

# Cloud-based Grant Management Software



**INVESTORS IN PEOPLE®**  
We invest in people Gold

Gold  
Microsoft Partner





Enabling grant makers to capture, assess and manage grant applications faster and smarter

## Make a faster impact

As a modern funding or grant making organisation, the value that you bring to making the world a better place can never be underestimated. Meanwhile, the size of the workloads and complexities of the processes involved can never be over-estimated.

If the volume of work seems overwhelming, it's understandable. The multiple stages of managing a grant-seeker's application—from checking to approval—can be tedious, repetitive and labour-intensive.

Flexi-Grant software streamlines your processes and, as it does, it accelerates them and eliminates the possibility of human error; meeting more needs, more quickly.

### We're 'people' people

We believe in the power of software to catalyse smarter process, but we believe even more that the power of personal connection with our customers is where the real magic begins:



PROCESS



PEOPLE



TECHNOLOGY



## BEST PRACTICE

HIGH QUALITY APPLICATIONS  
LESS STRESS FOR STAFF | HAPPY REVIEWERS

## BETTER OUTCOMES ALL ROUND

Fluent Technology Ltd are ISO 9001 and ISO 27001 accredited and Cyber Essentials certified.



## How Flexi-Grant makes life easier, and outcomes better

### Lifecycle

The Fluent team will guide you through **the full lifecycle solution that Flexi-Grant** provides, from its deep functionality to its essential features and more advanced capabilities, depending on your requirements.

That's the key: we adapt Flexi-Grant to work the way you work, only better.

We will guide you through those functions that relate directly to the priority areas and target areas of improvement that we identify with you in the initial discovery phase of your project.

### Transparency

When you feel you want to take another step into the functionality that may not have been relevant to you at the outset, but later becomes so, we'll guide you through exactly how to take the next step.

### Embedding best practice in your culture

Being 'modern' in the best way possible—in a digital world, in a high-profile sector, and with every grant application characterised by a pressing need for response—is about employing best practice.



### Flexi-Grant's key features and benefits

Fluent takes care of everything with monthly updates, ensuring that it's always current; always best practice-imbued. Full backups are performed daily.

### A powerful and truly cloud-based platform

Hosted on Microsoft Azure as a fully managed Infrastructure as a Service (IaaS) by Microsoft in London—Flexi-Grant can be accessed anytime, from anywhere. Microsoft Azure provides Flexi-Grant with a 99.95% to 99.995% uptime rate, with availability guaranteed.

### A scalable platform

Flexi-Grant has been built with growth in mind, to accommodate any number of grant schemes and applications.

### A secure home for your data

We subject Flexi-Grant to regular independent third-party penetration testing; it's always secure, always protected.



**Stay organised with automatic notifications that alert you when an application needs action.**

**Allow multiple team members to contribute to your application.**

**Attach documents and create tasks.**

- ✓ **Apply and check:** Build highly useable, modern forms. Collect and ensure eligibility with ease.
- ✓ **Score and review:** Score applications, and make it as easy as possible for your reviewers with our standalone reviewer and committee app.
- ✓ **Award and report:** Deliver your awards via a system that tracks and enables you to report on your awardees' progress.
- ✓ **Smart Email Management**  
**Automatic Notifications**  
**Intuitive Collaboration**

**The streamlined grant management process:**

Defined, aligned, and continuously refined, with Flexi-Grant

- **Financial management:** Flexi-Grant streamlines the capture and management of detailed financial information relating to individual applications easy whilst supporting full traceability and audit of all financial activities. Managing and tracking funds is a core strength of Flexi-Grant.
- **Management reporting:** Every field on every application and monitoring form is available for you to report on alongside all of the key data captured throughout the application and award processes.
- **API's/Integration:** Recognising that information often needs to be shared with other systems, whether it's your finance or CRM systems or your website, Flexi-Grant supports data sharing through its comprehensive API's.
- **Data management – GDPR:** Ensuring data integrity is maintained and compliance standards adhered to should be a given. Beyond this we strive to provide real insights from your data and because Flexi-Grant is cloud-based we can compare scheme performance across clients and sectors providing the benchmarks to allow you to keep on improving.



**Central Dashboard**

Flexi-Grant's central dashboard provides you with quick visual access to how your grants are doing.

**Roles & Responsibilities**

Delegate access to authorised colleagues so you can control who sees what and where.

**Shortlisting Tool**

Our intuitive shortlisting tool lets you shortlist, reserve, move applications on to the next round and roll-back applications.

**Question Bank**

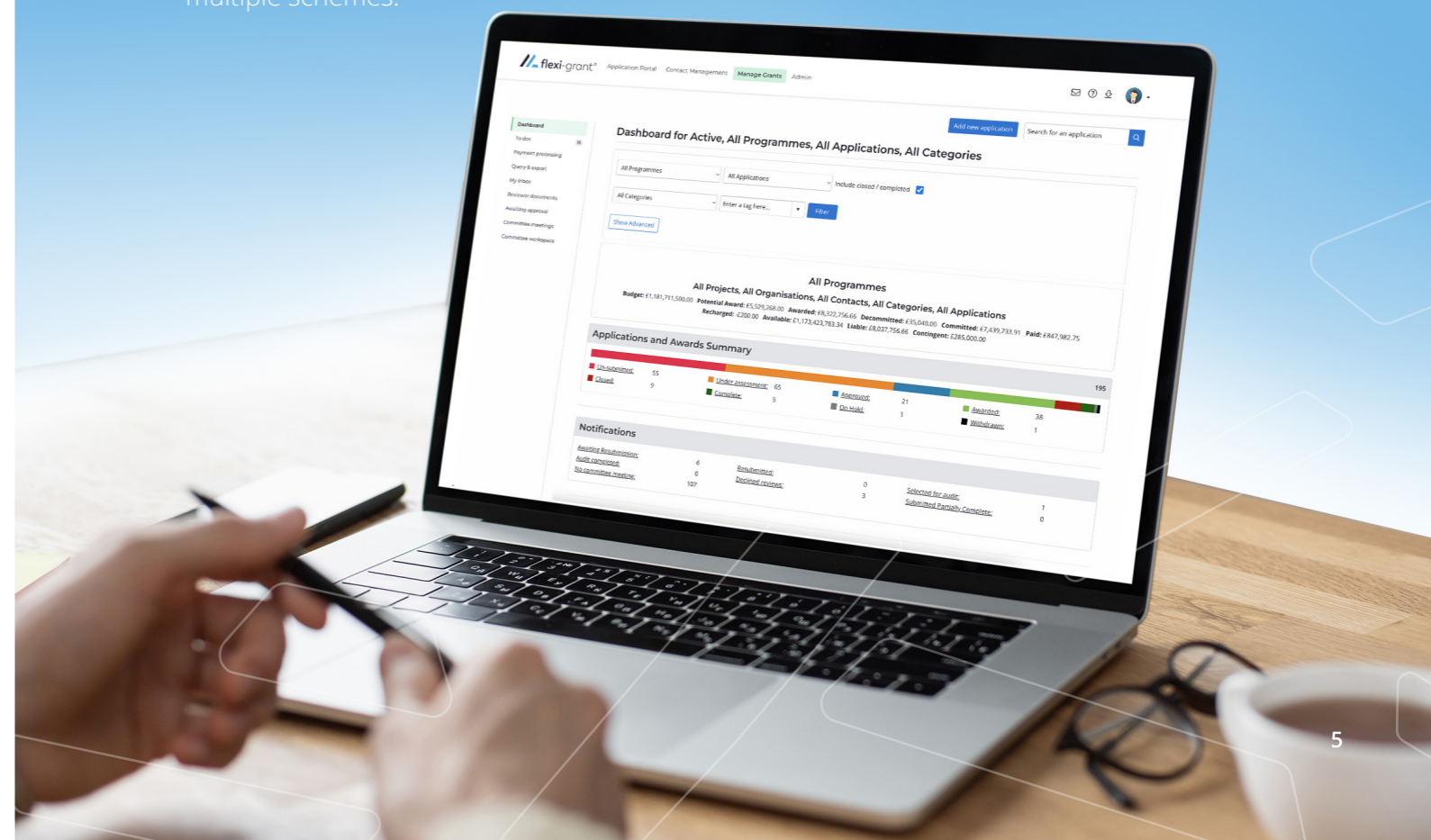
Our built in Question Bank is your very own library of question templates. Don't waste time creating the same question over and over again across multiple schemes.

**Templates**

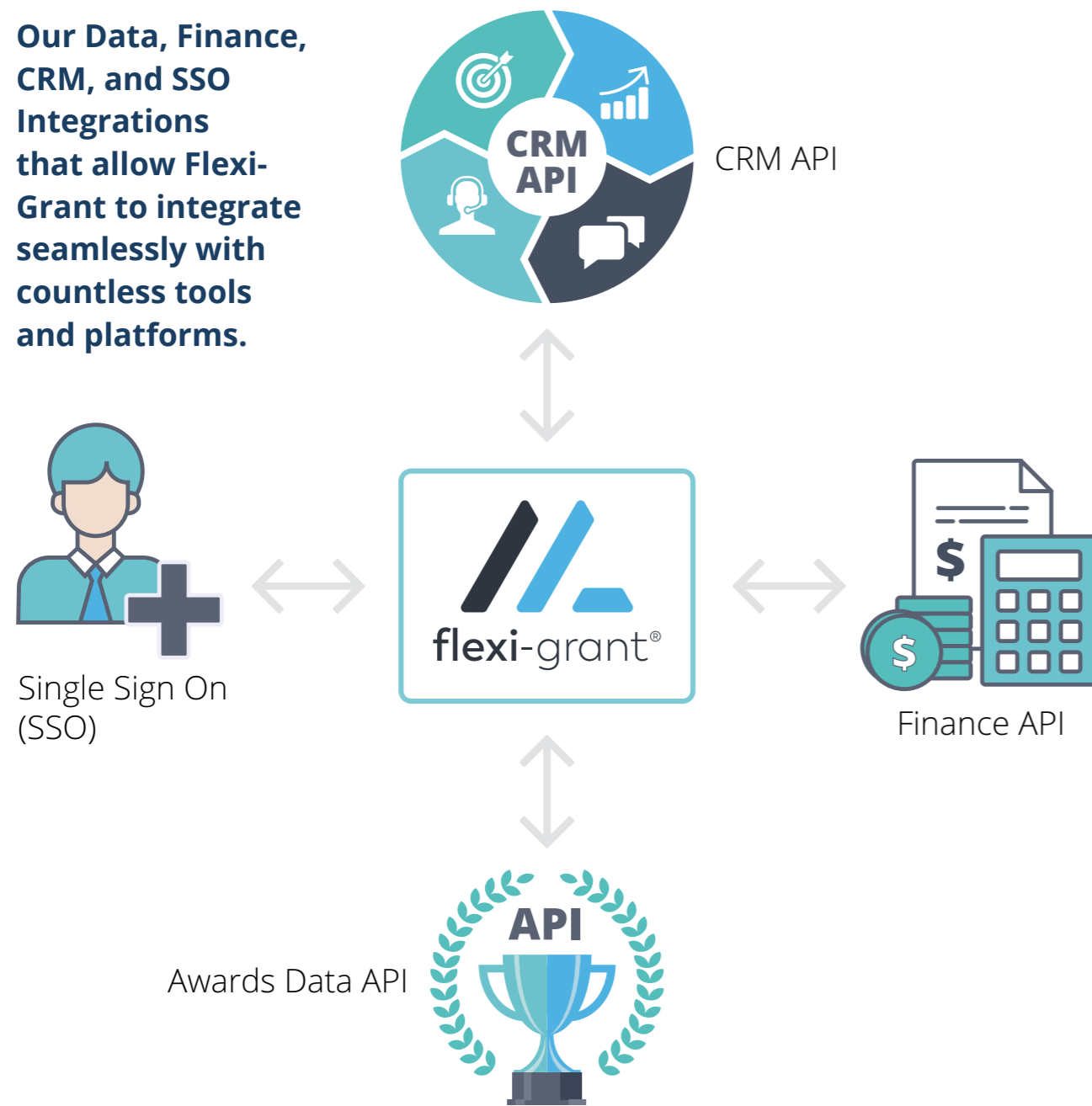
Flexi-Grant comes with all the templates you need but also lets you create your own.

**CRM**

Flexi-Grant's built-in CRM lets you set up to-do's, manage contacts and gives you visibility of past applications.



**Our Data, Finance, CRM, and SSO Integrations that allow Flexi-Grant to integrate seamlessly with countless tools and platforms.**



**Secure Single Sign-on (SSO)**

Flexi-Grant offers three different SSO approaches - Azure Active Directory, B2C, and JWT. So, however you want to authenticate your users, Flexi-Grant can help.

**Finance Integration**

Thanks to our robust integration technology - including our Finance API - Flexi-Grant can connect with any major finance system to process grant payments at scale.

**Specialist Integrations**

Flexi-Grant also has the power to integrate with specialist research-focused tools such as ORCID and Dimensions, to help streamline the process for research grant applicants.

**About Fluent Technology**

When it comes to grant management software, we're proud to say that we give more. Fluent started in 2001, originally developing sophisticated management information systems for local government clients. In 2009 we launched Flexi-Grant and have been dedicated to improving the grant management lifecycle ever since. We've implemented Flexi-Grant in over 80 different grant giving organisations both within the UK and Internationally, working hard with and for people who help people. We're about far more than software. We believe it's a facilitator. We promise to get close to the things that concern you, to understand the problems you want to solve, and ensure that our cloud-based platform addresses every aspect of your processes you want it to; with the reassurance that as you grow, the software will too.

**Expand your vision with us**

Our focus is on helping today's funding or grant making organisations to become 'modern' in the best way possible. Our consultancy approach is to explore with you any concern or aspiration you may have. Many of our team have worked on the frontline of grants management. We can help you explore and exploit areas for process improvement, because the better the process the more you can do for people and society. Every one of us is committed to personal involvement in what we do for our customers. We take pride in the help and consultancy we offer. We do more than just listen; we explore how your processes work and how well they meet the needs of your applicants, your users, and your mission. We're always ready to discuss your challenges and help expand your vision. Talk to us whenever you want to explore a little more, at [info@fluenttechnology.com](mailto:info@fluenttechnology.com).

**We're here to help when needed.**







## Testimonials

### We worked together to improve the way we manage grants

The team engaged with us really well from day one, and this was a key success factor of the project. Our mission was to move into the cloud which for an entire organisation was a big feat; They put us at ease and formed a partnership to ensure we worked together to improve the way we manage grants here at the BHF. Above everything else they're approachable and friendly; It was and is a real pleasure to work with them!



**Erez Cabili**

Head of Project Delivery, British Heart Foundation

Following a successful transition to Flexi-grant, the Royal Society's grants team has continued to grow its utilisation of the system. Through working with the Fluent team on an ongoing basis, we have been able to continually identify and act on opportunities to harness Flexi-Grant's broad functionality and strengthen our business processes in parallel, resulting in improved experiences for both our external stakeholders and staff alike.

THE  
ROYAL  
SOCIETY

**Charlotte England**

Head of Grant Operations, The Royal Society



## Flexi-Grant is more than software

Best practice in grant management defines us as much as we help define it—we work only on grant management, it's all that drives us.

Immersed in the grant management world, we bring value beyond software by partnering with you:

- To extend and enhance the capabilities of your people
- To enable you to embrace transformation,
- To ensure that you meet the expectations of your trustees and applicants... then exceed them.

Trusted by  
leading UK funders



**Flexi-Grant enables you to spend less time spent on the day-to-day administrative tasks of grants management, and more time on enhancing the quality of applicant interactions.**

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