**Grants Management System**

Implementation Questionnaire

Updated: 18 August 2025

This questionnaire is designed to help grantmaking organisations reflect on the full scope of their grant management needs — beyond just technical specifications.

Many tenders focus heavily on functional lists of features but give less attention to the processes, governance, and resourcing needed to make a new system successful. This document is intended as a practical tool to help you:

* Clarify your internal processes, volumes, and future requirements.
* Anticipate configuration and implementation considerations early.
* Provide a more complete brief to potential vendors or partners.
* Strengthen the quality of RFPs and procurement documents.

You can complete this in full, or simply focus on the sections that are most relevant. Early estimates are often enough at this stage. The value is in identifying the areas that matter most to your organisation.

This questionnaire is freely shared as a resource for funders exploring the GMS market. We hope it supports better conversations with vendors and more successful system implementations.

## Your details

We would like to better understand the scope of the solution you are looking for, to help us to provide you with a clear response to your enquiry. To that end, we have a series of questions about your business processes, the volume of programmes and applications you will receive.

To start with, please tell us a little about your grantmaking organisation, and what stage you are at in considering a new grant management system.

|  |  |
| --- | --- |
| Organisation name: |  |
| Organisation address: |  |
| Number of internal GMS users: |  |
| Website: |  |
| Annual grantmaking: |  |
| Contact name: |  |
| Position: |  |
| Email: |  |
| Phone: |  |
| Project title: |  |
| Project budget range | allocated, indicative, or to be confirmed? |
| Any compelling event/date | system retirement, compliance deadline, funding window? |
| Timeline | target dates for RFP release, selection, and go‑live. |
| Decision-making | who will participate in selection and final approval? |
| Other vendors | are you evaluating other GMS providers at this time? |
| Procurement stage | Market research / Request for information / Request for proposal |

# Project brief:

(up to 250 words)

|  |
| --- |
|  |

# Functional and technical considerations

Your functional and technical requirements may already include much of the following, but please feel free to indicate any items you require.

## Functionality

|  |  |
| --- | --- |
| Embedded analytics, dashboards |  |
| Realtime chat function |  |
| Custom business rules |  |
| Search uploaded documents |  |
| Multiple languages |  |
| Multiple currencies |  |
| Digital signatures | ValidSign by default |
| KYC/AML integrations |  |
| Data load / migration | From existing GMS or other sources |

## Technical setup

|  |  |
| --- | --- |
| Data encryption | In transit, at rest |
| Automated integrations | CRM, Digital signature |
| Single sign-on | What solution you currently use |
| Additional support environments | Production and UAT are standard. |
| High volume storage | Consider size limits for supporting documentation |
| High volume of concurrent users |  |
| Multi-factor authentication |  |
| O365 mail integration |  |
| Regional hosting location (UK or EU) with Oracle cloud Infrastructure. | Note: default EU region is Germany (DE); UK clients can be hosted in the UK. |

## Services

|  |  |
| --- | --- |
| Hypercare post-implementation | Recommended |
| Enhanced support packages | Recommended, standard support is Product bugs only |
| Disaster recovery services | Nightly backup is standard, RTO/RPO times |
| Environment copies/refresh | Production, UAT, other |
| Additional training | End user training |
| Report writing/dashboards |  |
| Data migration assistance |  |
| Grant management consultancy |  |
| Process reviews |  |

# Your grant management processes

Typical project implementation tasks can include:

|  |  |
| --- | --- |
| Implementation tasks | Configuration tasks |
| Project Management | Workflow – application to decision |
| Infrastructure setup of GMS | Schemes or programmes |
| Requirements gathering, workshops | Funds setup |
| Business requirements specification | User roles and permissions |
| Configuration tasks | General configuration (statuses, contacts, docs) |
| Development: automation, integrations | Application forms |
| User Acceptance Testing - prep & support | Business rules |
| Training and documentation | Project costs |
| Data load assistance | Workflow – reviewer process |
| Finance export/integration | Assessment/Review forms |
| Reporting dashboards and custom reports | Meeting papers |
| Ready for Go Live | Email notification templates |
| Hypercare | Offer letters/contracts/forms |
|  | Monitoring forms |
|  | General configuration (payments, claims) |
|  | Workflow – monitoring process |
|  | Workflow – variation/closure process |
|  | Branding |

# Functional questionnaire

Please complete the questionnaire below to get a sense of your Grant Management process requirements. In many cases, your best estimate will be enough at this stage.

|  |  |  |
| --- | --- | --- |
| General | Currently | Required |
| How many Schemes or Programmes are there? |  |  |
| Do all schemes / programmes follow the same process (workflow)? |  |  |
| If the schemes / programmes do NOT follow the same process (workflow) then how many different processes (workflows) are there? |  |  |
| Are the schemes / programmes open to the public? |  |  |
| Are the schemes / programmes only open for a specific time i.e. are there Calls? |  |  |
| If there are Calls, then how many per year? |  |  |
| Roughly how many different roles / user types are involved in a process? |  |  |
| External Users and Languages | Currently | Required |
| Do you wish to allow your external users to register online? |  |  |
| Do you accept applications from individuals and/or organisations? |  |  |
| Is organisation registration required? |  | Yes |
| Do organisations / users need to be approved by someone internally before being fully registered? |  |  |
| Is system required to be available in one language only.  If multiple, what languages are required? |  |  |
| Internal Users | Currently | Required |
| Are there different user groups in your organisation? How many? |  |  |
| Is task assignment required to be per department / user group? |  |  |
| Are there different restrictions per user group i.e. regional teams who can only view applications /data for their own region? |  |  |
| Application | Currently | Required |
| Can application be sent back to external users to provide more information? |  |  |
| Is the application a collaboration?  i.e. filled in by multiple users? |  |  |
| If the application is a collaboration, how many users / roles are involved? |  |  |
| If the application is a collaboration, who is the Lead applicant? |  |  |
| For research projects, do the Head of Department of the University have to approve the application before its submitted? |  |  |
| Would all schemes share the same application form?  If not, would they be similar or completely different forms? |  |  |
| Are any custom calculations part of the application form?  i.e. calculate applied amount based on business rules. |  |  |
| Does the applicant have to submit details on their planned Budget / Project Costs? |  |  |
| Will applicants upload supporting files? If so, which file types are allowed (e.g., PDF, DOCX, XLSX, JPG/PNG)? |  |  |
| What is the maximum file size per file and per application? Do you require virus scanning or file-type validation? |  |  |
| Eligibility and Assessment | Currently | Required |
| Is there an eligibility check? |  |  |
| If there is an eligibility check, is it automatic or carried out by an Internal user? |  |  |
| Assessment / Reviews | Currently | Required |
| Are there external Assessors / Reviewers? |  |  |
| Are external reviewers assigned based on certain criteria for example their expertise or the application scheme etc.? |  |  |
| Do external reviewers need to accept the application first before being assigned a task? |  |  |
| If there are external Assessors / Reviewers, then how many will be assessing each application? |  |  |
| Is there a specific process for the Assessment / Review stage or just one step for them to do the task? |  |  |
| Do you require conflict-of-interest declarations from reviewers and/or panel members? |  |  |
| Should the system detect/flag conflicts automatically (e.g., same organisation, prior relationship) and block or warn on assignment? |  |  |
| Decision | Currently | Required |
| Is there a Panel / Committee meeting where decisions are made?  How many different meetings? |  |  |
| Will the Panel / Committee members have access to that meeting to view the linked applications and the meeting papers? |  |  |
| Are meeting papers required i.e. a summary of all meeting projects?  Are meeting papers different per meeting? |  |  |
| Is there an approval process of the final contract document? Is the version numbering required?  How many levels of approval? |  |  |
| Emails | Currently | Required |
| Are automated emails required?  If yes, what type of emails are they?  For example: task assignment emails, deadline emails, notification emails etc. |  |  |
| Will you want to send attachments?  Are offer letters or contracts required to be generated automatically?  How much of the project specific information is to be pulled into contracts automatically? |  |  |
| Should GMS connect to your current email service (e.g., Microsoft 365, Exchange, SMTP) for sending emails, or send directly from your GMS system? |  |  |
| Note: For security reasons and to improve delivery success we normally now send out emails using a single email address (noreply@..). |  |  |
| Should all outbound system emails be stored in the GMS for audit/compliance? |  |  |
| Appeals | Currently | Required |
| Is there an Appeal Process if an application is rejected? |  |  |
| If you are a research Grantmaker, will you have a rebuttal process as part of peer review? |  |  |
| Funds | Currently | Required |
| Are overall funds set per programme / call or per an individual applicant? |  |  |
| Is the overall fund allowance per applicant categorised? If so, how many different categories? |  |  |
| Is any custom validation required for the approval of funds? |  |  |
| Monitoring | Currently | Required |
| Is there a monitoring stage? |  |  |
| If there is a monitoring stage, how long will the application / project be monitored? |  |  |
| Are there KPIs? |  |  |
| Does the applicant have to submit KPI reports? |  |  |
| If there are KPI reports, how often are they submitted |  |  |
| Are there interim project reports to be submitted? |  |  |
| Any mission reports / site visit reports? |  |  |
| Are there financial reports to be submitted by applicants at the end of the financial year? |  |  |
| Are there any application conditions for example project report? |  |  |
| Claims and Payments | Currently | Required |
| Does the applicant submit claims? |  |  |
| If the applicant submits claims, how often does this happen e.g. When they want, monthly, and quarterly? |  |  |
| If claims are required, is there a specific process for claims? |  |  |
| Should claims be approved in Batch or Singularly? |  |  |
| Do payments need to be scheduled automatically, by scheme or type or project, with business rules? |  |  |
| Are the conditions linked to each Payment? |  |  |
| Is there a specific process for each payment condition? For example, a condition report is submitted by an applicant and reviewed / approved by an internal user before a payment can be released. |  |  |
| Is there a specific payment process other than submission, approval and release? |  |  |
| **Post-Award Monitoring & Evaluation** | **Currently** | **Required** |
| Monitoring and Evaluation (M&E) methodologies |  |  |
| Outcomes and impact reporting (KPIs, SDGs, research impact). |  |  |
| Site visits / progress review logs / case study tracking |  |  |
| Compliance/audit requirements for funders. |  |  |
| **Variations** | **Currently** | **Required** |
| Are variations to the project allowed (e.g., change to grant award amount, budget reallocation, date extension, scope change, Principal Investigator/lead change)? |  |  |
| Is there a process required for this approval? |  |  |
| Are Variations approved by Panel / Committee? |  |  |
| Should the applicant be allowed to start a Variation process? |  |  |
| Data Migration | Currently | Required |
| Is there legacy data to be imported into the system? |  |  |
| If an import is required, how many applications? |  |  |
| How many contacts? |  |  |
| What database is the legacy data currently stored in? |  |  |
| Will some legacy applications be imported as read-only reference records rather than full active records? |  |  |
| If so, which fields should be included (e.g., applicant, amount, decision date, status, linked documents)? |  |  |
| **Analytics** | **Currently** | **Required** |
| What mandatory reports are required? |  |  |
| Do your reports require multiple filters such as date ranges, scheme, call, status, region, or panel? |  |  |
| Are there different reports required for different user groups? |  |  |
| Are there any user restrictions required for different reports? |  |  |
| Do you currently use a separate reporting or analytics tool? |  |  |
| Are you looking to enhance reporting with embedded analytics (e.g., Jaspersoft) for internal dashboards and ad‑hoc reporting? |  |  |
| Should any reports/dashboards be available to external users (applicants/reviewers)? If so, what data and security constraints apply? |  |  |
| How often are reports needed (on‑demand, scheduled)? What export formats do you need (CSV, XLSX, PDF)? |  |  |
| **AI readiness** | **Required** |  |
| Do you anticipate using AI/ML for triage, reviewer matching, or reporting in the next 3–5 years? |  | |
| Do they anticipate expanding to predictive or impact analytics in the next 3–5 years? |  | |
| Are there any other functional components of your grantmaking that need to be considered? |  | |

# Technical questionnaire

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Integrations** | **Currently** | | **Required** | |
| Identity management (SSO, MFA). |  | |  | |
| Finance/ERP systems (SAP, Oracle, Unit4, Exact). |  | |  | |
| How often should payments be transferred to finance system? |  | |  | |
| Are commitments transferred to the finance system? |  | |  | |
| Research tools (ORCID, ResearchFish, Dimensions). |  | |  | |
| Digital signature (ValidSign) |  | |  | |
| Are there any other interfaces to other systems? |  | |  | |
| **Access to System** | **Currently** | | **Required** | |
| Which domain/subdomain will be used for the public applicant portal (e.g., grants.yourorg.org)? Will you use your own domain or an GMS-provided domain? |  | |  | |
| Is Single sign on required or another form of login? |  | |  | |
| **Infrastructure Set-up** | **Currently** | | **Required** | |
| Notes: |  | |  | |
| • GMS-hosted: GMS vendor manages infrastructure, security patches, backups, monitoring and uptime. |  | |  | |
| • Client-managed cloud: Your IT manages the cloud tenancy and baseline controls; GMS vendor provides application deployment guidance. Additional prerequisites and costs may apply. |  | |  | |
| Hosting model: GMS-hosted (Oracle Cloud Infrastructure, managed service in EU/UK) or Client-managed cloud (e.g., AWS, Azure). On-premises is not offered. |  | |  | |
| Licence model preference:  One-time perpetual product licence, with annual support and hosting costs  Annual subscription (includes licence, support and hosting costs) |  | |  | |
| Will you require additional environments after implementation?  Live and Test are provided as standard |  | |  | |
| **Volumes** | **Currently** | | **Required** | |
| Total number of projected applications across all schemes/programmes (schemes) per year |  | |  | |
| Total number of projected applications across all schemes/programmes (schemes) for the next 5 years |  | |  | |
| Please estimate the number of attachments per application |  | |  | |
| Please estimate the average size of an attachment |  | |  | |
| Projected growth in applications over the next 5 years (e.g., % per year). |  | |  | |
| **Concurrent users** | **Currently** | | **Required** | |
| Maximum number of concurrent internal users that will be using GMS |  | |  | |
| Maximum number of concurrent external users that will be using GMS |  | |  | |
| How many deadlines per year? |  | |  | |
| How many projected applications per deadline? |  | |  | |
| How many projected applications are completed in the last week before a deadline? |  | |  | |
| How many projected applications are completed in the last 24 hours before a deadline? |  | |  | |
| Projected growth in internal/external users over the next 5 years. |  | |  | |
| Projected storage growth (documents/data) over the next 5 years. |  | |  | |
| **Accessibility & Inclusion** | **Required** | |  | |
| Does the system need to comply with WCAG 2.1 or the EU Accessibility Act? | |  | | |
| Will applicants need screen reader compatibility, mobile-optimised forms, or multi-language accessibility? | |  | | |
| **Security & Compliance** | | **Required** | |  |
| Data retention policies (how long should data be stored?) | |  | | |
| Consent management and data subject rights? (erasure/portability). | |  | | |
| Security accreditation:   * ISO 27001 * Cyber Essentials Plus * GDPR compliance | |  | | |
| **Change Management / Adoption** | | **Required** | |  |
| Internal training and onboarding expectations. | |  | | |
| Appetite for self-service configuration vs. vendor-managed changes. | |  | | |
| Interest in co-design workshops, iterative prototyping, or “train the trainer” models. | |  | | |
| Are there any other technical components of your grantmaking that need to be considered? | |  | | |