

SmartyGrants UK

Service Definition

Document

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1 What is SmartyGrants?

SmartyGrants is a no-code, end-to-end SaaS solution that has been designed by grants and technology experts to make managing the full grants lifecycle simple, streamlined, and secure.

SmartyGrants is one of the world's leading cloud-based grants management systems (GMS). It is used and trusted by more than 830 central and local government agencies, as well as philanthropic, corporate and charitable grantmaking organisations. The system was launched in Australia in 2009 and grew to become the most-used GMS in Australia and New Zealand. It is now used in 55 countries across the world, and was exported to the UK in 2024.

From application to final report, SmartyGrants helps funders work smarter – reducing administration, improving data quality, and enabling real-time reporting.

With UK hosting, world-class security, regular updates, unparalleled support, and flexible tools that don't require technical expertise, SmartyGrants empowers teams of all sizes to deliver impact with confidence.

Key points

- **Cloud-based and secure:** Access SmartyGrants anywhere, anytime, with enterprise-grade security and UK data hosting.
- **No-code configuration:** Set up forms, workflows and reports without developers or IT support.
- **End-to-end lifecycle coverage:** Manage applications, assessments, contracts, payments, communication and reporting (inclusive of progress and end-of-grant reports and contract variations) in one system.
- **Customisable workflows:** Tailor processes to suit your organisation's needs, from simple to complex.
- **API-enabled:** Connect SmartyGrants to your finance, CRM or external reporting/data systems to keep information flowing cleanly across your organisation.
- **Smart reporting and insights:** Track outcomes and measure impact with built-in Analytics and export tools.
- **Affordable and scalable:** Designed for organisations of all sizes, with sensible, predictable pricing.
- **Best-in-class support and training:** Backed by a team with deep expertise in technology-assisted grantmaking, user-focused technical documentation and an award-winning Learning Management System.
- **Impact-focused:** As a social-purpose business, the bottom line is not our major motivator. We strive to build tools that allow funders to make the very best use of their limited resources.

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2 Onboarding, Offboarding & End-of-Contract Data Extraction

Onboarding & implementation

The SmartyGrants onboarding experience has been tried and tested by more than 830 customers worldwide. SmartyGrants UK customers begin their onboarding journey with a tailored implementation process delivered by a team of experts. This comprises skinning of your applicant portal to match your styling and branding, and development of a bespoke implementation plan, informed by process mapping. Your implementation plan will include an outline of required activities, milestones and recommended training.

The objective of the onboarding and implementation programme is to help users set up your system (add users; define workflow; etc) and configure your first programme (and additional programmes, if required), which includes building of forms and reports. We also support you to become confident, independent system users.

As well as providing personalised one-to-one support, we provide a tailored mix of accessible and structured learning resources. SmartySkills, our award-winning online Learning Management System (LMS), provides immediate access to a self-guided, modular training experience. We can design a tailored LMS learning pathway for you, and live training (delivered via Microsoft Teams) is also available if and as required.

Detailed documentation is available via our Help Hub for funders, and an open-access Applicant Help Guide is provided for applicants. The Help Hub is a source of comprehensive written documentation on all core functionality, as well as specialist technical documentation on additional features.

Both SmartySkills and the Help Hub are available to all SmartyGrants UK customers as part of the Annual Access Fee (at no additional cost, regardless of user numbers).

More information about our onboarding services is available under 'After Sales Support' below.

Offboarding

SmartyGrants is delivered via an annual subscription (unless otherwise agreed). Upon notice of termination of the contract, we initiate a structured exiting/offboarding process with authorised customer representatives.

Our offboarding services include access to SmartyGrants staff, support resources and documentation to assist with data extraction, access to all customer data, and compliance with all relevant privacy and data-protection obligations.

We confirm and communicate schedules for data extraction, deactivation of service and data deletion in line with legal and contractual requirements.

Our offboarding services are available for 30 days after the end of the contract, unless otherwise agreed.

Most offboarding services are free; additional costs may apply to services such as provision of customised data extracts or other forms of post-transition assistance.

End-of-contract data extraction

Unless otherwise agreed in writing, at the end of the contract term we make all customer data available for downloading through SmartyGrants for a further 30 days.

We will then permanently delete the customer data. Customers may ask us to retain all customer data in full for an additional period after that 30-day period; however, this may be subject to additional fees and separate terms and conditions.

Customer data is available for download via document or spreadsheet reports (snapshot reports, default reports & custom reports), Analytics exports (if this feature is available on the account at the end of the contract term), XMLs, PDFs and native file format for attached files.

3 Support Hours & Service Availability

Support hours

Support, provided by our personable and experienced Customer Support Team, is available to all SmartyGrants UK customers as part of the Annual Access Fee.

This includes technical support for clients and their applicants and external assessors, as well as access to online training (via our Learning Management System) and documentation (via our Help Hub). Support hours are 9am to 5pm GMT Monday to Friday (excluding public holidays) for ordinary email-based support, with phone-based support available for critical incidents. We are committed to ensuring a response to all requests within 8 business hours during the ordinary support window.

A standard support package is included with all subscriptions (no additional charge). This package includes training webinars, applicant site design, self-service training resources, self-service help documentation, and ongoing email support.

Additional paid services – such as bespoke training, managed services and premium features – are available on request. Additional costs may apply.

SmartyGrants engages a managed service provider to manage our production systems. Our systems are monitored 24x7, and SmartyGrants is available 24x7x52.

Service availability

We commit to ensuring that SmartyGrants is available at least 99.9% of each calendar month, excluding downtime caused by scheduled maintenance, customer-side issues, third-party or network failures, breaches of the Agreement, or events outside our control (refer to our Support & Maintenance Policy for details). Users can access the SmartyGrants Status Page for live updates on system availability.

In the unlikely event of failure to meet our commitment, we honour affected customers with service credits that reduce the service cost of the affected month. Please consult our Support and Maintenance Policy for details.

4 Technical Requirements

SmartyGrants and SmartyFile are provided as “Software as a Service”, meaning that the system and data are hosted for you, so there is no need for your organisation to install and maintain it.

There are no specific operating system requirements. SmartyGrants is compatible with current versions of Google Chrome, Safari, Mozilla Firefox, Opera and Microsoft Edge.

5 After Sales Support

Implementation

SmartyGrants implementation processes are designed to swiftly and painlessly introduce new users to our software. During your implementation we will guide you through initial setup of your SmartyGrants account and help you become familiar with key features and functionalities. The goal is to ensure you can quickly start using the software effectively.

We provide three standard implementation offers; however, we can tailor implementation to suit each organisation’s unique needs and budgets, if that is preferred. All implementation options include the following services:

- Applicant Portal skinning to match your organisation's branding
- Onboarding consultation (up to 2 hours)
- 2 bespoke instructor-led training sessions (up to 2 hours per session).
- Free and unlimited SmartySkills LMS, Training and learning pathway advice
- System set-up guidance
- Review of forms and reports
- Review of system set up
- Help Hub Support documentation
- Technical support

Training and Support

All SmartyGrants subscriptions come with a range of complimentary training and support, comprising:

- Free access to SmartySkills, the SmartyGrants Learning Management System (LMS).
- Free access to the Help Hub, a source of comprehensive written documentation on all functionality with links to other helpful resources.
- Free access to email support when you contact our Support and Training Team.
- Regular update on scheduled releases.

Additional custom training can also be arranged, and our Managed Services can be provisioned for customers who are short on time or have complex needs.

Training and support are provided by people who are SmartyGrants experts and grants experts, who are highly experienced at working with government clients, who care about and respect your needs and timelines, and who take seriously their obligations to meet agreed response time targets.

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6 Backups, Business Continuity, Disaster Management & Incident Recovery

Backups

A full encrypted backup is conducted daily by our AWS Managed Services Provider, which is stored at multiple locations. Database restore points are created every 5 minutes. Backups are retained for 35 days, allowing the entire system's data to be restored to a backup restore point within that timeframe.

Business Continuity

SmartyGrants has robust and well-maintained Business Continuity, Disaster Recovery and Incident Response plans. While the SmartyGrants technical solution contains significant measures for redundancy and service protection, certain scenarios exist by virtue of the SaaS nature of the SmartyGrants platform that could disrupt access to or function of the service.

Disruption to SmartyGrants is rated as 'highest risk' regarding business continuity. As such there are dedicated internal plans for system security, disaster recovery and incident management which will be invoked in the relevant circumstance to manage impact and restore service as quickly as possible.

Disaster Recovery

In the event of a disaster impacting SmartyGrants operations we have a Disaster Recovery Plan that is comprehensively tested each calendar year, covering database failover, backup restoration and server rebuild from scratch.

Our recovery point objective in the event of disaster is 5 minutes. For major infrastructure failures that require a full database restore, the recovery time objective is 24 hours. Our AWS Managed Services Provider employs infrastructure-as-code and configuration management tools for provisioning our infrastructure and managing our servers. This allows servers to be built from scratch quickly if required.

Incident Recovery

At SmartyGrants we depend on our information systems to deliver our mission efficiently and reliably. Therefore, as an organisation we are prepared for information incidents and are equipped to respond to such incidents decisively to maintain business continuity and data security for our users.

Our plans and policies ensure that any incidents that could interfere in any way with Customer Data, or the system at large, are rapidly identified, contained and remediated. Our staff are well-briefed on their objectives if an event occurs, with clear departmental responsibilities and nominated leads for management of incidents. We have detailed policies and processes in place to facilitate forensic analysis, evidence handling, customer communication, and post-incident review processes.

7 Outage & Maintenance Management

Maintenance Management

We warrant that SmartyGrants will be available at least 99.9% of each calendar month (other than during periods outlined in our Support and Maintenance Policy).

Maintenance may take place during our standard maintenance window between 8pm and 4am GMT.

For significant system updates, we provide 7 days' notice by email and notification on the Status Page: <https://status.smartygrants.co.uk/>

Outages

Any major outages/incidents are report on our Status Page to ensure users are made aware of any issues to service as soon as possible.

8 Hosting & Denial of Service

Hosting

SmartyGrants UK is hosted by Amazon Web Services (AWS) and is physically located in the United Kingdom within the AWS London Region.

We also utilise AWS's cloud-based file storage system, AWS S3. All files stored within AWS S3 are located on servers controlled and managed by Amazon and are physically located in the United Kingdom.

SmartyGrants engages a certified AWS Managed Services Provider (MSP) to manage the SmartyGrants AWS environment and our production systems, including 24x7 monitoring, network and operating system security, backups and patching.

Customer accounts have no fixed overall storage limit.

A list of Third Party Service Providers is available on request.

Denial of Service (DoS)

All infrastructure is hosted in a secure AWS environment in a segregated Virtual Private Cloud with strict traffic controls.

All application web traffic is protected by an AWS Web Application Firewall to block malicious traffic, including automated rules to block traffic sources exceeding error rates or reasonable traffic volumes for key functions. User accounts are automatically disabled after 5 incorrect login attempts.

SmartyGrants is built as a horizontally scalable Java application, allowing additional standby servers to be enabled in event of high-volume traffic.

SmartyGrants is monitored 24x7 with Technical Support staff on call to investigate and deal with any unusual activity or high system utilisation.

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9 Security

Security

SmartyGrants is ISO 27001:2022 and Cyber Essentials certified.

SmartyGrants uses the Spring Security framework to manage authentication and web sessions. Sessions are identified by cookies, and measures are in place to reduce the risk of cross-site request forgeries, SQL injection and cross-site scripting attacks.

User credentials stored in the database contain only hashed/salted passwords, no plaintext or encrypted passwords.

Each customer of SmartyGrants is assigned an 'isolation ID' which uniquely identifies their data and segregates each record within the database. The system will not retrieve data if the isolation ID does not match.

All servers and the primary database utilise file-system encryption. Files stored on AWS S3 are encrypted using AES-256 and each SmartyGrants customer has a unique encryption key.

All network access to SmartyGrants and between servers is encrypted using HTTPS (TLS 1.3 by default, TLS 1.2 is supported for older browsers).

SmartyGrants is built with reference to the OWASP Top 10. Penetration tests are conducted at least once per calendar year by independent third parties. The latest Penetration Test Summary can be shared on request. We are happy to facilitate penetration testing by customers. Any serious vulnerability is swiftly resolved.

Network Controls

SmartyGrants servers are isolated from the internet within an AWS Virtual Private Cloud, with network restrictions in place to control traffic from the internet and between individual servers. They are accessible for administration only from a white-list of locations. All network access to SmartyGrants and between servers is encrypted.

File Upload Antivirus

Any files uploaded into SmartyGrants by applicants or funders are scanned by antivirus software at the time of upload. They are only accepted if they are found to be clean. The antivirus software used is ClamAV.

10 Contact Us

Free trial: <https://manage.smartygrants.co.uk/signup>

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