

Grants Management Solution

Manage the grants process throughout the entire lifecycle.

Key challenges of the grants management process

Government departments and agencies are under increased pressure to arrange, assess and evaluate a growing number and value of grants. These organisations are also more accountable to prove the success of granting programs.

While the administration side is complex enough, innovations such as the internet and social networking are also challenging government departments to deliver a more personal level of service to constituents and customers.

These challenges are further compounded because the grants management lifecycle is often delivered in separate and disconnected systems. This makes it difficult to administer grants with ease. At the same time, it also hinders your ability to accurately assess the true cost and outcomes of granting programs.

This ad-hoc approach to grants management and the high cost to maintain disparate systems is no longer viable. Today, grants and program managers are looking for an end-to-end approach to manage their significant and increasing grants management activity.

12 stage lifecycle of grants management

For complete control and accountability of the interactional and transactional activities of the granting process to occur, the various steps of grants management need to be well defined and understood.

Stage	Description
Arrange	Organising a grants program, category or round, including the objectives, funding, policy, criteria and associated approvals
Awareness	Making potential recipients aware of the grants program or round. This may include advertising, events, websites, emails, etc.
Answer	Responding to enquiries about a grants program/category/round.
Apply	The completion and submission of an application by an organisation or individual (i.e. the applicant).
Assess	The review and assessment of the applications received against the criteria that were specified under the terms of a grants program or round.
Approve	The process of finalising which applicants will receive a grant. The decision is usually made by a board or authorised delegate, and is based on the appraisal of the received applications.
Advise	Informing successful and unsuccessful applicants about the result of their application. Also providing feedback to unsuccessful applicants.
Agree	Concluding and recording a legally binding agreement with a recipient.
Assist	Providing the assistance specified in the agreement.
Assure	Receiving reports and undertaking audits to ensure that recipients are keeping their part of the agreement.
Acquit	Concluding the grant agreement. This can include the receipt of a final report. A final payment to the recipient may be dependent upon the acquittal.
Appraise	Reviewing and reporting on the results of a grant program or round with a mind to improvement.

Pressure is mounting to create more effective Grants Management solutions

With grants management processes being split across multiple systems ranging from Customer Relationship Management (CRM) through to Project and Portfolio Management (PPM), as well as traditional Enterprise Resource Planning (ERP), the internal technology challenges facing government are never far away. Adding to these challenges is that these systems will be duplicated several times across an organisation to address separate grants programs using fundamentally similar processes. As government agencies pause to take stock of their application portfolios, now more than ever the issue of providing an effective foundation for grants management must be addressed.

Unfortunately, the full lifecycle is often managed using disparate systems which do not talk to each other, often duplicating activity and requiring manual activity to make the process flow.

Benefits of TechnologyOne Grants Management

TechnologyOne Grants Management solution provides a single process and lifecycle view of every grant program you manage. This greatly empowers decision-making about the financial or in-kind assistance you provide to your constituency today. Specific benefits include:

One solution to manage entire grant lifecycle

TechnologyOne Grants Management is a centralised grants management platform allowing for seamless workflow from arrange to appraise. The system incorporates advanced TechnologyOne CRM and Supply Chain Contract Management modules. Other components include financial management, funds management, invoicing, payment, account management, financial reporting and Business Intelligence.

Keep your IT budget lean

Unlike the high cost of maintaining multiple systems to manage granting programs, you only use one solution to keep your IT costs low.

Integration saves time and eliminates duplication

Because Grants Management is an integrated part of TechnologyOne's enterprise suite, you only need to enter data once to utilise it in other systems. For example, you only need to enter information on payments and granting contracts into the Financials system in order to utilise it in the CRM system. Benefits include increased efficiency, as well as improved consistency and accuracy of information, which is also more easily shared: especially when tracking project milestones.

Simplify workflow and administer grants faster

Because the system is easy to use, new programs can be set up and managed by non-technical staff. Each business unit can rapidly set up new programs, ensuring prompt responsiveness to government policy decisions. Importantly, because the lifecycle of a program is managed centrally, you will experience a streamlined workflow from arrange to appraise.

Reduce risk and protect your department's reputation

Improve due diligence process by providing easy access to the full history of a recipient's past grant projects. The solution also includes automated checks at every stage of a current grant program, so you can easily track expected milestones against final outcomes.

Better accountability and process transparency

Gain complete transparency of the review, assessment and approval process with all information held in one place. This includes full applicant details, comments made

by the assessment panel, and recommendations from any boards or committees about funding decisions.

Improve communications

The Grants Management solution enables better stakeholder communication, both offline and online. Because the system keeps a history of all interactions for applicants and recipients, new staff or outside parties assisting with grant management have instant access and insight into all communications and correspondence, and can provide the same quality of service.

Deliver financial insight into viability of grants

When assessing grants, TechnologyOne's sophisticated Business Intelligence dashboards can assist with costing models, program levels and cost of grant delivery. You can also use Business Intelligence to run updates and reports throughout a grant's lifecycle, slicing and dicing information, depending on your requirements. For example, reporting to a government minister may require a different report than when reporting to a corporate entity. Improved reporting leads to improved accountability, and proper management of monies for grants.

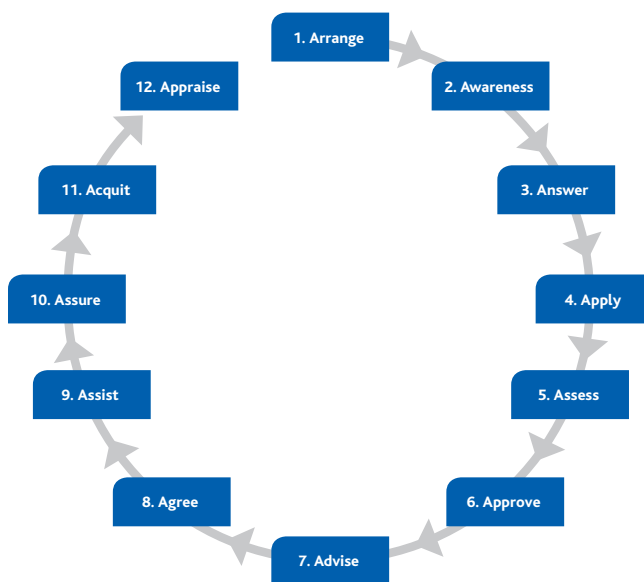


Diagram 1: The grants management lifecycle