SmartyGrants UK

Implementation Options

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Table of Contents

1 The SmartyGrants implementation approach

SmartyGrants implementation processes are designed to swiftly and painlessly introduce new users to our software.

During your implementation we will guide you through initial setup of your SmartyGrants account and help you become familiar with key features and functionalities. The goal is to ensure you can quickly start using the software effectively.

Implementation services are provided by a SmartyGrants human (no bots!), so you will get very practical, very targeted support every step of the way, whichever implementation option you choose.

We provide three standard implementation offers (as outlined in this document); however, we can tailor implementation to suit each organisation's unique needs and budgets, if that is preferred. We don't ever want you to feel trapped or locked into an option that you select without having the full picture; we are always very happy to rethink the implementation approach mid-stream, if the need arises.

2 Supporting independence through training

In providing implementation services, we aim to take away the pain of transitioning to a new software system; however, we can't take away the need to learn how to use SmartyGrants. Our aim is to support you to attain the skills you need to transition to self-service: managing your own forms, reports and system settings so that you don't have to contact us every time you need to change a word on a form, add a new field to a report, or amend a task (of course, we're here to help when you do need to call on us!).

All implementation options assume users will undertake enough training to allow you to transition to a self-service model over time. Our training is free, unlimited, and available 24/7 through SmartySkills, our online Learning Management System.

a) **SmartyStarter**: introductory course.
b) **SmartyPlus**: intermediate course.
c) **SmartyMaster**: advanced course.

3 Summary of implementation options

Option	Price (ex. VAT)	Style	Inclusions
Starter	£1,800	Supported self-build	• Applicant Portal skinning • Up to 6 hours one-on-one support • Training pathway advice • System set-up guidance • Review self-created forms and reports • Review system set up • Support documentation • Technical support

Enhanced	£9,950	Full build, transitioning to self-service following implementation of first programme	• Applicant Portal skinning
			• Account consultation
			• Training pathway advice
			• Implementation of 1 programme, including:
			    o System set up
			    o Building 6-10 forms
			    o Building 2-4 reports
			    o Workflow configuration
			• Support documentation
			• Technical support

Premium	Price on Application (indicative price approximately £40,000)	Bespoke	SmartyGrants can provide a full suite of services including: • Applicant Portal skinning • Business process mapping • Data structure design • Guidelines development and/or review • System set up • Form building • Report building • Workflow configuration • Training pathway advice • Support documentation • Technical support • Systems integration support

Each option is explored further below.

4 Option 1: Starter Implementation

This option suits uncomplicated grantmakers who have an existing programme (with existing processes, guidelines, forms, etc.), and a desire to "learn by doing". We provide some one-on-one support while you're in your learning phase. This option assumes users will undertake enough training to allow them to build their own forms and reports (with our support) and transition to SmartyGrants' ordinary "business as usual" (BAU) self-service model after implementation.

Includes:

- Skinning – we match your SmartyGrants customer-facing webpage to your website's existing look and feel.

- Supported self-build, including up to six hours of one-on-one support (via Teams) from our specialist team who will:
    - Conduct an account consultation, to understand your existing set-up and business processes
    - Provide advice on an appropriate training path (training is self-paced and online, via our learning management system) – it's important that you undertake some training (minimum 40 minutes) before you start building
    - Advise you on SmartyGrants system set-up (users/permissions, budgets, mailout templates, standard fields, contact fields, and programme and round set-up)
    - Review your self-created forms and reports, and your system set up, and provide feedback for improvements.

- Provision of API guides, Applicant Help documentation and other relevant documentation to inform integrations, applicant support, and support for specialist features.

- Ongoing technical support (via email) for your users, and your assessors and applicants (free technical support continues into BAU).

Cost: £1,800

5 Option 2: Enhanced Implementation

This option suits very time-poor grantmakers who have an existing programme (with existing processes, guidelines, forms, etc.) and need specialist help to implement their programme within SmartyGrants. We'll do the heavy lifting for you. It assumes users will do some work to build their own skills to allow them to transition to SmartyGrants' ordinary "business as usual" (BAU) self-service model after implementation.

Includes:

- Skinning – we match your SmartyGrants customer-facing webpage to your website's existing look and feel.

- Our specialist team will work with you to fully implement 1 programme within your SmartyGrants Instance system. We will:
    o Conduct an account consultation, to understand your set up and business processes – to inform our building and advisory services
    o Provide advice on system set-up (users/permissions, budgets, mailout templates, standard fields, contact fields, and programme and round set-up)
    o Build 6 – 10 forms (application, assessment and acquittal/reporting) to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing)
    o Build 2 – 4 report templates (in Excel or Word) to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing)
    o Configure your workflow (stages and tasks) to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing)
    o Provide advice on an appropriate training path (training is conducted via our LMS) to support you to transition to BAU.

- Provision of API guides, Applicant Help documentation and other relevant documentation to inform integrations, applicant support, and support for specialist features.

- Ongoing technical support (via email) for your users, and your assessors and applicants (free technical support continues into BAU).

Cost: £9,950

This assumes implementation of one programme. Additional programmes will incur an additional fee, likely around £4,850 per programme, depending on size and complexity.

6 Option 3: Premium Implementation

This option suits organisations with several programmes and/or complex programmes, and/or teams that are developing a new programme. You may or may not have existing documentation and forms. We take carriage of your implementation and ensure you have best practice grantmaking principles bedded into your SmartyGrants account from the start, while supporting your team to build their skills so your organisation can administer your own programmes into the future.

Includes:

- Skinning – we match your SmartyGrants customer-facing webpage to your website's existing look and feel.

- Our specialist team will work with you to:
    - Conduct an account consultation, to understand your set up and business processes – to inform our building and advisory services
    - Undertake business process mapping (we will provide you with your map at the end of the engagement)
    - Oversee data structure design to support streamlined, accurate reporting
    - Oversee system set-up (users/permissions, budgets, mailout templates, standard fields, contact fields, and programme and round set-up)
    - Design and build all forms to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing)
    - Design and build all report templates to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing)
    - Configure workflows to reflect your existing or desired processes/business needs (plus reasonable revisions following user testing).
    - Provide advice on an appropriate training path (training is conducted via our LMS) to support you to transition to BAU.

- One-on-one systems integration support to identify required integration points (finance, CRM, etc), and guide you through how your requirements can be satisfied via our out-of-the-box APIs or other built-in features such as automated scheduled extracts.

- Provision of API guides, Applicant Help documentation and other relevant documentation to inform integrations, applicant support, and support for specialist features.

- Ongoing technical support (via email) for your users, and your assessors and applicants (free technical support continues into BAU)

Cost: a bespoke quotation will be provided to you following your initial account consultation. A typical Premium Implementation costs approximately £40,000.

7 Additional services

All services described below are **optional and additional** and should be contemplated on an as-needs basis.

Grantmaking services

- Guidelines review
- Risk management assessment and advice
- Development of a grants data dictionary and advice on data management processes
- SmartyGrants diagnostics: annual health check; record-keeping audit; data clean-up; outcomes-readiness
- System process mapping (workshops, consultation, documentation review and development of a visual process map)
- Advanced reporting (advice and build services for advanced/automated reports)
- Data science services (subject to scope and available human resources)
- Assessment services (pre-vetting/eligibility services >> merit assessment and recommendations)

Cost: For most services we levy an hourly fee (£115-160 per hour, depending on the service required). A quotation can be provided on request.

Outcomes Engine package

The Outcomes Engine is a free SmartyGrants tool that helps funders answer the perennial question, *Did our grants make a difference?*

Self-service Outcomes Engine training options and technical support are provided for free as per our Support and Maintenance Policy. In addition, we offer an optional one-on-one Outcomes Engine support package, delivered by one of our experts. This package includes:

- Advice and support on what to include in your outcomes framework, including best practices from an outcomes measurement specialist.
- Guidance on training and supporting your organisation in adopting an outcomes-focused granting mindset.
- Advice on using/adapting Outcomes Engine Default Standard Sections for collecting applicant outcomes/metrics.
- Assistance with using SmartyGrants report templates to extract outcomes data.

The eight-hour package needs to be booked in two-hour slots via our online booking system and is subject to availability.

Cost: Flat price of £1,000 *(discounted to reflect our commitment to outcomes evaluation)*

Bespoke training

All SmartyGrants subscriptions come with complimentary training and support as per our Support and Maintenance Policy. In addition, we can arrange bespoke training to suit your requirements.

Bespoke training is delivered between 9am and 1pm BST or 9am and 3pm GMT via Teams. There is no cap on the number of training participants.

Our team will consult with you to assess your users' needs and advise you on the appropriate length and content of training.

Cost: Training can be booked in one-hour increments for a fee of £160 per hour. A quotation can be provided on request.

8 Contact us

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