

Grant application and reporting

Automates grant application submission, tracking, and compliance reporting to maximize funding opportunities while ensuring timely deliverables and donor stewardship.

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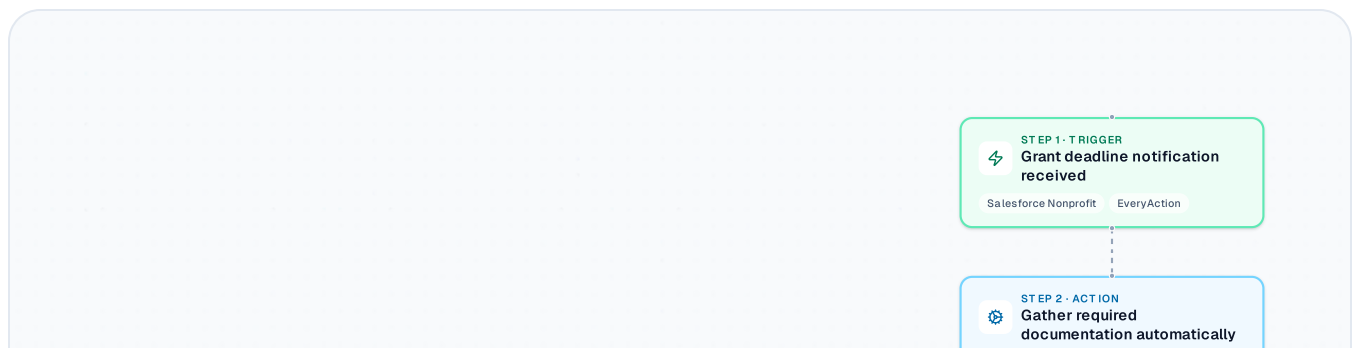


WORKFLOW TRIGGER

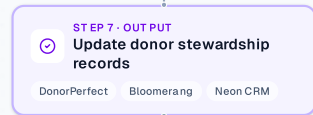
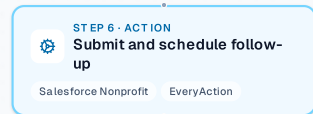
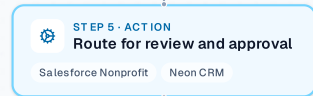
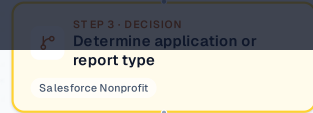
Grant opportunity deadline approaches or grant reporting period begins

Visual Flow

Each node represents an automated step. Connections show how data and decisions move through the workflow.



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Bloomerang



Step-by-Step Breakdown

Detailed explanation of each automated stage in the workflow.

1

Grant deadline notification received

System detects upcoming grant application deadline or reporting requirement from integrated grant database. Automated alert is generated based on predefined timeline.

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EveryAction

2

 ACTION

Gather required documentation automatically

Pulls necessary financial reports, program data, and organizational documents from CRM and donor management systems. Compiles attachments and required metrics.

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DonorPerfect

Bloomerang

3

 DECISION

Determine application or report type

System evaluates whether this is a new grant application, interim report, or final report. Routes workflow based on grant stage and requirements.

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4

Generate grant narrative content

Auto-populates application forms or reports using stored organizational data, program outcomes, and financial information. Creates draft narrative sections based on templates.

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EveryAction

5

ACTION

Route for review and approval

Sends completed draft to program managers and leadership for review. Tracks approval status and incorporates feedback through automated revision cycles.

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Neon CRM

6

ACTION

Submit and schedule follow-up

Electronically submits completed application or report to funder. Creates automated reminders for follow-up communications and future reporting deadlines.

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EveryAction

7

OUTPUT

Update donor stewardship records

Records submission in donor database and triggers appropriate stewardship communications. Updates grant tracking dashboard with status and next steps.



Outputs

- Completed grant applications submitted on time
- Compliance reports delivered to funders
- Updated donor stewardship tracking records



Key Metrics

- Grant application completion rate
- On-time submission percentage
- Funding success rate



Tools & Integrations

- Salesforce Nonprofit
- EveryAction
- DonorPerfect
- Bloomerang



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