



GRANTMAKERS: Join the FunderStorm!



SmartyGrants
Software & data science for revolutionary grantmakers

aigm | Australian Institute
of Grants Management

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



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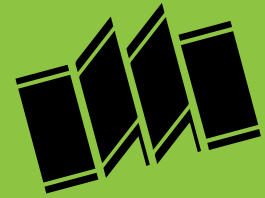
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Hundreds
of grantmakers



2500+
grants programs



1.1million+
forms



More than
half a billion dollars
in grants per year
(and growing!)



1 marriage proposal

“I want to marry
SmartyGrants! I want to be
Mrs SmartyGrants!”*

*True quote



1 massive agenda
Revolutionising Grantmaking!

**Grantmakers
using
SmartyGrants**

(as at Feb 2016)



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 distribution.

It's used by hundreds of grantmakers (federal, state and local government, as well as philanthropic, corporate and research grantmakers) to manage the allocation of more than half a billion dollars in grants each year to tens of thousands of applicants in 49 countries.

It is the most-used grants administration system in Australia and New Zealand, and its international presence is expanding all the time.

SmartyGrants is an initiative of award-winning social enterprise Our Community, which is an Australian-based, highly rated accredited B Corporation that provides advice, connections, training and technology tools for those working to create social change and build stronger communities.

SmartyGrants helps to reform and streamline the flow of grants from government, business and philanthropy into the wider community – an industry worth more than \$42 billion a year in Australia, around \$2.6 billion in New Zealand and many, many hundreds of billions across the world.

But it's more than a grants administration system; it's also a tool for understanding and improving grantmaking through data science, for grantmaking education and for better practice. SmartyGrants users gain access to tools embedded in the software that help create modern, best practice grantmaking practices. You also get complimentary membership to the Australian Institute of Grants Management, which unlocks 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 data analysis trends and tools.



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. Data-driven dashboards are next on our agenda.

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. (See next page)

¹ Figure cited in the Australian Charities and Not-for-profits Commission's Australian Charities Report 2014. Note this figure does not take into account grants from non-government organisations (e.g. philanthropic, corporate and community foundations), nor grants made to the hundreds of thousands of not-for-profit organisations that are not classified as charities.

² Our Community calculation carried out in March 2016, based on 2004 and 2006 surveys of the not-for-profit sector that estimated that 10% of the sector's income was derived from government grants and 7% from philanthropy, and a 2014 Charities Commission estimation of the sector's income at \$15.1 billion, implying \$1.5 billion in government grants and \$1.1 billion in philanthropic grants. Given difficulties with the inputs, this is a highly imperfect estimate – we would welcome revisions!

Tools for every phase of a grants program's lifecycle*:

Grants Program Lifecycle Stage 1:

Goals and Governance

- Establishing program goals
- Program design & guidelines
- Eligibility criteria



SmartyGrants Features:

- Create as many programs and rounds as required to fulfill your organisational goals
- Add multiple user types and control access privileges
- Example programs and form templates are provided for you to copy and edit, to get you started
- Set up standard fields and lists to use across your programs and in reporting
- Understand grantmaking structures through the Australian Institute of Grants Management's online resources (free membership for SmartyGrants users)

Grants Program Lifecycle Stage 2:

Record Keeping



SmartyGrants Features:

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

Grants Program Lifecycle Stage 3:

Creating/Promoting Applications

- Application forms and processes
- Advertising/promotions



SmartyGrants Features:

- Powerful and intuitive form editor with both standard and user-generated fields available
- Conditional logic and multiple question types available
- Automatic free advertising in Australia's most comprehensive grants database (excluding private rounds)

Grants Program Lifecycle Stage 4:

Decision Making

- Assessment of applications
- Deciding who gets the grants



SmartyGrants Features:

- Secure external assessor access
- Restricted access available for assessors (show them only what they need to see)
- Online assessments fed directly into the system
- Export 'snapshot' assessment summary report
- Best practice assessment materials available through AIGM (free membership for SmartyGrants users)

Grants Program Lifecycle Stage 5:

Advising Outcomes

- Successful applicants
- Unsuccessful applicants



SmartyGrants Features:

- Email successful and unsuccessful applicants direct from SmartyGrants
- Good practice templates and tips available through Australian Institute of Grants Management's website (free AIGM membership for SmartyGrants users)

Grants Program Lifecycle Stage 6:

Agreements & Payments

- Contract negotiations
- Making/recording payments



SmartyGrants Features:

- Track and record budgets, funding allocations and payments
- Suitable for single or multi-year grant programs
- Xero financial system integration available**
- Create agreement report templates and send directly from the system
- Create contract variation forms that applicants can complete online

Grants Program Lifecycle Stage 7:

Monitoring

- Progress reports
- Managing performance issues



SmartyGrants Features:

- Collect progress reports from your applicants online
- Send bulk email reminders
- Store file notes against each grantee/applicant
- Generate reports on late submissions
- Add flags and tags to your contacts

Grants Program Lifecycle Stage 8:

Acquittals

- Reviewing acquittals
- Reviewing projects



SmartyGrants Features:

- Build bespoke acquittal forms (or use templates)
- Grantees/applicants can access their acquittals and linked applications under 'My Submissions' on the applicant site

Grants Program Lifecycle Stage 9:

Evaluation & Dissemination

- Evaluating the program
- Sharing lessons learned



SmartyGrants Features:

- Copy, update and improve your forms for future use
- **Be part of Our Community's huge data project (including roll-out of Australia's first cross-sector grantmaking taxonomy, standard fields and outcomes engine – coming soon!)**
- Join the AIGM's network of grantmakers and hear and share lessons learned

* Find out more about the AIGM's grants lifecycle framework at <http://www.aigm.com.au/aigm/tools/>

** Availability restrictions and additional charges may apply. Please contact us for details.

Why SmartyGrants?

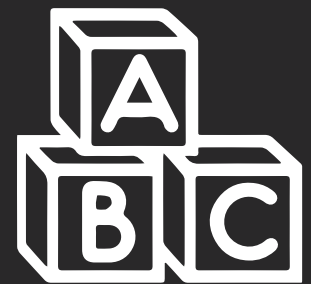
It's industry-leading

- Most-used grantmaking system in Australia and New Zealand (with a growing international presence), managing the flow of more than half a billion dollars in grants annually
- Handles more than 350,000 forms per year (and growing all the time)
- Meets (and often exceeds) all grantmaker software industry benchmarks
- Built on a backbone of knowledge of real experience and 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 support (we are real people and we answer our emails, and the phone!)
- Free training provided as part of every new subscription



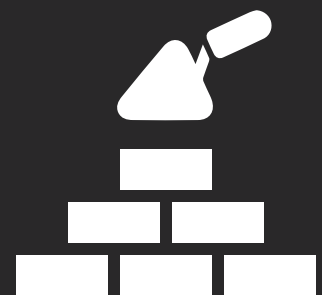
It's flexible

- 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 44)



It's built for the real world

- Designed, built and maintained by people who know grantmaking and technology
- Trusted by some of Australia and New Zealand's largest and most risk-averse grantmakers
- New functionality added constantly 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 social enterprises
- Overseen by a leading team of social-impact IT developers
- Part of an integrated suite of socially useful tech solutions
- Industry leading grants management software



Why is the cost so low?

The explosion of powerful, affordable technology offers grantmakers the opportunity for more efficient, effective and transparent management of a grants program from application to acquittal. But with more choice has come new risks. How do you know which system is best? Making the wrong decision has massive implications.

Over the past decade, we have seen millions of dollars spent on grants management systems that could have been procured for a few thousand. We've seen systems implemented that staff can't use and don't like, systems that take so long to build that they're out of date before they're installed, costs that double and triple and quadruple during development, application forms that look terrible and crash regularly, grantmakers who weep at the lost opportunity for reform and dramatic change.

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



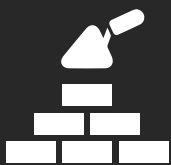
Share costs. Old-style system procurement involved everyone designing, building and hosting their own bespoke grants management systems. With a cloud-based system there's one team of designers, one team of builders. That means you're sharing the costs of continual development, the costs of security,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



Cut risks. You pay a fixed annual fee. That means you can leave (and take your data) whenever you like – and that we have a vested interest in not just winning your business, but keeping it.



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



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



Get the most up to date system all the time. 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, without paying one extra cent.

Certified



A system built by a social enterprise. As an accredited B Corporation, the bottom line is not our major motivator. We want to ensure that grantmakers can make the very best use of their limited resources. It's that factor that drives our pricing model, not the pursuit of quick profits.

See our full, transparent pricing list on page 44.

Responding to “Grants Rage”: Our grantmaking reform agenda

SmartyGrants is an initiative of the Australian Institute of Grants Management (AIGM) – a division of multi-award-winning social enterprise Our Community – which has for well over a decade been at the forefront of innovation in grantmaking in Australia.

The AIGM’s core offerings centre around three main themes:

1

Thought Leadership: 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 best practices in grantmaking.

2

Education & Professionalisation: Through our conferences, training and networking events, we’re bringing grantmakers together to share common problems and nut out practical solutions. Through our *Grants Management Intelligence* publication and our website we are helping to identify and disseminate sound, practical and innovative practices.

Through our annual survey, we are helping to identify benchmarks against which grantmakers of all kinds can measure their performance. And through our Grantmaker of the Year Award, we are celebrating those getting it right, and helping to spread their wisdom further afield.

3

Reform, Red Tape Reduction & Productivity Improvement: SmartyGrants is the central feature of our work to streamline and super-charge grantmaking – our “benevolent Trojan Horse”. We are embedding good practices – next practices – in the software. Other initiatives coming out of our Innovation Lab include a project to build and embed a common classification and reporting schema – creating unprecedented data sharing, benchmarking and learning possibilities – SmartyFile, our one-stop-shop data warehouse (“supply once, use often”) initiative, and the Centre for What Works, informing smarter, more effective grantmaking.

The SmartyGrants software is built upon the knowledge of grantmaking collected through more than 15 years of working with grantmakers and grantseekers. The software was built in part as a response to a deep vein of “grants rage” we saw flowing through the grantseeking world, a rage fed by difficult forms, bewildering practices, and infuriatingly slow processes. At the same time, we uncovered another significant stream of grants rage, with capable, well-meaning grantmakers hobbled by expensive, clunky, outdated technology (and some poor practices on the grantseeker side as well).

The clear takeaway from all of this was the need for better education, stronger connections between grantmakers and grantseekers, and a powerful but easy-to-use technology solution for managing grants. Having determined that no existing system met the standards we believed grantmakers and grantseekers deserved, we built our own.

SmartyGrants is a vital part of Our Community’s grantmaking reform agenda, ensuring that all grantmakers, regardless of type, sector or size, have access to an affordable, best practice online tool.

Standing shoulder to shoulder with our burgeoning community of SmartyGrants users and their constituents, we’re constantly adding and refining functionality as part of our cross-sector grantmaking reform agenda.

Find out more at www.aigm.com.au

REFORM, RED TAPE
REDUCTION & PRODUCTIVITY
IMPROVEMENT



SmartyGrants

SHARED TAXONOMY
(CLASSIE)

SMARTYFILE

CENTRE FOR WHAT WORKS

FUNDING CENTRE

CAPACITY-BUILDING
FOR NOT-FOR-PROFITS

GRANTMAKING
CONFERENCE

GMI GRANTMAKING
JOURNAL

ONLINE
KNOWLEDGE BANK

TRAINING

NETWORKING

GRANTMAKER
AWARDS



aigm

**Australian Institute
of Grants Management**

THOUGHT
LEADERSHIP

GRANTMAKING
MANIFESTO

CODES OF
PRACTICE

GRANTMAKING
LAB REPORTS

ANNUAL
SURVEY

EDUCATION &
PROFESSIONALISM

The Business Case

1 Get more bang for your buck

Financial savings

- Tiered pricing based on grantmaker's budget (see page 44)
- Dramatically cut down on administration and other manual and time-consuming processes (virtually eliminate data entry and duplication)

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 2013 (before they took up SmartyGrants) to just **876** in 2014. The number of email inquiries fell from **1153** in 2013 to **265** in 2014.

- Instant, accurate reporting
- Benefits of scale: One developer, many users
- Access to the latest technology without having to tie up IT teams or employ/contract developers

Generous inclusions

- No limits to number of users
- Free technical support for grantmakers and grant applicants
- Free training for all new subscribers
- Free 10-user membership to Australian Institute of Grants Management

Cost-effective training and support

- Local, friendly, knowledgeable support staff who answer emails and pick up the phone

"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)**

- Regularly scheduled, reasonably priced face-to-face training
- Training available via webinar for clients in remote locations or requiring urgent assistance
- Free, constantly updated help hub, including video tutorials

2 Reduce risk and protect your reputation

Secure, trusted

- Best-in-class cloud-based software solution
- Tested and trusted by some of Australia's biggest and most risk averse grantmakers (ask us for details)
- Customer service based in Melbourne, Australia. All data held in secure data centre in Sydney
- Daily data backups (weekly backups available to clients as a download)
- Complies with all Australian and New Zealand privacy and data security laws

Inbuilt audit trail

- Automatic tracking of decision-making
- Automatic file notes stored against each applicant/grantee
- Ability to manually add additional file notes
- Instant access to your organisation's full granting history (data migration available*)
- No data integrity or version control issues

No lock-ins

- Obligation-free trial available

Start your free trial at <https://manage.smartygrants.com.au/signup> (no wasted work - if you sign up, all your trial data can be transferred into your live account)

- No data lock-ins (clients have access to backup files)
- 12-month subscriptions with no obligation to renew

3 Experience best-in-class technology

Deep domain expertise

- Built by IT engineers with deep grants domain experience (and a social conscience)
- Backed by Our Community, Australia's leading grants aggregator and grants educator
- User-informed enhancement
- Additional help available for customers with complex needs*

* Additional charges may apply. Please contact us for details.

No maintenance burden

- Annual subscription model ensures constant updates and enhancements

Read more about the “build versus buy” dilemma at www.aigm.com.au/buydontbuild

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

4 Benefit from the power of the crowd

Reduce duplication

Get free access to:

- common taxonomy / data fields
- standard questions
- shared templates

Access to diverse grantmaker network

- Share (and learn from) experiences and best practices
- Data-based benchmarking
- Online and face-to-face networks
- Free and discounted networking and educational opportunities

SmartyGrants users get a free 10-user membership to the Australian Institute of Grants Management and live grantmaking forum

Functionality and Features – at a glance

Idealware's *Consumers Guide to Grants Management Systems* provides an excellent yardstick by which to judge the functionality and features of SmartyGrants. Here's how we measure up on Idealware's 22 key criteria*.

	None	Basic	Solid	Advanced	
Internal Tracking				●	→ More – see page 15
Online Applications – Grantmaker Experience				●	→ More – see page 17
Online Applications – Grantseeker Experience				●	→ More – see page 19
Form Design & Flexibility				●	→ More – see page 21
Applications Review				●	→ More – see page 22
Checking of Applicant's Legal Status*				●	→ More – see page 26
Letters & Board Dockets				●	→ More – see page 27
Emails				●	→ More – see page 28
Relationship Management				●	→ More – see page 29
Grant Requirements & Evaluation				●	→ More – see page 31
Payments			●		→ More – see page 33
Budgeting				●	→ More – see page 35
System Querying & Reporting				●	→ More – see page 36
Permissions & Workflow			●		→ More – see page 38
Data Access				●	→ More – see page 39
Overall Customisation				●	→ More – see page 40
Ease of Use				●	→ More – see page 41
Support & Training				●	→ More – see page 42
Stability in the Market				●	→ More – see page 43
	Unknown	Below Average	Good	Outstanding	
Support Customer Experience				●	
Training Customer Experience				●	
Implementation Customer Experience				●	

The full report, including evaluation criteria metrics, can be downloaded from www.idealware.org/sites/idealware.org/files/Idealware2013_ConsumersGuidetoGM_NOV18b.pdf
 More detailed information on each feature is provided in the following pages.

* Criteria taken from Consumers Guide to Grants Management Systems (released November 2013). Where possible, we have rated ourselves directly against the detailed Idealware criteria. Some criteria have been adapted for an international context.

Detailed functionality analysis

Internal Tracking

The SmartyGrants platform allows grantmakers to easily track an application, an applicant organisation, or an individual. Users have instant access to single or related records at the click of a button.

Key features:

Idealware criteria*	Idealware Rating (sophistication level)			SmartyGrants	
	Basic	Solid	Advanced		
1	Can track a project name, request amount, and organisation.	●		✓	
2	Can track the program with which a grant is associated.	●		✓	
3	All information for each grant project is linked together through its entire lifecycle.	●		✓	
4.	You can easily retrieve grant information and status.	●		✓	
5	Lets you attach documents to a grant record, possibly by logging into the system as an applicant to do so.		●	✓	
6	Can track by program cycle or board meeting date, and by categories such as geographic or population-based codes.		●	✓	
7	Lets you search grants and applications by a number of criteria, including organisation's legal name, application ID, program, and grant cycle.		●	✓	
8	Lets you easily update basic grant information like project names or codes throughout the process. or Applications that are received in paper can be easily entered into the system without logging into a separate interface as a grantee.		●	✓	
9	Lets you easily view related records and data across records.		●	✓	
10	Lets you easily attach external documents to a grant record, without logging into a separate interface as a grantee.			●	✓
11	Lets you define custom categorisation codes for tracking and reporting.			●	✓
12	Lets you easily update basic grant information like project names or codes throughout the process.			●	✓
13	Lets you easily enter applications received in paper into the system without logging into a separate interface as an applicant.			●	💰
14	Lets you perform batch updates of defined coding and other fields.			●	✓
15	The system stores attached documents in the database as objects rather than links. or The system uploads attached documents to the server and stores a link to that uploaded file in the database.			●	✓
16	Can track by percentage or dollar allocation across program.			●	✓

* As listed by Idealware, *Consumers Guide to Grants Management Systems* (November 2013)

✓ SmartyGrants has this functionality
 💰 SmartyGrants has this functionality but it may incur an additional cost
⌚ SmartyGrants does not yet have this functionality
 ✘ Not on the SmartyGrants roadmap

SmartyGrants highlights

(internal tracking features that we know you'll love):

- ✔ Keep detailed file notes against an application and its related contacts (automatically and manually generated)
- ✔ Easily attach additional documentation or additional online forms to an application
- ✔ Categorise and report on grants according to any criteria
- ✔ Customisable 'stages' and 'tasks' functionality ensures important tasks don't fall through the cracks
- ✔ Keep track of completed and overdue tasks using stages and through your program calendar / stages page
- ✔ Subscribe to a calendar feed to stay on top of when tasks, stages and payments are due. Round dates can also be included as form submission dates



“The support and ongoing communication from the SmartyGrants team has been exemplary”

Online Applications - Grantmaker Experience





Online applications are now preferred and expected, as revealed through successive Grants in Australia surveys over recent years. Grantseekers report, however, that clunky, slow, unreliable, unintuitive, unsaveable online forms are still commonplace.

SmartyGrants offers grantmakers access to the latest and greatest in form-building functionality – marrying a simple, flexible, intuitive form-builder at your end with an easy-to-use, custom-branded, attractive interface at theirs.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
17	Lets you collect application information online and view it.	●			✓
18	Can include custom dropdowns and text fields in applications.	●			✓
19	Lets applicants upload files as part of their application.	●			✓
20	Can include file uploads, dropdowns, checkboxes, and text fields in application fields.		●		✓
21	Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, and/or a more detailed proposal stage.		●		✓
22	Automatically pulls data from online applications into the core grants management system—no download or upload of data files is required.		●		✓
23	Supports multiple logins for grantees on a single application. or Grant application forms can branch at all stages, possibly through customisation.		●		✓
24	There is a virus scan or security feature to prevent malicious files from being uploaded onto the application or downloaded onto the system.		●		✓
25	Lets you create new online applications without additional charges from vendor.			●	✓
26	Lets you customise a confirmation message to be sent upon submission of an application.			●	✓
27	Lets applicants upload a wide variety of files as part of their application.			●	✓
28	The system allows both individual applicants and organisations to apply for grants from the same grant program.			●	✓
29	Supports multiple logins for grantees on a single application, AND Grant application forms can branch at all stages, possibly through customization.			●	⌚
30	Supports multiple application stages, including an automatically scored eligibility quiz, a Letter of Intent stage, a more detailed proposal stage, and as many other stages as needed.			●	✓

* As listed by Idealware, *Consumers Guide to Grants Management Systems* (November 2013)

 SmartyGrants has this functionality
  SmartyGrants has this functionality but it may incur an additional cost
 SmartyGrants does not yet have this functionality
  Not on the SmartyGrants roadmap

SmartyGrants highlights

(form-builder features that we know you'll love):

- ✔ Build your own forms and open program rounds without IT assistance
- ✔ Intuitive interface
- ✔ No limits to size or numbers of forms
- ✔ Ability to review unsubmitted applications
- ✔ Ability to re-open submitted applications
- ✔ Rounds close automatically at the time you specify (with support for multiple time zones)
- ✔ Ability to accept late submissions privately
- ✔ Automatically check organisation details through government charity/not-for-profit listing lookups (including Australian Business Register, NZ Companies Register and NZ Charities Register)
- ✔ Run private or invitation-only rounds
- ✔ Receive multiple file attachments
- ✔ Issue immediate application receipt confirmations (applicants receive an email with a PDF copy of their submission)
- ✔ Use conditional logic and choose from many field types (contact questions, general content, short answer, long answer, number, currency, date, single choice, multiple choice, dropdown list, budget/income/expenditure, file upload) and layouts (multi-column, grids, repeatable sections)



“The SmartyGrants system is the best support I have ever experienced. They are always helpful and know what they are doing.”

Online Applications - Grantseeker Experience

A great form building tool counts for little if it's a horrible experience at the grantseekers' end. SmartyGrants has been built by people with experience in filling in grant applications – we bring best practice knowledge of the domain to our technology solution.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
31	Lets applicants view their status online.	●			✓
32	System registration follows standard best practices—applicants enter email address and password and are sent a confirmation email.	●			✓
33	Lets applicants save their application and return to it at a later point.		●		✓
34	Carries over contact information and other appropriate data for an organisation or grant from one year's application form to another, or from a Letter of Intent to a proposal—for example, a narrative entered in a Letter of Intent doesn't have to be re-entered in a proposal.		●		✓
35	Applicants can easily view or print applications at any stage in the process.		●		✓
36	Both applicant and grantmaker can quickly and easily reset lost credentials.			●	✓
37	The applicant can create a preview packet of their grant, which includes either copies of all uploaded documents or links to them.			●	✓
38	The system checks the email address of each new registrant to make sure it doesn't already exist in the system, and prompts the user if it is a duplicate.			●	✓

* As listed by Idealware, *Consumers Guide to Grants Management Systems* (November 2013)

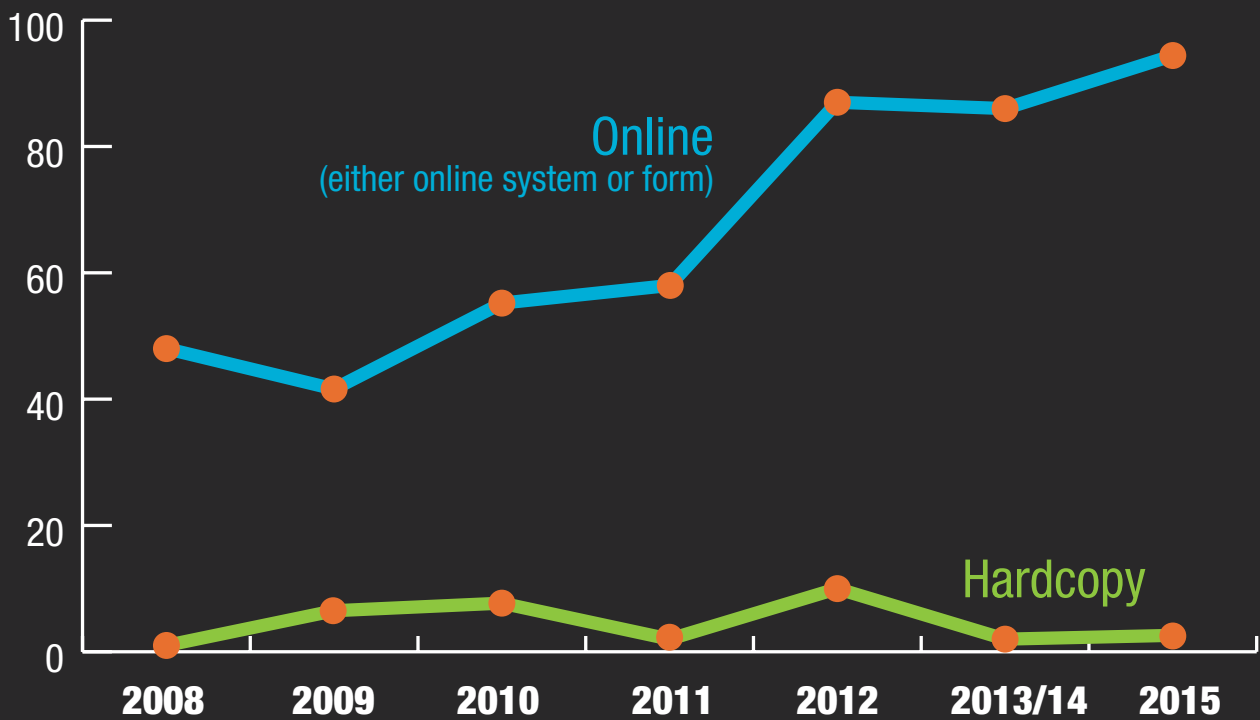
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⌚ SmartyGrants does not yet have this functionality
 ✘ Not on the SmartyGrants roadmap

SmartyGrants highlights

(applicant site features that we know you'll love):

- ✓ Intuitive interface that aligns to the look-and-feel of your website
- ✓ Ability to view the entire form before commencing an application
- ✓ Applicants can save and return to their submission later
- ✓ Accessibility compliant (WCAG 2.0 AA compliant)
- ✓ Support for broad range of web browsers
- ✓ Free technical support
- ✓ Grantseeker-preferred

Grants application systems – grantseeker preference



Our Community's Grants in Australia Survey

True Story:

One grantmaker, using SmartyGrants for the first time and fearing its largely multicultural community would struggle with the forms, found that 76% of applicants opted to submit online.



Form Design & Flexibility

SmartyGrants allows grantmakers to customise the look of their applicant-facing site to match their own organisation's branding.

Users can also customise forms to stipulate maximum character/word counts and may add additional field validation rules, as well as customised help and guidance notes.

Key features:

Idealware criteria		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
39	Lets you, or the vendor, customise online application forms with your logo, at a minimum.	●			✓
40	Lets you adjust character or word counts for at least some fields in online forms.	●			✓
41	Lets you adjust character or word counts for all fields in online forms.		●		✓
42	Lets you adjust character count, and displays prominently how many characters remain on a field.		●		✓
43	Lets you customise in-system help for applicants or grantees. or Vendor can customise in-system help for applicants or grantees.		●		✓
44	Lets you, or the vendor, customise online application forms to match the look and feel of your website, including colours, fonts, and navigation, at no additional cost.			●	✓
45	Lets you adjust word as well as character count, and displays prominently how many words or characters remain on a field.			●	✓
46	In-system help is customisable (by you or by the vendor) in the form of online videos, FAQs, wikis, or another sophisticated option.			●	✓

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 ✖ Not on the SmartyGrants roadmap

SmartyGrants highlights

(form design features that we know you'll love):

- ✓ Free site "skinning" (emulating your organisation's look and feel) for all new clients (re-skinning also available as required [extra charges may apply])
- ✓ Enforce compliance by adding mandatory fields, word limits, number and date ranges and address validation
- ✓ Customise overview text for your applicant website and each round
- ✓ Add question "hints" as desired within forms
- ✓ Use conditional logic to enable or disable sections or pages, as required





Applications Review

SmartyGrants allows easy access to historical information pertaining to any applicant (essential for eligibility checks), as well as powerful functionality to streamline the work of both internal and external assessors.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
47	Supports at least a single review comment and rating for each application.	●			✓
48	Lets reviewers easily print grant summaries.	●			✓
49	Lets you see a history of a relationship with prospective grantees—for example, what grants they've applied for or been given in the past.		●		✓
50	External or internal reviewers can print grant summaries or full grant information (including attachments). Lets multiple reviewers each rate an application, with at least one comment and one numeric grade for each application.		●		✓
51	Provides a simplified "portal" interface to allow reviewers to see and review grant applications without navigating the full grants management interface.		●		✓
52	Proposal owner and management staff can be automatically notified when reviews are completed, either via email or within the system.		●		✗
53	Supports checklist functionality to define what information or documents you require from prospective grantees. or Provides strong online application functionality, including the ability to reopen online applications once they've been submitted if more information is required from the applicant.		●		✓
54	Lets multiple reviewers each numerically rate an application on a number of different factors, and add comments.			●	✓
55	Supports different information or scoring schemes for different programs.			●	✓
56	Supports online viewing and reviewing of applications.			●	✓
57	Lets you track external reviewers' interests, potential conflicts of interest, and geographic location or area of expertise and use those criteria to assign applications for review.			●	✗
58	Lets reviewers see each other's comments and grades, if you allow it.			●	✓
59	Lets you view numeric review scores and report them as summary statistics—for example, average score—and aggregate them.			●	✓
60	Lets you define automatic steps and rules, or "workflow," for the grants review process.			●	⌚

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SmartyGrants highlights

(application review features that we know you'll love):

- ✔ Permits online application reviews/assessments by multiple internal and/or external assessors
- ✔ Ability to control which applications assessors can see
- ✔ Supports “blind assessments”
- ✔ Same intuitive form design capability as used for applications
- ✔ Save and load filters to find applications easily
- ✔ Move applications between stages in bulk
- ✔ Assessors can score, rate or comment on applications according to criteria set by the grantmaker
- ✔ Generate assessment reports
- ✔ Side-by-side assessment – assessors can view the completed application in the same window as the assessment form
- ✔ Easily track assessment progress through an administrator dashboard



“This system is absolutely brilliant. Easy to use, comprehensive, tells you off when you do something wrong – congrats to the team.”

SmartyGrants Features v6.2

NAVIGATION & SETTINGS

Launchpad

Select account

Main Menu

Help
AIGM forum
Contact us

Manage Account

Create trial account
Subscription preferences (view)
Personalise viewing preferences (view / edit)

Applicant Site

Website url (specified during account setup)
Site information (edit)

PROCESS & WORKFLOW

Stages

Stages (add / edit / archive / reactivate)
Specify end date
Assign specific assessment forms to a stage
View applications by stage

Tasks

Stage tasks (add / edit / delete)
Application tasks (add / edit / delete)
View completed / uncompleted tasks

Calendar

Calendar (rounds / stages / tasks / payments)
Configure calendar (view form submissions daily / weekly)

GRANT MANAGEMENT

Programs

Manage programs (add / edit / view / sort)
Specify default numbering schemes
View linked applications, rounds & stages

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
Round webpage message (edit)
Late submission page (generate link)
View applications by round

CONTACTS

Contact Fields

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

Contact Types

Default contact types (view)
Custom contact types (add / edit / delete)

Contact Management

Manage individuals and organisations (add / edit / delete)
Automatically add 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)
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)

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

Forms Features

Pages (add / move / delete)
Sections (add / move / delete)
Multi-column layouts
Repeatable sections (edit number of repeats)
Grids (edit number of rows)
Add / remove rows during form fill-out (enable / disable)
Conditional logic (enable / disable)
Hints
Word counts
Validation (mandatory fields / numbers / addresses)

Question Types

Standard fields (editable / read-only)
Contact fields (generation of contacts on / off)
Multiple name layouts (individual, organisation, both)
Multiple address layouts
Multiple text input layouts
General content
Short answer / long answer
Number / currency / date
Single choice / multiple choice / dropdown list
Budget / income / expenditure
File upload

APPLICANT SITE

Logins

Register
Log in / log out
Reset / change password
Concurrent login warning

Rounds

Current rounds (view information & dates)
Upcoming rounds (view information & dates)

Forms

My submissions
Preview form
Fill out application form (start / save / edit / submit)
Fill out acquittal form (start / save / edit / submit)
Download response (pdf)

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)
Application summary (view / edit)
Change user
Application history (view)

Application Responses

Request access to unsubmitted response
View submitted response (current / previous versions)
Download (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 (pdf / attachments)
Reopen form

Decisions

Specify decision and date
Internal / external comments (add / edit / delete)
Decision history (view)

Acquittals

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

Administration

Fill out administration form (edit / save / submit / delete)
View response (current / previous versions)
Download (pdf / attachments)
Reopen form

Attachments

All Files (View / Download Attachments)

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, assessor)
Manage access levels (per program)
View only / standard user / program manager access
Grant access to contacts
Grant access to mailouts
Remove user access

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

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 conditions & notes
Payments (schedule / approve / mark paid / edit / delete)
Cancelled & returned payments (add / edit / delete)
Specify payment date & payee

SUPPORT AND SERVICES

Training

Face-to-face training
Webinars
Help hub & video tutorials
Personalised training **
*** Personalised training incurs a fee*

Support

Enquiries & feedback
Troubleshooting
Technical support
Record maintenance

Services

Applicant site skinning
Custom email styles (colours, logos) **
Data migration / import **
*** Some services may incur a fee*

DATA AND REPORTING

Standard Fields

Default standard fields (archive / reactivate)
Standard field categories (add / edit / delete)
Custom standard fields (add / edit / delete)
Specify default question text, layout and hint
Link standard fields to choice lists

Choice Lists

Default choice lists (edit / archive / reactivate)
Default choices (archive / reactivate)
Custom choice lists (add / edit / delete)
Custom choices (add / edit / delete)

Search & Filter

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

Reports

Default templates
Custom templates
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

Data Export

Backups (xml, pdf)
Round snapshot (excel)
Payments snapshot (excel)
Export contacts (excel / pdf)
Export applications (excel / pdf)
Export file notes / forms / history (pdf)
Export attachments
Filter exports by date

Integrations

iCal feed
Australian business register
NZ companies register
NZ charities register
Document management system (TRIM / HP DMS) **
Xero integration **
Secure file transfer **

*** Some integrations may incur setup cost & annual fee*

Check Applicants' Legal Status

SmartyGrants integrates with a range of government information portals to allow auto-lookup of applicant organisations.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
61	Lets you click on organisations to view their record and tax status in a standard registry.	●			✓
62	Lets you create a list of organisations in a format that can easily be used to check them against terrorist watch lists, potentially in a different system.		●		✓
63	The tax status automatic check includes auto population of related fields for legal name, unique identifier (e.g. ABN), and tax status.		●		✓
64	Includes date and time stamp, which can serve as an audit trail demonstration completion of due diligence step(s).			●	✓
65	Lets you perform checks and updates in batch. or The vendor will perform checks and updates in batch for you.			●	✓

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 ✘ Not on the SmartyGrants roadmap

SmartyGrants highlights (lookup features that we know you'll love):

- ✓ In Australia, SmartyGrants interfaces with the Australian Business Register. In New Zealand, we interface with Charities Services and Business.govt.nz

SmartyGrants screenshot: Interface with Australian Business Register

Applicant ABN

The ABN provided will be used to look up the following information. Click Lookup above to check that you have entered the ABN correctly.

Information from the Australian Business Register

ABN

Entity name

ABN status

Entity type

Goods & Services Tax (GST)

DGR Endorsed

ATO Charity Type [More information](#)

ACNC Registration

Tax Concessions

Main business location

Letters and Board Dockets

SmartyGrants includes many tools to help grantmakers handle correspondence with all key contacts.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
66	Lets you print a view of each grant application.	●			✓
67	Lets you insert mail-merge data into letters, possibly by way of downloading data into Microsoft Excel.	●			✓
68	Lets you define a default format for grant application summaries and choose which fields to include.		●		✓
69	Provides several standard letter and electronic templates that you can generate using grant record information.		●		✓
70	Lets you define a default format for printing grant application summaries, choosing which fields to include, as well as customising fonts, colours, and logos.		●		✓
71	Lets you create letter templates that include mail-merged information about grants and organisations, and lets you customise their fonts, colours, and logos.			●	✓
72	Lets you print letters or summaries either individually or for a series of grants or grant applications in a single step.			●	✓
73	Lets you view and customise individual letters before printing them.			●	✓
74	The system provides support for electronic signatures, possibly with external verification.				⌚

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SmartyGrants highlights

(correspondence features that we know you'll love):

- ✓ Create any type of custom correspondence (e.g. letters, agreements) using Word or Excel
- ✓ Correspondence (reports) can be added as an attachment through the Mailouts functionality



“Love love love SmartyGrants and everyone who works there”





Emails

In December 2015, SmartyGrants unveiled new “mailouts” functionality to help streamline the process of corresponding with key contacts via email.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
75	Lets you send email through the system to a single individual.	●			✓
76	Lets you send email through the system to a single individual or a group of people who meet particular criteria. Group emails are not sent as blind copies, but rather as one-to-one.		●		✓
77	Lets you set up and send automatic emails based on certain events. or Lets you set up and send scheduled reminders to applicants and grantees.		●		⌚
78	Lets you create email to individuals and groups based on templates that include both standard text and “mail-merge” type inserted data.			●	✓
79	Lets you set up and send scheduled reminders to applicants and grantees.			●	⌚
80	Lets you see the open rate, click-through rate, and unsubscribe rate for each email, the number of people who clicked on each link, and bounce reports.			●	⌚
81	Lets you attach files to emails sent to individuals and groups.			●	✓

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SmartyGrants highlights

(correspondence features that we know you'll love):

- ✓ Send an email to any contact
- ✓ Send emails in bulk for a filtered list of applications, selecting which contacts to include in To, Cc and Bcc
- ✓ Insert key fields into the body of the email message
- ✓ Attach files and reports (letters) as an attachment to mailouts
- ✓ Track the status of sent emails, including bounce-backs
- ✓ Store/reuse previous mailouts for future correspondence
- ✓ Ability to customise the “reply to” address





Relationship Management

The job of a grantmaker is no longer (has never been) to robotically process applications. Grantmakers are community organisers, coalition builders, troubleshooters, relationship managers. SmartyGrants provides a range of technical functionality to support the very human function of grantmaking.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
82	Tracks organisations separately from individual grants to allow you to see a history of all grants to an organisation.	●			✓
83	Lets you note interactions with a grantee with at least a single comment field.	●			✓
84	Lets you associate multiple contacts with an organisation, and define their relationships to you and to a specific grant.		●		✓
85	Lets you keep a log of communications such as phone calls and emails with a particular contact or a grantee organisation.		●		✓
86	Lets you keep former staffers that were associated with a grant on an organisation's record without making them active contacts for communications.		●		✓
87	Can track individual business units under a larger organisation. or Lets you automatically capture emails from external email systems into grantee or organisation records.		●		✓
88	Automatically stores a record of all system-generated letters and emails for each grant.			●	✓
89	Lets you keep a log of communications such as phone calls and emails with a particular contact at a grantee organisation.			●	✓
90	Can track individual business units under a larger organisation.			●	⌚
91	Lets you communicate with a contact according to their relationship with the grant or organisation (for example, send the payment letter to the payment contact, or email reporting reminder to report contact).			●	✓
92	System allows you to automatically synchronise contacts with Outlook. or System allows you to automatically export system contacts to Outlook or Exchange. or System lets you automatically capture emails from external email systems into grantee or organisation records.			●	✓

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SmartyGrants highlights

(relationship management features that we know you'll love):

- ✔ Create your own contact types and contact fields
- ✔ New contacts are automatically created on submission of application
- ✔ Easily record file notes to capture the history of your relationship with the grantee
- ✔ Flag applications and contacts to ensure all staff are aware of special requirements
- ✔ Keep history of the grantee's grant involvements
- ✔ Easily tag groups of contacts
- ✔ Check for duplicates and merge contacts
- ✔ Export contact lists as required

SmartyGrants screenshot: Easily record file notes

The screenshot displays the 'File Notes' section of the SmartyGrants application. At the top right, there is a 'Create File Note' button. Below this, a table lists file notes with columns for 'Date' and 'File note'. Each entry includes a date, a summary of the note, and an 'Options' dropdown menu. The first entry, dated 19 Apr 2016, describes a file note created by Daisy Duke about Ms Betsy Grey, with a detailed note explaining that the contact was created from merging two existing contacts: 'Ms Betsy Grey - SG150011 (Applicant Admin Contact)' and 'Ms Betsy Grey - SG150011 (Head of Org)'. The second entry, also dated 19 Apr 2016, describes a file note by Daisy Duke about Greyhound Rescue and Ms Betsy Grey, with a detailed note stating 'Betsy Grey e-mailed updated signed agreement.' and a list of attachments including 'Agreement_GreyhoundRescue_v2.docx' (20.1 kB).

Date	File note
19 Apr 2016	Daisy Duke created a file note about Ms Betsy Grey <p>This contact was created as a result of merging the following contacts: Ms Betsy Grey - SG150011 (Applicant Admin Contact); Ms Betsy Grey - SG150011 (Head of Org);</p>
19 Apr 2016	Daisy Duke created a file note about Greyhound Rescue and Ms Betsy Grey relating to application SG150011 <p>Betsy Grey e-mailed updated signed agreement.</p> <p>Attachments Agreement_GreyhoundRescue_v2.docx 20.1 kB</p>





Grant Requirements & Evaluation

Grantmakers can't afford to drop their attention after the cheque's gone out. Proper monitoring of performance against the funding criteria and agreed contract is imperative to the success of the program. SmartyGrants provides tools to help ensure peace of mind for both the grantmaker and their supervisors and auditors.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
93	Lets you easily see which requirements grantees have met, and which they have not.	●			✓
94	Lets you define a default set of grant requirements and customise them for individual grantees. or Lets grantees submit progress report information through online data fields.		●		✓
95	Lets you store progress report information submitted by grantees in multiple data fields.		●		✓
96	Can automatically email grantees to remind them about upcoming deadlines.		●		⌚
97	Lets grantees submit progress report information through online data fields.		●		✓
98	Lets grantees view grant requirement deadlines online.			●	✓
99	Emails to applicants can include information specific to the grant program in question.			●	✓
100	Lets grantees submit progress report information through online data fields, which you can then summarise across grantees in reports.			●	✓
101	Lets you create custom online progress report forms (for example, corresponding to different programs) without paying additional vendor fees.			●	✓
102	Supports evaluation metrics based on user groups—i.e., you can summarise and report on data based on grantee's programs, geographic location, or other criteria.			●	✓
103	Data collection can branch based on type of grant.				✓

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  SmartyGrants does not yet have this functionality
  Not on the SmartyGrants roadmap

SmartyGrants highlights

(acquittal/evaluation features that we know you'll love):

- ✔ Design your evaluation and acquittal forms so you gain the critical information you need
- ✔ Allow online completion and submission of acquittals and other reports
- ✔ Stay on top of acquittals as they come in
- ✔ Acquittal reports are linked to an application, ensuring all information is stored against a single record
- ✔ Supports a range of processes – from a single evaluation process through to a formal committee review process

SmartyGrants screenshot: Add acquittals for online completion

Application SG150001

Add Form

Form

Please select from the following due date options:

- Use Grant Round closing date
- Set no due date for this form
- Use a custom date and time

- Create associated task
- Allow late submission (allow users to submit the form even after the due date has passed)
- Send notification email to applicant ([preview email](#))





Payments

Payments are a key function of grantmaking. Full and clear payment visibility is a key feature of the SmartyGrants software.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
104	Lets you define a payment schedule for each grant.	●			✓
105	Lets you see what scheduled payments are upcoming.	●			✓
106	Lets you see what payments have been made, including amount, date paid, and cheque number.	●			✓
107	Can generate a report of the amount scheduled to be paid out in a given year (including carryover from previous years' grants).		●		✓
108	Lets you see upcoming scheduled payments and whether the grantee has met requirements linked with that payment.		●		✓
109	Supports payments to organisations other than the primary grantee (for example, auspicing organisations).		●		✓
110	Lets you include a note on a payment.		●		✓
111	Supports grants in a single currency. or Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.		●		✓
112	Lets you pull reports on payments which carry coding attributes of associated requests, organisations, and contacts.		●		✓
113	The vendor has experience in integrating with at least one external accounting software package (if the accounting system is not built in).			●	✓
114	Can generate a paper cheque request for accounting.				✗
115	Supports wire transfers by storing required information and confirmation codes for successful transactions.				✗
116	Supports grants made in multiple currencies by storing currency and exchange rate information.				⌚
117	Lets you define a default payment schedule that applies to all grants, and then adjust the amounts and dates for each grant individually.				⌚
118	Allows for payments to be made contingent or conditional upon a specified grant or payment requirement.				✓

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  Not on the SmartyGrants roadmap

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
119	Lets you configure audit or security controls to ensure that only certain staff can change payment information.				✔
120	Supports an automated payment approval process with configurable workflow steps.				⌚
121	Lets you void payments, make refunds, and place payments on hold, which are attached to workflows within the system.				✔
122	There is the ability to update payment details and create payments (e.g., general ledger account, fund, etc.) in batch. or There is the ability to track quid pro quo and in kind payments.				✔

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 ⌚ SmartyGrants does not yet have this functionality ❌ Not on the SmartyGrants roadmap

SmartyGrants highlights (payments features that we know you'll love):

- ✔ Track payments against particular budgets and funding overviews
- ✔ Payments can be classed as “scheduled” or “approved” and “conditional”—ensuring that you only make payments to applications that have met their funding criteria
- ✔ Track what is to be paid or remains unpaid against financial periods and budgets
- ✔ Capture cancelled and returned payments
- ✔ Xero integration available (additional charges may apply – contact us for details)

SmartyGrants screenshot: Funding allocations

Funding Allocations								Create Funding Allocation												
Financial Period	Funding Source	Budget	Allocated	Scheduled / Approved	Paid	Returned	Allocation Available													
Financial Year 2016-2017	Community Social Plan	Youth Programs	\$15,000.00	\$0.00	\$15,000.00	\$0.00	\$0.00	Options ▾												
Related Payments <table border="1"> <thead> <tr> <th>Payee</th> <th>Scheduled Date</th> <th>Paid Date</th> <th>Status</th> <th>Amount</th> <th></th> </tr> </thead> <tbody> <tr> <td>Ms Betsy Grey</td> <td>28/10/2016</td> <td>28/10/2016</td> <td>Paid</td> <td>\$15,000.00</td> <td>Options ▾</td> </tr> </tbody> </table>									Payee	Scheduled Date	Paid Date	Status	Amount		Ms Betsy Grey	28/10/2016	28/10/2016	Paid	\$15,000.00	Options ▾
Payee	Scheduled Date	Paid Date	Status	Amount																
Ms Betsy Grey	28/10/2016	28/10/2016	Paid	\$15,000.00	Options ▾															
Financial Year 2015-2016	Community Social Plan	Youth Programs	\$15,000.00	\$15,000.00	\$0.00	\$0.00	\$0.00	Options ▾												
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Payee	Scheduled Date	Paid Date	Status	Amount																
Ms Betsy Grey	16/06/2017		Scheduled	\$7,500.00	Options ▾															

Budgeting

SmartyGrants provides tools to allow grantmakers to easily keep track of the available cash.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
123	Lets you track either the amount awarded or the amount budgeted in a particular year.	●			✓
124	Can split grants across more than one program for budgeting purposes. or Lets you use previous years' budgets as a base and adjust them for current year.		●		✓
125	Lets you choose whether to track either the amount awarded or the amount budgeted in a particular year.			●	✓
126	Can track budgets in hierarchically defined categories or program areas.			●	✓
127	Lets administrators view the impact a particular grant will have on future year payouts with a "what if" type feature. or Lets you track interest repayments on program-related investments (possibly through customisation).			●	⌚

* As listed by Idealware, *Consumers Guide to Grants Management Systems* (November 2013)

✓ SmartyGrants has this functionality
 💰 SmartyGrants has this functionality but it may incur an additional cost
⌚ SmartyGrants does not yet have this functionality
 🚫 Not on the SmartyGrants roadmap

SmartyGrants highlights

(budget management features that we know you'll love):

- ✓ Track budgets and funding priorities across funding sources and/or financial years
- ✓ Easily ascertain how much budget has been allocated, and how much remains
- ✓ Use the Budget Overview function to pinpoint which applications are funded from which budgets
- ✓ Generate a snapshot report of all payments
- ✓ Suitable for single or multiple year grant programs



“Can I just give you a hug now?”





System Querying & Reporting

You, your grantees and your assessors put the data in – SmartyGrants helps you push it out, in whatever form you choose. Any authorised user can construct and generate the reports they need.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
128	Lets you run pre-packaged basic reports, upcoming payments, or the list of grants currently being reviewed.	●			✓
129	Lets you search or filter to find a particular set of grants based on status, program, and cycle, and view pre-packaged reports based on this customised set of grants.		●		✓
130	Lets you save reports that you create or modify.		●		✓
131	Supports ad hoc reports, which can include nearly any field displayed to users, possibly by exporting data to Excel for formatting.		●		✓
132	Virtually all system data— including the data entered into online applications, review forms, and grantee progress reports, if supported—can be included in reports.		●		✓
133	Lets you quickly view favourite reports without navigating a much-larger set. or Can make small updates to standard reports.		●		✓
134	There is a process of running reports that is easy enough for casual users to run queries independently.		●		✓
135	Supports ad hoc reports within the system, which can include custom data columns, datasets, sorting, grouping, logos, and headers.			●	✓
136	Can make small updates to standard reports.			●	✓
137	Reports can be set to automatically run and sent to individuals or groups.			●	⌚
138	Users can create their own multiple unique dashboards, or a vendor can do this for you.			●	⌚
139	Lets you quickly view favourite reports, and possibly queries and actions, without navigating a much larger set.			●	✓
140	Lets you save ad hoc reports that you create or modify.			●	✓
141	Lets you search the contents of file attachments. or Lets you drill down for more information on some or all reports.			●	✓

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SmartyGrants highlights

(reporting features that we know you'll love):

- ✔ Flexible reporting allows you to manage your reporting requirements to suit your own needs
- ✔ All information related to contacts and applications is accessible through the reporting system – extract any field from any form
- ✔ Create and reuse report templates
- ✔ Easily filter which applications are included in your reports. Filter applications based on
 - Any response to any question on a form
 - The round or stage they are in
 - The decision (declined, approved, undecided)
 - Tasks assigned and whether they are complete or not
 - Funding and payment information
 - Contact information
- ✔ Report across your contacts
- ✔ Apply your own layouts and formatting to report templates, and upload them to run reports

SmartyGrants screenshot: Report templates

Report Templates + Create Template

Application Templates | Contact Templates

Program: Festivals and Events
Change program...

Default Templates

Template Name	Restricted / Unrestricted	Actions
Short Summary A one page summary of each application	Unrestricted	Download View Details Delete
App Contact Summary A short summary of key application and related contact details.	Unrestricted	Download View Details Delete
Task List A list of the tasks assigned to each application.	Unrestricted	Download View Details Delete
Task Spreadsheet An Excel spreadsheet of the tasks assigned to each application.	Unrestricted	Download View Details Delete
Open or Unsubmitted Forms A list of all forms that are unsubmitted or open on your applications.	Unrestricted	Download View Details Delete
Allocation and Payments Funding allocation and payment details for applications	Unrestricted	Download View Details Delete

Custom Templates

Name	Owner	Restricted / Unrestricted	Actions
Successful_Letters_2016	Daisy Duke	Restricted	Download View Details Delete
Committee Assessment Report	Daisy Duke	Restricted	Download View Details Delete





Permissions & Workflow

You want your system to adhere to privacy and probity requirements and be easy to use. SmartyGrants allows you to provide/restrict access to certain information to certain people. Its powerful but simple system of permissions allows administrators to control who can see and do what, when.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
142	Lets you grant individuals access (or not) to certain large areas of system information, such as a module.	●			✓
143	Has at least two different internal interfaces—for example, an admin view and a reviewer view—to provide a simpler experience for users with less complex needs.		●		✓
144	Records a number of specific actions—for example, grant approvals, status changes, and new grantee records—in a system audit log.		●		✓
145	Lets you grant individuals granular access to view, edit, or delete data for a wide variety of system functions.		●		✓
146	Lets you define user or group permissions on a field-by-field basis.			●	✗
147	Provides “dashboard” views, which summarise the grants and tasks currently relevant to each individual user.				⌚
148	Lets you assign tasks, such as the review of a progress report, to particular users through workflow functionality.				✓
149	Provides a standard, focused, roles-based view for management and board members. or Assigns tasks to users based on rules and roles.				⌚

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SmartyGrants highlights (permissions features that we know you'll love):

- ✓ Unlimited number of user accounts
- ✓ Your administrator/s maintain full control over who accesses the system
- ✓ Assign different access levels – ‘view only’, ‘standard’, ‘program manager’, ‘administrator’
- ✓ Grant overall access to the system or restrict users to specific programs
- ✓ Ability to separate programs into multiple ‘instances’, allowing grantmakers to create separate stand-alone grants programs (additional charges may apply)
- ✓ Workflow supported through stages (which you define, to match your grantmaking process) and tasks
- ✓ Move applications between stages in bulk
- ✓ Monitor key dates using the calendar in SmartyGrants, also available through an iCal feed





Data Access

Data accessibility and transferability is a cornerstone of SmartyGrants. We don't lock your data away; we want you to have complete portability so that you can leave us at any time. It helps keep us honest!

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
150	All data stored within the database can be extracted by someone other than the vendor. or The vendor agrees to provide data in a standard file format (such as .csv) as part of the standard license agreement.	●			✓
151	Lets you export core grant data, such as project name, program, and grant amount, into another file format, such as .xls or .csv, in a way that it can be used for further reporting.	●			✓
152	Lets you export most data visible to users into another file format, such as .xls or .csv, in a way that it can be used for further reporting.		●		✓
153	Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system. or Provides apps or views designed specifically for mobile devices (for any purpose).		●		✓
154	Lets you export all data visible to users into another file format, such as .xls or .csv.			●	✓
155	Provides a method, such as an API or a direct ODBC database connection, to allow a programmer to create custom data feeds to an external system.			●	✓

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SmartyGrants highlights

(data access and portability features that we know you'll love):

- ✓ Obtain your data from wherever and whenever you have an internet connection
- ✓ Access data through template or custom Word or Excel reports
- ✓ Export data easily through the SmartyGrants export function
- ✓ Data is protected through SmartyGrants' secure backup file system
- ✓ Full data portability – take your data with you if you decide to stop using SmartyGrants





Overall Customisation

Through a decade-and-a-half working with (and being) grantmakers, we've come to see just how similar one grant lifecycle is to another. And we believe that there are great economies of scale to be achieved when people doing similar things can use the same framework. SmartyGrants provides access to one expert development team, with a program of constant improvement informed by many users. We provide customisation ability to allow you to express your uniqueness, without overwhelming you with unnecessary setup. Most customisation options come at no additional cost.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
156	Lets you customise the information requested in online applications, if offered, potentially at additional cost.	●			✓
157	Lets you store custom information submitted by grantees, such as application narratives or progress report metrics, in separate fields.	●			✓
158	Lets you customise dropdown values for fields such as program or grant codes.	●			✓
159	Lets you customise the information requested in online applications and review forms at no additional cost. or Vendor will extensively customise system to your needs, potentially at additional cost.		●		✓
160	Lets you add custom "internal tracking" fields for staff use, potentially at additional cost.			●	✓
161	Lets you customise the names of fields displayed in the interface, potentially at additional cost.			●	✓
162	Lets you add a virtually unlimited amount of custom fields, with an audit log to track their creation.			●	✓
163	Vendor permits clients to extend system functionality via access to underlying database and code (as allowed through the API).			●	✓

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SmartyGrants highlights

(customisation features that we know you'll love):

- ✓ Maintain full control over the contents of your application forms, acquittals or progress reports
- ✓ Create your own standard fields (for use across all programs), choice lists, contact types and contact fields
- ✓ Easy-to-use form builder (easily build and alter your own forms)
- ✓ Your applicant site is customised to mirror the existing look and feel of your current website (free for new subscribers)
- ✓ Maintain precise control over when your grants rounds automatically open and close
- ✓ Create as many grant programs as you require
- ✓ Determine different access security levels for users

Ease of Use

We know our system is easy to use – because our users tell us so. Over and over and over again. (Aw, shucks 😊)

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
164	Most individuals could learn how to use the system with training.	●			✓
165	Users can easily find the actions they are most likely to take (possibly by looking through a considerable list of options).		●		✓
166	The interface is polished looking (though potentially otherwise flawed).		●		✓
167	The interface is polished looking and neatly laid out.			●	✓
168	Navigation and action items are labelled intuitively.			●	✓
169	Users can easily find the actions they are most likely to take.			●	✓
170	The system pulls together the information and actions an expert user is likely to need.			●	✓

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SmartyGrants highlights (ease-of-use features that we know you'll love):

- ✓ Uncluttered, easy-to-use interface
- ✓ Easy navigation between functions
- ✓ Plain English help documentation, written and video-based
- ✓ Intuitive labelling (labels roadtested with a team of journalists and a group of early-access SmartyGrants users)
- ✓ Prompt notification of changes through our email newsletter, *SmartyNews*
- ✓ Access to regular training and phone and email-based support where needed



“We’re very impressed. It’s clear how much experience sits behind this software.”

Support & Training

We're people-people: social innovators, not stand-back techies. Many of us are also grantmakers and grantseekers. So it stands to reason that this is an area in which we'd like to think we truly shine.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
171	Vendor can be reached for questions.	●			✓
172	Vendor provides either online or printed help manuals.	●			✓
173	Vendor provides training, potentially at additional cost.		●		✓
174	Vendor provides phone support.		●		✓
175	Vendor provides unlimited phone and email support within a yearly fee or maintenance package.			●	✓
176	Vendor provides initial training in person or via the internet at no additional cost, and additional training sessions can be scheduled.			●	✓

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SmartyGrants highlights (support and training features that we know you'll love):

- ✓ Initial training upon sign up (no extra charge)
- ✓ Regular computer lab training sessions, webinars and custom training sessions available in multiple locations
- ✓ Technical support for administrators, applicants and assessors (by email and phone) included in the subscription
- ✓ Help is never far away and, most importantly, you get an email or phone response FROM A HUMAN
- ✓ Service targets mean we aim to respond to all emails within 60 minutes during business hours (though we usually exceed that aim) and resolve issues within 24 hours
- ✓ Full suite of videos and online help documentation available
- ✓ Form and report-building support available as required
- ✓ (Optional) monthly updates on scheduled functionality updates/releases, upcoming training, grantmaking news, etc.
- ✓ Online access to details of any scheduled maintenance or unexpected incidents (automatic email updates also available via optional subscription service)



“I love the feeling that we are not alone. SmartyGrants people always make me feel supported.”

Stability in the Market

SmartyGrants has been developed by the Australian Institute of Grants Management (AIGM), the grants management body established by Our Community to help drive and disseminate best and next practices in grantmaking in Australia. Our Community is 15-year-old certified B Corporation with a reputation for innovation and for delivering what we promise, on time and within budget. SmartyGrants is an integral part of our reform agenda. It's now used by hundreds of grantmakers. We have big plans for its future. It's here to stay.

Key features:

Idealware criteria*		Idealware Rating (sophistication level)			SmartyGrants
		Basic	Solid	Advanced	
177	The software package has been in use by clients for more than one year. or The vendor reports that the software package has more than 10 clients.	●			✓
178	The software package has been in use by clients for more than three years while supported by the same vendor. or The vendor reports that the software package has more than 20 clients.		●		✓
179	The revenue earned from the software package covers the personnel and operational expenses required to support it.		●		✓
180	The software package has been in use by clients for more than three years.			●	✓
181	The vendor reports that the software package has more than 50 clients.			●	✓

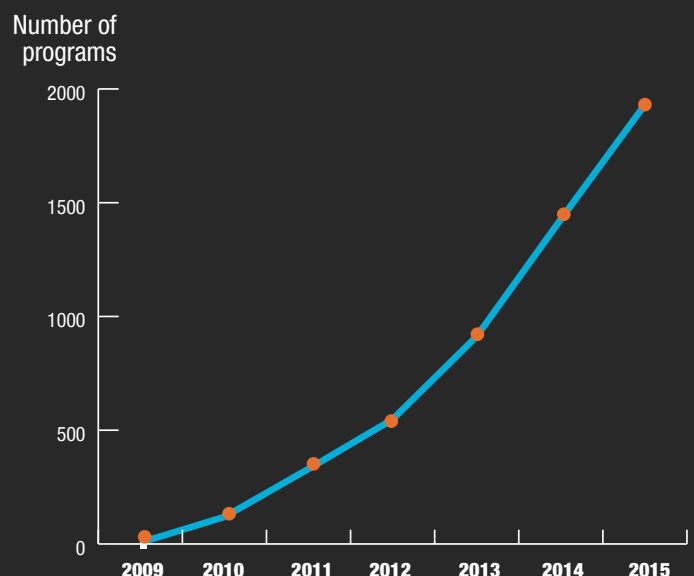
* As listed by Idealware, *Consumers Guide to Grants Management Systems* (November 2013)

✓ SmartyGrants has this functionality
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SmartyGrants highlights (stability points that will give you peace of mind):

- ✓ Proven track record – Australia's most widely used grants management system, used by hundreds of grantmakers from all sectors with budgets of all sizes
- ✓ System has efficiently processed and safely stored more than 1.1 million forms
- ✓ Run by people who genuinely care about, and understand, grantmaking
- ✓ Backed by one of Australia's oldest and most successful social enterprises – Our Community (www.ourcommunity.com.au)

SmartyGrants Growth



Pricing

SmartyGrants users pay an annual fee based on each organisation's annual grant/award/scholarship allocation, allowing you to lock in your budget allocations with certainty.

If you are an uncomplicated organisation distributing less than \$25 million a year, your annual fee will be as described below.

Large organisations with multiple departments and/or which distribute more than \$25 million a year in grants, and/or the equivalent in scholarships/awards, should contact us for a tailored quote.

Our Pricing Pledge

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

Annual Subscription

ANNUAL DISTRIBUTION (Includes grants and equivalent dollar value of scholarships/awards managed through the system)	ANNUAL FEE	INCLUSIONS
Less than \$30,000	\$4,000	<ul style="list-style-type: none"> • Access to the very latest version of the system at all times • Unlimited applications • Unlimited grant/awards/scholarships programs • Unlimited rounds • Unlimited number of users (including external assessors) • Unlimited contacts • 100GB storage space • Free telephone and email technical support for you, your assessors and your grant applicants
\$30,000 to \$100,000	\$7,500	
\$100,000 to \$500,000	\$12,500	
\$500,000 to \$5 million	\$20,000	
\$5 million to \$10 million	\$25,000	
\$10 million to \$15 million	\$30,000	
\$15 million to \$25 million	\$35,000	
More than \$25 million	By negotiation	
		YEAR ONE ONLY:
		<ul style="list-style-type: none"> • Initial training – see next page for details • Skinning – match your SmartyGrants customer-facing webpage to your website's existing look and feel

All fees include GST. Fees correct as at April 2016.
Note New Zealand subscription excludes GST

Training fees

TRAINING TYPE	LOCATION	COST
SmartyGrants initiation <i>Subscriptions of up to \$12,500</i>	<ul style="list-style-type: none"> Process consultation (up to 2 hours) Training pack 2 personalised webinars (up to 2 hours per webinar) 6 SmartyClass vouchers 	FREE Included in 1st year subscription
SmartyGrants initiation <i>Subscriptions of more than \$12,500</i>	<ul style="list-style-type: none"> Process consultation (up to 2 hours) Training pack 2 personalised webinars (up to 2 hours per webinar) 12 SmartyClass vouchers 	FREE Included in 1st year subscription
Help Hub / Video Tutorials <i>Self-serve via the SmartyGrants website</i>	Online: http://help.smartygrants.com.au	FREE
SmartyClass <i>Regularly scheduled training for new and advanced users</i>	Held in various locations – classes are demand-driven. See current schedule: www.smartygrants.com.au/training-schedule.html	\$210 per attendee per session, or one training voucher
Onsite training <i>Face-to-face – we come to you</i>	Our onsite training can be tailored to meet your requirements regarding content (exploring any SmartyGrants topics of your choosing) or format (stand-and-deliver, workshops or computer lab)	\$2,000 per day, plus travel costs (economy class airfares, car hire, accommodation [capped at maximum of \$350 for travel within Australia and New Zealand and only if required])
Training at SmartyGrants HQ <i>You come to us</i>	If we can't bring the training to you, or if it suits you better, we are happy to provide training in our office in West Melbourne (Melbourne city fringe). Capacity and date restrictions apply.	\$150 per hour
Personalised online webinars <i>Just like face-to-face training but via your computer</i>	Custom online webinar (via GoToMeeting), including up to 15 people at your end (participants do not need to be in the same place). The audio is delivered either over the internet or by dialling in through a telephone. Sessions are fully interactive.	\$150 per hour

All fees include GST. Fees correct as at April 2016.

More questions?

Call us on +61 3 9320 6888 (Australia or international customers) or +64 4889 3068 (New Zealand) or email service@smartygrants.com.au

Other fees

SERVICE	FEE
<p>DATA MIGRATION Shifting historical data into your SmartyGrants account</p>	<p>Tailored quote is provided after discussion of your requirements. Typical charge is between \$3,000 and \$10,000.</p>
<p>FORM BUILDING Most clients build all their own forms but occasionally a client asks us to do it for them</p>	<p>\$75 per hour</p>
<p>REPORT BUILDING Most report-building is self-serve, however for complex reports you may request our team's assistance</p>	<p>\$150 per hour</p>
<p>RE-SKINNING/RE-BRANDING We tailor your client-facing SmartyGrants webpage to your look and feel. Your first one is free.</p>	<p>\$500 flat fee</p>
<p>PROJECT MANAGEMENT SUPPORT We are happy to help steer your transition to SmartyGrants by providing presentations to steering committees, etc.</p>	<p>\$150 per hour Note: for more complex requirements we are happy to refer you to an external team of trusted SmartyGrants specialists</p>
<p>VARIATIONS TO STANDARD AGREEMENT/ CONTRACT Our contract has been roadtested 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.</p>	<p>\$2,500 flat fee</p>
<p>ADDITIONAL STORAGE Additional storage available.</p>	<p>\$1000 per 100GB per annum</p>

What now?



1. Look at who else is using SmartyGrants

Hundreds of grantmakers of all sizes and types are already using SmartyGrants – see a sample at www.smartygrants.com.au/WhoUsesSmartyGrants



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 playing with the 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 an annual grantmaking conference and other events, and we always have plenty of SmartyGrants staff around to chat to people who want to find out more about us. Find out when the next event is on at www.grantsmanagement.com.au/events



5. Get us to come to you

We're happy to come to you 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. Each SmartyGrants user receives a free 10-user membership to the Australian Institute of Grants Management, unlocking a treasure trove of grantmaking news, best practice case studies, tools and templates. Check out what's on offer at www.aigm.com.au

Contact us:

Phone:

Australian grantmakers: 03 9320 6888

New Zealand grantmakers: +64 4889 3068

All other grantmakers: + 61 3 9320 6888

Email: service@smartygrants.com.au

www.smartygrants.com.au

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