Grantmakers:
SUPERCHARGE YOUR GRANTMAKING WITH
SmartyGrants

SmartyGrants
Software, data science & grantmaking intelligence

An enterprise of:
ourcommunity.com.au
Where not-for-profits go for help

Contents

Receive, assess, award, manage, evaluate

A system designed by grantmakers for grantmakers

"As a first-time user I have found SmartyGrants very easy to use, intuitive and straight forward."

Simple to use and configure

Send your program live within just one week

Australia and New Zealand's most-loved software

"I want to marry SmartyGrants. I want to be Mrs SmartyGrants."

User-centric training, support & development

"The level of support we get from Service@Smartygrants is great. We have an open plan office and every time my guys get off the phone to your guys, they are smiling and know what they are doing."

SmartyGrants is Australia and New Zealand's most-loved, most-used online grants administration system.

SmartyGrants combines simplicity, flexibility and responsiveness with flexible reporting and powerful visualisations to allow you to do less paper-shuffling and more change-making. SmartyGrants is trusted by more than 570 leading federal, state and local government grantmakers. It supported the NSW Government in establishing a foundational whole-of-government grants management platform, and a wide range of industry-leading philanthropic and corporate funders have embraced it too.

Join the grantmaking revolution with SmartyGrants.

What is SmartyGrants?

SmartyGrants is a cloud-based grants administration software and data science 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 is licensed under a transparent annual subscription fee based on the grantmaker's annual disbursement[1].

It's used by hundreds of grantmakers to manage the allocation of more than $7 billion in grants each year to tens of thousands of applicants in 32 countries.

SmartyGrants is an initiative of the award-winning 'business for purpose' enterprise Our Community, an Australian company that provides advice, connections, training and technology tools for people and organisations working to create positive change and build stronger communities. We were one of the first companies in Australia to legally mandate our social mission by enshrining our values in our constitution.

SmartyGrants helps to reform and streamline the flow of grants from government, business and philanthropy into the wider community.

But it's more than a grants administration system; it's also a tool for understanding and improving grantmaking through data science, peer learning, grantmaking education and in-built tools. SmartyGrants users gain access to a huge range of grantmaking tips and templates, as well as strong, authentic connections with grantseeking and grantmaking communities, and the very latest in grants research, data analysis and visualisation tools.

Ultimately, SmartyGrants aims to do a lot more than manage workflows and money. By helping users to gain insights into the outcomes of their grants – what works? what doesn't? – it's an engine room for social, economic, environmental and cultural change.
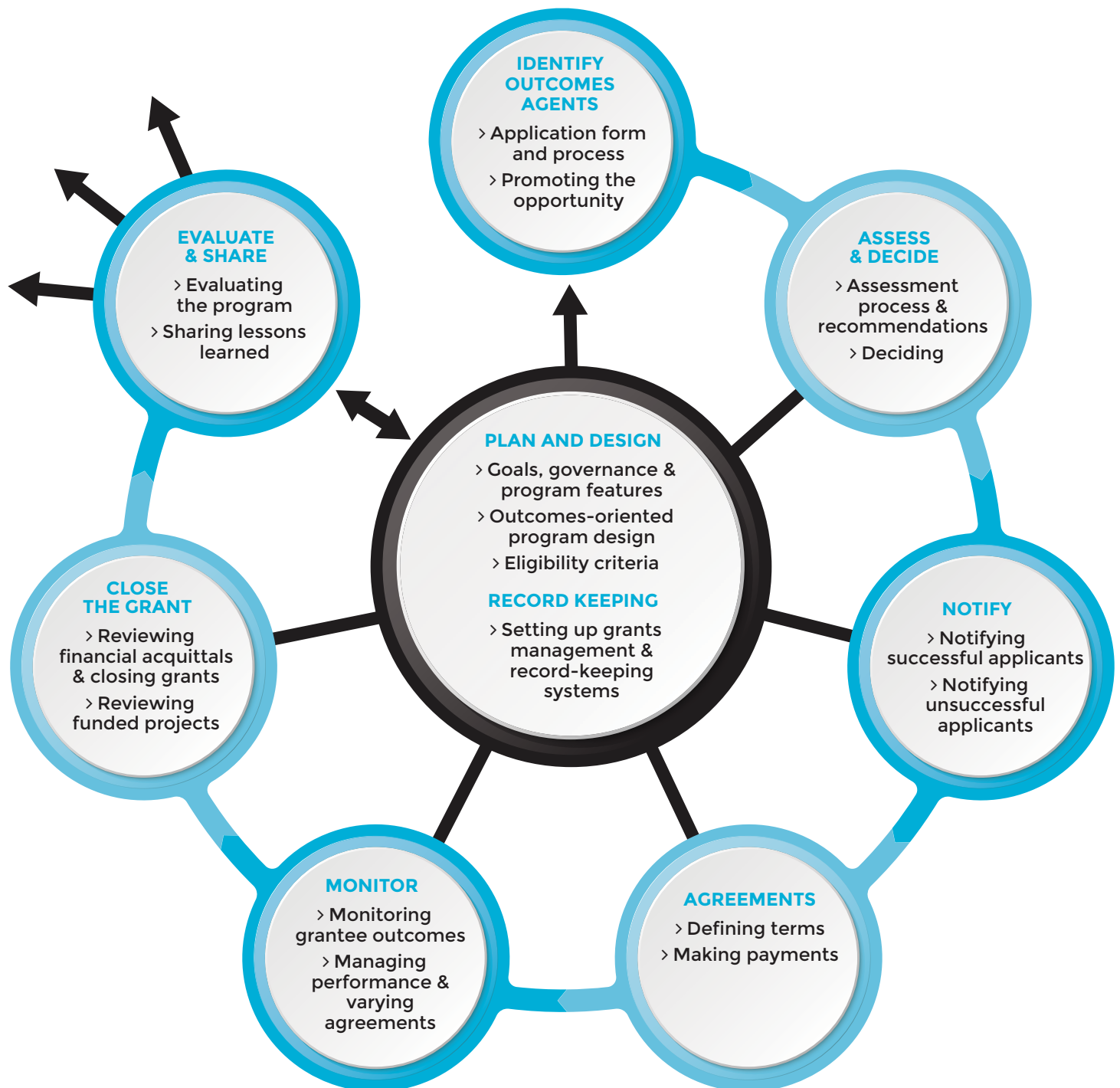
A solution for every problem

SmartyGrants is a complete grantmaking software solution. It includes a contacts management module, a mailouts module, a sophisticated system of user access privileges, and a simple to use, grantmaker-branded applicant site. New features are developed constantly and released to all users throughout the year.

The system is designed in accordance with international best practice standards, alongside consultation with working grantmakers (including a fabulous band of early access users who help us smooth out the edges of new features).

SmartyGrants provides tools for every phase of a grants program's lifecycle.

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[1] *Disbursement means the total monetary value of the grants, scholarships or other relevant budget that is budgeted to be awarded through the SmartyGrants platform over 12 months.*

Best practice grantmaking lifecycle

IDENTIFY OUTCOMES AGENTS
> Application form and process
> Promoting the opportunity

ASSESS & DECIDE
> Assessment process & recommendations
> Deciding

NOTIFY
> Notifying successful applicants
> Notifying unsuccessful applicants

AGREEMENTS
> Defining terms
> Making payments

MONITOR
> Monitoring grantee outcomes
> Managing performance & varying agreements

CLOSE THE GRANT
> Reviewing financial acquittals & closing grants
> Reviewing funded projects

EVALUATE & SHARE
> Evaluating the program
> Sharing lessons learned

PLAN AND DESIGN
> Goals, governance & program features
> Outcomes-oriented program design
> Eligibility criteria

RECORD KEEPING
> Setting up grants management & record-keeping systems

Tools for every phase of a grant program's lifecycle

Grants Program Lifecycle Stage 1

PLAN AND DESIGN

- Goals, governance & program features
- Outcomes-oriented program design
- Eligibility criteria

SmartyGrants features:

- Create as many programs and rounds as required to fulfill your organisational goals
- Align programs and rounds with your strategic objectives and outcome goals
- Add multiple user types and control access privileges
- Draw on the sample programs, template forms, standard fields and access to standard questions from CLASSIE (our social sector taxonomy) included in all accounts
- Set up standard fields and lists to use across your programs and in reporting
- Understand grantmaking structures through online resources
- Derive insights from your dashboard
- Host files such as round guidelines online

Grants Program Lifecycle Stage 2

KEEP RECORDS

- Setting up grants management & record-keeping systems

SmartyGrants features:

- Manage your workflow with user-defined stages and tasks
- Store and manage contacts, defining your own contact types and fields
- Store and easily access in-built audit history and all-in-one record-keeping system
- Create file notes, tags and flags against applications and contacts
- Store and easily access records relating to each round, each application and each applicant
- Access your data wherever and whenever you need it

Grants Program Lifecycle Stage 3

IDENTIFY OUTCOMES AGENTS

- Application forms and processes
- Promoting the opportunity

SmartyGrants features:

- Take advantage of automatic free advertising in EasyGrants, Australia's most comprehensive grants database (excluding private rounds)
- Generate forms using the powerful and intuitive form editor, with both standard and user-generated fields available
- Easily add conditional logic and other question types
- Apply filters and use mailouts to create and send emails promoting your program/round
- Draw on the power of the Outcomes Engine, a tool to inform your decision making

Grants Program Lifecycle Stage 4

ASSESS & DECIDE

- Assessment process & recommendations
- Making decisions

SmartyGrants features:

- Restrict assessors' access (show them only what they need to see)
- Provide secure access to external assessors
- Feed online assessments directly into the system
- Export 'snapshot' assessment summary reports
- Generate best-practice assessment help sheets and templates
- Automatically calculate fields from weighted assessment scores
- Automatically classify applications by subject and beneficiaries using CLASSIEfier
- Assign tasks to individuals or multiple users
- Record decisions and internal/external comments

Grants Program Lifecycle Stage 5

NOTIFY

- Notifying successful applicants
- Notifying unsuccessful applicants

SmartyGrants features:

- Email successful and unsuccessful applicants
- Automatically record contact notes
- Use best-practice templates and tips built in

Grants Program Lifecycle Stage 6

SIGN AGREEMENTS

- Defining terms
- Making payments

SmartyGrants features:

- Use the 'report' function to create funding agreements and send them directly from the system; suitable for single or multi-year programs
- Track and record budgets, funding allocations and payments
- Export application metadata for importing into your finance or document management system**
- Create contract variation forms that applicants can complete online
- Also available: Xero financial system integration, Payments API**, ContactSync API**

Grants Program Lifecycle Stage 7

MONITOR

- Monitoring grantee outcomes
- Managing performance & varying agreements

SmartyGrants features:

- Track applications across different grant programs using multi-program reporting
- Collect progress reports from your applicants online
- Send bulk email reminders
- Store file notes against individual grantees and applicants
- Generate reports on late submissions
- Add tags and flags to your contacts

Grants Program Lifecycle Stage 8

CLOSE THE GRANT

- Reviewing financial acquittals & closing grants
- Reviewing funded projects

SmartyGrants features:

- Build bespoke acquittal forms, or use templates
- Enable grantees and applicants access to their acquittals and linked applications under 'My Submissions' on the applicant site
- Send automatic reminders when acquittals are due

Grants Program Lifecycle Stage 9

EVALUATE AND SHARE

- Evaluating the program
- Sharing lessons learned

SmartyGrants features:

- Set and track outcomes via the Outcomes Engine**
- Copy, update and improve your forms for future use
- Track your program's overall health and progress via the dashboard
- Automatically classify successful and unsuccessful applicants by subject and beneficiaries using CLASSIEfier and uncover funding patterns
- Join a network of outcomes-focused grantmakers and hear and share lessons learned
- Visualise your grants data with SmartyGrants Maps**

**Additional charges apply. See page 20 and 22 for details of pricing.

SmartyGrants features list

NAVIGATION & SETTINGS

Launchpad
• Select account

Main Menu
• Online documentation
• Education and training system
• Grantmaker forum
• Privacy policy
• Contact us

Create Account
• Sign up for trial account

Applicant Site
• Website URL (specified during account setup)
• Landing page text (edit)

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

Some integrations may incur setup cost & annual fee

PROCESS & WORKFLOW

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

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

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

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)

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)

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

FORMS

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 (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 (federal/state electorate/LGA/remoteness)*
- General content
- Number/currency/date
- Single choice/multiple choice/dropdown list
- Budget/income/expenditure
- File upload
- Calculated fields

APPLICANT SITE

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

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

Forms
- My submissions and associated forms
- View application progress (stage name)
- Preview form
- Fill out application form (start/save/edit/submit)
- Fill out acquittal form (start/save/edit/submit)
- Pre-fill contact details (SmartyFile profile)
- Download response (PDF)
- Filter, sort, search submissions
- Assign to SmartyFile organisations
- Share/change owner (SmartyFile organisations)
- Archive/reactivate
- Delete unsubmitted applications

SMARTYFILE

My Profile
- Individual contact details (add/view/edit/delete)
- Update password

Organisations
- Create organisations
- Contact details (add/view/edit/delete)
- Users (add/view/edit/remove)
- User permissions (edit/customise)

Submissions
- Multi-factor authentication
- Multi-funder submission list
- Filter, sort, search
- Assign to organisations
- Share/change owner
- Archive/reactivate
- Delete unsubmitted applications

MANAGE SITE: APPLICATIONS

Application 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

Acquittals
- 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 acquittal

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
- 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 (including CLASSIE 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)

Maps *
- Mapped display of applicant addresses
- Boundary overlays
- Heat mapping based on application data (location/decision/funding)
- CSV export (excludes lat/long)

Maps incurs an annual fee

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
- Dashboard (linked to CLASSIE fields & other common fields)

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 exports by date

OUTCOMES ENGINE*

- Upload custom outcomes frameworks
- Track outcomes and metrics across grant life-cycle

Outcomes Engine incurs an annual fee

CLASSIE

- Multi-layered subjects list
- Multi-layered beneficiaries list
- Gender inclusion measuring

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 access

INTEGRATIONS

- iCal feed
- Australian Business Register
- New Zealand Companies Register
- New Zealand Charities Register
- Document management system (e.g. Objective/Open Text) *
- Xero integration *
- Secure file transfer *
- APIs (payments/contacts/applications/standard fields) *
- Single Sign On *

Some integrations may incur setup cost & annual fee

SUPPORT & SERVICES

Training
- Face-to-face training (by arrangement)
- SmartySkills: learning management system
- Public Q&A sessions
- Webinars
- Help hub & video tutorials
- SmartyTips: guided on screen tips
- Personalised training*

Personalised training incurs a fee

Support
- Applicant site skinning
- Enquiries & feedback
- Troubleshooting
- Technical support

Services *
- Consulting
- Admin
- Legal
- Evaluation
- Other services
- Data migration/import

Services may incur a fee

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)
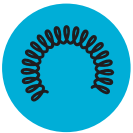- Specify payment date & payee

Why SmartyGrants?

It's industry-leading

- Most-used grantmaking system in Australia and New Zealand, with more than 570 grantmakers distributing more than $7 billion in grants annually
- Supports the New South Wales Government's whole-of-government grants management solution
- Handles more than 460,000 forms per year (and growing all the time)
- Meets and often exceeds all grantmaker software industry benchmarks
- Built on a backbone of knowledge and experience of current and emerging best practices in grants administration

It's easy to use

- Intuitive design
- Cloud-based (no need for servers or internal IT support) and ready to use immediately
- Free, personable tech support (we answer emails and the phone) – no chat bots!
- Free training provided as part of every new subscription

It's flexible

- Establish your own data dictionary using standard sections, questions and lists
- Configurable to your business processes
- 'Skinning' provided to align the applicant site to your website's look-and-feel
- Additional help and implementation services available for customers with complex needs
- Annual subscription – no lock-ins
- Priced to suit most budgets (see page 20)

It's built for the real world

- Designed, built and maintained by people who know grantmaking and technology
- Trusted by some of Australia's and New Zealand's largest and most risk-averse grantmakers
- New functionality added regularly in consultation with a dynamic community of grantmakers
- Practical end-to-end solutions for real-life grantmaking problems

It's here to stay

- Backed by Our Community, one of Australia's oldest and most successful for-purpose enterprises
- Ethical and sustainable
- Overseen by a leading team of impact-oriented IT developers
- Part of an integrated suite of for-purpose tech solutions

Why is the cost so low?

The explosion in powerful, affordable technology offers grantmakers the opportunity to practise more efficient, effective and transparent grantmaking, from application stage to acquittal. But more choice brings with it more risks. How do you know which system is best? It's a decision with massive implications.

Over the past two decades, we have seen millions of dollars spent on grants management systems that could have been procured for a fraction of the price. We've seen the implementation of systems that staff can't use or don't like, systems that take so long to build that they're out of date before they're implemented, costs that have doubled, tripled and quadrupled during development, application forms that look terrible and crash regularly, and grantmakers lamenting the loss of the opportunity for reform.

SmartyGrants is your insurance against a grants system implementation disaster. Here's why:

Costs are shared

Old-style system procurement involved everyone designing, building and hosting their own bespoke grants management systems. With a cloud-based system there's one team of designers, one team of builders. That means you're sharing the costs of continual development, the costs of security, the costs of service and the costs of training.

Risks are minimal

Create a SmartyGrants trial and see if it will work for you before you sign on. Then pay a fixed annual fee, meaning you can leave whenever you like – and we have a vested interest in continually improving the system to keep your business.

Knowledge is shared

Each year we interact with hundreds of system users (both grantmakers and grantseekers), so we have up-to-the-minute knowledge of the improvements that will make the most difference in people's lives.

It's built for the real world

SmartyGrants uses the latest in intuitive, user-friendly technologies. That means our support costs are far below those of custom-built systems.

It's always up to date

With a custom-built or installed system, you have to pay every time you want to make a change or improvement. With SmartyGrants, you get access to the very latest version of the software at all times and you can update forms, reports and settings whenever you need to.

It's built by a for-purpose enterprise

We're a for-purpose enterprise, which means the financial bottom line is not our main motivator. We want to ensure that grantmakers can make the very best use of their limited resources. That's what drives our pricing model, not the pursuit of quick profits.

See our full, transparent pricing list on page 20.

Our grantmaking reform agenda

SmartyGrants is a division of the multi-award-winning social purpose enterprise Our Community, which for over two decades has been at the forefront of grants innovation in Australia. Our grantmaking reform agenda is based on three main themes:

1 Thought leadership

Our Community built Australia's first grants discovery portal (EasyGrants), published Australia's first cross-sector grantmaking journal (Grants Management Intelligence), and built Australia's first cloud-based grants administration solution (SmartyGrants).

Our internationally acclaimed Grantmaking Manifesto sets out what drives us in pushing for reform and professionalisation in grantmaking, while our Codes of Practice for Grantmakers and Grantmaking Organisations provide guidelines for better practices in grantmaking.

2 Education, professionalisation and peer exchange

Through our conferences, training sessions and networking events, we bring grantmakers together to share common problems and nut out practical solutions.

Through our publications, our website, our online grantmaking forum and our grantmaking services, we identify and disseminate sound, practical and innovative practices.

Through our regular surveys and other research programs, we identify benchmarks against which grantmakers of all kinds can measure their performance.

3 Standardisation

Our standardisation agenda provides practical tools to help grantmakers remove red tape, simplify forms, streamline reporting and effortlessly uncover deep insights into funding patterns. Our data science initiatives are helping us speed up those processes.

Through our Managed Services division we provide assistance to grantmakers who wish to overhaul their data governance to ensure a direct route from guidelines to forms to reports.

Coming soon: CLASSIEfier

Australia's first automatic grants classification tool, CLASSIEfier gives funders the power to instantly reveal funding patterns and gaps. Following five years of development and testing by data scientists and developers, this central plank of Our Community's standardisation agenda will soon be integrated into SmartyGrants.

The algorithmic system works by reading grant applications to automatically assign labels defined by CLASSIE, our social sector "dictionary". CLASSIEfier takes its name from that dictionary. Developed by SmartyGrants' parent company, Our Community, the CLASSIE taxonomy classifies the social sector by organisation, subject and population.

Already widely used, CLASSIE has been adopted by the Australian Charities and Not-for-profits Commission's online charity search portal, among others. CLASSIE has been available to SmartyGrants users for several years, but until recently users were required to assign CLASSIE labels manually when filling in, assessing or managing forms.

CLASSIEfier removes the need for human classification with its keyword-matching algorithm. Results are available instantly via labels applied to each classified application form, while collective results (e.g. total funding by subject; funding split by beneficiary type) are shown on the grantmaker's dashboard. For example, an arts grantmaker who wants to know what proportion of their budget went to ballet versus contemporary dance versus hip-hop has effortless access to this information.

CLASSIEfier will be free for SmartyGrants users.

The business case

Get more bang for your buck

Financial savings

- **Dramatically cut down on administration and other manual and time-consuming processes (virtually eliminate data entry and duplication)**

  Implementation of SmartyGrants saved one Federal Government department a total of 200 weeks per annum across three grants programs. One single piece of SmartyGrants functionality saved the department 16 days of processing time for just one program.

  One State Government department noted that the number of call centre inquiries dropped from 2973 in the year before they took up SmartyGrants to just 876 the year after. The number of email inquiries fell from 1153 to 265.

- Tiered pricing based on each grantmaker's budget (see page 20)
- Instant, accurate reporting
- Benefits of scale: one system, many users
- Access to the latest technology 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 technical support for grantmakers and grant applicants
- Free training for all new subscribers

Online training when it suits you, plus Q&As and webinars

All SmartyGrants subscriptions include the following training options:

- Free access to SmartySkills, the SmartyGrants learning management system
- Free access to weekly Q&A sessions with the SmartyGrants training team
- Free access to bi-monthly webinars
- Free access to the Help Hub, comprehensive written documentation on all SmartyGrants functionality

For more information on training, see page 21.

Top-rated support

- **Local, friendly, knowledgeable support staff who answer emails and pick up the phone – no chat bots!**

  "The staff who work on SmartyGrants have just been superb and have responded quickly and efficiently to every query we raised – and there were many!"

  (Regional local government authority, Queensland)

  "Thanks especially for the generosity with your time, prompt assistance, and patience in responding to my questions. I really appreciate the quality of service you provided."

  (Community foundation, Queensland)

  "We are getting excellent support and backup as we need it ... We are happy to recommend this service as we have had an excellent experience with staff and the process itself – it has made life so much easier for us."

  (Local government authority, NSW)

Reduce risk and protect your reputation

Secure, trusted, local

- Best-in-class cloud-based software solution
- Tested and trusted by many large and risk-averse grantmakers (ask us for details)
- Customer service based in Melbourne, Australia, with data held in secure data centres in Sydney
- Daily data backups (weekly backups available to clients for download*)
- Complies with all Australian and New Zealand privacy and data security laws

Inbuilt audit trail

- Audit history of any grant application available on demand
- Manually add additional file notes with ease
- Instant access to your organisation's full granting history (data migration available*)
- No version control or data integrity issues

Additional charges apply. See page 20 and 22 for pricing details.

No lock-ins

- **Obligation-free trial available**

  Start your free trial at
  https://manage.smartygrants.com.au/signup

  There's no risk of wasted work – if you sign up, all your trial data can be transferred to your live account.

- No data lock-ins (clients have access to backup files)

- 12-month subscriptions with no obligation to renew

Experience best-in-class technology

Deep domain expertise

- Built by IT engineers with extensive grants domain experience (and a social conscience)

- Value added by a sophisticated, ethical data science team

- Backed by Our Community, Australia's leading grants aggregator and grants educator

- User-informed enhancements added continually

- Additional help available for customers with complex needs*

No maintenance burden

- Annual subscription model ensures continual updates and enhancements

- All subscribers have access to the latest version of the software at all times

Benefit from the power of the crowd

Reduce duplication

Get free access to:

- standard questions, standard lists, template forms and reports, and standard sections

- a specialist taxonomy

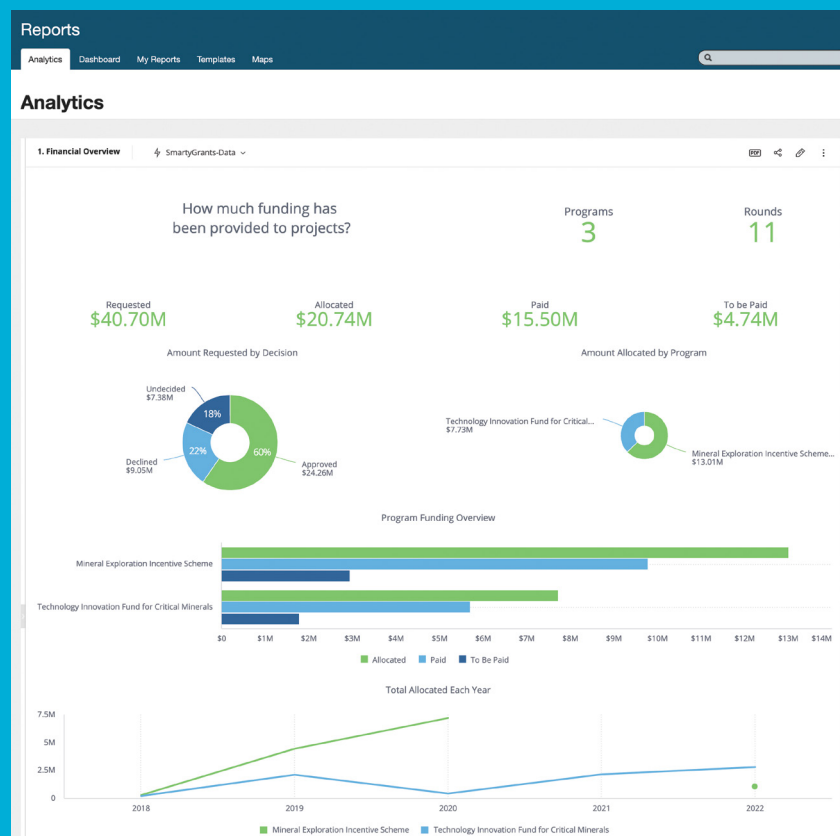- data science and artificial intelligence initiatives to speed up processes and reduce risk

Gain access to a diverse grantmaker network

- Share (and learn from) the experiences and best practices of your peers

- Data-based benchmarking

- Online and face-to-face networks and forums

- Free and discounted networking and educational opportunities

Coming soon:
Premium features

SmartyGrants Analytics

SmartyGrants Analytics goes beyond traditional manual reporting capability. It's a business intelligence tool that helps users to visualise their data within the SmartyGrants application. SmartyGrants Analytics provides grantmakers with tools and resources to visualise and present their data effectively, empowering them to gain and share meaningful insights from their grantmaking activities in a powerful, easy-to-use tool.

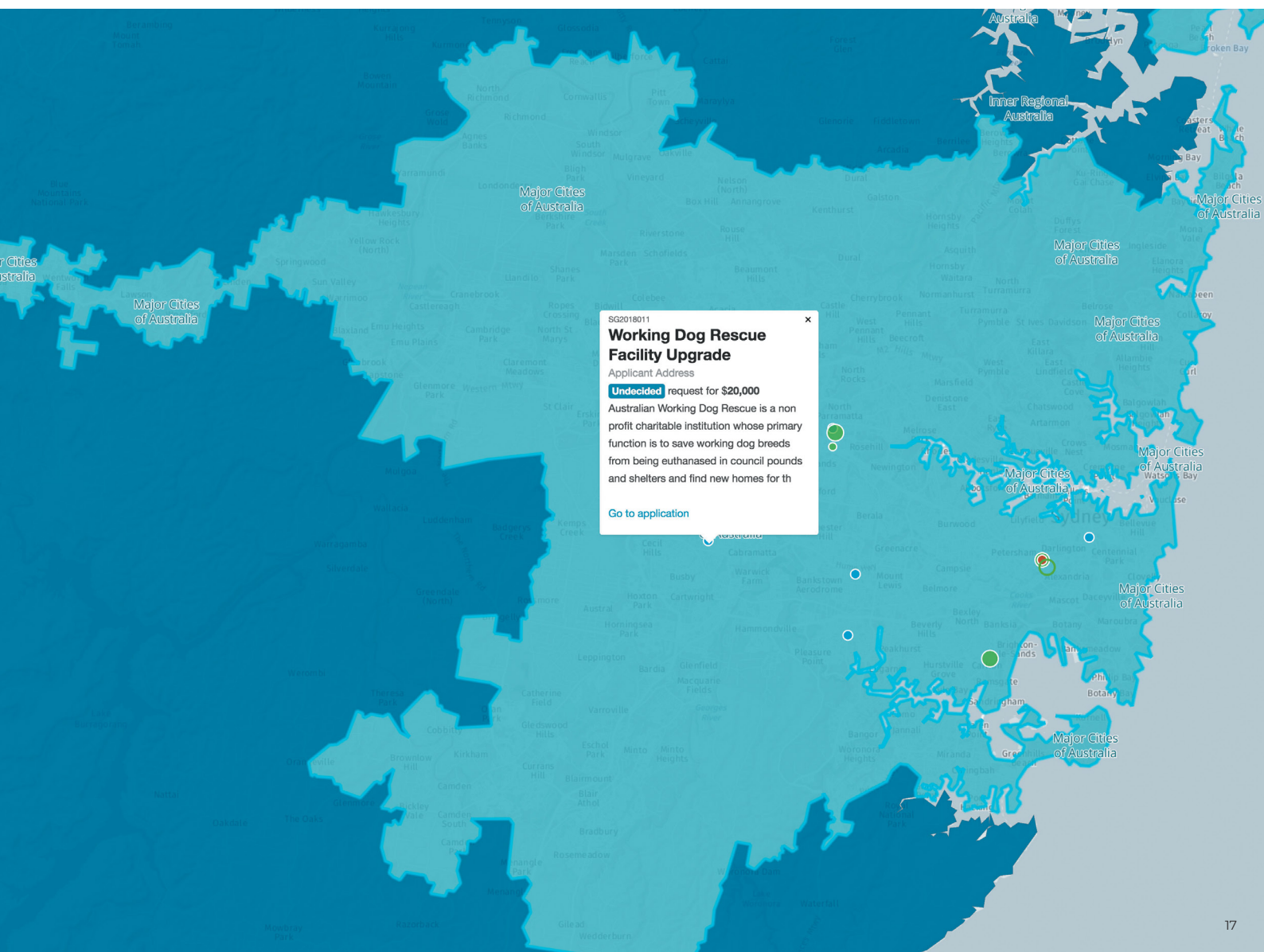*Additional charges apply. See page 20 and 22 for pricing details.*

SmartyGrants Maps

SmartyGrants Maps helps you unlock powerful insights about your funding patterns, instantly revealing where your grants applications are coming from, and to where your money is flowing.

A product of the Our Community Innovation Lab and available exclusively to SmartyGrants users, SmartyGrants Maps helps you visualise and make sense of your grants data and facilitate faster reporting and better-informed decision-making.

Use the SmartyGrants Maps dashboard to:

- Visualise your grants in the context of a range of geographic boundaries
- Take a bird's eye view of your grants across a wide region or zoom in on a particular point with pin-point accuracy
- Generate insights about over/under-funded regions or areas that are over/under-represented in application stats
- View heat maps that reveal contextual insights about your data

The Outcomes Engine: aligning your funding with your goals

Did your grants make a difference? How do you know?

The Outcomes Engine helps grantmakers to measure their social, economic, cultural and environmental impact by providing access to a library of standard outcome measures. Alternatively, you can upload your own bespoke outcome frameworks to SmartyGrants and apply them to any of your programs and rounds.

The Outcomes Engine uses in-built SmartyGrants functionality, including forms, standard fields, standard sections and report templates, to make information on outcomes available as soon as you receive your first application.

The Outcomes Engine is available to all SmartyGrants users for a flat annual fee of $2,990. It gives you the ability to:

- **Upload an outcomes framework and start collecting data against that framework**
- **Export aggregate outcomes data and slice and dice it according to your needs**
- **Access Outcomes Engine standard questions that have been tested by grantmakers, evaluation experts and grantees. Any of the questions can be added to your forms, acting as funnels for outcomes data you can feed into your reports.**

- **Access free specialist support and training, including:**
  - eight hours of one-on-one support from an outcomes specialist in the first year to help you get your outcomes framework working well in the system (conditions apply)
  - free webinars and training on outcomes and the Outcomes Engine
  - a facilitated monthly online community of practice (Outcomes Engine Muster)
  - an optional Outcomes Engine review and feedback after 12 months

- **Access the dedicated Outcomes Engine section of the SmartyGrants Help Hub, including:**
  - videos and help sheets
  - sample outcome frameworks
  - sample outcomes reports and report templates

More than 560 grantmakers are already using the Outcomes Engine to track and report on their impact. Are you ready to join them? Add the Outcomes Engine to your SmartyGrants account and get started today!

More information: https://smartygrants. com.au/outcomes-engine

SmartyFile

SmartyFile is your grantees' filing cabinet in the cloud, enabling each grant applicant or grantee to create a profile and safely store and reuse contact information, text and files.

SmartyFile also allows grantees to effortlessly share that data with trusted colleagues and to collaborate on grant applications, progress reports and acquittals.

If a grantee has previously used SmartyGrants to apply for a grant, they already have an account and can access it now to streamline the management of their grants data.

SmartyFile features:

- Free profile for individuals and organisations (requires ABN/NZBN)
- Login to any sites powered by SmartyGrants
- Collaborate with other team members on SmartyGrants submissions
- Set up multiple team members as users for yor organisation with different access levels
- Automatically pre-fill your personal and organisation contact information into SmartyGrants forms
- Store files under your personal and organisation profiles to access when completing SmartyGrants forms
- Manage, view, search, and sort submissions across multiple funders in one spot

SmartyFile
Store it, share it, use it

Pricing

SmartyGrants users pay an annual fee based on their annual disbursement[1] of grants, awards and scholarships, allowing them to lock in budget allocations with certainty.

For most users there are no set-up costs. If your organisation is uncomplicated and distributes less than $25 million a year, your annual fee is as described below. Implementation services are available for those who need them.

Large organisations that have multiple departments, or disburse more than $25 million a year in grants, or the equivalent in scholarships or awards, should contact us for a tailored quote.

Our pricing pledge

- Annual subscription fee
- Clearly defined inclusions and exclusions
- No hidden fees, exit fees or lock-in clauses
- No extra fees for a spike in support needs or applications
- Pricing stable (no sudden ramp-ups) and publicly available

Annual subscription

Annual distribution*	Australia annual fee (AUD)[2]	New Zealand annual fee (NZD)[3]	International annual fee (USD)	Inclusions
Less than $30,000	$4,250	$4,000	Price on application	• Access to the very latest version of the system at all times • Unlimited applications • Unlimited grants, awards and scholarships programs • Unlimited rounds • Unlimited number of users (including external assessors) • Unlimited contacts • Unlimited storage • Unlimited training via SmartySkills, the SmartyGrants learning managements system (LMS) • Free access to weekly Q&A sessions with SmartyGrants Trainers • Free access to bi-monthly webinars, as advertised in SmartyNews • Free access to tools and resources in our password-protected Help Hub, covering all aspects of grants management • Free telephone and email technical support for you, your assessors and your grant applicants **Year one only:** • Skinning – match your SmartyGrants customer-facing webpage to your website's existing look and feel • Introductory consultation (up to two hours) • Two personalised webinars (up to two hours per webinar)
$30,001 to $100,000	$8,000	$7,750	Price on application	
$100,001 to $500,000	$13,500	$12,750	Price on application	
$500,001 to $5 million	$21,250	$20,750	Price on application	
$5,000,001 to $10 million	$26,500	$25,500	Price on application	
$10,000,001 to $15 million	$31,750	$30,750	Price on application	
$15,000,001 to $25 million	$37,000	$36,000	Price on application	
More than $25 million	Price on application	Price on application	Price on application	

[1] *Disbursement means the total monetary value of the grants, scholarships or other relevant budget that is budgeted to be awarded through the SmartyGrants platform over 12 months.*
[2] *AUD prices include GST.*
[3] *NZD prices do not include GST.*

*Where a client or government agency has multiple ministers or governance regimes, a separate subscription fee applies for each entity distributing funds, relative to the reporting regime or the minister they report to. Fees are correct as at October 2023. Prices and inclusions are subject to change from time to time. Check **https://smartygrants.com/pricing** for updates.*

Training and support

Learning a new software system can be challenging, especially when time is tight and your team is under pressure to hit the ground running.

SmartyGrants has you covered, offering a range of training options designed to allow users to learn at their own pace, at a time and place convenient for them – whether that's in small groups in the office or while working from home, and on a desktop, laptop or mobile.

All SmartyGrants subscriptions include free access to the following training and help options.

SmartySkills

SmartySkills is the SmartyGrants education and training program. This learning management system (LMS) consists of a series of high-quality, regularly updated, self-guided online courses for SmartyGrants users of all skill levels.

Whether you are an account administrator who needs to know SmartyGrants inside out and back to front, a grants officer keen to build your grants program for maximum impact, or a casual user seeking insights into a specific topic, SmartySkills has you covered. There are dozens of interactive and video-driven online courses available, plus a points-based system of rewards to help keep you motivated to learn. Once you've acquired 2,500 points, you will have covered most of the essential content.

Weekly online Q&A sessions with the SmartyGrants training team

These sessions are designed to allow you to ask questions, get tips and tricks from other SmartyGrants users, and spend some time with our incredible training team to learn more about how you can get the most out of the system. You'll need to book for these, as attendance caps apply. We look forward to seeing you there!

Webinars

Held every two months on specific topics, webinars are advertised in SmartyNews, the SmartyGrants newsletter.

Custom training (online and on-site)

So that you can make the most of your custom training booking, we ask that you first take the time to explore the extensive library of courses in SmartySkills (above), and familiarise yourself with the online Help Hub and the weekly online Q&A sessions.

Once you've gained an overview of the system, our training team will be able to assist you with a custom training session where you can set the training agenda. We recommend booking a session of one to four hours in length, depending on what you want to cover. Our trainers will be able to work out how long you'll need based on the experience of attendees and the complexity of the topics you choose.

All custom training is charged by the hour. For details of rates, please go to **https://smartygrants.com. au/training/training-options**.

Here are some examples of what you could cover in one or four hours:

- **One hour**: In this time, you could explore a single topic in depth. For example, perhaps you've just finished building your first application form and you'd like to talk through the results with a trainer. Or perhaps you need some help managing your contact directory. We can assist. Looking for assistance with something more complex? Just ask.

- **Four hours:** In this time, you could cover multiple topics. When you contact us, let us know what aspects of the system you are keen to cover so we can deliver the training effectively.

Online custom training

All online training sessions use Microsoft Teams.

On-site custom training

On-site custom training is available to users who would like to experience our high-quality training face-to-face. The same hourly training rates outlined above apply to on-site training. In addition, accommodation, meal and travel expenses also apply.

Online training will be arranged as a backup option for all on-site custom training bookings. If travel disruptions, illness or other circumstances prevent a face-to-face session from taking place, we can revert to online delivery if suitable.

The Help Hub

The online Help Hub within SmartyGrants provides comprehensive written documentation on all SmartyGrants functionality.

Phone and email support

Our Melbourne-based support and training team is available Monday to Friday from 8am to 6pm AEST/AEDT. No chat-bots, no long waits on the phone, no overseas call centres – just friendly, sympathetic, knowledgeable help and support.

Self-service software: add-on services

At SmartyGrants, we're dedicated to ensuring that our software works for you. Here are some of the popular add-on services we offer that might be useful to you.

And if you're looking for even more assistance with grantmaking than self-service software can provide, explore our full-service options on page 23.

Service	Description	Fee (AUD)[1]
Outcomes Engine	The Outcomes Engine enables you to upload an outcomes framework, apply selected outcomes and metrics to programs and rounds, and track and report on your impact. Includes eight hours of help in year one. Refer here for full inclusion list: **https://smartygrants.com.au/outcomes-engine**	$2,990 per year
Re-skinning (re-branding)	Changed your branding? We can re-skin your client-facing SmartyGrants webpage to match your new look and feel.	$150 per hour
Data migration and geocoding	Shifting historical data into your SmartyGrants account or geocoding historical records.	$1,000 + $150 per hour
Secure back-up of your data and files	Weekly back-up of all data and files related to your account, comprising three files and access to back-up files via secure file transfer protocol (SFTP).	$500 per year
Integrate with Xero	Connect to your online accounting software.	$500 per year
Application programming interface (API)	Integrate SmartyGrants with other business applications (e.g. your electronic document and records management system [EDRMS] or customer relationship management [CRM] software).	$2,000 per year
Metadata file export	Ability to export data from SmartyGrants and import into your chosen electronic document and records management system (EDRMS).	$550 for default configuration+ $150 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 log-in credentials (e.g. name and password) to access multiple applications.	$2,000 one off set-up fee + $500 per year
Translations	Ability for applicants to apply in a foreign language (12 additional languages supported).	$1,500 per year
Copy program	Copy a SmartyGrants program or programs from one SmartyGrants instance to another.	$1,500 per program
Lock instance	Put an entire instance "on ice" – deactivate all system-wide settings but preserve data for reference and audit purposes.	$2,000 per year
Variations to standard agreement contract	Our standard contract has been road-tested on hundreds of clients (it's had the eyes of many, many lawyers on it). If you do feel you need to alter the standard contract, we will need to recoup our legal costs.	$2,500 flat fee
Feature development	We occasionally accept requests to undertake feature development or build product enhancements. Our decision to accept requests generally depends on the applicability of the new functionality to our wider customer base, its compatibility with our own roadmap, and its impact on the customer.	Price on application

[1] *Fees are correct as at October 2023. All fees include Australian GST of 10%. Please check* **https://smartygrants.com.au/pricing/other-fees** *for updates.*

Managed Services

SmartyGrants is designed as self-service software, but we can provide more help if you need it.

The SmartyGrants Managed Services team is highly experienced and dedicated to finding commonsense solutions to the problems grantmakers face. We offer full-service options that give you customised access to our extensive inhouse expertise in every element of grantmaking and allied disciplines. Our core SmartyGrants team can also call on the additional expertise of our wider staff group in the Institute of Community Directors, the Funding Centre, GiveNow and Our Community at any time to help you get your grants program humming.

To learn more about our team, please visit **https://smartygrants.com.au/about/our-team**.

What we can do for you

Whether you're seeking to improve your program efficiency or effectiveness, or you just need a few tips or shortcuts, we are here to help you make the most of every dollar you spend on administration and grants. We can tailor a package of services to suit your budget and needs. This may include any or all of the following activities – or more!

- Undertake business process planning, design or review with recommendations, before you start using SmartyGrants or later on

- Lead review to ensure proportionate, risk-based governance processes and program requirements

- Improve or establish data governance, including advice on account setup

- Create data dictionary for your account, programs and/or rounds

- Articulate program goals, outcomes and metrics (KPIs) to improve data tracking and impact reporting

- Conduct SmartyGrants diagnostic: system use health check; contacts, tasks and stages review; data clean-up; outcomes readiness review

- Write or review program guidelines

- Design, build, review and test forms

- Manage program inquiries via a dedicated inbox or call centre

- Manage or conduct application assessment (eligibility review; merit-based review; coordination of expert review), including recruitment and vetting of suitable assessors

- Establish business reporting requirements and reporting systems

- Design, build or review templates and scheduled reports, including data visualisation

- Draft contracts and agreements

- Manage payments and milestones

- Monitor compliance, reporting and contract variations

- Conduct final assessments and program evaluations.

For us to work most effectively with you, and to optimise the quality and efficiency of your grantmaking, we recommend that you engage with us as early as possible to discuss your requirements.

Implementation services

The Managed Services team cam support transition and implementation of your programs onto the SmartyGrants platform. Using a co-design approach, our team will assist you to develop system process maps to optimise efficiency in your program administration, establish your data schema to support effective reporting, identify any software or integration development to enable your core business requirements, and support the configuration of your account. We're also able to support migration of data into SmartyGrants to create coherence in your historical reporting.

Pricing

For details of pricing of Managed Services, please visit **https://smartygrants.com.au/smartygrants-grantmaking-services/services**.

What now

1 **Look at who else is using SmartyGrants**

More than 570 funder organisations use SmartyGrants software, policy templates and best practice advice to revolutionise their grantmaking. Read more at **www.smartygrants.com.au**.

2 **Sign up for a free trial**

It's free to sign up and there's no obligation to do anything or buy anything. You can instantly start creating or modifying forms and testing functionality. If you do decide to subscribe (and we're pretty sure you will) you will be able to use the forms created in your trial account once your account goes live.
https://manage.smartygrants.com.au/signup

3 **Talk to us**

We're friendly and approachable and we love talking to grantmakers! Please give us a call or send us an email. Our contact details are provided below.

4 **Come and meet us**

We run regular grantmaking events, and we always have plenty of SmartyGrants staff around to chat to people who want to find out more about us. Check when the next event is on at **www.smartygrants.com.au**.

5 **Get us to come to you**

We're happy to come to you or get online to provide a demonstration of our fantastic system. Just give us a call or send us an email – our contact details are provided below.

6 **Sign up**

If you've already looked into SmartyGrants and you're ready to get started, we can help you have your grant program up and open – typically within five working days. Call or email us and we'll get to work.

7 **Join the grantmaking revolution!**

Besides SmartyGrants, we have a whole range of resources to help you supercharge your grantmaking, including a treasure trove of grantmaking news, case studies, tools and templates.

8 **Contact us**

smartygrants.com.au | **smartygrants.co.nz** | **smartygrants.com**

Australian grantmakers: 03 9320 6888 | New Zealand grantmakers: +64 4889 3068 |
All other grantmakers: + 61 3 9320 6888

sales@smartygrants.com.au

The last word

"SmartyGrants is a credit to Our Community. Their responsiveness to feedback is extraordinary."

WA Government user

"We'd never used the program before and had to stand it up at breakneck speed. It was all thanks to the SmartyGrants team who had helped us through the process and made it possible. It was a resounding success and the system was so easy to use and made an impossible task possible."

NSW Government associate director

"On behalf of the grants team here at Yarra Ranges Council, I just wanted to say a HUGE thank you for the first-rate support you provided us yesterday. Gina, your patience explaining all things conditional logic was second to none and will set us up well for our new grants program."

Team member, Yarra Ranges Council, Vic

"Dear support, developers and programmers etc. How *&^%$$#@!! WONDERFUL you all are. SmartyGrants is the best purpose-built product I've ever used and it just keeps getting better and better. The attention to detail is superb. What prompted this? Our new ability to check bulk mails, with merged attachments, before they go out. Now I can sleep at night."

Team member, Noosa Council, Qld

Notes

You can't save the world – but your grantmaking dollars can.

Create more impact with SmartyGrants.

smartygrants.com.au