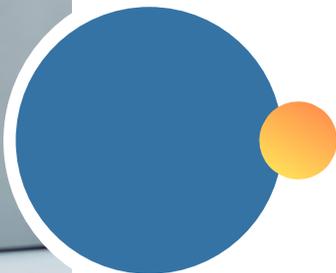




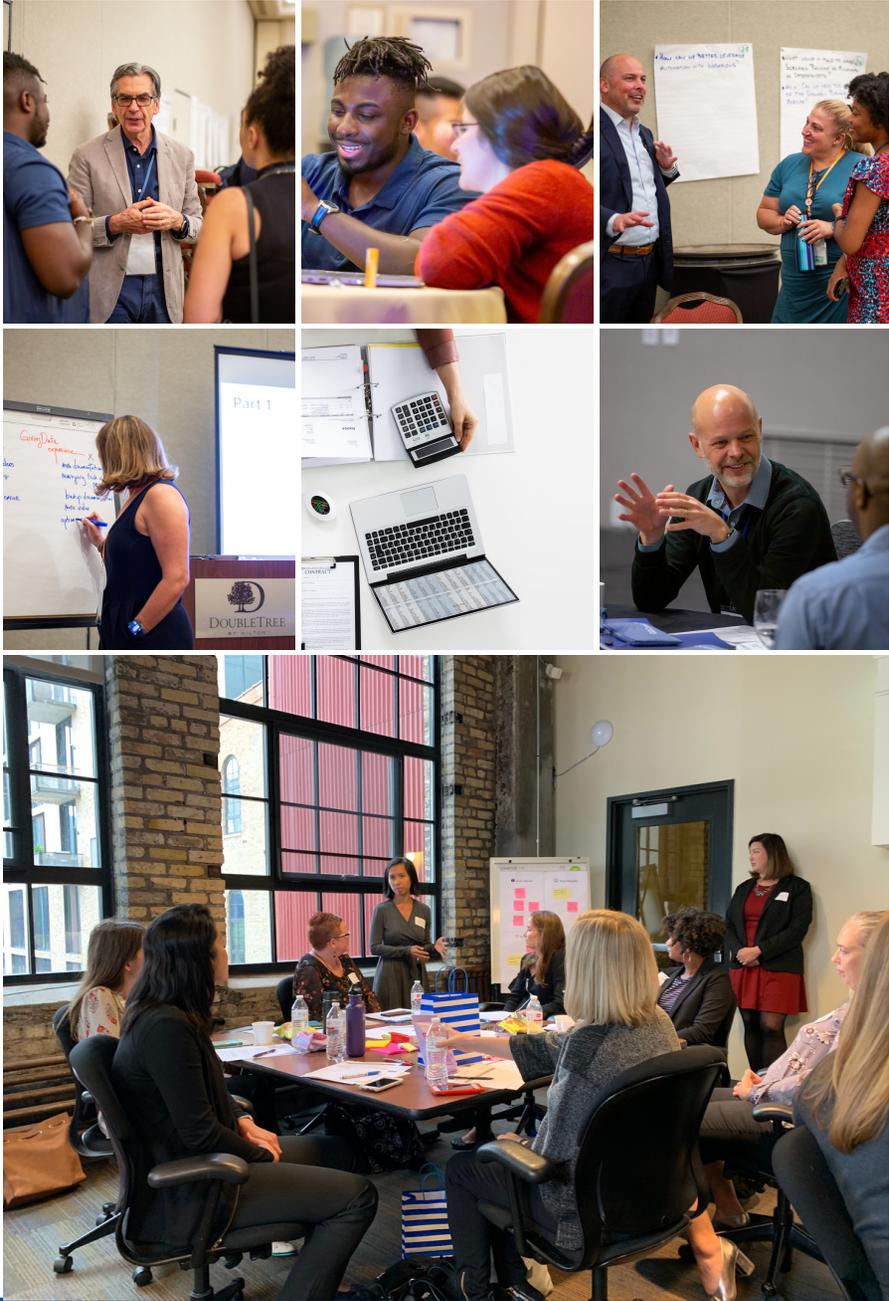
Planning a Grants Management System Transition

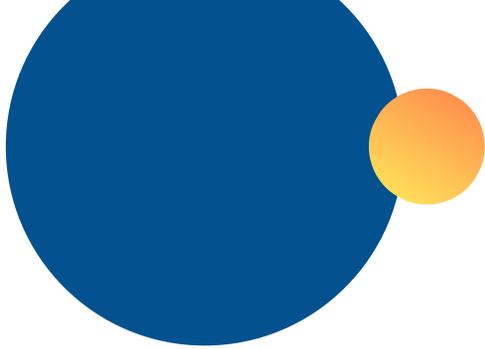
A GRANTMAKER'S GUIDE



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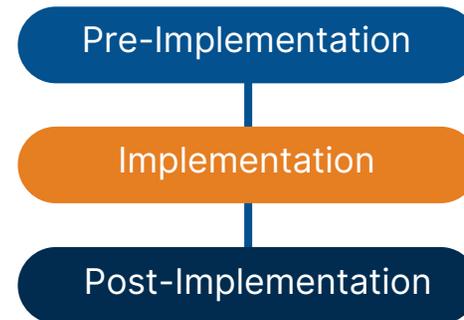
INTRODUCTION

Sometimes, change is necessary. When the change involves something as complex as a new grants management system, it's not uncommon to feel a bit overwhelmed by the journey ahead.

If your foundation goes into the transition with a clear plan, you'll be pleased to discover how seamless the process can be.

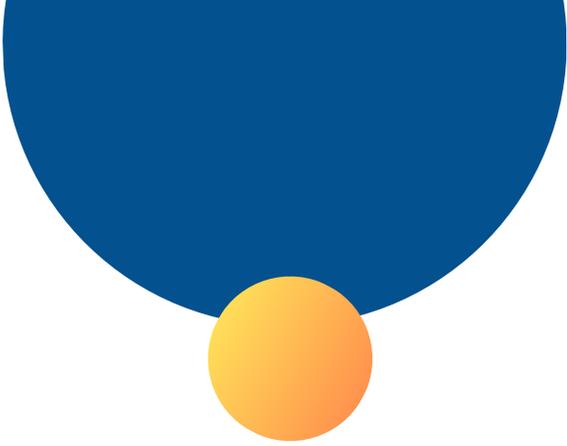
This guide can help. It highlights best practices for foundations planning a transition to a new grants management system.

A GMS transition consists of three distinct stages:



Each of the three sections of this guide includes advice and best practices from GivingData's implementation team, direct quotes from recently implemented clients, and additional resources provided by both our team and clients.

Read on to learn about these best practices and where to focus your attention during each stage.



STAGE 1

Pre-Implementation

**Primary Focus of this Stage:
Team Preparation**



STAGE 1

Pre-Implementation

1. Define Roles and Responsibilities



Assemble all the key stakeholders

As with any major process change at your organization, you should include all relevant team members in the planning and execution. In the case of a new GMS, this typically involves people from IT, finance, programs, grants administration, and anyone else who touches your grantmaking processes. This will vary depending on the size of your foundation. The key is to think broadly about who to include.



Identify the “Super User” who will oversee system administration

This doesn't necessarily need to be your grants manager. It can be the person leading the GMS selection process or whoever will be in your new system most often. Depending on the structure of your organization, this could be a program officer, executive director, or operations manager.

STAGE 1

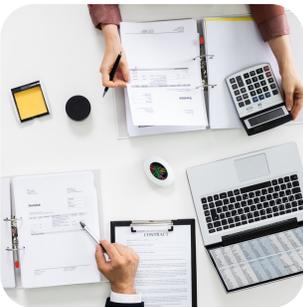
Pre-Implementation

2. Define Processes



Focus first on your high-priority processes

Take the time to get your high-priority processes hammered out in advance so you're ready to build them into the new GMS once implementation gets underway. These should be processes that are core to your grantmaking lifecycle. If you're unsure where to start, ask your implementation specialist.



Prepare essential documents

These can include applications, award letters, grantee communications, and reporting templates. It's best to have all documents ready in a single location to access during implementation.

A woman with glasses and a lanyard is talking to another woman at a training session. The background is a blurred crowd of people in a room.

“

We planned multiple trainings and provided office hours for the staff to allow everyone to ask questions specific to their work.

- Nailah Hart, Grants Manager
The Morris and Gwendolyn Cafritz Foundation

”

Data & Document Migration Checklist

- Identify the datasets to migrate to the new GMS** - What records do you need to retain?
- Identify the specific data you need** (e.g., grant amount, project titles, fiscal sponsors, etc.)
- Break down data into smaller datasets** - You don't need to migrate all data at once. Try tackling datasets in this order:
 - Organization, Contacts, and Users
 - Grant and Application
 - Payments and Requirements
 - Additional items such as bank account information, custom fields, etc.
 - Documents and Attachments
- Document Migration** - Collect and store all documents in one centralized folder.
- Unique Source IDs** - These will often be used in your GMS to identify and link your datasets. As you prepare your data, you'll want to keep these unique identifiers handy.
- Blackout Date** - Set a date by which no further updates are made to your current GMS.

STAGE 1

Pre-Implementation

3. Evaluate the Grant Approval Process

Determine what's needed for grant approval

You should have a clear understanding of what information you need to review to approve a grant. This will help you prioritize what should be built out first in your new system.

Examples of what to review:

- ✓ Project proposal (is it a good fit?)
- ✓ Organization (region, programs, DEI, etc.)
- ✓ Due diligence
- ✓ Stakeholders (who needs to review?)
- ✓ Budget (are the funds available?)

STAGE 1

Pre-Implementation

4. Identify Implementation Goals and Objectives

Prioritize what to “build” first

Have a clear definition of your goals and objectives and what needs to be built (applications, board reports, templates, etc.) during the implementation phase of your transition. Understanding the necessary items and information from the above steps should help here.



Focus on must-have features

This doesn't mean you should let go of the nice-to-haves, but in this planning phase, it's best to ensure the must-haves are taken care of straight away to avoid any unforeseen issues. Aim to build some consensus with your team about what's essential to have operational once your new GMS is live.



STAGE 1

Pre-Implementation

5. Be Open-Minded

Embrace flexibility and be open to workarounds and new ideas

If you're transitioning from a GMS that you've used for many years, there will likely be some processes you're comfortable with because they're familiar, even if not the most efficient. Be flexible. Collaborate with your implementation specialist to explore workarounds and new processes that can have a big impact on your work.



Consider whether an outside expert could help

Philanthropy consultants with technical expertise can provide invaluable implementation support, especially ones familiar with your new GMS. For example, GivingData partners with consultants who can assist funders with implementation, while also providing advice on process re-engineering and change management.





“

We went into this knowing what we wanted, but also understood that with a new system we had to be flexible and adapt to what the process could be with the new efficiencies available in the system.

- Heather Moore, Grants Manager
The Just Trust

”

STAGE 1

Pre-Implementation

6. Be Mindful of Scheduling Conflicts

Consider team availability and potential absences

Make sure key stakeholders (especially Power Users) will be available during critical stages of your implementation. You should communicate these potential schedule conflicts with your implementation manager to ensure proper timelines and deadlines are in place that take absences and the grantmaking calendar into account.

Plan around your grantmaking calendar as much as possible

A new grants management system is a big change for both your staff and grantees. It's best to plan the launch of your new system at a time when you know the foundation isn't distributing as many grants.



There were a few steps we took that really helped ease the transition:

- We had feedback sessions with staff to gauge how they wanted to use the system
- We outlined what we wanted to stay the same and what we wanted to update
- We spoke to some people who use [the GMS] and are similar to our foundation's giving and staff size

All this planning ahead helped us focus on what we wanted to add to the database.

- Katherine McGonagle, Grants Associate
The Morris and Gwendolyn Cafritz Foundation





STAGE 2

Implementation

**Primary Focus of this Stage:
Problem Solving and Dedication**



STAGE 2

Implementation

1. Focus on the Positive

Emphasize the problems the new system will address

You chose a new GMS for a reason — to improve your grantmaking processes and increase efficiency. During your implementation, it's helpful to focus on the key problems you're solving. Socialize and reinforce those benefits with the rest of your team.

Focus on the positive aspects of the transition rather than potential challenges

Any change is bound to come with a few challenges. Sometimes it's just the anticipation of those challenges that can cause the most anxiety. You'll address those with your implementation team as they come up. If you focus on the positives and forge ahead knowing they can be resolved, you'll likely find the experience all the more rewarding.



STAGE 2

Implementation



2. Manage Your Time

Avoid long delays in decision-making

In implementations, it's helpful to be thoughtful and methodical, but at the same time not delay in making decisions. Have a good handle on the processes that everyone at the foundation wants to see for the grantmaking lifecycle. Know what your workflow process is and map it out, but also know that you're going to pick up efficiencies along the way. Good chance you'll discover steps that could be eliminated or others that should be added.

Allocate dedicated time outside of meetings to work within the system

In our experience, foundation staff who have dedicated time to working within the system outside of regular implementation meetings feel more confident at the end of the process.

STAGE 2

Implementation

3. Ensure Staff Buy-In

Showcase incremental progress to the wider team

By gradually introducing the rest of your team to the system on a weekly basis, you'll not only build excitement and anticipation, you'll also find that they transition to the new system faster.

Highlight small elements of the new system to help staff acclimate

Don't feel compelled to introduce everything at once. Focus on one or two features or tools in each meeting, starting with those that are likely to be of greatest interest to specific stakeholders or teams.

4. Understand the System

Distinguish between customization and configuration

Some elements of a GMS can be customized, while others can only be configured to match your specific preferences. This is generally meant to promote ease of use and ensure consistency within the system. It's important to understand how customizable each feature is and adjust your processes and expectations accordingly.

Focus on addressing specific pain points rather than solving all problems

Don't expect to solve every problem right away. Focus on important pain points and work from there.

STAGE 2

Implementation



5. Avoid Unnecessary Complications

Follow the plan

If you follow the pre-implementation steps and stick to your implementation plan, you'll find it to be a smooth experience. Trust your implementation team to know the best practices and to provide a streamlined process tailored to fit your foundation's needs and goals.

Avoid implementing too many things at once

If your foundation is trying to implement a GMS, a project management system, and an expense management system all at the same time, do what you can to stagger the rollout of the systems. Team members will learn what they have to do to get their work done. They may not spend as much time learning each of these tools fully if you attempt to add them all at once.

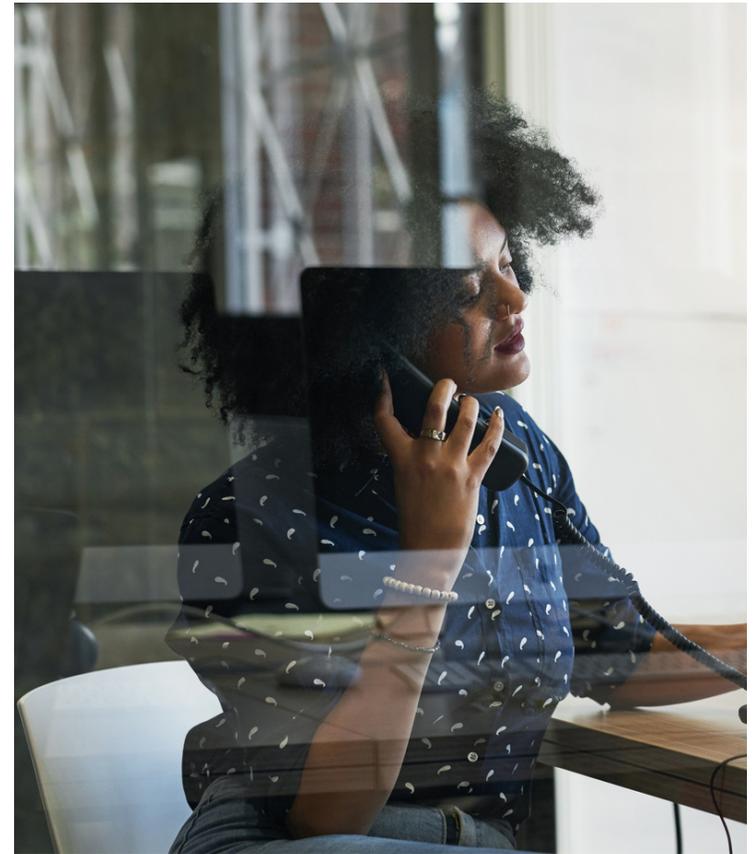
STAGE 2

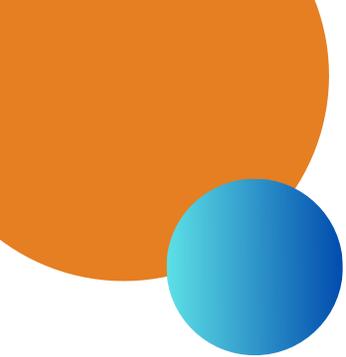
Implementation

6. Don't Be Afraid to Dream Big

Ask questions

Don't hold back any questions or ideas that come up during implementation. You may discover a capability of the system that you hadn't considered before. For example, if a program officer asks if a certain process or capability is possible in the new system, bring it back to your implementation team. Even if it isn't possible in the way you may have envisioned, there may be a workaround that you hadn't considered before.





STAGE 3

Post-Implementation

**Primary Focus of this Stage:
Learning and Improvement**



STAGE 3

Post-Implementation



1. Identify Weekly Learning Opportunities

Conduct small, focused sessions for staff

Continue the meetings you were conducting during implementation. These should be short sessions focused on one feature at a time to ensure everyone on the team is comfortable using the system.

Review implementation recordings regularly to reinforce learning

Your implementation team should provide recordings of each session, which you can continue to refer back to regularly.

STAGE 3

Post-Implementation

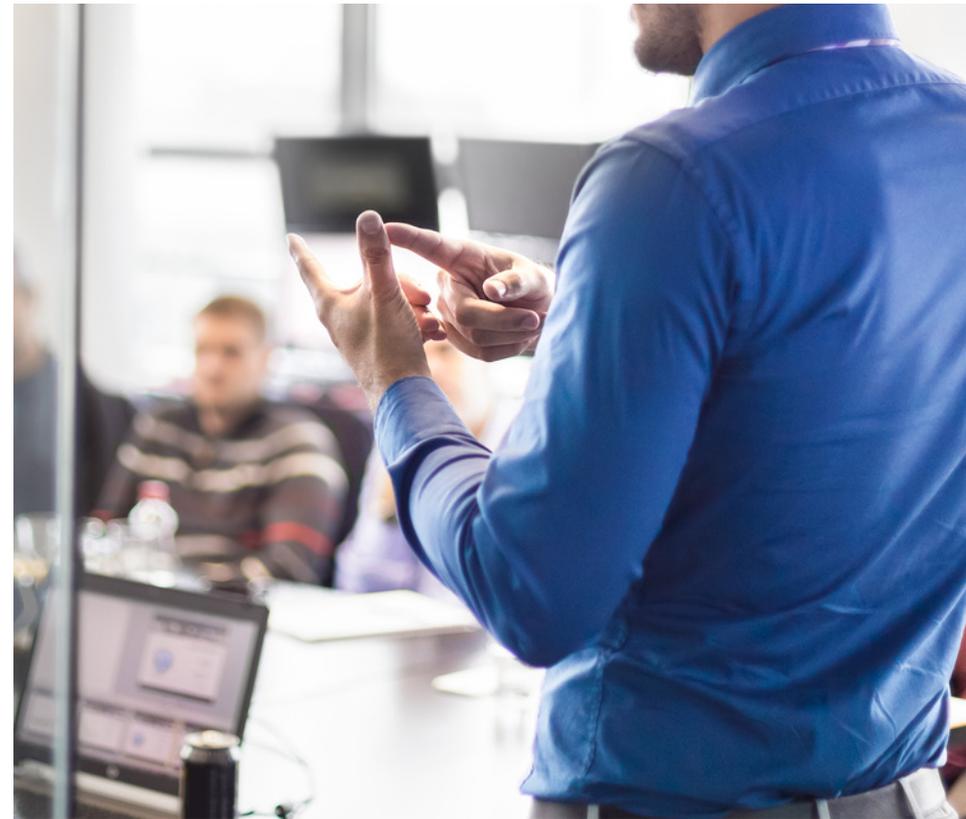
2. Evaluation and Adaptation

Continuously assess what's gone well and areas for improvement

Now that you're familiar with the system and any new processes that were built during the implementation, identify what has gone well and anything that you feel still needs to be improved.

Evaluate the progress and efficiencies of any new processes

Check in with your team and grantees to evaluate their experiences with any new processes and find where small adjustments may need to be made.



STAGE 3

Post-Implementation



3. Ongoing System Refinement

Recognize that the system is not static

There are continued opportunities to refine the system after your implementation is complete. Let your hands-on experience guide and inform those refinements. You don't have to learn everything during the implementation phase and not everything is set in stone.

Focus on both must-haves and nice-to-haves

Your implementation team will focus on goals/objectives to get you up and running with your must-haves during implementation. Post-implementation, you can focus more on those nice-to-haves to ensure you're getting the most out of the new system.

STAGE 3

Post-Implementation

4. Stay Informed

Regularly check for communications from your new system

Keep an eye out for release notes, updates to the knowledge base, regular product webinars, events, and more.

Participate in the online community to stay informed about relevant discussions

Connect with your peers who are using the same system. Ask questions in the online community, or see what other users are talking about. You may discover some ideas you may have never considered both within and outside of the system.



STAGE 3

Post-Implementation



5. Sustained Support

Seek out post-implementation resources through various channels

In addition to the Support Desk and your Client Success Manager, tap into virtual and in-person events like vendor-specific conferences, informal meet-ups, and user groups at events like PEAK or TAG.

“

The implementation process was very well organized. We did a lot of planning before and it helped to understand the pieces that went into the implementation at the start of it.

- Nailah Hart, Grants Manager
The Morris and Gwendolyn Cafritz Foundation



Take the Next Step in Your GMS Transition

A successful transition to a new grants management system involves meticulous planning, an open-minded approach to evolving your processes, and a commitment to continuous learning and improvement. If you go into your implementation with a positive mindset and these steps as your guide, the result is likely to be a seamless and rewarding experience that empowers your team.

Planning an Implementation?

Learning about these best practices is one thing, but putting it into action is another. Let us know how we can help.

[Contact Our Team Today](#)