Submittable

How Grant Management Software Is Evolving (+Checklist)

By Eric Thompson & John Shieldsmith

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Introduction

The majority of people who interact with grant management software (GMS) are not grantors. Applicants vastly outweigh the number of administrators and reviewers who interact with a GMS and it's not close.

In 2023, 31,091 programs received **3,280,284 applications in Submittable**. That's about 105 applicants per program on average.

Behind each of those 3M+ applications is a human being who has to work their way through a form. And this work isn't optional. They *have* to deal with whatever applicant experience a grantor provides—good or bad—because they need funding to do their work. Plus, they often have little or no say in the process. On a fundamental level, this is a power imbalance.

And because of this imbalance, if you're a funder who is evaluating a new grant management software, you have a responsibility to take into account its impact on the grantee experience alongside its ability to meet your team's needs. In doing so, you'll be choosing a tool that will help you achieve your mission now and well into the future.

If you're plugged into grant management trends none of this will be new to you. Writers like **Vu Le** and **Edgar Villanueva** have long advocated for more equitable funding practices like **trust-based philanthropy** and **unrestricted funding** to rebalance the scales. Social media accounts, like **Crappy Funding Practices** (which boasts 16k+ followers at the time of writing this guide), also do good work bringing to light the need for better applicant experiences.

Put simply, what benefits the grantor doesn't necessarily benefit the grantee. And since grantors make the GMS buying decisions, the grantees often just have to make do with whatever software the grantors choose, even if this software is tedious for applicants. This tedium can range from minor annoyances to accessibility issues that prevent eligible applicants from applying. Le, Villanueva, and accounts like Crappy Funding Practices, point these problems out often.

For their part, funders have taken note. **More than half of funders** who switch to Submittable to run their grant program do so in search of a less "burdensome applicant experience." We share this not to brag, but to underline **a mutual desire for a better applicant experience and the central role a GMS plays in achieving it**.

We're at an exciting time for grant management technology with the rise of new tools, like AI, but a great GMS will always prioritize a great user experience for both the grantor *and* the grantee. Let's explore what that means, specifically.
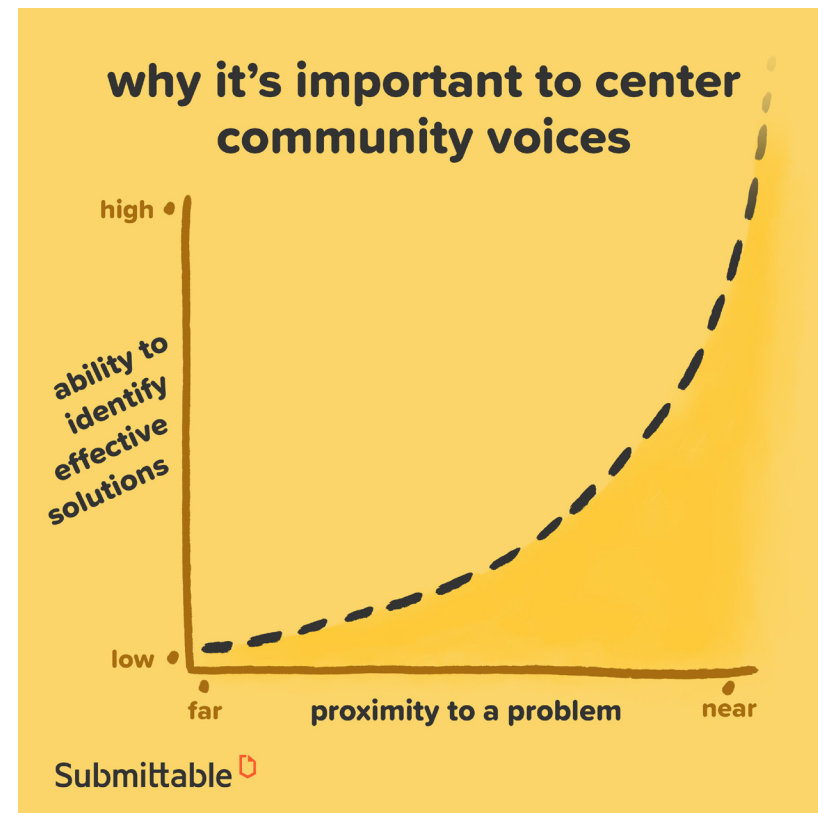
Grantees need a **smooth** applicant experience

A potentially hard truth for grantors to internalize is that grantees have better things to do than work through a poorly thought-out application. But often they have to anyway because they need the funding. A GMS that works best is one that allows you to get all the information you need to make a good funding decision without taking up too much of your applicants' time. Let's get into the specifics.

Simple collaboration and communication

The "traditional" model of philanthropy, in which a grantor dictates much of how a grantee can use funding, can constrain the very people who need to be empowered. Often, the people closest to a problem know best how to solve it. And when you place restrictions on how they go about solving problems, you can hamper the efficacy of their work.

On his blog Nonprofit AF, Vu Le has a great example of **how restricted funding can cause huge headaches** for grantees trying to make an impact. He describes it as "Funding Sudoku" where the restrictions placed on how a nonprofit team uses funds puts them in a difficult budget balancing act. All of this takes time and energy which could be used more wisely. In response, many grantmakers are embracing a more collaborative approach to funding their grantees. And this collaboration requires strong lines of communication.

why it's important to center community voices

ability to identify effective solutions

high

low

far   proximity to a problem   near

Submittable

Unrestricted funding, which allows nonprofits to decide how to best allocate the funds they receive, and participatory grantmaking, which involves community members in the decision-making processes, are two such collaborative approaches. But, without the right GMS, they can be difficult to enact.

For example, reporting on the impact of unrestricted funding is tricky because you don't itemize where every dollar is going. But, it is doable if you **use collaborative storytelling** to tell the full story of impact beyond the numbers. Getting this context for a story requires a back-and-forth between the grantor and the grantee to understand the full nuance of the situation. Automated follow-up forms can help capture the nuance of the impact created without adding work for those involved.

How to prepare

Participatory grantmaking could add quite a bit of administrative work for a grantor if they don't find a way **to strike the right balance** between going all-in or starting slow. A good GMS can help you invite participation without overwhelming your team thanks to in-app communication tools that can keep all communications with applicants in one place.

The goal of these collaborative approaches is to improve equity for grantees by giving them a larger voice in how funding gets used. But when you go about enacting these approaches, you need to ensure they *do not* add more work and confusion. Great communication tools and automation can help you improve equity and be more collaborative without increasing the burden on applicants.

Features to look for:

- In-app communication tools

- Additional forms and progress reports for follow-up communication

- Real-time collaboration tools for applicants who'd like to work on applications together

- Real-time collaboration tools for administrators and reviewers to evaluate applications together

- Permission levels that enable key stakeholders and subject matter experts to participate while maintaining privacy and reducing bias

The ability to adapt quickly

It's not enough to have strong communication channels established, you need to ensure you have the ability to act on what you hear from your applicants. And your ability to act quickly is made possible by your GMS.

You won't get all the details of your program exactly right before launch. It's unreasonable to think you will. But, in our conversations with funders, some GMS tools will require you to think through all the contingencies beforehand because making changes after the launch of a program is **either impossible or very cumbersome**.

When this is the case, poor applicant experience is inevitable. There is so much you don't know about how people will interact with your form until it's out in the world. It could be small things, like the wording of a question may be unclear.

Or, it could be big things, like you didn't realize you'd need **identity verification steps** to mitigate fraud. Being able to adjust your application as soon as you see a need means you can nip any issues in the bud.

How to prepare
A good GMS will allow you to easily make important changes after you launch your program. This way, you can accommodate the needs of your applicants as they arise while you run your program as you envisioned.

You may also want to ensure you're working with a GMS that has great customer service. Having **an implementation** or **customer success team** to help you understand how post-launch changes will impact applicants and reporting can be a huge help.

Features to look for:

- No-code drag-and-drop form builder you can learn in minutes

- Robust, yet easy-to-tweak review workflow builders which you can adjust at any time on your own

- Auto-labeling to quickly create segments of submitters

- A great customer support team that can step in and help when needed

How Submittable Helps

Submittable provides customer support for both grantors *and* grantees. This is another way we help you provide a great application experience.

AI tools rooted in equity

Two of the most consistent themes to come out of **our research on AI in grantmaking** are the excitement around its potential and concern for its effect on equity. Grantors and grantees alike recognize the potential upsides of AI eliminating manual busywork, reducing human error, and ultimately making a bigger impact. But they also worry about AI inadvertently automating away vitally human aspects of the grantmaking process and perpetuating inequity as a result.

When you remove the human from (or at least reduce the human's role in) parts of the grantmaking process, what will that do to equitable decision-making? No one fully knows yet. **But that doesn't mean you can sit back and wait**.

How to prepare

AI is here to stay. When evaluating a GMS, look for **a clear set of AI principles** that are easy to understand. These principles will drive decisions about what AI tools the GMS provider develops and how they develop them.

As a result, these principles will have a large influence on how you and your applicants use AI. To create an equitable experience that your applicants trust, you need to use a GMS whose AI principles you believe in and can contribute to. Submittable, for instance, has an active research group you can join that influences our AI development. You can **read more about Submittable's AI principles and approach here**.

Empowering

Help humans make better decisions and achieve more while preserving human agency.

Accountable

Leverage human-in-the-loop monitoring and continuously evaluate and improve.

Transparent

Make users aware of when, where, and why they're interacting with AI.

Equitable

Identify, mitigate, and correct for bias and engage stakeholders in model development.

Private & Secure

Implement world-class measures to ensure all data is private, secure, and never shared.

The kinds of technology these principles inform from a grantee perspective are features like:

- A browser extension that remembers their answers helps them fill in forms faster, but *always* reminds them to double-check the responses before submitting.

- A document parser that can accurately read uploaded PDFs without requiring the submitter to manually re-enter all the information within it.

Features to look for:

- Clearly articulated responsible AI principles

- Deep research into how AI will affect decision-making

- A browser extension that saves a library of answers

- A growing list of AI tools being rolled out consistently and thoughtfully

Grantors need less admin work

The biggest way a GMS can help grantors is by offloading their more manual work. But, as advancements in AI have pointed out, not all manual work is worth offloading. It's important that your GMS helps you move efficiently without losing what's vitally human about your work.

AI tools to help them be stewards of their funds

In our AI research, we found that funders had a common desire: They want to reduce human error without removing human agency in the granting process. To strike this balance, your GMS needs to have solid AI principles (as we mentioned above) and AI tools you can use right now.

Grantmakers see AI as having the potential to help them solve two common problems:

1. Authentic voices being drowned out by poor-quality submissions
2. Reviewers inadvertently skipping over good submissions due to simple formatting issues

Used poorly, AI could make these problems worse. AI-generated submissions could quickly drown out deeply thought-out submissions from humans, as they did for this **small indie publication**. And, AI-assisted application reviews could skip over good answers simply because they aren't formatted in a certain way.

Both of these potential scenarios can lead to funds being disbursed in ways that are inequitable or ineffective. In other words, poor stewardship. To avoid these outcomes, you have to be highly targeted with where you introduce AI and automation so you can solve these problems, not make them worse.

How to prepare

Situations where AI is a good choice are typically ones where you know exactly what you want to achieve, but the process of achieving it takes a few too many manual steps or too much mental energy.

Form building is a good example, where you know exactly what kind of form you want, but the process of setting up an initial version takes just a bit too much time. In this case, what if you could use natural language to create the form you want in seconds?

Another example is document parsing, as mentioned above, where all the information is already in a PDF, you just need to extract the information for it to be more usable. AI can help here, too, saving you and your applicants time.

Features to look for:

- Clearly articulated responsible AI principles
- A natural language AI assistant
- Deep research into how AI will affect decision-making
- AI-assisted translations
- Accurate AI-driven document parser

Easier access to data

With the rise of concepts like trust-based philanthropy, there comes the occasional pushback where leaders a**dvocate for more accountability in the form of data**. While it's important to note that **trust-based and data-based approaches are not mutually exclusive**, this impulse to push back comes from a real pain point grantmakers face: the need for easy access to data.

Data can be difficult to unlock in the social impact space. Compliance regulations, siloed and outdated software, and the sheer variety of file types (from PDFs to MP4s) all contribute to a "scattered" feeling when it comes to using data in grantmaking.

If you layer concepts like trust-based philanthropy, which advocate for a different relationship with reporting data, on top of these difficulties grantmakers can feel stuck. Do you ask for and invest in more data reporting capabilities at the risk of appearing to reduce your trust in the organizations you support? Or do you step back and reduce your ability to clearly understand how the funds are being used?

Again, these are tough questions to answer. But a start is a GMS that simply makes data easier to access. With this access to data secured, all other aspects of your work can improve: you can make more confident decisions, you can communicate with the right people at the right time, you can tell more nuanced impact stories, and so on.

How to prepare

Set clear objectives for your grant programs in order to know what kind of data to track and why you want to track it. Do you want to focus primarily on the amount you give out? How many different organizations or groups you're able to serve? Knowing all of this will help you track the right information.

Think: This isn't just *data* you're collecting, but *context*.

Beyond the obvious data safety concerns, ensure that your team is handling data securely and responsibly. A good GMS partner will help you think through these compliance concerns and could even connect you with consultants to bring you up to speed.

Features to look for:

- The ability to accept many different file types

- Data sharing capabilities

- Reporting functions for both casual and power users

- Two-way API connections

- A customer success team that deeply understands data security and compliance

How Submittable Helps

- **Submittable Data Sharing** allows you to easily access all your Submittable data in Snowflake, one of the most popular cloud-based data platforms.

- Submittable supports uploads of **70+ file types**

- Robust permission levels make sure everyone sees the data they're meant to see, helping you mitigate bias and security issues.

- Submittable partners with **Candid** so you can import firmographic data right into your GMS

- We offer both real-time dashboards and **advanced reporting** tools so you can dive deeper into the data to tell the story of your impact

"When I work with the board of directors, and I'm trying to get a better idea of, what does our application pool look like? And what is the need out there? Submittable has made it really, really easy to be able to go in and find that data."

KATE TRUJILLO   Director of Programs at The Honnold Foundation

Streamlined collaboration

For grant managers without a good GMS, "collaboration" looks like dozens of email threads, messy spreadsheets, and, often, stacks and stacks of paper. A good GMS centralizes all these communication touchpoints, making it much easier for all stakeholders to collaborate. And giving everyone clarity and continuity.

This streamlined collaboration unlocks new potential for a more equitable approach to grantmaking. Trust-based philanthropy, for example, is much easier if you have **a CRM-style view** of an organization's historical relationship with your organization.

How to prepare

Beyond the day-to-day, you could create focus groups with different objectives, some focused on community data, others on organization objectives, etc. Or, you could host community events, like **data walks**, which give your team opportunities to form genuine relationships with the community while getting real data from the people you're looking to help.

Look for a GMS that allows multiple users to have differing permission levels, has built-in communication tools, and makes it possible for your team to quickly share the progress of your program (e.g. dashboards or data exports).

Features to look for:

- In-app communication tools for all stakeholders

- Multi-level user permissions

- Collaborative applications, where applicants can work together in real-time

- Collaborative review stages

- Custom review logic and workflows to route the right application to the right reviewers

- Simple yet robust labeling and sorting features

- CRM-like dashboard

How Submittable Helps

- Submittable allows for all communication to be hosted within the app itself. No need for separate email threads or communication tools.

- We also have collaborative applications, so multiple applicants can work on the same forms together.

- Reviewers can access any file submitted as a part of an application within Submittable—no need to download. This keeps each reviewer's comments and scores in one place that can be accessed anywhere.

- You get a CRM-style organization record for each organization that applies to your program so you can build more meaningful relationships with them.

Accessibility that's built-in

Roughly **27% of people in the United States** have some form of disability. This means that when you overlook accessibility, you're neglecting one in four people. Simply put: Accessibility is not optional. It's a must.

When you make your workplace and systems more accessible, you're helping those with disabilities thrive and have a better experience at work. And when your grant applications and portals are more accessible, you're reducing grantee burden and helping everyone have the chance to apply. Fully-abled people also benefit from accessibility features, such as mobile-friendliness, multiple languages, video captions, and more.

How to prepare

Increased accessibility won't happen overnight, as it entails tackling a number of elements of your organization and processes. But, there are countless ways you can start working on accessibility now:

- **Prioritize accessible forms**: Include a brief text intro to the form, then run straight down the page with one field/question per line. If there are multiple pages, introduce those with text as well, as this can help with screen readers.

- Ensure you have representation from the disabled community, in leadership and by way of anonymous feedback submissions.

- Follow **web accessibility best practices**, allowing anyone and everyone to have the best experience possible when on your website.

- Make sure you're following the right change management practices for a remote-first environment. If you and other leaders aren't familiar with remote best practices, expect to spend on consulting or training to ensure you deliver the best possible experience.

- Use grant management software that's capable of fitting a remote environment. Collaborative functionality is crucial, as are ease of use for your team and the ability to quickly communicate within the platform.

- Enable applicants to put their best foot forward with translation and localization features as well as the ability to upload any file type (from voice memos to videos to spreadsheets).

Lastly, put the right communication channels in place, for both your employees and applicants/grantees. Anonymous channels are essential, as not everyone is comfortable sharing feedback with their name on it. An open-door policy can go a long way with accessibility as well, as this gives your team the chance to voice any concerns before they snowball.

Features to look for:

- Mobile-friendliness

- A GMS that follows Web Accessibility Guidelines, the global standard for online accessibility

- Autosave features

- The ability to add dyslexia-friendly typefaces

- Screen-reader compatibility

- The ability to include granular instructions at the organization, project, and form field level

How Submittable Helps

- Submittable is built from the ground up to be accessibility-first. Click here to r**ead our blog article about our approach**.

- Our GMS has autosave, is screen reader compatible, accommodates a wide range of typefaces, and is mobile-friendly for everyone.

Strict compliance and cybersecurity by default

An important part of maintaining trust with the community you serve is not making mistakes when it comes to compliance and cybersecurity. The simple answer when considering GMS cybersecurity is to get the IT folks involved (if you have them on staff), but you can—and should—do some legwork on your own to ensure you're not wasting time with **non-compliant and risky software**.

Relationships are at stake. All the work and good intentions you develop can be undone by one instance of fraud or one data breach. From there, it's a long road to regain the trust of your community.

How to prepare
There's no silver bullet for cybersecurity. Keeping your company and your community's data secure requires a multi-faceted approach.

- Follow industry-standard encryption practices to keep data safe.

- Adhere to the right security protocols and compliances. For example, if you collect healthcare data, stick to HIPAA. If you're in Europe or collect data from the EU, adhere to GDPR, etc.

- If you follow a "bring your own device" policy, make sure you have the right VPN and security procedures in place.

- Use a GMS platform that follows industry-leading security protocols and utilizes a secure infrastructure.

Top-tier security measures are huge, but it's also essential your team knows data handling best practices and stays up to date on the latest threats. Hold regular IT and cybersecurity training sessions and make sure your team is always staying as safe as possible. The best defense starts right at home.

Features to look for:

- SOC 2 Type 2, GDPR, CCPA, FERPA, and HIPAA compliance

- Single sign-on (SSO) support

- Robust admin controls to limit access to sensitive information

How Submittable Helps

- Submittable is SOC 2 Type 2, GDPR, CCPA, FERPA, and HIPAA compliant.

- We use Stripe to avoid storing any payment information on their own servers.

- Submittable supports SSO for users, with admin controls for users of your choice.

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.

Great grant management software should work well for everyone

Grant management software is a vitally important connection point. If it doesn't serve the needs of admins, reviewers, and applicants alike, it's not the right choice. Worse, as John Brothers put it in a **2023 panel discussion**, it can do harm.

We built Submittable from the ground up to be easy for everyone to use. Because fulfilling your mission depends on your ability to reach those you seek to help. And, if we may say so, we're on to something big here. Laura Jackman, Deputy Director for Early Care & Education at the Low Income Investment Fund, put it this way:

> "Really, what makes our program successful is having our grantees have a positive experience… we couldn't have done our work without Submittable."

See how Submittable can help you evolve your programs today.

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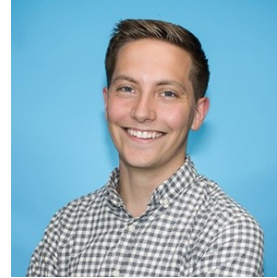
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Submittable

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