



Grants System Evaluation Checklist

Use this checklist to assess whether your current platform—whether it’s legacy software, spreadsheets, or an entry-level GMS—is still serving your mission.

Category	Key Question	When to Rethink
Strategic Alignment	Can your system support evolving funding strategies and equity goals?	Limited flexibility to adapt funding categories, processes, or evaluation frameworks
Transparency & Trust	Does your system support clear, accessible communication with stakeholders?	Difficulty producing real-time reports or sharing data with board, staff, or grantees
Grantee Experience	Is reporting streamlined and meaningful for your grantees?	Burdensome reporting processes; no capacity to co-design data collection or track capacity-building
Data & Learning	Can your team use data to guide decision-making—not just check compliance boxes?	Siloed data, static exports, or lack of dashboard functionality for real-time insights
Integration & Scale	Does your system connect to other tools you use and grow with your mission?	Manual workarounds, no integration with financials or CRM, limited scalability
Internal Adoption	Is your team confident using the system day-to-day?	Low adoption, inconsistent use, or reliance on a few “power users” to keep things running

If you answered “no” to more than two questions above, it may be time to reconsider your grants management system.

[Talk to a Strategic Advisor]

Since 2005, **Exponent Partners** has been a trusted ally to Foundations and Human Services nonprofits, working together to deliver greater impact through mission-aligned information systems.

