



SmartyGrants UK

Yorkshire Funders – 8th January 2025, 9am

The SmartyGrants UK team



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SmartyGrants

Software, data science & grantmaking intelligence

About SmartyGrants UK

SmartyGrants is an enterprise of Our Community, an Australian social-purpose oriented business that has worked with funders, charities, community groups and other not-for-profit groups since 2000.

Through Our Community's early work with grantees we discovered an undercurrent of frustration with poor grants discovery tools, inadequate application and reporting technology, convoluted processes, and missed opportunities for knowledge exchange. These issues echoed globally.

Grantmakers too were frustrated. In an effort to improve and streamline their processes, many had invested heavily in bespoke grants management systems, off-the-shelf systems or CRM software services designed by people with little on-the-ground experience of grantmaking and no aspirations for doing things differently, and better. Most of these systems quickly became outdated, costly and cumbersome, failing to meet the evolving needs of the specialist grantmaking sector. Governing bodies and auditors frequently reported inefficiencies, weak audit trails, and uncertainty about the impact of grants.

In a bid to alleviate the pain, Our Community formed a dedicated team to research best and emerging practices from around the world, test them with grantmakers and grantees, and build them into a technology solution fit for modern realities. In 2009, SmartyGrants was born.

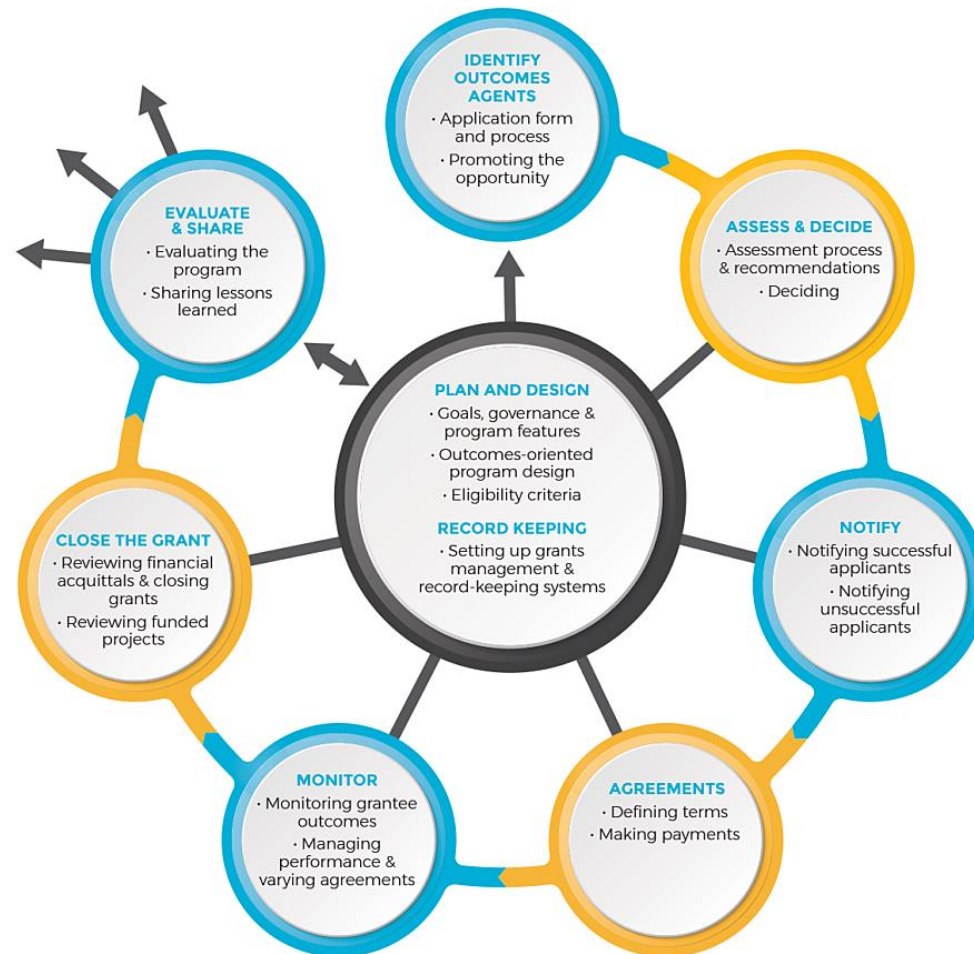


About SmartyGrants UK

- **Established and sustainable:** SmartyGrants was launched in 2009, born out of the need to improve submission and grants management in pursuit of our overriding mission: *“Building stronger communities through stronger community organisations”*.
- **One of the world’s biggest submissions platforms:** More than 750 entities (representing around 70,000 Manage Users and more than 1.3 million applicants) use SmartyGrants to manage 400,000 submissions per year.
- **User-friendly tech:** We boast a near-100% renewal retention rate. We believe it’s because we provide first-class technology coupled with knowledgeable and empathetic support – at a competitive price.
- **More than a tech company:** SmartyGrants has been designed, built and maintained by people who have grants and submissions running through our veins. We know your pain points and we’re here to help.
- **Safe and secure:** SmartyGrants is hosted in the UK and is ISO accredited (ISO/IEC 27001:2022 – the world’s best-known standard for information security management systems).
- **Values-oriented:** SmartyGrants is an enterprise of Our Community, an Australian for-purpose enterprise. It’s part of a suite of tech solutions designed to promote social impact.



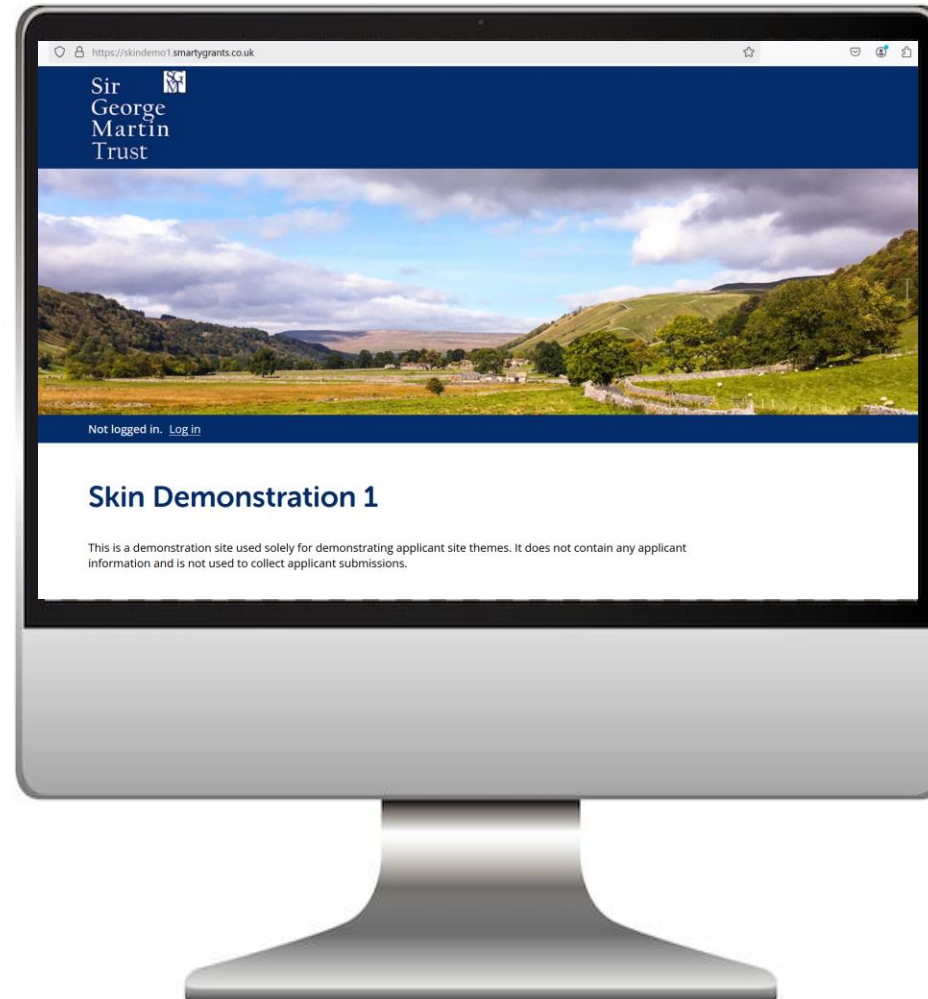
The grantmaking lifecycle



Demonstration



Link to demo shared
with Carla.



System features

NAVIGATION & SETTINGS

General

Launchpad (select account, where multiple accounts are in use)
In-system link to online help documentation
In-system link to online education and training system (LMS)

Create Account

Sign up for trial account

Applicant Portal

Custom website URL (specified during account setup)
Landing page text (editable)

Manage Account

Account settings (view/edit)
Subscription information (edit)
Public Display Name)
Personal viewing preferences (view/edit)
Users (add/view/edit)
Account backups*
SFTP access*
Reply-to email address
API keys*
Restrict file types
File storage and hosting

CONTACTS

Contact Fields

Contact field categories (add/edit/delete)
Custom contact fields (add/edit/delete)
Specify default layout and hint
Link contact fields to choice lists
Download contact fields
Default contact types (view)

Notifications & Emails

Automatic notification emails (some customisable)
Automatic reminder emails
Email contact (manage draft/send/view status)
Application mailout (manage draft/send/view status)
Attach documents, reports & letters to emails and mailouts
View past correspondence (automated file notes)
Send bulk mailouts

Contact Management

Custom contact types (add/edit/delete)
Manage individuals and organisations (add/edit/delete)
Automatically create contacts from form submissions
Tags (add/edit/delete/view tagged contacts)
Flags (add/delete/view flagged contacts)
Find contacts (browse/search/filter)
Check duplicates
Merge contacts (individual duplicate match/bulk)
Grant involvements (view/edit)
File notes (add/edit/delete)
Contact history (view)

PROCESS & WORKFLOW

Stages

- Stages (add/edit/archive/reactivate)
- Set public stage status for applicants (optional)
- View applications by stage
- View tasks by stage

Rules

- Automated workflow rules (add/edit/delete)
- Actions upon task completion

Tasks

Recurring tasks (add/edit/delete)
One-off tasks (add/delete)
View complete/incomplete tasks
Assign tasks to specific users
Task reminder email (view/edit)
Auto-complete task on form submission

Calendar

Configure calendar (rounds/stages/tasks/payments)
View form submissions (daily/weekly)
Configure iCal feed settings

System features

GRANT MANAGEMENT

Programs

- Manage programs (add/edit/view/sort)
- View account summary information
- Specify default numbering schemes
- Specify reply-to email
- View linked applications, rounds, stages, tasks

Rounds

- Public and private rounds (add/edit/publish/archive)
- Test rounds (add/edit/publish/delete)
- Specify application form & initial stage
- Specify round opening & closing dates
- Customise webpage URL
- Specify form preview options
- Set numbering scheme
- Specify reply-to email
- Round webpage message (edit)
- Late submission page (generate link)
- View applications by round

FUNDING ALLOCATIONS & PAYMENTS

Funding Settings

- Financial periods (add/edit/delete)
- Funding sources (add/edit/delete)
- Budgets (add/edit/delete)
- Budget allocations (add/edit/delete)
- Specify identifiers, account codes and notes
- Specify default payment dates
- Program-specific budgets

Application Funding & Payments

- Set default payee for the application
- Funding conditions (add/edit/delete)
- Funding allocations (add/edit/delete)
- Link to financial periods & budgets
- Specify funding & notes
- Payments (schedule/approve/mark paid/edit/delete)
- Payment statuses (individual/bulk)
- Cancelled & returned payments (add/edit/delete)
- Specify payment date & payee

APPLICANT/GRANTEE FEATURES

- Access a list of submissions and associated forms (multi-funder submission list)
- Filter, sort, search forms/submissions
- Preview forms
- Fill out forms (start/save/edit/submit)
- Store and pre-fill contact details
- Download draft & completed submissions (PDF)
- Receive submission confirmation (& copy of submission) via email
- Archive/reactivate draft submissions
- Delete unsubmitted forms

APPLICANT PORTAL

Login

- Register
- Log in/log out
- Reset/change password

Rounds

- Concurrent login warning
- Current rounds (view information & dates)
- Upcoming rounds (view information & dates)

System features

CROSS-AGENCY AGGREGATION TOOLS

Standardised & centrally controlled branding
Standardised & centrally controlled forms, fields, choice lists and workflow
Bespoke pre-publication planning & approvals workflow
Aggregated reporting (Analytics), including by domain/outcome
Customised integrations
Customised change management, training & reporting

OUTCOMES ENGINE

Upload custom outcomes frameworks or use curated framework
Track & report on outcomes and metrics across grant life-cycle

INTEGRATIONS

iCal feed
Document management system (e.g. Objective/Open Text)*
Xero integration*
Secure file transfer*
APIs (payments/contacts/applications/standard fields)*
Single Sign On*

SECURITY

Logins

- Log in/log out
- Reset/change password
- Concurrent login warning
- Login history

User Access

- Manage users (add/edit)
- Manage access types (system, program)
- Manage access levels (per program)
- Customise access permissions
- Access level audit (per user)
- Grant access to contacts
- Grant access to mailouts
- Export user login history
- Remove user

TRAINING & SUPPORT

Training

- SmartySkills: learning management system
- Help Hub & video tutorials
- SmartyTips: guided on-screen tips
- Grantmaker Forum
- Personalised training*

Support

- Applicant site skinning
- Enquiries & feedback
- Troubleshooting
- Technical support
- Managed Services*

FORMS

Build & Manage Forms

- Application forms (add/edit/delete)
- Assessment forms (add/edit/delete)
- Acquittal forms (add/edit/delete)
- Administration forms (add/edit/delete)
- Copy form (sample form/custom form)
- Preview form
- Review & apply changes to responses
- Archive/reactivate form

Form Features

- Pages (add/move/delete)
- Sections (add/move/delete)
- Layouts (multi-column, grid, flowing)
- Repeatable sections (edit number of repeats)
- Grids (edit number of rows for grids)
- Add/remove rows during form fill-out (enable/disable)
- Conditional logic (enable/disable, and/or)
- Hints
- Word counts
- Validation (mandatory fields/numbers/addresses)
- Change question type
- Foreign language translation*

Question Types

- Standard fields (editable/read-only)
- Standard sections/grids (linked sets of standard fields – all editable/new rows editable/read-only) (beta)
- Contact fields (generation of contacts on/off)
- Multiple name layouts (individual, organisation, both)
- Multiple text input layouts (short answer/long answer)
- Address lookups*
- General content
- Number/currency/date
- Single choice/multiple choice/dropdown list
- Budget/income/expenditure
- File upload
- Calculated fields

System features

APPLICATIONS

Application (Project) Management

- Find applications (browse/search/filter)
- Change stage (individual application/bulk)
- Change decision (individual application/bulk)
- Add task (individual application/bulk)
- Add form (individual application/bulk)
- Link contact (individual application/bulk)
- Reopen form (individual application/bulk)
- Change form due date (individual application/bulk)
- Fill out standard field (individual application/bulk)
- Application summary (view/edit)
- Change user
- Application history (view)
- Standard field history (view)

Application Responses

- Request access to unsubmitted response (view)
- Set and modify due date
- Allow late submission
- Create associated task
- Notify applicant
- View submitted response (current/previous versions)
- Download (form PDF/attachments)
- Reopen form

Assessment

- Fill out assessment form (edit/save/submit/delete)
- View application & assessment side-by-side
- View response (current/previous versions)
- Download (form PDF/attachments)
- Reopen form

Decisions

- Specify decision and date
- Internal/external comments (add/edit/delete)
- Decision history (view)
- Create funding allocation
- Record funding payments

Grant Monitoring & Reporting

- Request access to unsubmitted response (view)
- Set and modify due date
- Allow late submission
- Create associated task
- Notify applicant
- View submitted response (current/previous versions)
- Download (form PDF/attachments)
- Reopen form
- Auto reminder for grant reports

Administration

- Fill out administration form (edit/save/submit/delete)
- View application & administration form side-by-side
- View response (current/previous versions)
- Download (form PDF/attachments)
- Reopen form

Files

- Download associated files and attachments

DATA & REPORTING

Standard Fields

(standardised data fields, facilitating cross-program reporting & allowing input data to be fed from form to form)

- Default standard fields
- Standard field categories (add/edit/archive/delete)
- Custom standard fields (add/edit/archive/delete)
- Default standard sections (beta)
- Custom standard sections (beta) Specify default question text, layout & hint
- Link standard fields to choice lists
- Download standard field snapshot

Choice Lists

- Default choice lists (edit/archive)
- Default choices
- Custom choice lists (add/edit/archive/delete)
- Custom choices (add/edit/archive/delete)
- Smart choice lists (multiple layers grouped into categories) (beta)

Search & Filter

- Filters (ad-hoc/save/load)
- Search (all/applications/contacts/rounds/stages)

Reports

- Default templates (download)
- Custom templates (create/view/download/delete)
- Download template (edit/apply formatting offline)
- Upload template
- Report on any form field
- Filter records for reporting
- Multi-program reports (Excel/Word)
- Application reports (Excel/Word)
- Contact reports (Excel/Word)
- Rerun report

Maps*

- Mapped display of applicant addresses
- Heat mapping based on application data (location/decision/funding)
- CSV export

Data Export

- Backups (XML, PDF)
- Round snapshot (Excel)
- Payments snapshot (Excel)
- Standard Field snapshot (Excel)
- Contact Field snapshot (Excel)
- Export contacts (Excel/PDF)
- Export applications (Excel/PDF)
- Export file notes/forms/history (PDF)
- Export attachments
- Filter files and attachments

System features: **Coming Soon**

- **SmartyFile**
 - Applicant facing
 - Store files and data
 - Prefill forms
 - Collaborate on applications
- **Analytics**
 - Explore and visualise your data
 - Export graphs/widgets
- **Data export**
 - 360Giving



Reports

Analytics

My Reports

Templates

Maps



Analytics

Dashboards

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- 📁 Default Dashboards
- 📄 Current Rounds
- 📄 Data Export - Applicatio...
- 📄 Data Export - Location F...
- 📄 Financial Overview
- 📄 Funding by LGA
- 📄 Key Performance Indicat...
- 📁 How-To Dashboards
- 📄 4. Overview - Outcomes (KR)
- 📄 Case Management Overview
- 📄 NSW-SmartyHQ-Data

Current Rounds

PDF



How many applications are rounds receiving?

Filter by 'Round Status After Published' to see only open or closed rounds.

Rounds



4

Submitted Applica



43

Unsubmitted Appli



14

Submission Ra



75.4%

Total Applications 57

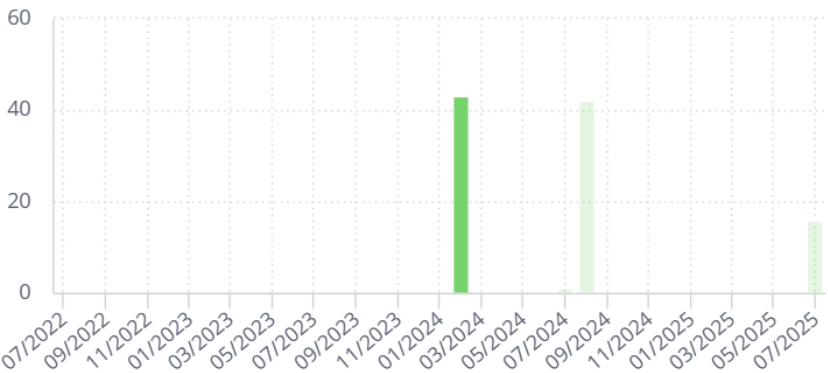
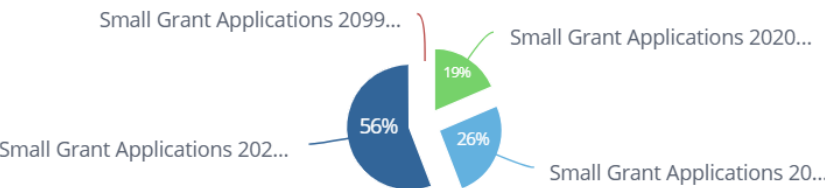
Submitted Applications

Clear Selection



Applications Submitted

Clear Selection



Filters



Program Name

Include all

Round Name

(Demo) R...

N/A

Translatio...

Test N1

Years in Opening Date

This & Last 2 Years

> Current Stage

Include all

> Program Archived Flag

Include all

> Round Archived Flag

Implementation

- Develop a 'Common' visual workflow, including forms, reports, stages and tasks.
- Design and build a suite of template forms to be built based on 'Common' forms, presumed:
 - EOI
 - Application
 - Eligibility Assessment
 - Merit Assessment
 - Final Report
- Design and build a suite of template reports to be built based on 'Common' forms, presumed:
 - 360 Giving input
 - Outcomes tracking
 - Financial tracking
 - Outcome Letters
- Coordinate two updates to content of form and report **templates** (i.e. at 6 month and 12 month mark) based on user feedback.
- Adapt template forms to individual Trust needs (<20% of form to be changed)
- If requested, undertake migration with the following parameters:
 - into a single 'Historical' Program .
 - via a single form with no more than 10 fields.
 - Standard Fields and Contact Fields not included.
 - No testing environment provided.
 - Will allow for searchability of previous records from within the same system.



Training & Support

- **SmartySkills**
 - Free, online LMS
- **Bespoke training**
- **Help Hub**
 - Free, online
 - Text, images & videos
- **Free technical support**
 - For you (email to support team and phone access to customer rep)
 - For your grantees (email only)



Pricing model

- **Tiered pricing**
 - Based on annual disbursement rather than usage numbers/volume
 - Equitable access
 - Scalability
 - Reduces perverse incentives (e.g. sharing passwords, restricting access).
- **Transparency, consistency, predictability**
 - Annual review (no increase or increase in line with CPI)
 - No sudden price hikes
 - Incentives for early adopters/Pathfinders



Annual Subscription

- **Cost effective**
 - Spread cost over time, avoid hefty upfront investment
- **Automatic Updates**
 - Latest features without additional costs
- **Outsourced data management**
 - We manage data security, feature enhancements, compliance with government rules & best practice, you focus on supporting your stakeholders
- **Self-service flexibility**
 - Self-service tweaks, no costly consultants, no need to learn code





Options for Yorkshire Funder Members

Offer for Yorkshire Funders



12 months subscription
(fixed for 3 years)



IMPLEMENTATION:

Option 1: Use of standard forms and workflow - flat fee of £1,000

Option 2: Bespoke implementation - flat fee of £9,950



Training video on how to use the common form and report templates and workflow



Optional add-ons



Sign up by the 30th June 2025 and receive a 50% discount on the total package. Sign up by 31st December 2025 and receive a 30% discount on the total package.



If 3 or more Yorkshire Funders members sign up before 31 March 2025, they will also receive 16 hours' of free group training (4 x 4 hrs), delivered via Teams by a SmartyGrants expert.



SmartyGrants
Software, data science & grantmaking intelligence

Example of year-on-year cost savings for Option 1 (standard forms & workflow) :

Members Offer for Subscription and Implementation

OPTION 1 (£1,000 adaptation of template forms)																	
	RATE CARD COSTS		YEAR 1			YEAR 2			YEAR 3			TOTAL COST / SAVINGS FOR 3 YEARS					
Annual disbursement	Annual Fee	Implementation (year one only)	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	Saving	30% Discount	Saving	
Less than £100,000	4,000	1,000	5,000	2,500	3,500	4,000	2,000	2,800	4,000	2,000	2,800	13,000	6,500	6,500	9,100	3,900	
£100,001 – £500,000	8,000	1,000	9,000	4,500	6,300	8,000	4,000	5,600	8,000	4,000	5,600	25,000	12,500	12,500	17,500	7,500	
£500,0001 – £1 million	10,000	1,000	11,000	5,500	7,700	10,000	5,000	7,000	10,000	5,000	7,000	31,000	15,500	15,500	21,700	9,300	
£1 million – £3 million	11,500	1,000	12,500	6,250	8,750	11,500	5,750	8,050	11,500	5,750	8,050	35,500	17,750	17,750	24,850	10,650	
£3 million – £5 million	13,000	1,000	14,000	7,000	9,800	13,000	6,500	9,100	13,000	6,500	9,100	40,000	20,000	20,000	28,000	12,000	
£5 million – £7 million	14,500	1,000	15,500	7,750	10,850	14,500	7,250	10,150	14,500	7,250	10,150	44,500	22,250	22,250	31,150	13,350	
£7 million – £9 million	16,000	1,000	17,000	8,500	11,900	16,000	8,000	11,200	16,000	8,000	11,200	49,000	24,500	24,500	34,300	14,700	
£9 million – £11 million	17,500	1,000	18,500	9,250	12,950	17,500	8,750	12,250	17,500	8,750	12,250	53,500	26,750	26,750	37,450	16,050	
£11 million – £15 million	20,000	1,000	21,000	10,500	14,700	20,000	10,000	14,000	20,000	10,000	14,000	61,000	30,500	30,500	42,700	18,300	
£15 million – £20 million	23,000	1,000	24,000	12,000	16,800	23,000	11,500	16,100	23,000	11,500	16,100	70,000	35,000	35,000	49,000	21,000	
£20 million +	POA?																

Option 1 Continued:

Members Offer for Subscription, Implementation *and Analytics*

OPTION 1 (£1,000 adaptation of template forms)																		
RATE CARD COSTS				YEAR 1			YEAR 2			YEAR 3			TOTAL COST / SAVINGS FOR 3 YEARS					
Annual disbursement	Annual Fee	Implementation Analytics	(year one only)	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	Saving	30% Discount	Saving	
	Less than £100,000	4,000	1,250	1,000	6,250	3,125	4,375	5,250	2,625	3,675	5,250	2,625	3,675	16,750	8,375	8,375	11,725	5,025
	£100,001 – £500,000	8,000	1,500	1,000	10,500	5,250	7,350	9,500	4,750	6,650	9,500	4,750	6,650	29,500	14,750	14,750	20,650	8,850
	£500,0001 – £1 million	10,000	1,500	1,000	12,500	6,250	8,750	11,500	5,750	8,050	11,500	5,750	8,050	35,500	17,750	17,750	24,850	10,650
	£1 million – £3 million	11,500	1,725	1,000	14,225	7,113	9,958	13,225	6,613	9,258	13,225	6,613	9,258	40,675	20,338	20,338	28,473	12,203
	£3 million – £5 million	13,000	1,950	1,000	15,950	7,975	11,165	14,950	7,475	10,465	14,950	7,475	10,465	45,850	22,925	22,925	32,095	13,755
	£5 million – £7 million	14,500	2,175	1,000	17,675	8,838	12,373	16,675	8,338	11,673	16,675	8,338	11,673	51,025	25,513	25,513	35,718	15,308
	£7 million – £9 million	16,000	2,400	1,000	19,400	9,700	13,580	18,400	9,200	12,880	18,400	9,200	12,880	56,200	28,100	28,100	39,340	16,860
	£9 million – £11 million	17,500	2,625	1,000	21,125	10,563	14,788	20,125	10,063	14,088	20,125	10,063	14,088	61,375	30,688	30,688	42,963	18,413
	£11 million – £15 million	20,000	3,000	1,000	24,000	12,000	16,800	23,000	11,500	16,100	23,000	11,500	16,100	70,000	35,000	35,000	49,000	21,000
£15 million – £20 million	23,000	3,450	1,000	27,450	13,725	19,215	26,450	13,225	18,515	26,450	13,225	18,515	80,350	40,175	40,175	56,245	24,105	
£20 million +	POA?																	

Example of year-on-year cost savings for Option 2 (bespoke implementation):

Members Offer for Subscription and Implementation

OPTION 2 (bespoke implementation)																
Annual disbursement	RATE CARD COSTS		YEAR 1			YEAR 2			YEAR 3			TOTAL COST / SAVINGS FOR 3 YEARS				
	Annual Fee	Implementation (year one only)*	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	Total Cost 50% Discount	Saving	Total Cost 30% Discount	Saving
Less than £100,000	4,000	5,000	9,000	4,500	6,300	4,000	2,000	2,800	4,000	2,000	2,800	17,000	8,500	8,500	11,900	5,100
£100,001 – £500,000	8,000	5,000	13,000	6,500	9,100	8,000	4,000	5,600	8,000	4,000	5,600	29,000	14,500	14,500	20,300	8,700
£500,0001 – £1 million	10,000	5,000	15,000	7,500	10,500	10,000	5,000	7,000	10,000	5,000	7,000	35,000	17,500	17,500	24,500	10,500
£1 million – £3 million	11,500	5,000	16,500	8,250	11,550	11,500	5,750	8,050	11,500	5,750	8,050	39,500	19,750	19,750	27,650	11,850
£3 million – £5 million	13,000	5,000	18,000	9,000	12,600	13,000	6,500	9,100	13,000	6,500	9,100	44,000	22,000	22,000	30,800	13,200
£5 million – £7 million	14,500	5,000	19,500	9,750	13,650	14,500	7,250	10,150	14,500	7,250	10,150	48,500	24,250	24,250	33,950	14,550
£7 million – £9 million	16,000	5,000	21,000	10,500	14,700	16,000	8,000	11,200	16,000	8,000	11,200	53,000	26,500	26,500	37,100	15,900
£9 million – £11 million	17,500	5,000	22,500	11,250	15,750	17,500	8,750	12,250	17,500	8,750	12,250	57,500	28,750	28,750	40,250	17,250
£11 million – £15 million	20,000	5,000	25,000	12,500	17,500	20,000	10,000	14,000	20,000	10,000	14,000	65,000	32,500	32,500	45,500	19,500
£15 million – £20 million	23,000	5,000	28,000	14,000	19,600	23,000	11,500	16,100	23,000	11,500	16,100	74,000	37,000	37,000	51,800	22,200
£20 million +	POA?															

*Normally £9,950, however we have added a Pathfinder reduction to this cost.

Option 2 Continued:

Members Offer for Subscription, Implementation *and Analytics*

OPTION 2 (bespoke implementation)				RATE CARD COSTS			YEAR 1			YEAR 2			YEAR 3			TOTAL COST / SAVINGS FOR 3 YEARS				
				Annual Fee	Implementation Analytics (year one only) *		Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	50% Discount	30% Discount	Total rate card fee	Total Cost 50% Discount	Saving	Total Cost 30% Discount	Saving
Annual disbursement																				
Less than £100,000				4,000	1,250	5,000	10,250	5,125	7,175	5,250	2,625	3,675	5,250	2,625	3,675	20,750	10,375	10,375	14,525	6,225
£100,001 – £500,000				8,000	1,500	5,000	14,500	7,250	10,150	9,500	4,750	6,650	9,500	4,750	6,650	33,500	16,750	16,750	23,450	10,050
£500,0001 – £1 million				10,000	1,500	5,000	16,500	8,250	11,550	11,500	5,750	8,050	11,500	5,750	8,050	39,500	19,750	19,750	27,650	11,850
£1 million – £3 million				11,500	1,725	5,000	18,225	9,113	12,758	13,225	6,613	9,258	13,225	6,613	9,258	44,675	22,338	22,338	31,273	13,403
£3 million – £5 million				13,000	1,950	5,000	19,950	9,975	13,965	14,950	7,475	10,465	14,950	7,475	10,465	49,850	24,925	24,925	34,895	14,955
£5 million – £7 million				14,500	2,175	5,000	21,675	10,838	15,173	16,675	8,338	11,673	16,675	8,338	11,673	55,025	27,513	27,513	38,518	16,508
£7 million – £9 million				16,000	2,400	5,000	23,400	11,700	16,380	18,400	9,200	12,880	18,400	9,200	12,880	60,200	30,100	30,100	42,140	18,060
£9 million – £11 million				17,500	2,625	5,000	25,125	12,563	17,588	20,125	10,063	14,088	20,125	10,063	14,088	65,375	32,688	32,688	45,763	19,613
£11 million – £15 million				20,000	3,000	5,000	28,000	14,000	19,600	23,000	11,500	16,100	23,000	11,500	16,100	74,000	37,000	37,000	51,800	22,200
£15 million – £20 million				23,000	3,450	5,000	31,450	15,725	22,015	26,450	13,225	18,515	26,450	13,225	18,515	84,350	42,175	42,175	59,045	25,305
£20 million +				POA?																

*Normally £9,950, however we have added a Pathfinder reduction to this cost.



Add-on services (optional features)

RE-SKINNING/RE-BRANDING: Change of branding? We can reskin your client-facing SmartyGrants webpage to match your new look and feel.	£115 per hour
BACKUP AND SECURE FTP: Weekly backup of all data and files related to your account, comprising of three files and access to backup files via SFTP (Secure File Transfer Protocol).	£275 per annum
XERO INTEGRATION: Connect to your online accounting software.	£275 per annum
APIs: Integrate SmartyGrants with other business applications (e.g. CRM/FINANCE/EDRMS)	£1,150 per annum
METADATA FILE EXPORT: Ability to export data from SmartyGrants and import into your chosen Electronic Document and Records Management System.	£300 for default configuration+ £115 per hour for configuration customisation
SINGLE SIGN ON (SSO): Allows a session and user authentication service that permits a user to use one set of login credentials (e.g. name and password) to access multiple applications.	£1,150 one off set-up fee + £275 per annum

Add-on services (continued)

TRANSLATIONS: Ability for applicants to apply in a foreign language (12 additional languages supported).

£850 per annum

COPY PROGRAM: Copy one or multiple SmartyGrants programs from one SmartyGrants instance to another.

£850 per program

LOCK INSTANCE: Put an entire instance "on ice" - deactivate all system-wide settings but preserve data for reference/audit purposes.

£1,150 per annum

VARIATIONS TO STANDARD AGREEMENT/ CONTRACT: Our contract has been road-tested on hundreds of clients (it's had many, many lawyers' eyes cast over it). If you do feel you need to alter the standard contract, we will need to recoup our legal costs.

£1,450 flat fee

ODATA: (Open Data Protocol) Load data from your SmartyGrants account directly into data visualisation software (e.g. Power BI/Tableau. (Coming soon)

£3,000 per annum

ANALYTICS: Visualise, interactively explore and present your data effectively. (Coming soon)

POA (sliding scale based on annual disbursement, noted in example of cost page)

CUSTOM DOMAIN: Personalised Applicant Site web address (Coming soon)

£1,000 per annum

SANDBOX INSTANCE: A sandbox environment can be provided for customers who require a test environment (usually associated with testing of bespoke development).

£1,500 per annum

Add-on services (continued)

FORM BUILDING: Our form builders are expert system users and experts in grantmaking. You define the fields, we build the form, you test, happy days.

£160 per hour

REPORT BUILDING: Our report builders are expert data wranglers. If report building is giving you indigestion, hand it over to us.

£160 per hour

SPECIALIST SUPPORT: We can provide a range of grantmaking support services, from review of guidelines or forms to process mapping to full-suite grants management.

£115- £160 per hour



SmartyGrants

Software, data science & grantmaking intelligence

SmartyGrants UK

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