the mail, track down correct addresses, reissue expired checks, and the rest of the headaches that typically come with distributing payments.

To make disbursement as painless for yourself as possible, seek a solution that allows you to [trigger the payment from within the platform](#), ideally in a single click.

Look for a vendor that provides payments via ACH—providing the best and fastest constituent experience. They should be able to establish an average digital payment delivery time of 48 hours or less.

It's also important to consider whether you need a vendor that can support payments via checks and prepaid debit cards, especially if your programs support unbanked populations.



### **Top tools to look for moving fast**

- Form and project duplication
- An agile platform with self-service tools
- AI-powered automated review
- In-app triggering of funds disbursement
- Payment via ACH
- Payment via check and prepaid debit card

### **Do more with less**

All of the capabilities described thus far will help teams that are stretched thin. But what if you simply don't have the people power to meet constituent expectations or legislative requirements—even with better technology?

Here's where partnership, and professional services, make all the difference.

Some grant management software providers also offer project managers who act as an extension of your team, implementing your program according to your direction and subject to your approval, but without you needing to lift a finger.

Beyond project management, it's worth considering if you need a dedicated customer service desk. With dedicated campaign support, your GMS provider's help staff can answer not only the applicant's technical questions but also questions regarding the program, such as those related to eligibility or payment, that would typically be routed to your team.

### **Top professional services offerings to look for:**

- Project management
- Dedicated applicant support





## Provide a better constituent experience

Much of what has already been covered will improve the constituent experience. Still, it's worth zooming in on this benefit separately because it is key to how your program will ultimately be perceived and judged by members of the public. If this is your top priority, utilize the list below as you evaluate solutions.

Top considerations for providing the best constituent experience:

- Auto-saved applications
- Mobile-friendliness
- In-app collaboration
- Technical support for applicants
- File uploads
- Ability to edit application
- Digital funds disbursement

## Improve accountability

When it comes to accountability, your GMS provider essentially can offer two types of support:

- Reporting tools, audit trails, and checks and balances that improve your compliance, audit-readiness, and program integrity
- Partnership that will stand by you if something goes wrong until you make it right

### Top accountability tools to look for

- Comprehensive reporting
- Imports and exports
- Balancing of funding across demographic or other criteria
- Fraud prevention
- Partnered approach



# How to make your pitch for a grant management system

How to make your pitch for a grant management system  
You're now ready to make your pitch. Follow these final tips to increase your chances of success.

## Tip #1: Define your specific catalyst.

Beyond the overall trends, what is unique to your situation? For example, call out the unique challenges of your current system, any significant recent process changes or challenges (such as churn or burnout), or any specific upcoming programs you want to be prepared to execute better.

## Tip #2: Emphasize your particular pain points.

Leveraging the common pain points covered in this guide, which are you experiencing most acutely? See if you can supplement your experience with any data points specific to you, such as:

- The number of hours it takes you to conduct a tedious manual review
- The number of applications that were lost or misplaced in previous programs
- Any PR blowback your department, or a peer agency, may have received due to moving slowly, exposure to fraud, or running an inequitable program

## Tip #3: Point out the upside.

Out of the opportunities identified in this guide, which will resonate most with your superior? Be sure to call it out in compelling terms.

## Tip #4: Make your pitch.

Looking at the guideline provided, be sure to emphasize the benefits which correspond to your program priorities. If something genuinely excites you, talk about it and explain what it would mean for you, your program, and your constituents (and ultimately, your boss).

## Tip #5: Use these resources.

Leverage the checklist and slide deck provided here to make your case as compelling and professional as possible.

### Links to these resources

[Checklist](#)[Slide Deck](#)

## CONCLUSION

# Change is difficult, but important

Change is hard, and convincing a superior that change is necessary can be even harder. But as you already know, your job is too important to let insufficient tools hold you back. Move forward with confidence—you have everything you need to convince your procurement officer that it's time to make this technology investment to transform your work and your community.

Good luck—and when you're ready to discuss if Submittable is the right grant management solution for you, we'll be here to talk.



## ABOUT THE AUTHOR

Natalya DeRobertis-Theye is Director of Product Marketing at Submittable, where she helps CSR and philanthropy professionals run smarter, more inclusive, and more impactful programs through purpose-built solutions. She leads strategy, messaging, and execution for multiple markets across the product suite, heads all go-to-market efforts, and is responsible for keeping thousands of Submittable customers active, happy and meeting their goals. She received her BA in History from the University of California, Berkeley. Originally from Oakland, California, Natalya currently lives and loves spending time in the mountains in Missoula, Montana.



# Submittable

Since 2010, Submittable has helped organizations collect nearly 20 million applications for thousands of customers all over the world.

[submittable.com](https://www.submittable.com)

| 855.467.8264