Grant Module Guide

For Clubs

2014
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Welcome to the Grants Module

**Introduction**

The Grants module is an add-on module for the District version of ClubRunner. This module allows all clubs in the District to apply online for grants, and for Grant Committee members to login and review all active and archived grants in their District. The approval process includes a workflow that allows the District to either approve a grant, or request further information, with as much collaboration as needed.

**Accessing the Module**

This module is accessible from your District website. If you haven’t logged in before, you can use the same login name and password as your club’s site. **FAQ: I don’t know my user name and password, how do I login?**

Please visit the following website for instructions on access your ClubRunner website:

http://clubrunner.helpserve.com/Knowledgebase/Article/View/357/0/how-do-i-login-to-my-clubrunner-website
Getting Started

When you first login, you will have a Grants tab at the top left of the page. Click on My Club Grants to view all Grants submitted by your club.

Access and Permissions:

The following table outlines the access in the grant module. An ‘X’ indicates access to that functionality.

<table>
<thead>
<tr>
<th>Function</th>
<th>Trained Member or Grant Contact (As defined in grants module)</th>
<th>Club Executive</th>
<th>Club Member</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Club Grants</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td>Submit Club Grants</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Club Grants</td>
<td>X</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>View All Grants</td>
<td>X</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Change Grant Status</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit All Grants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cancel/Delete Grants</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Adjust Settings</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Edit Help Text</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Club Qualification

Your club must also be setup as a qualified club. These are the clubs that have provided a Memorandum of Understanding (MOU) and have the appropriate number of trained members. If you do not have access to the grants module or your club is not qualified, please contact your Grants Committee Chair.
## Understanding the Workflow

Before submitting a Grant, it’s important to understand the workflow a grant application undergoes from when it is initially submitted to when it is completed and archived. Here is a listing of all the available Statuses for a grant application and their meanings:

<table>
<thead>
<tr>
<th>Status Name</th>
<th>Change Made By</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initial Request Submitted</td>
<td>Club</td>
<td>The initial request to submit a grant application has been submitted by the club, but the full application has not yet been completed. The club would submit a very simple form indicating the nature of the project in brief, and once the District Grants committee sends it back to the club for further information, they would then go ahead and fill in the entire application.</td>
</tr>
<tr>
<td>Under Review</td>
<td>District</td>
<td>The District has received the initial request and is currently reviewing the grant request. This status is automatically updated as soon as a member of the committee opens the request.</td>
</tr>
<tr>
<td>Awaiting Further Information</td>
<td>District</td>
<td>The District is requesting further information from the club. This normally follows the initial request being submitted, and may be repeated several times if inadequate information was supplied. During the information gathering stage, the grant application will typically go back and forth from Under Review to Awaiting Further Information, until a decision is made by the District.</td>
</tr>
<tr>
<td>Approved</td>
<td>District</td>
<td>The grant application has been approved by the District.</td>
</tr>
<tr>
<td>Rejected</td>
<td>District</td>
<td>The grant application has been rejected by the District. Comments can be made at the time of rejection to explain reasoning.</td>
</tr>
<tr>
<td>Completed and Closed</td>
<td>District</td>
<td>The project has been completed and this grant is considered closed; no further changes can be made.</td>
</tr>
<tr>
<td>Adjustment Requested</td>
<td>District</td>
<td>The club is requesting an adjustment to the grant amount requested.</td>
</tr>
<tr>
<td>Cancelled</td>
<td>District</td>
<td>The grant application has been cancelled by either the club or the district. This status is available should there be a change of mind by the club, or to be able to take back a grant application that was submitted in error. Note that the club can only cancel a grant request if it is still under the status Initial Request Submitted. The district can cancel the grant on behalf of the club at any stage.</td>
</tr>
<tr>
<td>Archived</td>
<td>District</td>
<td>After the grant project has been completed and closed, it goes into archived status. This will prevent any further updates to be made to the information.</td>
</tr>
</tbody>
</table>
Please Note: Once the project has been completed and the grant is considered closed; no further changes can be made.

The Chart below explains the steps that a Grant takes after being submitted. The first step of the Grant Application workflow begins with **Submit Grant Request**.
District Grant Documents

This section is primarily used for the district to put universal grant documents. Examples include, blank MOU, eligibility requirements, sensitive dates and timelines and grant committee terms and conditions. Before applying for a grant, you may wish to review documents provided by your District.

Please Note: This documents page is not the place to upload documents related to your grant project. This is done in the documents tab inside your grant, which is covered later in this manual.
View Club Grants

For an overview of the grants that your club submitted, you can view a full list by using My Club Grants link under the Grants tab.

Within this page, you will see that the Grants are listed by the Rotary year. To view the list of Grants for each year; use the Previous Year and Next Year link located at the top of the page to view each list. As you move through each page, you are provided with a list of all your club’s projects and their status for that year. To view project details or to make modifications, click on the project name or the Open link to view the project details.

Applying For a Grant

Please be sure to consult your District’s timelines and due dates for applying for grants.

Submit a Grant Request

This is the first step in starting the application process. It is used to indicate your intention to apply for a grant prior to filling in the complete application. Once the District has setup your club as qualified, you would simply need to login to the District site and enter the grants module using the Grants tab at the top left of the page. Click on Submit a Grant Request.

Note that only those trained members will have access to enter the module and submit a grant on behalf of the club.
To begin submitting a new Grant request, start by clicking on the **Submit a Grant Request**. This link can be found on the left side menu.

Your next step is to fill in the appropriate fields within the initial application, and press **Submit**.

**Notice:** Please ensure you select the correct year for which this grant application relates to. Once a grant is submitted you cannot change the year. If an error is made, you can cancel and delete a grant application, and re-submit a new request.

Once a Grant has been submitted, you will then be able to open this grant application from the View All Grants listing and update any additional information as well as assign it with the next workflow step. As soon as any of these changes are made, the notifications will be sent to the club contact specified and Grant Committee Members.

Once you submit this request, the Grants Committee will receive a notification. You do not need to email them to let them know, unless your District’s procedures tell you otherwise.

**FAQ:** Why do I see just a limited list of members in the Contacts dropdown? The dropdown only shows trained members for that particular year. Only trained members are able to be the designated contact for a project.

**FAQ:** What if I am working with other clubs on this grant project? If you are working with other clubs in the District, only the primary club can submit the grant request to the District. You will be able to indicate the other clubs that are involved in this project later.

**FAQ:** I am not sure how much financing this project requires. Will I be able to change this later? Yes, the estimated budget is only an estimate. Once your initial request is approved, you will be asked to provide an itemized budget as part of your application.

**FAQ:** I am not a trained member. Can I submit a request on behalf of the project’s contact? Yes, as long as you have Level 50 or higher, you can submit this request on behalf of the project’s contact.
However, all subsequent communication and notifications will go to the official project’s contact, not to you.

FAQ: I submitted a grant request, but it hasn’t been approved yet. Can I still go in to the grant and start adding information? Yes. However, keep in mind that if the District rejects the grant for some reason (usually due to ineligibility) then you may need to re-enter it in a separate request or abandon your work.

Completing the Grant Application

Once you receive notification from the District that your initial request has been approved, you can start to supply all the details required for your application. Go to the “My Club Grants” page, and open your project by clicking on the project name, or the “Open” link on the right.

Details: This is a general description of the Grant project. Within this tab, you will be able to confirm the information provided in your initial request and add any other local clubs in the District who are working with you on this project. Remember, for joint projects, only the primary club should complete an application, unless your District states otherwise. Also supply any other partners that your club is working with.

Application: Within this section, you will be able to fill in all the fields and supply the information. Keep in mind that there are several sections in this page, and you need to click on the section header to open it up for editing. Please click on the Update button for each section to save your work. It is good
practice to write “Not applicable” or something similar in a section instead of leaving it blank. This lets the District know that you didn’t mistakenly skip the section.

General Description: This section is used to describe the project, the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need.

Community Assessment & Impact: This section describes how the benefiting community has been determined and what impact will be made by this project after grant funding has been fully expended.

Sustainability: Within this section, you will need to provide an explanation of how the project be sustained over time.

Cooperating Organizations: This section is used to list and describe the Cooperating Organizations. These Organizations are any other groups (other than partnering Rotary clubs) that are working with the sponsoring club in either funding or implementing the project.

Implementation Plan: This section is used to describe specific activities of the sponsoring club and any partners in implementing the project. What will the Rotarians who are members of the sponsoring and/or partner clubs do during the project?
**Budget:** This section indicates your project financing planning. Using Expected Expenses, you can supply both requested district funds in addition to other funding sources you have already obtained elsewhere. With the Expected Income section, you can supply all anticipated expenses you think you will need. If you are basing an expense on a proposal or estimate, please add the supporting document in the Documents tab so your District can view it.

![Budget Example](image1)

**Documents:** Within this section, you will be able to store any related files, images, or documents relating to the Grants you have submitted. Once you are satisfied with all the information that has been provided, you are able to submit the grant to the committee for review. Click on the “TBD” button in the Status box (supply screenshot). Your District Grant Committee will receive a notification.

If you wish, you can print a hardcopy of your application form, by going to the “Project Overview” tab in your grant project.

![Documents Example](image2)
Revisions to the Grant Application
Sometimes your District committee may indicate additional information is required. If that is the case, you will receive an email notification to let you know. Supply the additional information or corrections, and click the “TBD” button to submit your changes to the committee for their review.

Approval and Completion
Once the committee approves your application, you will get an email notification. You can proceed with the project activities right away, or wait until you receive the funds. Your District procedure on funding may differ, as some District send the funds after a project is complete. During the course of your project activities, keep track of all expenses and save receipts and documents.

Final Project Report
Once all the information has been applied to the grants and the approval process has been completed. You are required to submit a final project report after your project is completed. Within the Individual Project Report, you will need to fill in the description of the activities that have taken place.
In the Financial Report section, enter all actual financing that you’ve received, as well as all actual expenses you have incurred.

These can be different from what you indicated on the Budget tab when applying for the grant. Make sure you add all supporting documents (such as receipts, invoices, and photos) in the Documents tab. You can also create folders and subfolders to organize your files.

When all the information has been filled in, click on the **Submit** button. You can modify the subject and body of the email that will notify the Grants Committee. The project report file is already added as an attachment. One your notification email has been composed, click the **Send** button.
Training & Support

Introductory Video
To get a visual introduction to the Grants module from a District perspective, please visit the following link:

http://web.clubrunner.ca/grants

Submitting Feedback
We welcome your feedback on the Grants module. You can submit this feedback by emailing us at feedback@clubrunner.ca, submitting a ticket through our Support site at www.clubrunnersupport.com, or by phoning us at 1-877-469-2582 (+1 905-829-5299).

We have also created a Group on Linkedin for beta testers to share information and ideas for further discussion. Please click on the following link to access the group:

http://www.linkedin.com/groups/ClubRunner-Beta-Early-Access-Participants-4746832/about

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