Maximising Nonprofit Funding with Automated Grant Management

Sage Intacct Webinar

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Introductions

Kristina Kopic

Head of Charity & Voluntary Sector
@ ICAEW

Grant Gevers

Senior Solutions Consultant
Nonprofit Industry
@ Sage UKI

Suzanne Davies

Director of Finance and ICT
@ Prison Advice and Care Trust (PACT)

Ciaran Burke

COO & Co-Founder
@ Swoop Funding

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ICAEW

What we will be discussing...

Grant Lifecycle

- How can Sage help you with the whole Grant lifecycle?

Customer Spotlight

- Discussion with Suzanne Davis CFO, PACT. Re Grant's & Projects reporting.

Increase your Grants

- Discussion with Swoop Funding's co-founder Ciaran Burke.

Automating Grants

- Close the Grant reporting lifecycle using technology.

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Grant lifecycle

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Who are the Prison Advice and Care Trust?

Building stronger & safer communities!

PACT is a pioneering national charity that supports prisoners, people with convictions and their families.

Suzanne Davies

Director of Finance and ICT
Prison Advice and Care Trust (PACT)

Pact

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Report Example

Nonprofit Financials

- **Using Project / Grant Dimension:** Tag any transactions using the Project or Grant dimension to see reporting in this way.
- **Standard reporting:** This is available using standard reporting tools in Intacct. Reports like this can be viewed in Dashboards or automatically sent out on a schedule.

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Restricted

Restricted Projects Movement
As of February 28, 2025

Project ID and Name	Income and Expenditure Year To Date 28/02/2025 ACTUAL NET	Income (inc man chg) Year To Date 28/02/2025 Actual	Expenditure (inc man chg) Year To Date 28/02/2025 Actual	Net Mvt in year	Restricted Funds Period Ending 28/02/2025 Actual	B/f plus Movement
All Project						
A00209	344,286.41	344,286.41	-	344,286.41	(2,004.37)	342,282.04
F00816	(217.98)	-	217.98	(217.98)	-	(217.98)
F00842	(76.50)	-	76.50	(76.50)	-	(76.50)
F00930	(217.98)	-	217.98	(217.98)	-	(217.98)
G00210	(4,346.55)	10,000.00	14,346.55	(4,346.55)	9,530.49	5,183.94
G00217	(1,539.96)	-	1,539.96	(1,539.96)	-	(1,539.96)
G00225	(427.37)	-	427.37	(427.37)	-	(427.37)
G00227	(4,329.67)	-	4,329.67	(4,329.67)	4,329.67	-
G00232	(382.65)	-	382.65	(382.65)	2,953.74	2,571.09
G00233	3,954.20	6,448.69	2,494.49	3,954.20	3,811.31	7,765.51
G00236 (CHK)	(1,545.44)	(170.88)	1,374.56	(1,545.44)	1,545.44	-
G00241	(11,030.76)	(706.52)	10,324.24	(11,030.76)	11,030.76	-
G00244	95.97	-	(95.97)	95.97	(95.97)	-
G00249	(47,624.39)	500.00	48,124.39	(47,624.39)	92,855.22	45,230.83
G00253	(12.00)	-	12.00	(12.00)	-	(12.00)
G00254	5,334.94	101,000.00	95,665.06	5,334.94	4,404.93	9,739.87
G00256	(88.60)	-	88.60	(88.60)	2,866.00	2,777.40
G00260	(24,085.05)	10,000.00	34,085.05	(24,085.05)	24,191.57	106.52
G00270	(5,402.00)	(5,402.00)	-	(5,402.00)	5,402.00	-
G00271	(34,850.33)	(2.90)	34,847.43	(34,850.33)	34,850.33	-
G00278	-	-	-	-	9,772.68	9,772.68
G00280	(43,089.63)	(382.00)	42,707.63	(43,089.63)	25,316.08	(17,773.55)
G00281	(1,473.39)	-	1,473.39	(1,473.39)	4,221.59	2,748.20
G00282	28,803.48	71,608.00	42,804.52	28,803.48	23,013.01	51,816.49
G00283	(8,528.73)	-	8,528.73	(8,528.73)	9,404.33	875.60
G00284	(3,998.71)	9,994.00	13,992.71	(3,998.71)	995.99	(3,002.72)
G00285	3,245.31	10,000.00	6,754.69	3,245.31	3,660.01	6,905.32
G00286	(5,488.11)	75,000.00	80,488.11	(5,488.11)	75,788.30	70,300.19
G00287	(28,918.05)	-	28,918.05	(28,918.05)	109,023.76	80,105.71
G00288	338.12	5,500.00	5,161.88	338.12	18,270.02	18,608.14
G00289	(113.47)	61,907.25	62,020.72	(113.47)	18,806.66	18,693.19
G00290	(12,431.02)	(3,127.62)	9,303.40	(12,431.02)	14,771.15	2,340.13
G00291 pel)	(2,019.27)	-	2,019.27	(2,019.27)	5,416.38	3,397.11
G00294	(76,722.40)	241,938.64	318,661.04	(76,722.40)	190,483.01	113,760.61

Who are ?

Swoop

Grants simplified

It's often essential in getting a new capital development off the ground, or for exploring new and innovative models to solve some of society's toughest social problems.

Ciaran Burke

COO & Co-Founder at Swoop

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How the funding ecosystem works for non-profits

In the UK, nonprofits access grants from a broad ecosystem including government, Lottery distributors, trusts, and regional partnerships.

Navigating the grant landscape means knowing what matters to funders and where your work fits into their goals.

What to know:

- Most funders focus on impact, equity, and sustainability
- Grant calls often reflect national priorities like cost-of-living, climate, or digital inclusion
- Local Enterprise Partnerships (LEPs) and councils offer place-based funding

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Types of Grants Available

Capital / Local Grants

For capital expenditure
typically to stimulate employment

Most often distributed regionally

Direct to local LEP/Growth Hub

Innovation Grants

For new and unique R&D projects with wider impacts

Typically distributed nationally

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Types of Grants Available

Type	Information	Distribution Key Players
Social Enterprise / Charities Initiatives	• Funding and support is available to enable social enterprises and charities fund and build on the work they are doing.	National Lottery / NESTA / The Big Issue / Government (The Culture Fund)
Innovation Grants	• Focus on market-leading technologies / processes for economic growth, innovation and disruption. • Subsidise the cost of staff, partners, equipment, materials, sub-contractors, IP advise, PM. • Help company grow without diluting equity.	**Nationally**: Innovate UK(UKRI) (A governmental agency and the main channel for businesses to secure UK innovation funding.) / UK Government departments and philanthropic organisations. **Internationally**: Horizon Europe, Eureka, Eurostars
Business Growth Grants	• Subsidise the cost of capital items (buildings. Equipment, machines) and support (recruitment, business planning).	Local Enterprise Partnerships
Sustainability /Sector-Specific	• Support to make businesses more sustainable and environmentally friendly.	Local Enterprise Partnerships / Innovate UK(UKRI)

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Local Enterprise Partnerships

England is divided into 38 different local authorities called Local Enterprise Partnerships, better known as LEPs.

LEPs are good to be aware of if you are searching for grants as these partnerships have their own pool of grants, other funding and training opportunities which must be allocated to businesses in the given area.

1. Black Country
2. Buckinghamshire
3. Cambridgeshire & Peterborough
4. Cheshire & Warrington
5. Coast to Capital
6. Cornwall and Isles of Scilly
7. Coventry and Warwickshire
8. Cumbria
9. Derby, Derbyshire, Nottingham, Nottinghamshire
10. Dorset
11. Enterprise M3
12. GFirst
13. Greater Birmingham & Solihull
14. Greater Lincolnshire
15. Greater Manchester
16. Heart of the South West
17. Hertfordshire
18. Hull & East Yorkshire
19. Lancashire
20. Leeds City Region
21. Leicester & Leicestershire
22. Liverpool City Region
23. London
24. New Anglia
25. North East
26. Oxfordshire
27. South Yorkshire
28. Solent
29. South East
30. South East Midlands
31. Stoke-on-Trent and Staffordshire
32. Swindon and Wiltshire
33. Tees Valley
34. Thames Valley Berkshire
35. The Marches
36. West of England
37. Worcestershire
38. York & North Yorkshire

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Other Local Support Systems

Local Enterprise Partnerships are specific to England.

In Wales the local support system is “Business Wales”.

While support to Scottish businesses is delivered through Business Gateway and the support for businesses located in Northern Ireland is mainly delivered through Invest NI.

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Eligibility Explained

Legal Entity - NFP

You must be a recognized non-profit such as registered charity, Community Interest Company (CIC), or equivalent. Funders need to ensure compliance, accountability, and that funds support public benefit.

Mission

Your organisation's purpose should align closely with the goals of the funder.

Example: a grant focused on youth mental health should support projects working directly with young people.

Financials

Grant-givers want to see clean, current financial records, budgets, and ideally audited accounts. This shows you can manage funds responsibly and deliver value for money.

Delivery

Your project should demonstrate a considered approach and the readiness to put plans into action. Funders need to trust that the work will be carried out effectively and lead to lasting impact in the community.

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Tips for applying

Timing. Ensure you are applying at an appropriate stage and have a clear opportunity to take advantage of. New funds open all around the year, so make sure to check Swoop's grant finder on a regular basis for new grants you may be eligible for.

Define the opportunity and make sure you are eligible and fit the scope for the specific grant. It is easy to spend time applying for grants which are not suitable for your business.

Have a defined project and outline and highlight the impact it'll have to align with the scope. Make your application worthy of receiving funding by ensuring you have done all the necessary preparation.

Outline the costs involved in the project and ensure you justify why they are needed and how much is needed to cover these costs.

Share your objectives clearly. Make sure you are clear what success looks like as a result of taking on a small business grant. How will you know when you've got there? What economic and social impact will your project have?

Outline a timeline and projections of progress expected to be achieved as these will be monitored closely if you are successful and mentioned within the scope.

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Grant Opportunities Right Now

Climate Action Fund

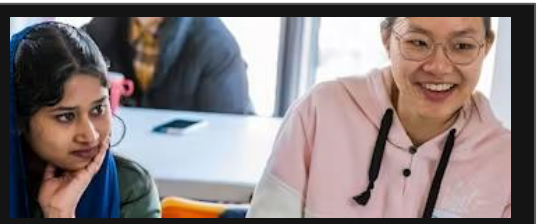
The Climate Action Fund is our commitment to help communities tackle climate change. Projects that use nature to encourage more community-led climate action.

Area: UK-Wide

Funding: £500,000 - 1,5 million

Deadline: 31/05/2025

Funder: The National Lottery Community Fund



Fairer Life Chances

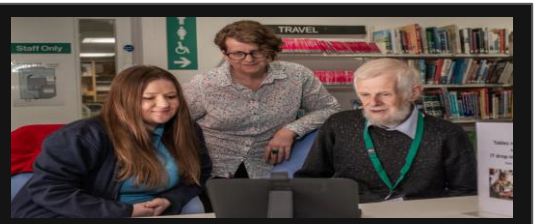
Funding for projects that support children, young people and families. Or that help people to be healthier and have better access to support.

Area: Scotland

Funding: £20,001 to £500,000

Deadline: Ongoing

Funder: The National Lottery Community Fund



Fibrus Community Fund

The Fund is aimed at addressing digital poverty and exists to support the work of communities across Northern Ireland (NI) to provide access to digital technology.

Area: Northern Ireland

Funding: £0 - £2,000

Deadline: 09/05/2025

Funder: The Fibrus Community Fund

Supporting Rural Areas

Funding for organisations working in agriculture, rural development, and insurance across the UK to deliver projects and activities

Area: UK-Wide

Funding: £1,000 - £50,000

Deadline: Ongoing

Funder: NFU Mutual Charitable Trust

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Using Grants to Drive Organisational Growth

When used strategically, funding becomes a tool to advance long-term goals and strengthen your organisation's ability to create lasting impact.

Think about funding that allows you to:

- Launch a new programme aligned with your mission
- Hire for roles that drive long-term impact
- Improve service delivery or expand reach
- Digitally transform systems to reduce admin or increase efficiency

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Swoop's Grant Offering

1. Grant Finder Tool	2. Grant Support Service
This tool shows customers all available grants that may be right for them based on the information provided such as sector, stage, geographical location etc. We then send you directly from our grant finder through to the application page for the relevant grant provider.	For those commercial or 'innovation' grants (typically above £50,000 project) we can match customers to our grant writing partners who can support them with their application as well as the project management should they be successful. These are the diamonds in the rough we are looking for. Need to be creating a new product/service that will have a significant economic and social impact. We **only** match **innovative** projects to our grant writing partners.

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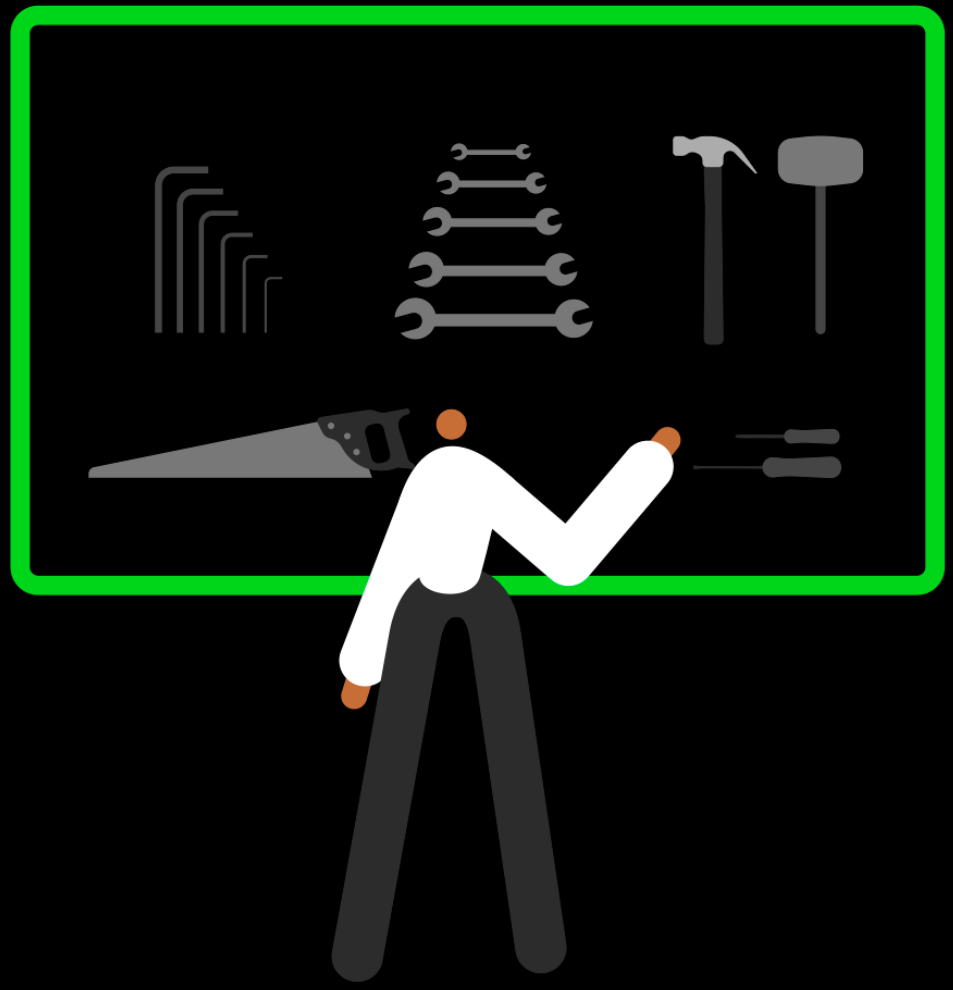
Sage Intacct Examples

Technology that makes it work

Let’s see how Sage Intacct automates the tracking, measuring, and reporting of the metrics that matter.



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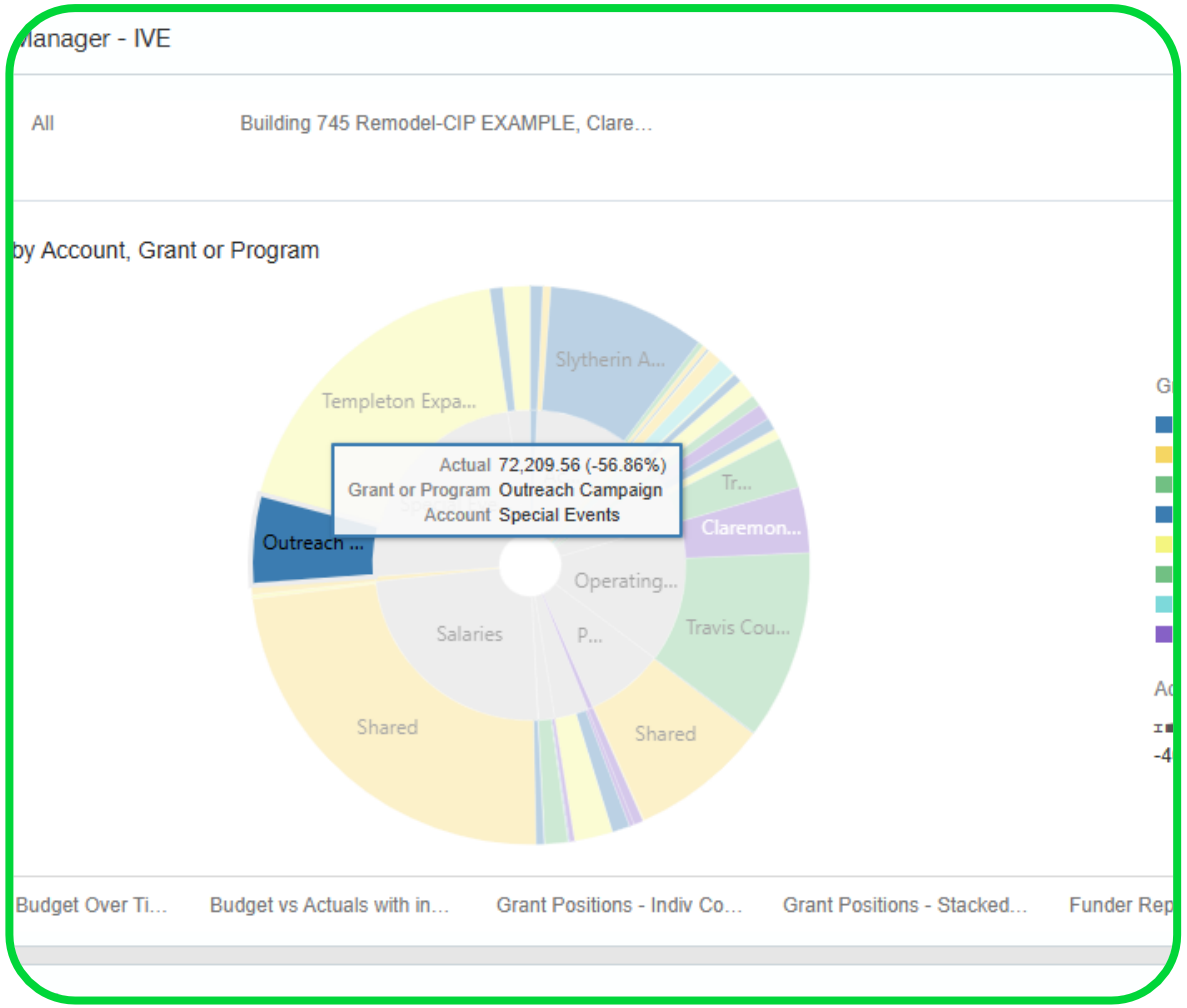
Trusts & Foundations reporting



Graphical overview: All Grant Expenditure

Health Initiative 1 Grant

	Inception To Date 12/31/2021		
	Operating Budget	Actual	Variance
Income & Expenditures			
Operating Income			
Grant Income	1,400,000.00	606,434.00	793,566.00
Service Fees	0.00	810,000.00	(810,000.00)
Total Operating Income	1,400,000.00	1,416,434.00	(16,434.00)
Expenditures			
Professional Fees	0.00	810,000.00	(810,000.00)
Program Expenses	328,991.20	34,484.00	294,507.20
General and Administrative Expenses			
Conferences, Conventions, and Meetings	0.00	25,365.49	(25,365.49)
Office Supplies	39,863.62	145,545.84	(105,682.22)
Other Expenses	0.00	170.00	(170.00)
Travel Expenses			
Travel - Transportation	0.00	76,628.00	(76,628.00)
Travel - Other	0.00	129,232.96	(129,232.96)
Total Travel Expenses	0.00	205,860.96	(205,860.96)
Total General and Administrative Expenses	39,863.62	376,942.29	(337,078.67)
Total Expenditures	368,854.82	1,221,426.29	(852,571.47)
Net Income over Expenditures	**1,031,145.18**	**195,007.71**	**836,137.47**

Detailed Reporting : Actuals vs Budget by Grant

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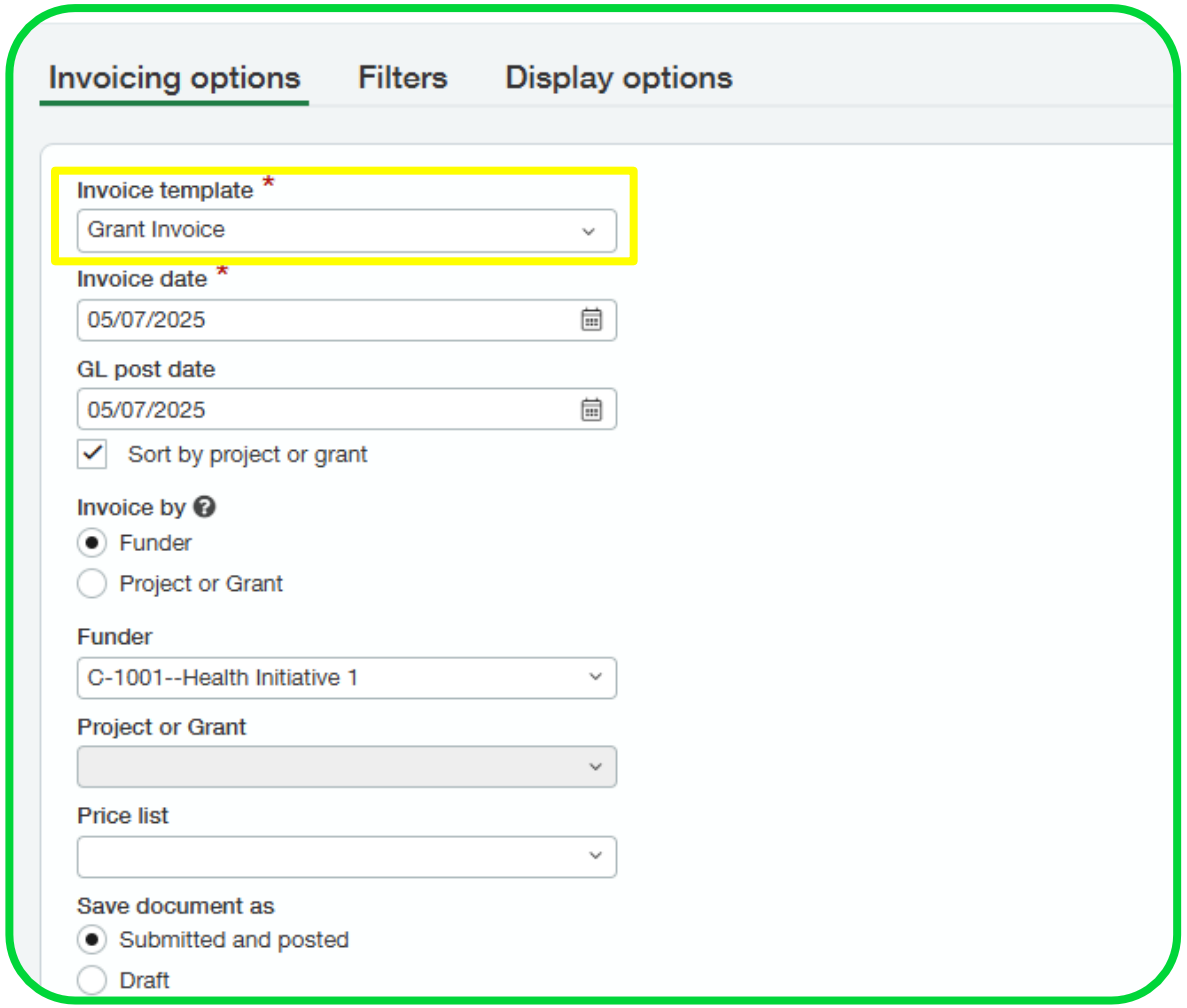
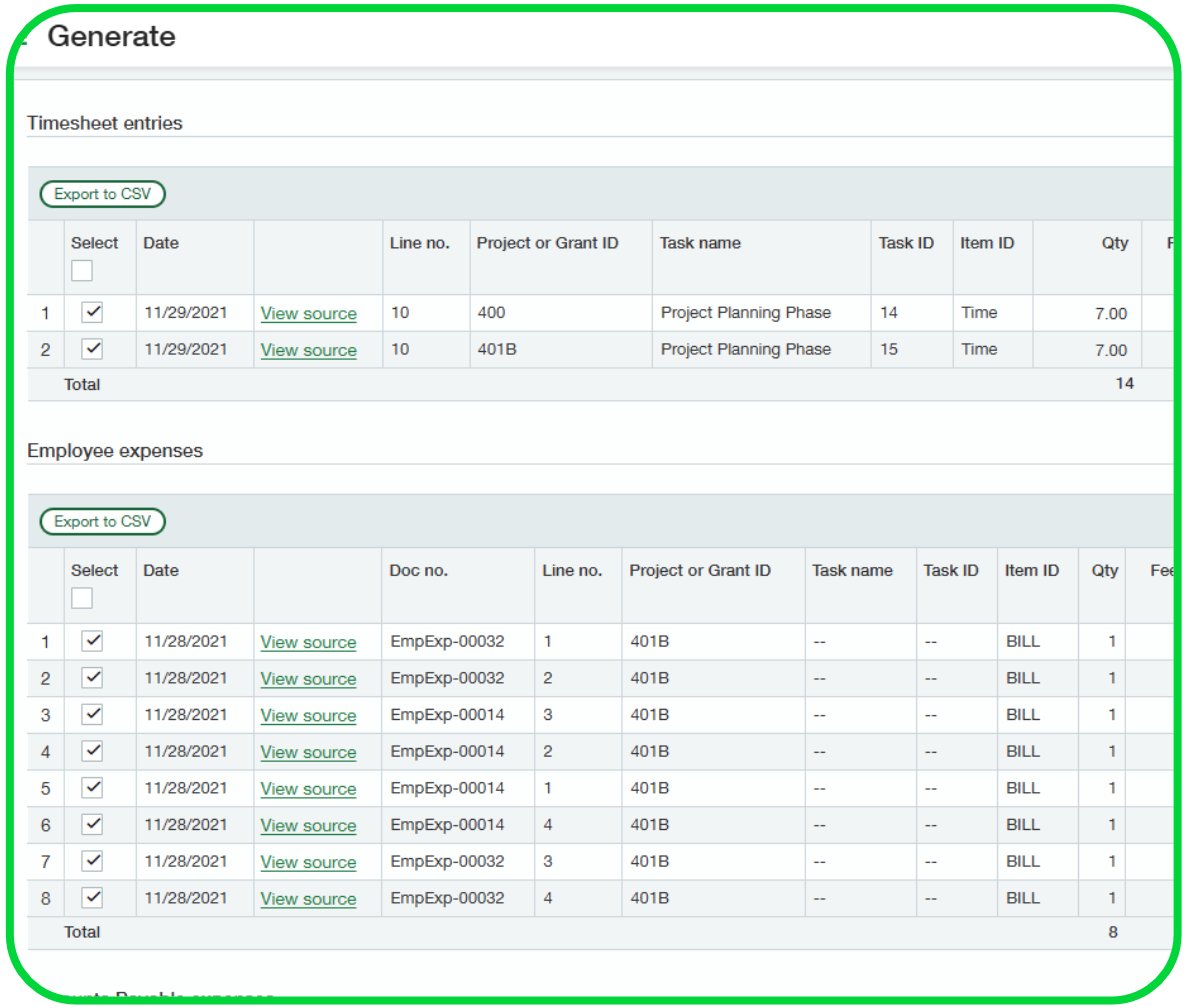
Detailed Grant reporting



Step 1 : Generate Funder Report Criteria



Step 2 : Select Transaction History

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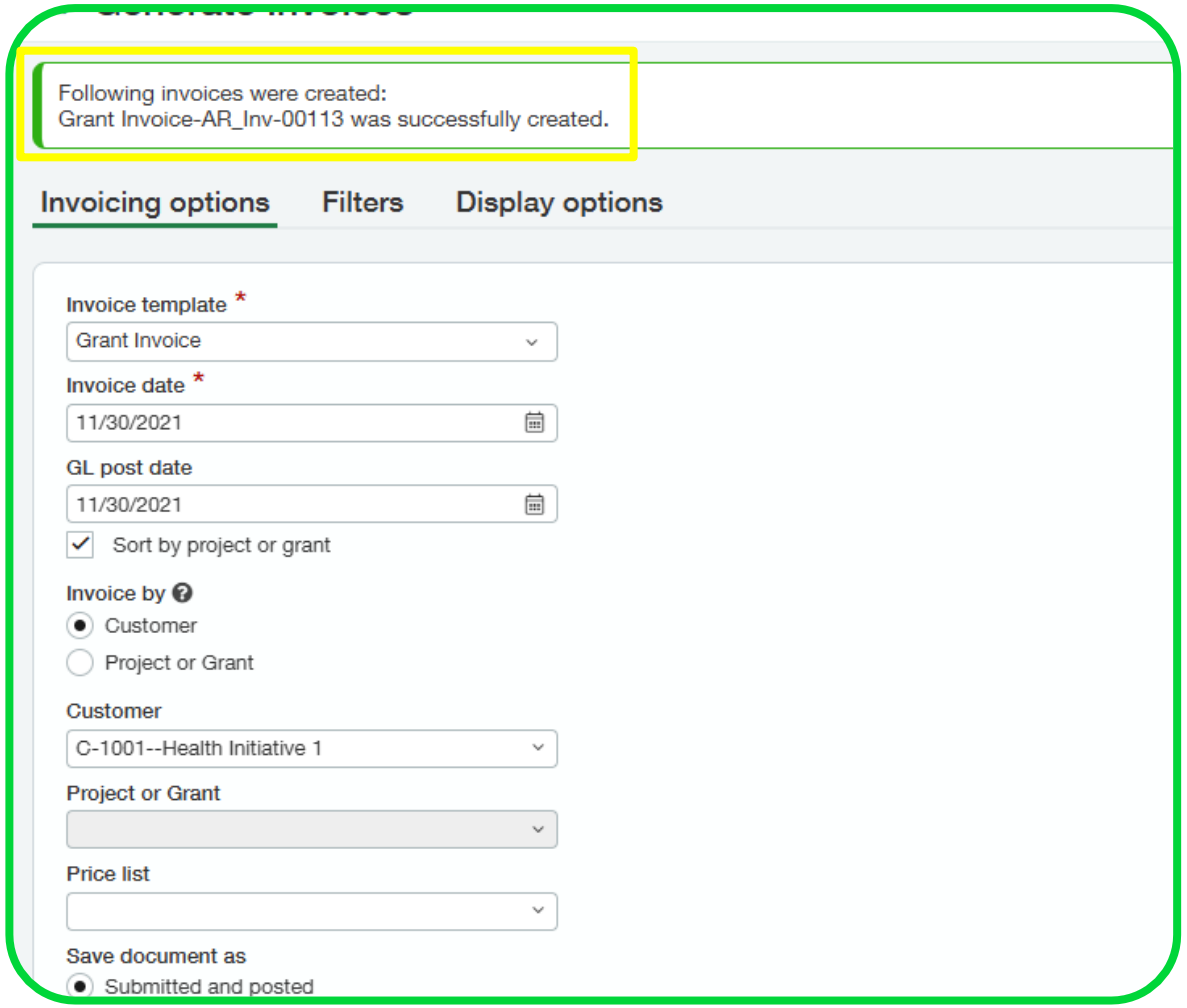
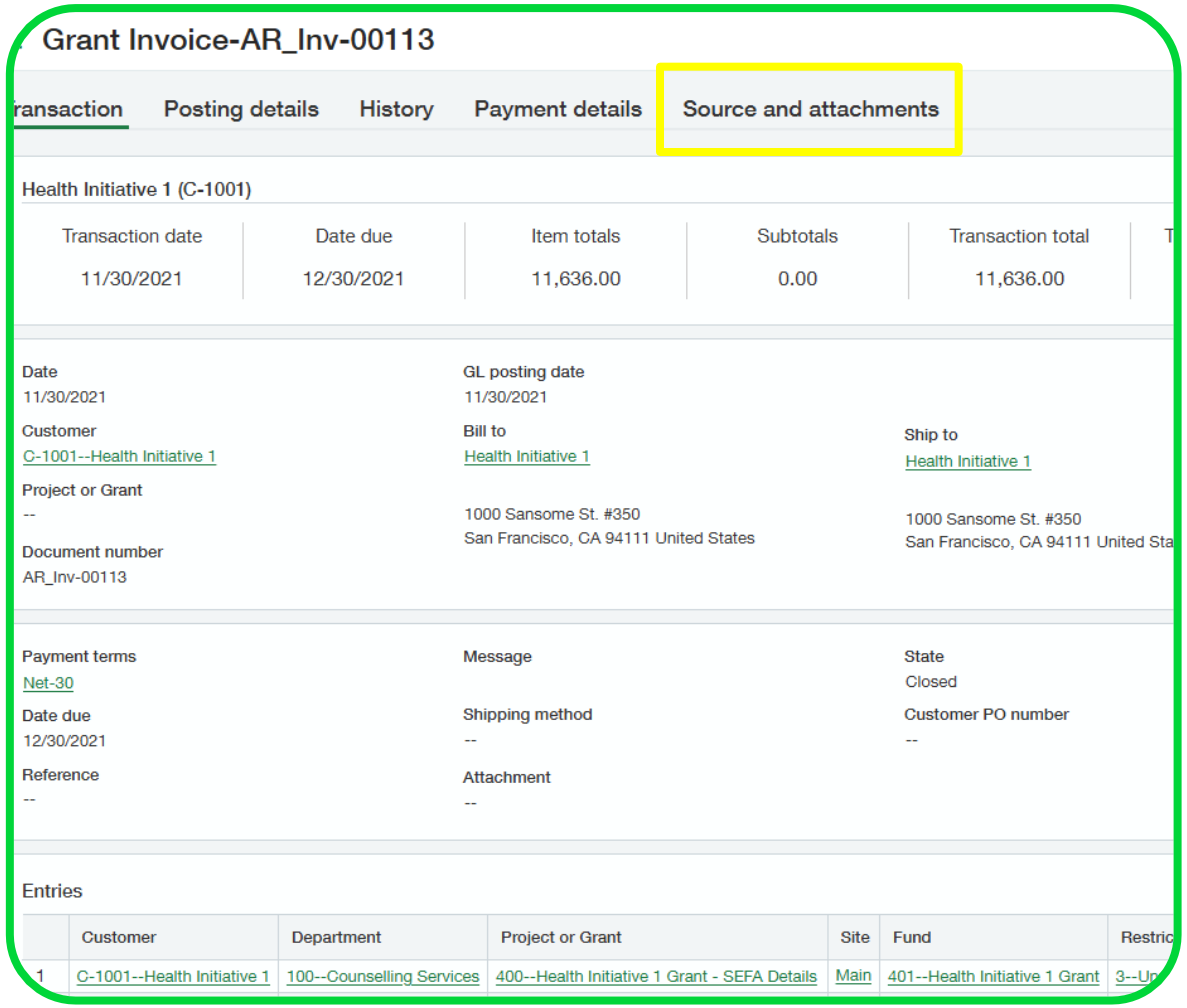
Detailed Grant reporting



Step 3 : Generate Funder Report



Step 4 : Send Funder Report

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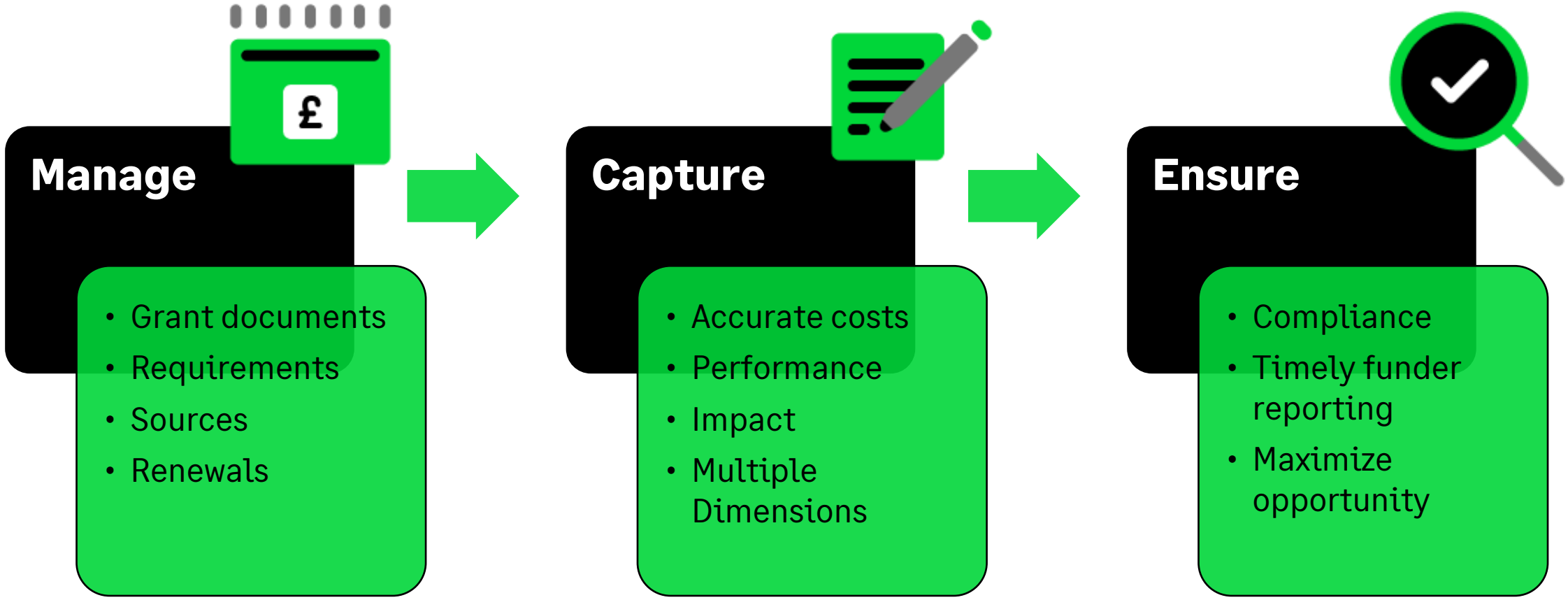
In Summary



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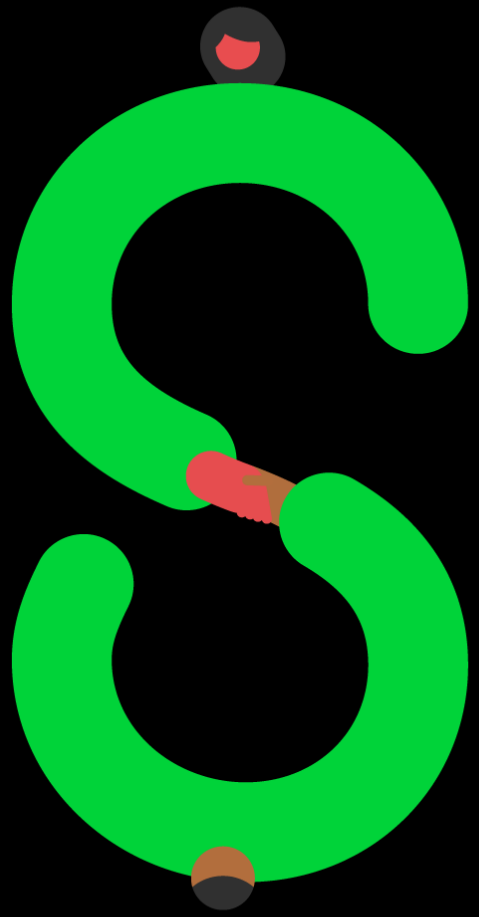

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