



Grant Management

Advanced Grant Management GC15

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Introduction

This document summarises the Service Definition submitted by Civic Computing Limited for its 'Advanced Grant Management' cloud software for the Public Sector, herein referred to as AGM.

This Service is suitable for those customers who require Civic to deliver its AGM cloud software for holding data classified as OFFICIAL, including OFFICIAL-Sensitive, in accordance with the UK Government Security Classification Policy (GSCP).

Where required, compatible cloud hosting can be provided via infrastructure services procured through Civic's separate G-Cloud 15 Lot 1 Cloud Hosting listing, or through a customer-selected G-Cloud-compliant hosting provider.

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Company

Civic is a premier full-service digital agency and a partner of GoPro, specialising in Case Management solutions. Having managed over 2,000 projects across the UK and Europe, our commitment is to enable the public sector to leverage digital opportunities, enhancing operational efficiency and improving service delivery.

Our mission is to empower public organisations to optimise their workforce and effectively serve their communities. At Civic, we are guided by values of honesty, integrity, and quality, which define our customer relationships.

We are dedicated to creating measurable positive social impacts, with a focus on combating climate change, fostering equal opportunities, and prioritising staff wellbeing.

Civic proudly holds ISO 27001 certification, affirming our continuous commitment to the highest information security standards. This includes the implementation, maintenance, and ongoing enhancement of our information systems. Furthermore, our ISO 9001 certification reflects our unwavering dedication to operational excellence.

Our primary solutions are hosted on UK-sovereign cloud infrastructure provided by G-Cloud 15 Lot 1 Cloud Hosting suppliers, with hosting services procured either via Civic or directly by the customer, depending on the delivery model. These services adhere to stringent industry standards and best practices, including compliance with the NCSC Cloud Security Principles. Additionally, we offer the flexibility for solutions to be deployed on alternative hosting platforms chosen by our clients.

Our values

Straight-talking and approachable

We're respected for telling it as it is. We're friendly, engaging, and welcoming, and pride ourselves in building genuine, honest, and lasting relationships with clients.

Expert and flexible

We're skilled at applying the technology and know-how that can transform user experience and deliver excellent service by listening to the needs of our clients.

Innovative and curious

We believe in innovation and are always open to new ideas. We have a passion for building great user experiences that help businesses prosper and make a difference to society.

Trusted and collaborative

We're respected for the quality of our work and the integrity of our relationships. We strive to be open, honest, and professional with everyone.

Respectful and supportive

We encourage personal development, value job satisfaction, and engage staff in major decisions. We support the environment, respect diversity, and strive to make a positive social impact.

The service

AGM is a comprehensive and adaptable '5th generation' low-code, high-configuration platform specifically designed for advanced grants management. This robust solution facilitates grant application case management, process automation, rules management, content handling, reporting, business activity tracking, applicant self-service, and secure external stakeholder collaboration.

AGM is structured around five core elements:

Publish: AGM enables the publication of available grants, making it easy for potential applicants to discover opportunities and understand the associated conditions.

Apply: AGM features a comprehensive grant application portal that serves as a central hub for submitting, monitoring, and managing grant applications. This portal facilitates ongoing communication with the grant-providing authority throughout the application process and beyond, ensuring a streamlined experience for both applicants and administrators.

Assess: AGM equips authorities with a user-friendly, efficient grant case and document management system designed for processing and assessing applications. This system supports a variety of assessment methods, from individual and committee evaluations to highly automated, rules-driven processes.

Allocate: AGM includes all necessary tools to ensure the auditable and compliant allocation of grants. It provides real-time insights into the financial aspects of a grant scheme, including available budget, funds already allocated or disbursed, and statistics on applications, allocations, and disbursements.

Post-award: AGM recognises that grant management often extends beyond the initial disbursement. The platform supports comprehensive post-award management, including monitoring the use of funds as intended, managing instalment disbursements based on deliverables, and handling conditional repayments. This ensures ongoing compliance and fulfilment of grant conditions.

Key Features

AGM offers a comprehensive end-to-end grant management solution designed with a strong focus on usability. The platform is intuitive and user-friendly, allowing both new and infrequent users to quickly become proficient and start working effectively with minimal training.

Key features of AGM include:

Application Guidance: AGM provides detailed application forms with embedded guidance to help applicants understand requirements and complete their submissions accurately.

Streamlined Management: The system efficiently manages the receipt of applications, ensuring that all submissions are organised and accessible.

Robust Evaluation Tools: AGM facilitates thorough evaluation processes, allowing for clear and transparent decision-making regarding grant allocations.

Funds Distribution: Once decisions are made, AGM handles the allocation and disbursement of grant funds smoothly and securely.

Reporting and Analytics: AGM supports the generation of detailed reports and statistics, providing valuable insights into the performance and impact of grant programs.

These features combine to make AGM a powerful tool for managing the complete lifecycle of grants, from application to post-award reporting, ensuring efficiency and compliance throughout.

Easy Registration with Ready Grant Case Templates

AGM streamlines the grant application process through the use of predefined templates for each grant case type. These templates set specific properties such as metadata, workflow, deadlines, responsibilities, and access controls, ensuring consistency and compliance across applications. Each new grant application is automatically linked to the appropriate scheme, facilitating a smooth and accurate application process for applicants.

Always Up-to-Date Overview with Grant Statistics and BI

AGM simplifies the management of grant schemes and budget allocations. The platform allows for the creation of hierarchical grant schemes, enabling the distribution of funding from top-level funds down to multi-level sub-schemes as needed. This structure not only supports detailed and flexible funding management but also enables AGM to provide users with real-time, comprehensive statistics

about the scheme. Metrics such as funds allocated, approved, disbursed, and remaining budget are readily available.

All reports are generated from a dedicated, optimised reporting database designed to enable real-time insights without compromising the performance of the main production system. This ensures that reporting is both fast and efficient. Additionally, users can easily search, filter, and export data, for instance, to Excel, enhancing the flexibility and usability of reporting features.

Tasks and Workflows

AGM's grant application cases are managed through predefined workflows and tasks, which users can efficiently navigate using the intuitive Kanban task board. Each case is structured into phases or stages, representing significant milestones in the grant application process. These phases are equipped with their own set of predefined tasks, decision gateways, deadlines, and assigned responsibilities, ensuring a systematic approach to case management.

Ad-Hoc Process Management

AGM's process framework guides users through standardised case processing to ensure consistency and compliance. However, the nature of certain applications may be more dynamic and require exploration beyond the standard procedures. In these instances, AGM allows for the integration of dynamic ad-hoc processes and tasks alongside core predefined steps and milestones. This capability ensures that while core activities adhere to defined Service Level Agreements (SLAs), there is also the flexibility to accommodate the evolving needs of the assessment process. Moreover, AGM maintains a complete audit trail of all tasks and activities, ensuring comprehensive documentation and accountability.

Document and Content Management

AGM features a comprehensive document, content, and email management system integrated seamlessly within the platform. Users can easily create or add documents and other content to their application cases. All materials can be categorised and tagged, facilitating quick filtering and searching for specific documentation types. A document preview feature allows users to swiftly glance at attached documents without opening each file individually, enhancing efficiency. Additionally, the AGM Sidebar, a user-friendly Microsoft Outlook add-on, enhances email management with features like drag-and-drop importing, streamlining the integration of email communications into case management.

Forms, Emails, and Document Templates Management

AGM's integrated management system for forms, documents, and email templates simplifies the creation process. Templates can be used to generate forms, documents, and emails, which are then auto-populated with relevant data from grant cases, such as applicant contact information, awarded amounts, and associated conditions. This significantly reduces the time spent on document editing and minimises inconsistencies. Templates are linked to specific case types, workflows, or other relevant contexts to ensure their availability when most appropriate. This feature is particularly useful in capturing data efficiently, for instance, through forms used by field investigators. Non-technical users can easily define and adjust these templates using a graphical editor, making it accessible to all users without requiring specialised training.

Contact and Relationship Management

AGM features an integrated contact management system that efficiently stores and organises contact information for individuals and organisations. Each contact can be associated with specific grant applications and designated roles within those applications. Contacts are easily categorised by type,

grouped, and linked to multiple cases according to their involvement. When an applicant submits a form through the Application Portal, they are automatically registered within AGM, streamlining the process and ensuring that all relevant data is captured and categorised accurately from the outset.

Rules Management

AGM's Rules Management engine simplifies the externalisation of rules from core processes and application logic, enhancing usability for non-technical users. This flexibility allows for the automated scoring of applications against predefined assessment criteria and the automatic calculation of grant amounts based on specific application parameters. By enabling these operations to be defined and adjusted through an intuitive interface, AGM ensures that grant processing is both efficient and adaptable to varying requirements.

Process Automation

AGM's BPM process automation module significantly enhances operational efficiency by automating routine processes and tasks. This module features a user-friendly, graphical BPMN 2.0 compliant process designer that allows non-technical users to easily define and model business processes. Users can intuitively add automation to these processes using drag-and-drop functionality.

These automated operations can include tasks such as the automatic generation of documents from templates, such as award notifications, updating case statuses, or publishing documents directly to applicants through the portal. This level of automation streamlines complex procedures, reduces manual efforts, and ensures consistent execution of tasks across the board.

Applicant Portal

The optional Applicant Self-Service Portal is a configurable, fully integrated platform that enhances the grant application process. It enables applicants to identify relevant grants and submit applications effortlessly. The portal supports individual applicants as well as organisational accounts, allowing multiple users from the same organisation to collaborate on and access applications.

Registration is streamlined through the portal, where applicants can easily provide their information and integrate login credentials with e-certificate authentication services. The intelligent forms within the portal ensure that only complete and eligible applications are submitted, guiding applicants step-by-step through the process.

The portal also facilitates bi-directional communication between the applicant and the funding authority, both during the application process and throughout post-award activities, such as reporting. This feature significantly enhances transparency and service quality.

The design of the portal adheres to GDS (Government Digital Service) design principles, ensuring a user-friendly and compliant interface.

100% Service Enabled

AGM is fully service-enabled, meaning that the entire solution's functionality is accessible via standard REST or SOAP APIs. This design allows seamless and straightforward integration with other systems, such as ERP systems, enhancing interoperability and simplifying the process of connecting disparate platforms.

AGM's capabilities are designed to support different user roles across the grant lifecycle, providing a comprehensive and integrated service. This description helps clarify how different roles interact with the system, showcasing the comprehensive scope of AGM's functionality.

Advanced & Optional Grant Capabilities

In addition to core grant management functionality, the service supports a set of advanced and optional capabilities that can be introduced where appropriate to the scheme design, data sensitivity, delivery model, and organisational readiness. These capabilities are designed to strengthen assurance, improve efficiency, and support proportionate automation, while maintaining transparency, auditability, and human oversight.

AI-Assisted Grant Processing (Optional)

The platform supports the controlled use of AI-assisted features to help authorities manage high application volumes and complex assessment processes, without removing accountability from grant managers or assessors.

Where enabled, AI-assisted capabilities can include:

- Summarisation of grant applications, supporting evidence, and post-award reports to aid rapid understanding and handover
- Identification of similar or related applications or awards to support consistency and fairness in decision-making
- Assisted classification and tagging of application content and supporting documents to reduce manual triage effort
- Assisted drafting of internal notes, correspondence, or progress summaries, subject to review and approval by authorised users

All AI-assisted activity operates within defined governance controls. Decisions remain the responsibility of human users, with AI used only to support professional judgement. AI features can be enabled selectively and configured to align with organisational policy, funding rules, and data protection requirements.

Fraud, Risk and Compliance Support

The service includes optional capabilities to support proactive risk management and the protection of public funds throughout the grant lifecycle.

These capabilities can include:

- Configurable eligibility checks and validation rules applied at application and assessment stages
- Risk indicators and flags to support targeted review and assurance activity
- Structured capture of declarations, evidence, and audit artefacts to support inspections and internal audit
- Comprehensive audit trails across applications, assessments, decisions, payments, and post-award activity

These features help authorities demonstrate fairness, value for money, and compliance with funding conditions, governance standards, and audit requirements.

Event-Driven Automation and Rules-Based Processing

The service supports rules-based automation and event-driven processing across grant schemes and application workflows.

This enables authorities to:

- Externalise assessment logic, scoring rules, and funding calculations from workflow steps
- Apply consistent rules across multiple grant schemes or funding rounds
- Automatically trigger actions such as task creation, notifications, document generation, or status changes when defined conditions are met

Rules can be updated as policies or scheme criteria evolve, allowing authorities to respond quickly to change without redevelopment.

Payments, Milestones and Conditions Management

Where required, the platform supports advanced management of grant awards, including staged payments and conditional release of funds.

Capabilities can include:

- Definition and tracking of payment schedules linked to milestones or deliverables
- Automated checks to ensure conditions are met before funds are released
- Ongoing monitoring of delivery and outcomes through structured reporting
- Support for variation management, suspensions, or recovery processes where conditions are not met

This ensures that grant funding is released in a controlled, auditable, and transparent manner.

Transparency, Auditability and Control

All actions taken within the system—whether by users or automated processes—are fully auditable.

Capabilities include:

- End-to-end audit trails capturing who did what, when, and in what context
- Traceability across applications, assessments, decisions, contracts, payments, and reports
- Version control for data, documents, and templates
- Role-based access controls at item level

These capabilities support internal governance, external scrutiny, and compliance with public-sector record-keeping and information management obligations.

Secure, Governed Use of Emerging Technologies

Where advanced automation or AI is used, it is implemented in line with privacy-by-design and security-by-design principles.

This includes:

- Clear governance over where and how advanced features are enabled
- Strong access controls and authentication
- Full visibility of automated activity within the grant record
- The ability to restrict or disable advanced capabilities by scheme, role, or funding stage

This approach ensures that innovation is introduced responsibly and proportionately, aligned with organisational risk appetite and statutory obligations.

Extensibility and Future Readiness

The platform is designed to evolve over time, allowing new grant management capabilities to be introduced incrementally as policy, funding models, and delivery approaches change.

This includes:

- Modular enablement of advanced features
- Compatibility with integration, analytics, and automation technologies
- Support for future enhancements without disruption to live grant schemes

This ensures the service remains adaptable and sustainable over the life of the contract.

Our cloud services

Civic offers professional consultancy and configuration services to ensure a smooth and successful onboarding experience for new customers transitioning to our G-Cloud software service.

Customer Onboarding

Our customer onboarding process is grounded in agile principles and comprehensively covers all necessary service components, ensuring a successful digital service transformation.

Design

Our Solution and Technical Architects are dedicated to crafting the optimal solution and infrastructure design tailored to each client's needs. Whether providing a standard cloud service or a custom solution with specific customer requirements, our team ensures every design aspect is carefully considered and addressed.

Business Analysis

Leveraging our extensive experience in delivering case-based solutions, we support customers in defining and clarifying their requirements. This involves expressing needs through user stories and acceptance criteria, enabling clear and actionable project goals.

Project Management

Our project management approach incorporates the best practices of PRINCE2 and agile methodologies. A team of certified project managers guides the customer through the onboarding process, ensuring milestones are met efficiently and effectively.

Configuration

The customer success team collaborates closely with the client to configure the system according to defined user stories. This hands-on approach helps transfer knowledge to the customer's team, empowering them to manage and adapt the system's configuration over time.

Data Migration

Smooth transition to a new system relies on seamless access to both current and historical data. Our data migration experts oversee the data mapping and migration process, utilising standard tools to ensure data integrity and accessibility.

Ongoing Support

We offer a comprehensive support model with our cloud service, including standard SLAs for regular business hours and 99.5% system availability. Enhanced support options are also available, featuring 24/7 assistance and improved recovery objectives.

Engagement Models

Civic provides flexible engagement models through G-Cloud, accommodating complex implementations and existing supplier relationships. Customers can engage with us as a Prime Contractor for an end-to-end service or under a Collaboration Agreement with preferred systems integrators and hosting providers.

Off-boarding Services

Civic supports customers during the off-boarding process, whether through standard data extraction services or by assisting with data migration to another platform. Extracted data can be delivered as a SQL database containing all system data and file attachments, or in XML format with files included. Off-boarding services are provided on a time-and-materials basis, with transparent cost estimates provided upfront.

By adopting these comprehensive services, Civic ensures that every phase of the customer journey, from onboarding to off-boarding, is supported with expert guidance and tailored solutions.

Pricing & commercials

This section summarises the basic pricing details and minimum contract periods. A complete pricing guide is provided in the separate pricing documents.

Civic cloud software is priced based on various components including licences, support, configuration, and hosting. The pricing structure includes initial setup costs as well as ongoing expenses. While hosting is typically provided via Civic's G-Cloud arrangements, alternative G-Cloud-compliant hosting options are also available.

Unit price

Users are licensed in 'units of one' with a minimum number of 10 users.

For more details, please refer to the pricing document.

Minimum contract period

The minimum period over which a customer must have a contract with us for its cloud software is three months. Thereafter, the service may be terminated with three months written notice.

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