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SmartyGrants:

The smart solution for time-poor grantmakers



SmartyGrants is a user-friendly, cloud-based grants administration solution that is powerful and flexible enough to meet the needs of every type of grantmaker, every size of grantmaker, and grantmakers operating in any part of the world.

SmartyGrants
Software, data science & grantmaking intelligence

About **SmartyGrants**

SmartyGrants is a cloud-based grants administration software solution that's used by more than 880 grantmakers to manage the allocation of grants across 55 countries.

SmartyGrants is a complete grantmaking solution, incorporating a simple yet powerful form builder, an assessments module, a contacts management module, a mailouts module, a sophisticated system of user access privileges, a flexible reporting tool, an Analytics feature, and a branded applicant portal. New features are developed constantly in response to user feedback and released regularly.

SmartyGrants helps streamline the administration of funding into the community - but it's more than a grants management solution. By helping funders gain insights into the outcomes of their grants, SmartyGrants works as an engine room for social, cultural, economic and environmental change.

Discover why 880+ government and philanthropic funders use SmartyGrants to administer their grants.

Try SmartyGrants for free

Set up a free trial (it takes less than a minute) and start exploring. Your trial account can be converted to a live site if you later decide to sign up.

Build your forms

Use our templates or create your own application, assessment, administration and reporting forms. Our form building tool is easy to use - no tech support required.

Open your programme

Publish your programme on your customised, branded applicant portal and start receiving applications right away. Get notified as applications are submitted.

Award your grants

Invite internal/external assessors to view and score/assess specified applications. Record decisions, notify applicants and track funding budgets. Save time with reporting tools and workflow automations.

Monitor and track

Manage contracts (including variations), monitor funded activities, and collect, aggregate and report on outputs and outcomes.



Get started today at www.smartygrants.co.uk

Why **SmartyGrants?**

It’s industry leading

- Used by more than 880 funders in 55 countries
- Handles around 400,000 form submissions per annum
- Meets all grantmaker software industry benchmarks
- Built on a backbone of knowledge and experience of current and emerging best practices in grants administration
- Industry-leading outcomes tracking

It’s easy to use

- Intuitive design
- Cloud-based (no need for internal IT support)
- Practical on-demand (self-serve) online training and support provided at no extra cost

It’s built for the real world

- Designed, built and maintained by people who know grants (and technology)
- New functionality developed in consultation with grantmakers and grantees
- Provides practical end-to-end solutions for real-life grantmaking problems

It pays for itself

- Dramatically cut down on administration and other manual processes
  - **SmartyGrants saved one funder a total of 200 weeks in staff time per annum across three grants programs**
  - **One funder noted that the number of call centre inquiries dropped by 70% after they adopted SmartyGrants, with email inquiries falling 77%**
- Access to the latest technology and constant improvements without having to tie up IT teams or employ or contract developers
- Generous inclusions - no limits to the number of users, the number of forms or the amount of file storage. Free training and support. No sudden ramp-ups.

It's flexible

- Establish your own data dictionary using standard sections, questions and lists
- Configurable to your business processes and outcomes frameworks
- "Skinning" provided to align your applicant portal to your website's branding
- Implementation services available for customers with complex needs
- Annual subscription and portable data - no lock-ins

It's safe and secure

- Modern cloud-based architecture hosted in secure Amazon Web Services Virtual Private Cloud (London Region)
- ISO accredited (ISO/IEC 27001:2022 - the world's best-known standard for information security management systems)
- Cyber Essentials Plus certified

It's ethical and sustainable

- Backed by Our Community, one of Australia's oldest and most successful for-purpose enterprises (distributed in the UK and Ireland by Our Community's UK-based subsidiary, Our Community International)
- Overseen by a social value-oriented team of professionals from diverse backgrounds and experiences
- Part of an integrated suite of for-purpose tech solutions

SmartyGrants 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

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

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

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)

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

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

Contract variations
- Manage variation requests for agreements
- Allow self-serve request for variation for applicants
- Record decisions for each request

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

*May incur an additional fee

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 & REPORTS

Standard Fields
(Facilitates cross-program reporting & allowing input data to be piped between forms)
- 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

Analytics/Maps*
- Dynamic dashboards
- Pre-built, customisable templates
- Easy filtering and drill-downs – focus on specific programmes, funding rounds or applicant groups
- Export and share reports – download reports in PDF, CSV or image formats
- Maps – visualise your grants within geographic boundaries, generate aggregated funding and application stat insights by locations
- 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

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)

OUTCOMES ENGINE

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

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*

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

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*
- OData API*

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