

Flexigrant Service Description

G-Cloud 15 Framework

Commercial in Confidence

Fluent Technology | Flexigrant®

Category	G-Cloud
Classification	Confidential
Version	1
Creation Date	20 January 2026
Last Revision	1.0
Document Approver	Gary McNally

www.flexigrant.com
info@fluenttechnology.com



CONTENTS

Revision History.....	5
1. Service Overview and Solution	6
2. Information Assurance.....	7
3. Cloud Hosting	7
3.1. Resilience and Reliability	8
3.2. Disaster Recovery	8
4. Onboarding and Offboarding Processes.....	9
4.1. Onboarding	9
4.2. Off-boarding.....	10
5. Flexigrant Security	11
5.1. Infrastructure and Application Security	12
5.2. Information Security	12
5.2.1. Input Validation.....	13
5.2.2. Authentication and Authorisation	13
5.2.3. Data Encryption	14
6. Service Management Details	14
6.1. Technical Boundaries.....	14
6.2. Support Boundary.....	14
6.3. User Authorisation and Details.....	15

6.4.	General Support Details	16
6.5.	Service and Support Levels.....	16
7.	Service Constraints.....	17
7.1.	Planned Maintenance.....	17
7.2.	Emergency Maintenance.....	18
8.	Financial Recompense	18
9.	Training	18
10.	Invoice Processing	20
11.	Termination Terms	20
12.	Data Extraction and Removal Criteria.....	21
12.1.	Data Standards in Use.....	21
12.2.	Data Extraction	21
12.3.	Price of Extraction.....	22
12.4.	Purge and Destroy	22
13.	Data Processing and Storage Locations	22
13.1.	Host Provider of Flexigant Infrastructure.....	22
13.2.	Bulk email Service Provider	22
13.3.	Support Ticket Management Provider.....	23
13.4.	Community Portal Provider.....	23
14.	Data Restoration and Service Migration	23
15.	Customer Responsibilities	24
16.	Technical Requirements	24

17. Browsers24

18. Details of any Trial Service Available25

19. Vendor Accreditations25

Revision History

Date	Version	Author	Reason
09/01/26	1.0	Gary McNally	Created
20/01/2026	1.1	Gary McNally	Final Version

1. Service Overview and Solution

Flexigrant is provided as a cloud-based, scalable grant management software solution. Catering for 3 to over 100 users Flexigrant is a highly configurable grant management system that can be rapidly set up and deployed.

Flexigrant is a modern and innovative grant management software system that allows organisations to streamline the management of their grant and funding schemes. Built on the latest Microsoft technologies, Flexigrant streamlines the submission of applications, assessment, scoring and evaluation (including multiple review rounds, automated reviewer assignment and tailored document generation), post award grant management, finance, claims and payment management, monitoring and reporting and delivers real-time statistics on grant performance. Designed to be set up rapidly, Flexigrant delivers efficient grant administration and supports more and better-quality applications leading to greater uptake of funds and grants.

As a cloud-based solution, Flexigrant is delivered over the web providing access from any location with Internet access. Core to Flexigrant are the form and scheme building tools that allow authorised users to set up their grant schemes/funds as required including all associated on-line application and monitoring forms, checklists and document/email templates. Flexigrant has been designed to require minimal training before users can set up and administer their own programmes and schemes.

Flexigrant is a continually evolving solution with a roadmap of future developments and monthly releases of new and improved features. The focus of the on-going programme of Flexigrant development is to enhance and extend the existing features of the product and add new innovative functions to ensure grant

schemes are managed as efficiently as possible. The Flexigrant user base contribute to the road map and can submit ideas and suggestions via the on-line Community Portal.

In accordance with our guiding principles, we aim to continue to make Flexigrant flexible and feature rich without compromising on quality or simplicity of use. Core to this is ensuring that Flexigrant remains as a 'current' technical solution, and is built on open standards.

2. Information Assurance

Flexigrant has been developed to ensure compliance with information security standards. Fluent Technology Ltd, the authors of Flexigrant, are accredited to the ISO 9001, ISO 27001 and Cyber Essential Plus standards. These standards not only govern our service delivery but oversee our development practices and development environment. This ensures compliance from the design, development and testing of our product through deployment, implementation and support solutions for customers.

We typically deliver solutions to IL 2 (protect) but have the capability to deliver solutions to IL 3 (restricted).

3. Cloud Hosting

Our hosting partner is Microsoft Azure and the Flexigrant cloud platform is located in London. This includes extensive compliance including: SOC 1, 2 & 3; ISO 9001, 20000, 22301, 27001, 27017, 27701, 27018; CSA STAR; and G-Cloud.

Reliability is one of our key tenets and our cloud platform has been designed to meet the needs of companies whose solution requires high availability network, infrastructure and uptime guarantees ensuring mission critical applications are always up and running.

Our cloud environment employs hardware redundancy and geographic failover across multiple sites in the event of a disaster. Azure provides between 99.95% and 99.995% uptime (depending upon specific service). This highly resilient and scalable infrastructure is why we value hosting Flexigrant in Microsoft Azure.

Please note that although Microsoft Azure operate globally the Flexigrant environment is maintained solely within the UK.

3.1. Resilience and Reliability

- Data centre physically located in London, with geographic expansion available.
- Fully managed Infrastructure as a Service (IaaS) by Microsoft which means we can focus on building awesome software.
- Zero-Downtime Network (fully resilient routers, switches and cabling).
- Access to 24x7x365 dedicated support team.
- Fully resilient DNS infrastructure.
- Fully resilient and redundant network infrastructure.
- Tier-1 network utilising multiple bandwidth providers.
- Managed Operating System patching, including priority support through our Microsoft Gold Partner.
- Service monitoring, URL, database, DNS etc.

3.2. Disaster Recovery

- Fully managed backups.
- Full geographic redundancy.
- Recovery Point Objective (RPO) of 30 seconds.
- Recovery Time Objective (RTO) of ~1 hour.

4. Onboarding and Offboarding Processes

4.1. Onboarding

Our on-boarding process reflects an Agile approach. We are flexible and happy to tailor our governance processes to the needs of the customer.

Access to guides to implementing Flexigrant features is provided (as part of an extensive online Knowledge base) and walked through on contract agreement (if this has not been provided and discussed as part of requirements gathering and pricing). These guides detail all the aspects to be considered as part of any implementation and aids in planning. Flexigrant also contains significant help and instruction text to ensure that administrators have help available to them during set up. This is supplemented with a wide range of help and “how to” videos in the online Flexigrant Community to supplement training.

As part of any implementation we would typically work through the following project stages:

- **Project initiation:** typically, this involves finalising the detailed project plan/timetable, setting up the project logs, which includes a detailed risk review, and the process for issue tracking;
- **Design phase:** typically, this involves reviewing the current grant scheme/fund processes and structures and agreeing their new proposed structure and documenting how Flexigrant is to be set up and configured to support this;
- **Configuration phase 1:** typically, this involves Fluent staff setting up Flexigrant as agreed for 1 – 2 schemes/funds, reviewing and customer testing of this and then updating the agreed configuration design (if applicable).

- **Training phase 1:** typically, this involves Fluent staff training key client staff i.e. system administrators on the set up of Flexigrant and how the first schemes/funds have been configured.
- **Configuration phase 2:** typically, this involves supporting client staff in the setup of the next schemes/funds and providing ad-hoc support and training to ensure schemes are working correctly.
- **Training phase 2:** typically, this covers administrator specific topics and customer staff user training. This also provides an opportunity for a learning review of the topics covered in phase 1.
- **Project closure:** typically, this involves a review and closing of the project logs, consideration of any changes being required to on-going support or hosting arrangements and transfer of the project to our Customer Success team to support business as usual.
- **Customer Success:** typically, this involves holding regular progress and support review meetings to ensure that on-going support and account management arrangements are delivering to the agreed service standard.

4.2. Off-boarding

On termination we typically provide an export of all data held in the system or agree to hold the data in a limited version of the system for future access. The costs of these services are typically discussed on contract agreement and revisited during termination. Any data to be transferred to a client would be transferred by secure media only and would be encrypted in accordance with our ISO9001 and ISO27001 accredited procedures.

5. Flexigrant Security

Flexigrant has been developed to ensure compliance with information security standards and is independently security tested at least every year. Fluent Technology Ltd, the authors of Flexigrant, are accredited to the ISO 9001, ISO 27001 Cyber Essentials Plus standards.

All data transferred between clients and Fluent Technology is governed by our Information Security policies and procedures and ensures that only encrypted data is transferred from Fluent to clients. In addition, any data (if) supplied to Fluent for testing purposes is scrambled immediately on receipt.

Fluent Technology Ltd is registered with the Information Commissioner (registration number: Z1672181) and we operate in accordance with the Data Protection Act (2018), the Regulation of Investigatory Powers Act (2000) and the Electronic Communications Act 2000.

As a cloud-based solution Flexigrant is available over the Internet. Users are authenticated on login with a history of all logins being maintained for all users. Flexigrant includes its own password management functions and can interface with existing identify providers through JWT SSO or Azure Active Directory pass through authentication (subject to discussions on contract agreement).

Access to functions and data is controlled through a comprehensive role-based security model maintained by system administrators. As Flexigrant incorporates a user Role Group administration function, authorised administrators can create and edit profiles for the necessary user profiles as required allowing clients to set up the exact roles that are needed and using the terminology that is preferred.

5.1. Infrastructure and Application Security

- Data centre physical security – public access to data centre is strictly forbidden. 24/7 Video Surveillance and 24/7 On-Site Security Personnel.
- Application monitoring to ensure engineers are alerted of service interruptions and are able to proactively remedy issues.
- Data centre monitoring including daily inspection of the physical infrastructure.
- Performance monitoring to ensure engineers are alerted to increases in service usage to scale resources when required.
- Built in system application alerts, our software looks after itself! If a code error occurs, the system automatically logs exceptions which are monitored enabling remedial actions to be taken.
- All our servers are patched with critical security updates as they are released.
- We have a complete development environment that is a mirror of our production platform, all major updates are put through their paces on this platform before being rolled out to live environments.

5.2. Information Security

Flexigrant protects data in transit using TLS (SSL) SHA 256 security certificates ensuring customer data is encrypted between end users and the cloud service platform. Data at rest is also stored encrypted with key storage managed through Azure Key Vault. If custom domain names and security certificates are required, then this will be subject to negotiation at engagement and subject to appropriate incremental cost increases and/or SFIA rate card charges.

In addition, we employ the recommended best practices (OWASP top 10) for developing and managing security and validation, including:

5.2.1.

Input Validation

- Programmatic validation for data types, length, format and range.
- Standard checks for SQL injection issues on all input boxes and query strings.
- Standard validation on all user input fields that may allow for cross-site scripting.
- Server side validation on ALL forms as mandatory and client-side validation where it enhances the user interface or removes unnecessary processing from the server.
- Encoding is applied dynamically where appropriate.

5.2.2.

Authentication and Authorisation

- Flexigrant uses Microsoft Forms Authentication to provide user authentication. Forms Authentication is a standard Microsoft security feature and uses encryption to encode authentication tickets.
- Flexigrant supports strong passwords and all user account passwords are stored encrypted.
- Flexigrant includes a standard security policy which can be tailored to meet specific requirements: e.g. password length, allowed failure attempts, automatic lockout of inactive accounts.
- Flexigrant utilises a role-based security authorisation model, providing a granular level of access to functions and data. User access permission groups are setup as part of the on-boarding and can be changed.
- Least privileged permission are applied to new users by default.

5.2.3. Data Encryption

- Flexigrant protects data in transit using TLS (SSL) SHA 256 security certificates.
- Data at rest is stored encrypted with key storage managed through Azure Key Vault.

6. Service Management Details

6.1. Technical Boundaries

Fluent Technology are responsible for:

- The maintenance and management of the hosting environment.
- The Flexigrant application software including regular software updates.
- Data backups and disaster recovery.
- On-boarding including the initial configuration of Flexigrant, training and handover to the client.

Clients are responsible for:

- The on-going system administration including users and access control, configuration management, and document and email template management.
- The on-going management of grant schemes and forms (unless additional implementation managed services are procured).

6.2. Support Boundary

The maintenance and support element of any contract will typically comprise the following:

- Flexigrant maintenance releases (applied by Fluent Technology outside of business hours), including, at Fluent's sole discretion, patches and fixes in respect of the Software,

- Service monitoring: monitoring of the Software as a Service to ensure continuous high availability,
- Disaster recovery support: in the event of server/service failure reinstating the Software as a Service,
- Administration User support: telephone/email support Monday to Friday 9am to 5pm excluding public/bank holidays to the Client's system administrators (Super users) to provide help and assistance;
- The issue of new releases of the Software to the Software as a Service.

Fluent Technology will provide support:

- Via email, web portal help-desk or optional telephone support (at an added cost) to provide support of the Software to the Customer to named Super users; and
- Via remote diagnosis and (where reasonably possible) correction of faults by code updates.

6.3. User Authorisation and Details

Flexigrant supports the use of strong passwords and has a best practice, role- based access control (RBAC) security model.

Staff users (and other system users) are assigned particular roles, and through those role assignments acquire the permission to perform particular system functions.

Since users are not assigned permissions directly, but only acquire them through their role (or roles), management of individual user rights becomes a matter of simply assigning appropriate roles to the user's account. This simplifies common operations, such as adding a user, or changing a user's team/department.

Flexigrant also supports the segregation of duties at a grant scheme/fund level. This adds a further level of security by ensuring

that, irrespective of the roles assigned to a user, a member of staff cannot complete all tasks relating to the approval and release of finances. For example, if segregation of duties is switched on a single user cannot approve a letter of offer for a grant application that they have completed an assessment or scoring on or process a payment against a letter of offer they have approved. This additional feature ensures that the schemes are well managed and fraud prevention re-enforced.

6.4. General Support Details

To ensure a continuous high level of on-going support we would typically engage as follows:

- A satisfaction survey is completed at least once annually,
- Quarterly reports on use of helpdesk, bandwidth consumption and disk storage are provided,
- Quarterly service level/contract reviews are held to ensure that client needs are met.

The above points are considered on contract agreement and can be tailored to meet individual client specific requirements.

6.5. Service and Support Levels

We will use commercially reasonable endeavours to ensure that the Service is available to the Customer 99.5% of the time during Normal Business Hours in any one calendar month. Normal Business Hours means Monday to Friday, 9:00AM – 5:00PM (UK time), excluding UK public and bank holidays.

Fluent Technology will typically respond to all support requests as quickly as is reasonably possible and supports the following target response times once a request has been recorded:

Priority	Initial Response	Target Resolution
A – Critical	Within 30 mins	Within 8 working hours thereafter
B – Significant Impact	Within 2 hours	Within 12 working hours thereafter
C – Minor Impact	Within 4 hours	Within 24 working hours thereafter
D – Low Priority	Within 24 hours	By agreement

7. Service Constraints

7.1. Planned Maintenance

Planned maintenance is done outside normal business hours, and where possible at weekends.

Any updates applied to Flexigrant are deployed to a test server first and a detailed test plan is worked through to ensure changes do not affect other parts of the system. Planned enhancements are deployed to the test server at least 3 days ahead of being deployed to the production server. Only on successful completion of the test plan are changes deployed to the production server. This results in zero or minimal disruption for users. Planned updates are communicated to customers in advance.

Fluent Technology are committed to the on-going development and continuous improvement of Flexigrant. This is reflected in:

- A major product release being deployed every quarter (typically including significant extensions/improvement of existing features, addition of new features),
- Minor product releases deployed monthly (minor improvements, bug fixes),
- Client feedback being gathered to contribute towards future product development.

7.2. Emergency Maintenance

In the event of emergency maintenance (e.g. security fixes) being required these may be deployed as and when required. When possible, these will be performed outside business hours.

8. Financial Recompense

Fluent Technology would work to mutually agreed service level agreements as defined on contract agreement. Any compensation agreed would be proportional to the value and planned duration of the agreed contract.

9. Training

Flexigrant has been designed to require little training before system administrators can set up and maintain their system.

Administrators are typically provided with comprehensive training on how the self- service aspects of the system are managed. This will result in clients being quickly capable of adding new users, establishing user profiles, being able to edit schemes, content and forms.

During initial set up and configuration administrators will typically be involved in the configuration and will be shown how to execute many of these tasks for themselves. With the system configured to the agreed requirements, end-user training is not complicated and does not require complex instructions.

All forms/pages in Flexigrant include help pages. These help pages include content management tools that allow administrators to update help text as required (i.e. to include organisation specific instructions). On top of this, our Flexigrant Community offers help guides, videos, and webinars to support ongoing usage of the system.

Help videos are available for regularly used functions to compliment training and help guides. Therefore, typically no more than 7 modules of 1-2 hrs training is required as standard and covers the following key topics:

1. **Product overview:** introducing the online portal, setting up sub-pages in the portal, and introducing the contact management modules for adding and maintaining people and organisations, and the GMS dashboard.
2. **Creating a grant scheme and configuring application forms:** covering creating / copying schemes, building online application forms (expression of interest, full application), how to set up instruction text, best practise in setting up online application forms, adding/copying/updating form questions, setting up special questions, validating question responses and switching schemes on and off.
3. **Setting up the checking and review stages:** covering configuration and processing of the checking stage, review / scoring stage set-up, including assessment form design, assigning applications to reviewers, completing reviews, moving review to subsequent review stages, creating and managing a Panel, creating and managing a committee meeting.
4. **Processing the approval and offer stages:** including shortlisting of applications, assigning delegated authorities to approve applications, creating an offer letter, issuing and accepting an offer letter.
5. **Managing finances and progress reports:** covering the creation of payment schedules, assigning delegated authorities for the processing of payments and creating payment batches, the design and scheduling of progress reports, creating and managing conditions of award, award checklists, utilising the query and export tool to extract key data.
6. **Configuring the workflow and Admin settings:** covering in depth the settings and templates that are enabled and utilised when covering each stage of your grant / scheme workflow, including, checking, review, approval, and offer stages, configuration of reporting forms, document and e-mail templates and other admin settings, such as

setting up roles and roles groups, managing users and user permissions.

7. **Configuring finance settings:** covering the configuration and management of budget tables, configuring payment settings and funding sources, adding finance codes, configuring a claim form, processing claims and payments, auditing and rolling back the status of an application, reporting and the building report exports.

Training is not included in the licence fee and is subject to the SFIA rate card.

10. Invoice Processing

The solution licence, covering software licence, hosting and support, is invoiced on order and every quarter thereafter and payment terms for licence fees are payment within 14 days. Implementation services are typically invoiced monthly in arrears for work delivered in that month with payment due within 30 days. We are happy to discuss any specific invoicing and payment requirements that clients may have.

11. Termination Terms

We do not believe in subjecting clients to complicated or lengthy termination clauses. Typically, we require 3 months' notice of termination and this is discussed and the notice period agreed on contract agreement. Failure to advise Fluent of termination shall result in continuity of the service unless otherwise agreed with Fluent, please refer to our Standard Terms and Conditions for a full description. On termination we typically provide an export of all data held in the system in an agreed format or agree to hold the data in a limited version of the system for future access. The costs of these services are typically discussed on contract agreement and finalised before termination. Any data to be transferred to a client would be transferred by secure media only and would be encrypted in accordance with our ISO9001 and ISO27001 accredited procedures.

12. Data Extraction and Removal Criteria

12.1. Data Standards in Use

Flexigrant has been designed to comply with open standards to ensure the software interoperability, data and document formats are compatible with other systems.

Integration with legacy or proprietary systems can be catered for subject to discussions and use of the SFIA rate card for implementation services.

All data held in Flexigrant is deemed to be owned by and the responsibility of the client creating it. Typically, Fluent would acknowledge the 'ownership' of data (in accordance with data protection principles) lies with client and that Fluent Technology will only access this to provide support or implementation services with the permission of the client.

The circumstances and working arrangements through which Fluent may access client data is agreed on contract agreement with our typical position being that we should not be accessing client data with explicit permission of the client.

12.2. Data Extraction

On termination we typically provide an export of all data held or agree to hold the data in a restricted instance of the system for archival access. The costs of these services are typically discussed on contract agreement and finalised before termination. Any data to be transferred to a client would be transferred securely in accordance with our ISO9001 and ISO27001 accredited procedures.

12.3. Price of Extraction

Data extraction can be catered for subject to discussions and use of the SFIA rate card for implementation services. The costs of data extraction services are typically discussed on contract agreement and finalised before termination (if required).

Please note that Flexigrant includes a Query & Export tool that allows users to create export data in Excel. Our services for data extraction are only required if bespoke extracts are required upon contract termination to a separate database.

12.4. Purge and Destroy

On termination all data is removed from the hosting environment unless an alternative arrangement is put in place. Data will be held on backups but as these are rotated data held on backup will be purged within 4 weeks.

13. Data Processing and Storage Locations

13.1. Host Provider of Flexigrant Infrastructure

Microsoft Azure hosts our infrastructure as Platform as a Service (PaaS) facilities, so that Fluent can provide the Flexigrant services to the Customer in a cloud environment. Microsoft Azure sub-processes Personal Data in the UK under GDPR compliant data processing terms. The Microsoft Azure data centre is based in the UK.

13.2. Bulk email Service Provider

The bulk email service provider (Mailgun EU) may sub-process Personal Data in the EU under GDPR compliant data processing terms to provide Fluent with support services for the emails service.

13.3. Support Ticket Management Provider

The Support Ticket Management Provider (Freshdesk) provides support ticket management services to Fluent so that Fluent can better support its customers. The Support Ticket Management Provider may sub-process Personal Data in the US using an EC approved model clause data transfer agreement.

13.4. Community Portal Provider

The Community Portal provider (Circle) is used by Fluent to create a customer focussed community online for our customers, providing them with access downloadable resources, videos, links to webinars and new development with the Flexigrant platform as they unfold. The Community Portal provider may sub-process Personal Data in the EU under GDPR compliant data processing terms.

14. Data Restoration and Service Migration

Data migration is commonly required as part of the implementation service i.e. to import data into the system ahead of 'go live'. Typically, this would involve:

- Discussions to agree the scope and scale of the import required,
- Obtaining a sample of the current data from the client in a standardised Flexi- Grant compliant format,
- Reviewing the existing data and mapping this to Flexigrant,
- Identifying any data cleansing and quality issues needing to be actioned ahead of the final import (to be performed by the client),
- Running a test data import and validating the routine and results,
- Documenting the import process and instructions (if needed for future imports),
- Completing the import typically performed jointly between the client and Fluent.

Please note any import routine is configured and built to be a repeatable process so that it can be adjusted to allow for variations in data structures between schemes.

Flexigrant includes a data import tool to ensure that the effort required to import historic data is minimised however certain constraints exist that must be considered during implementation.

15. Customer Responsibilities

Clients and users access Flexigrant through a web browser. System administrators have access to all of the form and scheme/fund building tools as well as the administration tools for managing system configuration codes, users, help content and document/email templates.

Customers do not have access to the infrastructure upon which Flexigrant is installed i.e. including network, servers, operating systems or storage.

In summary the client can self-service and manage their solution but not the underlying infrastructure.

16. Technical Requirements

Clients and users access Flexigrant through a web browser and need no additional software to use the product. As Flexigrant is delivered as a hosted solution no additional licence costs are required.

17. Browsers

Flexigrant has been tested and works with the latest version of the following browsers:

- Microsoft Edge
- Safari
- Firefox
- Google Chrome
- Opera

As updated versions of browsers become available Flexigrant is tested against a pre-defined test plan to identify any potential errors or issues. We are committed to ensuring Flexigrant is maintained as a current product and continually develop and upgrade the underlying infrastructure and application.

18. Details of any Trial Service Available

We can provide both demonstration and trial systems. We accept that customers may need to test and explore the system functionality to assure themselves that Flexigrant will meet their business process and requirements.

We are also happy to provide contact details for reference sites.

19. Vendor Accreditations

We are an organisation committed to quality and information security. We have been independently assessed to the ISO9001:2015 ,ISO27001:2013 and Cyber Essentials Plus standards.

