



LEVERAGING TECHNOLOGY FOR EFFECTIVE ENVIRONMENTAL GRANTMAKING

TOP 3 CHALLENGES FACED BY
ENVIRONMENTAL GRANTMAKERS AND
HOW TO OVERCOME THEM.

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TABLE OF CONTENTS:

[The importance of Grantmaking in addressing pressing environmental challenges](#)

2

[Environmental Grantmaking Challenges and SaaS solutions](#)

3

[Challenge 1: Project Selection and Data Management](#)

4

[Challenge 2: Project Tracking and Stakeholders Collaboration](#)

7

[Challenge 3: Monitoring and Reporting on Impact](#)

10

[Resource Library for Effective Environmental Grantmaking](#)

13

[Evaluating and Selecting](#)

13

[Stakeholders Collaboration](#)

14

[Monitoring and Reporting](#)

14

[Impact made easy](#)

15

Environmental Grantmaking plays a pivotal role in addressing pressing environmental challenges. As our world grapples with issues such as climate change, biodiversity loss, and pollution, the significance of targeted funding for environmental initiatives cannot be overstated. Through grantmaking, organizations and stakeholders can channel resources toward projects that promote sustainability, conservation, and environmental stewardship.

As with any other supported causes, environmental grantmaking encompasses several key components essential for effectively addressing environmental challenges. For grantmakers, these components include setting clear goals and criteria for selecting grantees, tracking and monitoring supported projects, as well as reporting and communicating on the achieved impact. Each dimension plays a crucial role in prioritizing funding decisions and guiding the allocation of resources towards projects, ensuring that resources are allocated efficiently, and projects are implemented successfully to achieve sustainable objectives. All of this makes managing environmentally related grants a complex task.

In celebration of Earth Day 2024, we're releasing this eBook to discuss the top 3 Challenges of Environmental Grantmaking and showcase how technology helps grantmakers enhance their support for impactful and sustainable solutions for our planet.

Happy reading!

The importance of Grantmaking in addressing pressing environmental challenges

Environmental Grantmaking Challenges and SaaS solutions



Managing environmentally related grants can be complex and resource-intensive without proper strategies in place. In response to the challenges faced, SaaS Platforms emerge as powerful allies to streamline processes and maximize impact.

Challenge 1: Project Selection and Data Management



The [grant application process](#) serves as the initial point of engagement between funding organizations and potential grantees. It involves the submission of proposals outlining project objectives, strategies, budgets, and expected outcomes such as climate change mitigation or any other environment related target. Clear and comprehensive grant applications provide funding organizations with the necessary information to evaluate the alignment of proposed projects with environmental goals and priorities.

[Project evaluation and selection](#) are key steps during which grant applications are assessed to determine their suitability for funding. One prevalent challenge is effectively managing the vast amount of data associated with the grant applications and being able to make transparent and informed decisions.



Solution

From providing centralized databases for storing and organizing grant-related data, to ensuring easy access and secure storage, SaaS platforms allow organizations to manage data effectively, make informed decisions and derive valuable insights.

Here are some of the key features that you might be looking for in a specialized SaaS solution.

Key Solution Features

- **Smart forms:** Capture the information you need and provide a good applicant experience.
- **Automatic filtering and scoring:** Automatically score and/or decline all applications not in line with your strategy and your selection criterias.
- **Messaging and communication:** Send emails directly from your admin interface and ensure all communication is stored directly in the system.
- **Evaluation add-on:** create a dedicated and centralized interface for colleagues or external experts to access forms and evaluate projects.

“We went from 7 to 3 minutes per application! With such an increase in efficiency, the team can now focus their time and energy with our partners in local communities.”



SUCCESS STORY

Capital Power is dedicated to delivering long-term value, protecting the environment, and supporting local communities. Their CSR team sought a flexible and customizable solution to streamline the project management flow for grant-making in terms of selection, communication, and task management to allocate more time for the team to collaborate with partners in local communities to enhance impact and support. With the help of Optimy, Capital Power streamlined the application process, reducing it from 7 to 3 minutes, all while enhancing the quality of their relationships with grantees.





Challenge 2: Project Tracking and Stakeholders Collaboration

Engaging stakeholders, including grantees, funders, and community members, is essential for the success of environmental initiatives. However, fostering meaningful engagement can be challenging, particularly when stakeholders have diverse interests, objectives, and priorities. Building relationships, fostering collaboration, and ensuring transparency are critical aspects of effective stakeholder engagement and in the long term of sustainable impact.

Solution

By providing collaborative features and communication tools, SaaS Platforms facilitate stakeholders engagement. These platforms enable organizations and stakeholders to easily access relevant information, receive and provide feedback, send reminders and much more. Thus enhancing transparency and open communication to help build trust, collaboration, and accountability among stakeholders.

Here are some of the key features to look out for for in a specialized SaaS solution to improve your stakeholder engagement:



Key Solution Features

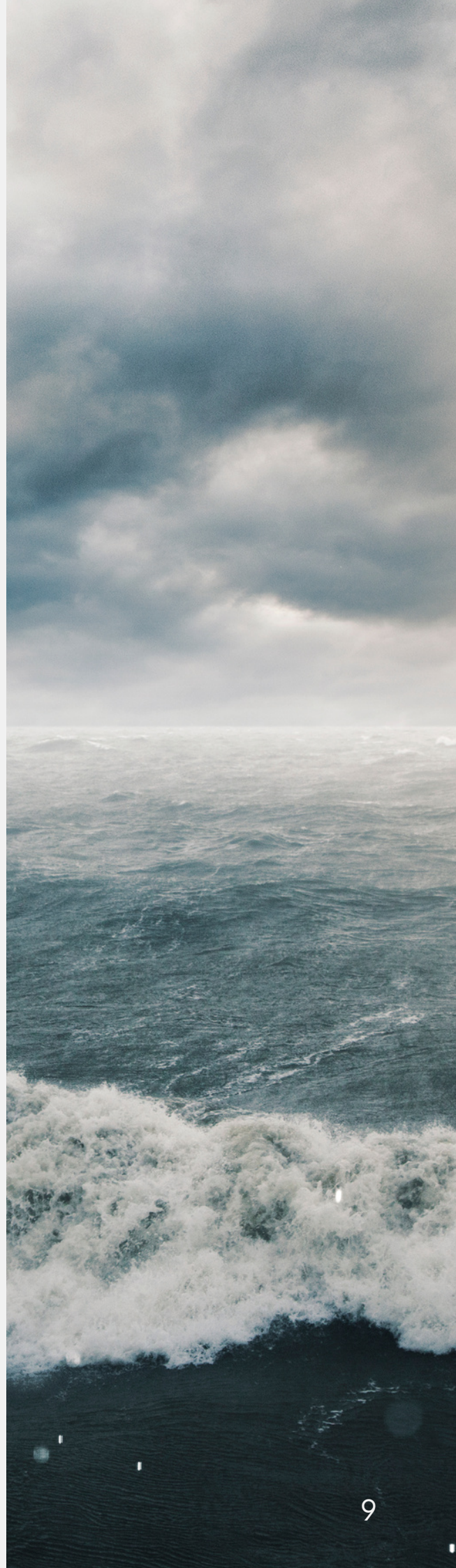
- **Form access rights:** organize your projects supported by relevant topics, causes, regions, teams, etc., while benefiting from a global overview to see what is happening on a group level. Enable targeted engagement by providing stakeholders with access to projects specific to their interests and involvement in environmental initiatives.
- **Automated workflows:** automate key tasks, standardize your processes, simplify request evaluation, and empower your team to efficiently handle grant applications, feedback collection, and stakeholder communication, reducing administrative burdens and enabling more focused engagement efforts.
- **Custom statuses:** gain a more specific and transparent overview of project activities and stakeholder interactions through a customizable central dashboard.
- **DocuSign eSignature:** enhance stakeholder experience by providing a convenient and efficient method for completing necessary paperwork, fostering trust and collaboration throughout the grantmaking process.

“If you are looking to make changes and improve your systems and processes to meet the needs of your applicants it’s definitely worth using **Optimy** to do that.



SUCCESS STORY

The [Veolia Environmental Trust](#) supports a variety of community and environmental projects in various locations across England. Transitioning from a team of 12 staff members to just 5 while managing 25 projects per quarter, the foundation needed a solution to maintain efficiency within a reduced timeframe and in a more structured manner. One crucial aspect they identified was the ability to create application forms with conditional questions that adapt to the needs and profiles of their applicants. Thanks to Optimy, they can now focus on what matters most: helping communities across England. [Discover how Optimy features proved beneficial for both grantees and the foundation.](#)





Challenge 3: Monitoring and Reporting on Impact

Monitoring and Reporting are an essential part of Project Management for Grant-making organizations. It allows them to make sure they support sustainable projects but also to analyze how they could eventually be of better help for future supports.

This involves regular oversight, documentation and communication of project activities, milestones, and expenditures to assess performance and identify any challenges or deviations from the original plan. In this regard, grantees are typically required to submit regular progress reports detailing project activities, achievements, challenges, and financial expenditures.

Determining whether initiatives are achieving their intended outcomes and contributing to environmental objectives can be a daunting task. Without proper mechanisms for monitoring and evaluation, organizations may struggle to assess the effectiveness of their investments and demonstrate tangible results.



Solution

By facilitating data management, SaaS platforms allow organizations to capture project data, track progress against predefined metrics, and generate comprehensive reports on project outcomes and impact. Thus, assessing the effectiveness of their investments and demonstrating tangible results to stakeholders.

Here are some of the key features that you might be looking for in a specialized SaaS solution.

Key Solution Features

- **Follow up surveys:** send follow-up surveys to collect key information on the development of the project. Ask about the meeting of the predefined goals and about budgeting to create insightful reports.
- **Budget tracking:** manage and keep track of all your payments, and always stay on top of allocated funds for each project.
- **Chart Building:** create custom and visually compelling reports, measure and benchmark performance, and communicate your performance and goals to all stakeholders.
- **Impact Map:** show your organization's impact all over the world by creating a map of where your projects are taking place.

“No more guesswork!
we now have a
complete overview
of the funds we
allocate per year and
whether we are
dealing appropriately
with the money that
we are receiving by
tracking our KPIs.



SUCCESS STORY

The [Swiss Re](#) Foundation focuses on several SDGs, including natural hazard and climate risk management. One of its commitments is to provide funding for impactful, evidence-based, and sustainable projects and partners. Thus, the Foundation's team wanted a tool that they could use independently to track all projects and assist them in building insightful reporting dashboards. Questions such as how much money is allocated per cause per year, where the funds are being directed, which types of initiatives receive more support, whether there are regional differences, and how grantees manage the received funds are essential. Their utilization of the Optimy solution helps them streamline tasks such as tracking milestones, setting reporting deadlines, and updating key performance indicators, including outcome indicators, to facilitate easy reporting on their activities. [Learn more about their process here.](#)



Resource Library for **Effective** Environmental related Grantmaking

Would you like to know more about this topic? Our Environmental Grantmaking Resource Library is a great place to start. This digital library contains a short curated collection of resources to inspire, empower and help you as a Grantmaker to streamline your processes, develop impactful projects, and maximize your positive impact!

Evaluating and Selecting

- [Funding trends 2023: Climate change mitigation philanthropy: Annual report on funding trends in climate change mitigation philanthropy covers eight years of funding data from 2015 to 2022.](#)
- [Strategic Partnership Mastery: Linking Business Goals to Impactful Collaborations:](#) A session to break down the essential aspects of partnership relations; from optimizing partners' sourcing processes to scoring for alignment with your organization's needs and streamlining processes.



Stakeholders Collaboration

- [Supporting public engagement on climate change – a guide for grant-makers | Summary](#)
The [full report](#) was commissioned by the Climateworks Foundation, aiming to provide recommendations on how funders could better support programmes that undertake public engagement on climate change.
- [Amplifying Social Impact: Strategic Resource Management for cutting edge professionals:](#) A session on 360° resource management. From HR to budget management, learn how to streamline and automate your processes to amplify your impact.
- [How to overcome the top 4 challenges to your employee engagement program:](#) Building programs is one thing, but how do you actually motivate employees to participate in your engagement programs?

Monitoring and reporting

- [Measuring vs Reporting on Social Impact: The Secret to Telling Engaging Impact Stories:](#) A session to discover how to streamline impact reporting practices and tell engaging impact stories that captivate stakeholders.
- [Five Key Steps To Measure Your Corporate Social Impact:](#) A webinar to learn how to obtain buy-in from stakeholders, define your theory of change, and set clear impact goals to successfully measure their impact.

IMPACT MADE EASY

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organizations
use Optimy

projects
managed

languages

countries

At Optimy we empower 350+ organizations around the world to amplify their impact. From grantmaking to employee engagement programs, our solution helps you to streamline your processes. Get in touch with us today!

Eager to jump in?

[Book a demo](#)



Join over 300 organizations in amplifying **your impact**