BenefactorCloud



Standard Software Definition

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Software Excellence.

Unrivalled Support.

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Service Definition

BenefactorCloud supports your organisation to advance its strategy by achieving measurable impact. Designed specifically for grant-making charities, our comprehensive grant management software is now trusted by over 100 UK grant making organisations across the U.K.

BenefactorCloud consolidates all your grant, report, and audit information into a single, secure location, offering a comprehensive library for your communication and document needs. Built and hosted with industry-leading security practices, you can trust that your organisation's data is safeguarded.

The efficiency of BenefactorCloud reduces staff administration time by streamlining data capture, communications, and reporting processes.

Due to its configurable interface, BenefactorCloud provides easy adaptation of your programmes, processes and data needs.

Analytical reports can be produced with ease with BenefactorCloud's standard and bespoke capabilities along with the assessment and monitoring information features, allowing budgets to be easily managed and accessible.

Gallery's highly experienced grants team makes implementation straightforward with required resourcing laid out in advance through detailed project task management to reduce unexpected impact on you and your IT department. Further support is available, when required, with an expert on the helpdesk to hand.

Key Functionality

Applications Module

Receiving and assessing applications can be a time-consuming task without the right tools. Offering applicants an intuitive portal will reduce the reliance on grants officer assistance, thereby allowing focus of time on application processing and streamlining the grants process.

- **Customisable forms** to reflect the look and feel of your organisation's process
- **Support** for **multiple grant programmes** with different application forms and workflow requirements
- Define questions, add **mandatory requirements**, **validation criteria** and capture **applicant feedback**
- **Customisable category fields** add option fields to track application categories which can later be reported
- **Address validation,** improved data quality with the ability to map grant giving visually
- **Applicant portal** with a trackable unique reference number and unique access accounts
- **Eligibility assessment** prior to access to the application
- Automatically saved applications with the ability to generate a **printable PDF** at any point

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- **Secure file upload** fields of multiple file types held against each grant request
- **Conditional logic** improves form usability by showing only relevant fields and sections, reducing complexity and completion time.
- **Exchange Secure messaging** with applicants within BenefactorCloud
- **Multi-stage applications** allow for initial and subsequent staged applications, providing the process for improved and informed decision making
- **Post grant monitoring** collect information post grant to create measurable outcomes from grant spend. Use the inbuilt dashboards to clearly demonstrate this.

Administration Module

The main hub of the grant making process, increasing efficiency by providing easy to view information whilst guiding staff through clearly defined workflows.

- **View part-completed** applications at any stage of the application process
- **Customisable workflows -** independent to each grant programme with templated, automatic or bespoke communication to applicants
- **Graphical representation** of which stage the grant is in (e.g. longlist, interview, etc.)
- Finance – keep track of **awards**, **budgets, cost codes** and single or multiple **payments**
- **Defined user roles and permissions** for specific user groups e.g. grant officers, financial officers, and Grant Committee Members
- **Secure applicant messaging** - grouping communications by topic
- **Clear audit** of decisions and workflow changes
- **Automated reminders -** avoid manually chasing both applicants and reviewers.
- **Team and individual tasks lists** can be coupled to a request, or stand-alone; supportive Dashboards keep track of upcoming tasks

Review Module

The review process can be particularly time consuming with multiple stakeholder's present. By keeping the process all within one system, grant officers no longer need to chase reviewers and re-key data. Ease of access for the reviewers allows for quicker decisions therefore speeding up the process.

- **Centrally manage the** application **review process** for multiple grant programmes
- **Invite** system (or 3rd party external) **users to comment and score** applications
- Support for **tiered review** e.g. internal staff followed by external
- Only **show specific information** to **remove bias** and ensure a fair and equitable distributor of grants
- **Produce** customisable board papers (precis)
- **Track review progress** across grant programmes via the reporting tools
- Provide **reporting based on review scoring** incorporating weighted criteria if required

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Finance and Payments

The finance module provides a comprehensive array of tools designed to support the grants team in effectively managing payments at every stage of the process. Some key features are as follows:

- **4-step process** which shows where the application is within the payments process.
- **Funding allocation against multiple budgets** with a live display of budget balance.
- **Automated fiscal year assignment based on the award date**, which feeds into finance reporting tools.
- **Multi-payments** which can be split across years
- Payment l**ocks**
- **Fund Balance management**

Dashboard and Management Reporting

Dashboards offer a clear, immediate overview, enabling you to monitor grant performance effortlessly, facilitating informed, data-driven decisions. Additionally, bespoke dashboards can be tailored to meet each customer's specific reporting and data needs.

- **Report with weighted scoring options –** e.g. example application questions or review responses.
- **Tracking spend** against financial years, budgets and cost codes.
- **Grant analysis** on anonymous EDI data, application status, banded request amounts and many more to suit individual requirements.
- **Payment tracking,** by scheduled, outstanding, overdue and reversed.
- **Review tracking,** by grant programme, invites, reviewer and status.
- **Geo mapping** (beta)
    - Show requests and awards grouped by council ward
    - Heat mapping
    - Pins on a map

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Cloud Hosting

BenefactorCloud is designed with security best practices in mind. It's hosted on **Amazon Webservices (**AWS**)** within the UK, with its full suite of server and data centre security protocols. All data is encrypted at rest with systems tested by an independent CREST approved supplier.

Server Security

Hosted within Amazon Web Services (AWS) within a Virtual Private Cloud (VPC). Administrative access is only possible by authorised staff.

Access to the AWS infrastructure is limited to development staff with multi factor authentication (MFA) in place. Access is recorded and audited as part of Cyber Essentials Plus.

All staff are DBS checked; any new staff must be DBS checked before receiving access.

Data Centre Security

The application and are all held within Amazon Web Services (AWS). Our chosen availability zone is within London – UK (EU-west-2).

Complying with stringent global standards such as SOC 1, SOC 2, SOC 3, and Cloud Security Alliance Controls, AWS data centres and network architecture are built to meet the requirements of the most security-sensitive organisations.

For more information see AWS Compliance and data centre controls.

Data Encryption

All data, including databases and media stores, are stored and encrypted using AWS EBS encryption. Key storage is handled by AWS Key Management Service (AWS KMS). Data in transit, including login credentials, are protected by default using TLS 1.3 (https), employing AES-256 bit encryption and SHA-256 signed certificates.

Additional software encryption is provided for bank details and can only be accessed via the finance module within the software.

Security Testing

To minimise security risks Gallery Partnership, undertake external security testing from a CREST approved tester as well as automated testing. The tests covers aspects such as the OWASP Top 10 (2021 -) as well as analysing the supporting infrastructure of the application to determine

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threats from all possible attack vectors, including:

- Broken Access Control
- Cryptographic Failures
- Injection
- Insecure Design
- Security Misconfiguration
- Vulnerable and Outdated Components
- Identification and Authentication Failures
- Software and Data Integrity Failures
- Security Logging and Monitoring Failures
- Server-Side Request Forgery (SSRF)

Our most recent penetration test summary is available on request.

Application Security

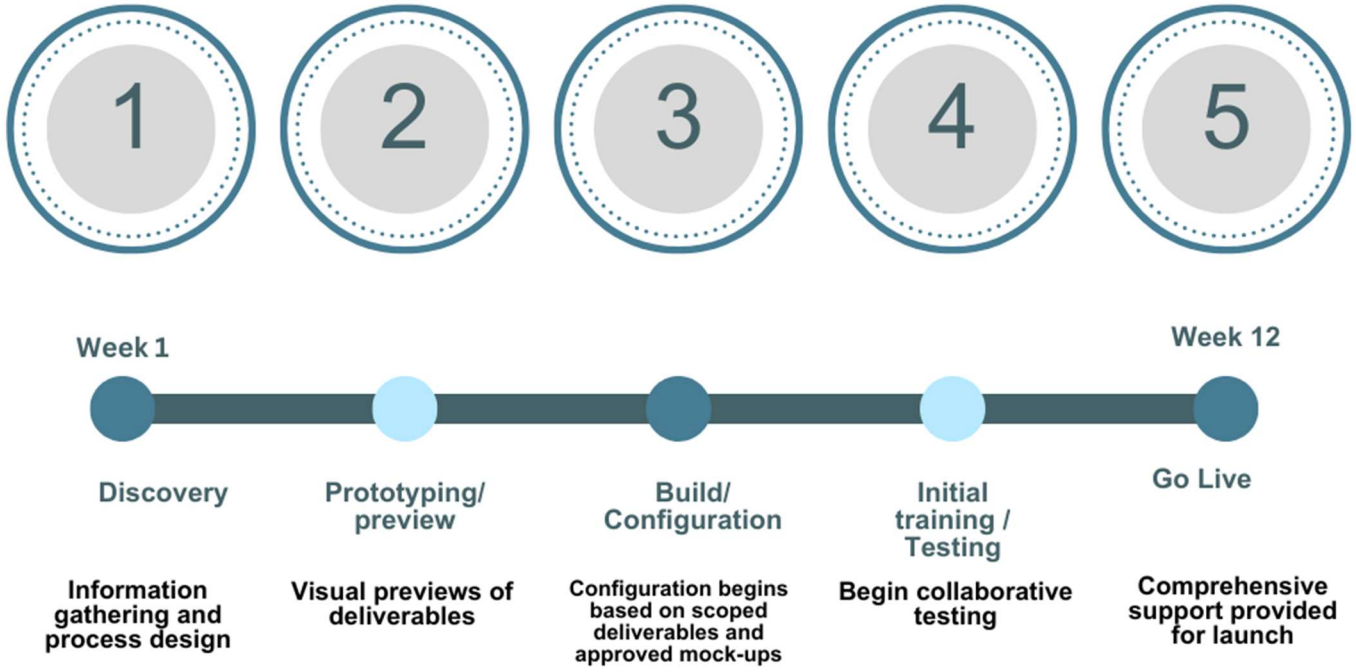
- **Multi-factor authentication (MFA)** requires the user to enter additional information, such as a code, to access the system, providing an additional layer of security and validation.
- **Industry standard** password requirements require multiple character types.
- **Single Sign-on (SSO)** compatible with Azure AD which allows for the user to authenticate with a Microsoft account linked to an organisation.
- **Extra encryption for bank details** minimises risk to the account holder as well as the grant-making organisation.
- **Restricted database procedures and code** to block SQL injection stopping attackers from manipulating database functions. By restricting these inputs and limiting the type of database procedures that can be performed, BenefactorCloud can minimise the risk of unauthorised or malicious queries.
- **Real time threat monitoring and protection –** using AWS WAF and shield.

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Implementation (Onboarding) Approach

Every customer is assigned a dedicated Senior Implementation Consultant with deep expertise in both BenefactorCloud and the onboarding process. To promote transparency and keep the project on track, Gallery Partnership provides access to a dedicated project management platform. This tool offers clear visibility of deliverables, due dates, and progress, while serving as a central hub for communication and documentation.

We understand the demanding schedule of Grant Managers and tailor our onboarding process to fit around your commitments. When planning your implementation timeline, we account for key deadlines such as funding applications, Trustee meetings, and other critical events. This thoughtful and flexible approach ensures a smooth, steady rollout—minimising disruption and setting your project up for success.



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Support Model

An email address is provided for non-urgent enquiries.

A telephone support line for urgent queries is open from 9:00 a.m. to 5:30 p.m. (GMT) each working day. Authorised Users calling this line will be able to describe the nature of the problem or question to a technician who will immediately log the call. If unable to work on the problem immediately, a support technician will return the call to a designated customer contact and will work to resolve the problem.

All enquiries are logged on a support database and a unique call reference number assigned to allow progress to be monitored. Enquiries are dealt with in line with their severity, as detailed below.

	Level 1	Level 2	Level 3	Level 4
Severity	Major	High	Medium	Low
Impact	Services are unavailable to all, or the majority of users or serious data loss has been experienced	Significant features of the software are unavailable, the software is still useable however, will impede the client's day-to-day use.	Problem is affecting one or two users, but the majority of users are unaffected	Problem does not prevent user from working; general query
Acknowledgement	Within 30 minutes during working day	Within 2 hours during the working day	Within 4 hours during working day	Within 24 hours
Initial Action	Corrective action commenced within 30 minutes during working day	Corrective action commenced within 2 hours during working day	Corrective action commenced within 4 hours during working day	Corrective action commenced by agreement
Resolution	The time required to resolve the problem will depend upon its severity and complexity. Hence no resolution time is guaranteed. The support technician will give the customer representative an estimated resolution time once the problem is fully understood			

Disaster Recovery

- Databases are backed up via AWS Point-in-time recovery which offers continuous backups.
- Maintained disaster recovery plan, with periodic testing.
- Recovery Point Objective (RPO) of < 1 minute
- Recovery Time Objective (RTO) of ~ 1 hour

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Offboarding

Upon receiving notice to terminate, Gallery Partnership will agree an offboarding plan with the client. The client will be free at any point to use the inbuilt reporting tools to export data into a CSV or XLSX. When agreed a downloadable database will be provided with accompanying file attachments. All data will then be made available via an encrypted method with an agreed retention period.

Contact Details

Should you require any further information, please contact us using the details below:

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