

**The World of Rotary Grants
has changed, and with that change comes a new
format for our
District Grants for 2013-2014.**

**This slide show will give you a general idea of
the grant process and how our 5910 Clubs will
apply for & manage their grants.**

Stay Tuned !

ClubRunner

Grants Module

Background on District Grants

District Grants

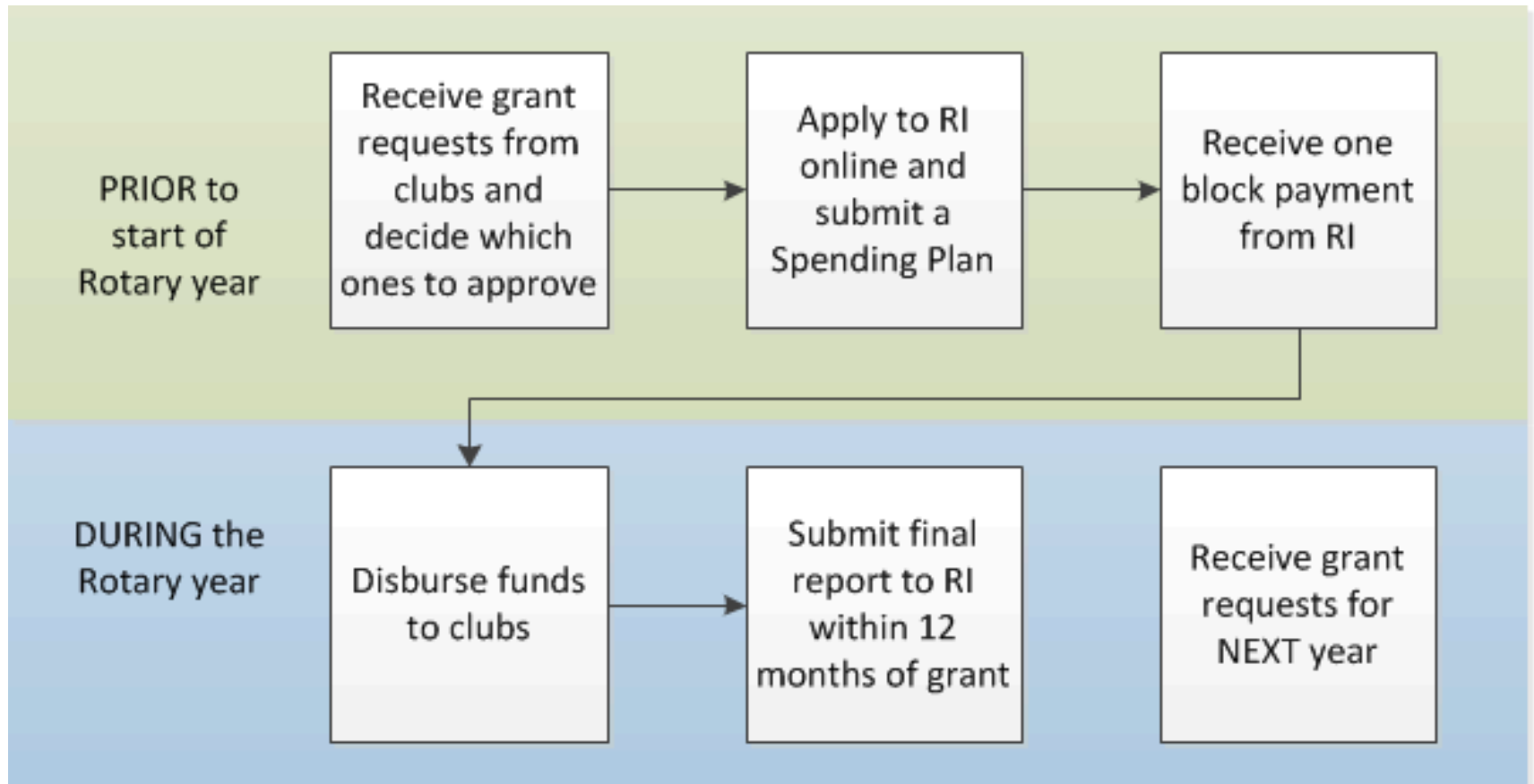
District Grants

- Districts will be responsible for administering District Grants
- Effective in the 2013-14 Rotary year
- Funded solely by DDF generated from Annual Programs Fund and Permanent Fund SHARE earnings from 3 years prior (*up to 50% of DDF*)

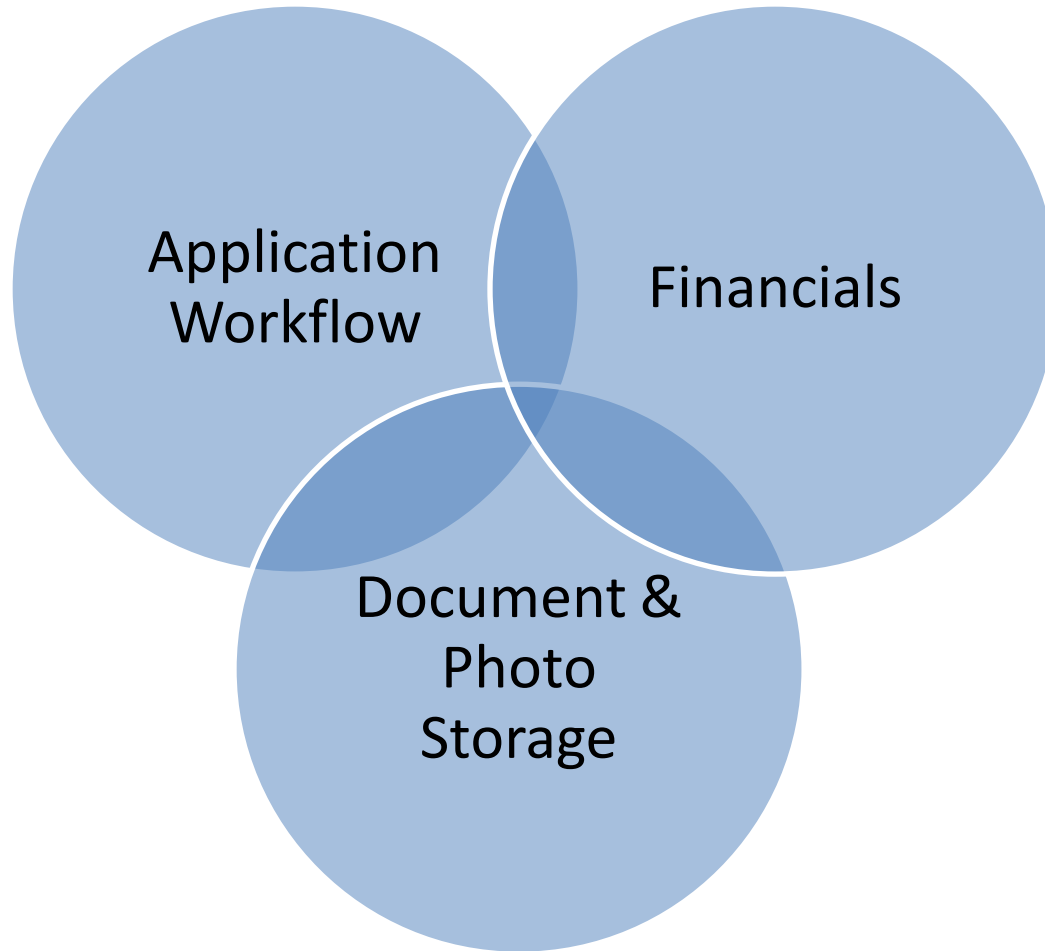
District vs. Global Grants

- RI does not plan to provide a tool to administer District Grants between the district and its clubs
- RI will however be continuing to support Global Grants
- ClubRunner's Grants Module is intended for District Grants only

Business Cycle



Grants Module



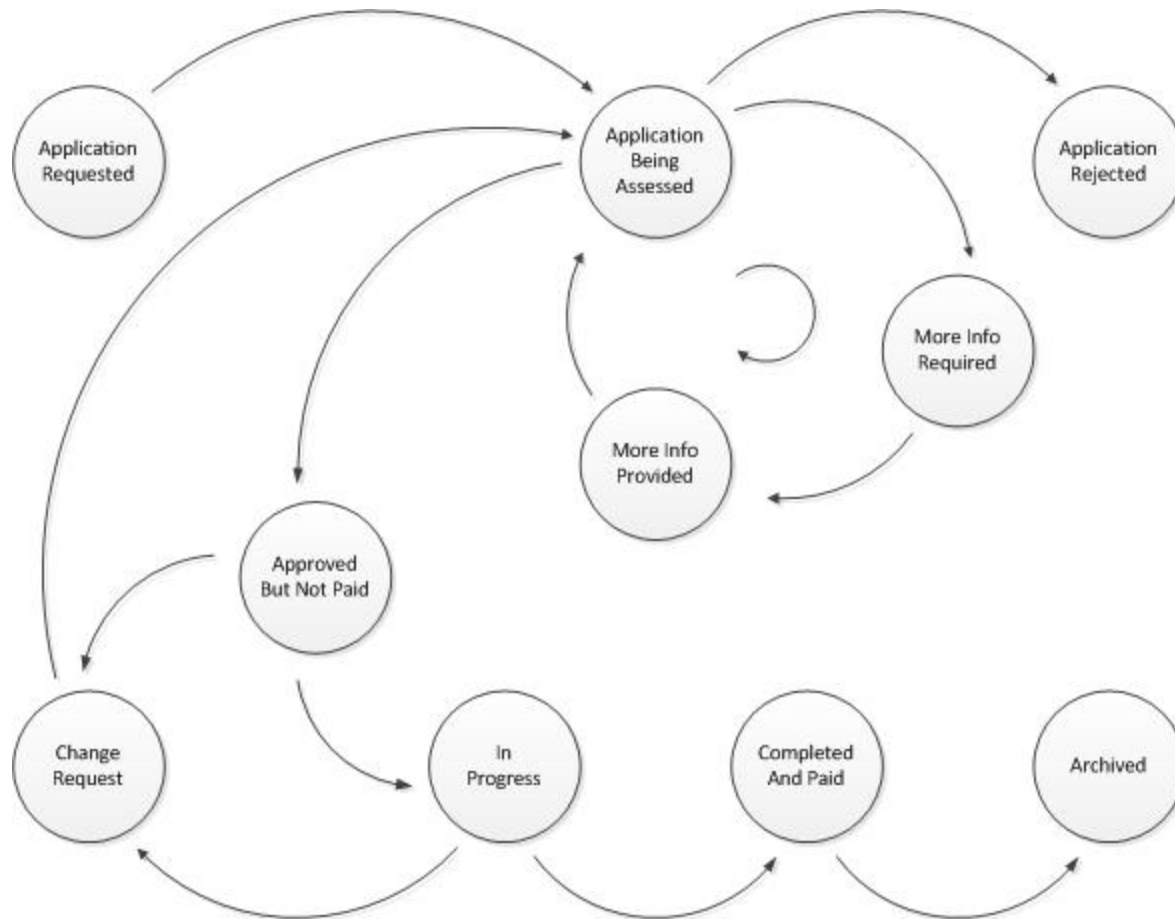
Club Access

- **Once the District orders the Grants Module, it will be available for use by all the clubs in the District.**
- **Clubs will access it from the District website.**
- **Clubs will not need to get the Grants Module on an individual basis.**
- **Secured by club executive level**

Application Workflow

District Grants

Grants Workflow



Club Grant Request

- **Club Executives will apply online through the District website**
- **Provide all the details that the District needs to make a decision on approval**
- **This includes a description of the project, impact to the community, partnering clubs and organizations, budget, and anything else the District requires.**

Grant Request Review

- **The District Grants Committee will have an “inbox” of all pending requests.**
- **As soon as a request is opened, the status will change to “Under Review”.**
- **The grant request can be green lighted and sent back to the club for full details so that the club can prepare a more thorough application.**

Grant Application

- **Once a grant request is green lighted, the club will submit all information requested.**
- **Sections:**
 - Detailed description
 - Community Impact
 - Itemized Budget
 - Areas of focus
- **The grant is submitted back to the District for assessment.**

Grant Assessment

- **District Grants Committee members login to the District site and can see the details of all pending applications received by clubs.**
- **A grant can be sent back for more information if it is incomplete**
- **Otherwise, the grant application is either Rejected or Approved and payments can be made**

Grant in Progress

- Once a grant is approved, clubs will continue to have access to all of their own grants so that they continue to update it.
- Clubs will add all photos, invoices, documents, and supporting files related to the Grant.
- These files will be stored for archival purposes.

Grant Completion

- All payments to a club for a grant are tracked by the Grants Module.
- Once all payments have been made to a club, the grant is considered completed and the District Grants Committee can archive it.

Overview of Features

District Grants

Grants Dashboard

- Statistics
- At-a-glance info
- Pending requests

ClubRunner™ Connect. Collaborate. Communicate. Welcome, Gillian Anderson | Logout

District 9998

Admin | For Clubs | For Members | Membership | Organization | Communication | Website | Reports | Attendance | Events 2.0 | Grants | Help


My Club Grants | District Grants

District Grants

Welcome Gillian Anderson.
If you are new to the ClubRunner Future Vision Module for Districts, please visit our extensive Help section to orient yourself with the features.

◀ Previous Year | 2012 - 13 | Next Year ▶

Grant Global Distribution



Status Summary

- 3 Under Review
- 4 Approved
- 4 Initial request submitted
- 2 Need more information
- 1 Rejected or Cancelled

Requests Awaiting Your Attention


Search

Date	Project Name	International Club	Requested Budget	
Initial request submitted				
Oct 18, 2012 at 03:47 PM GMT	Handicapped Access For Rural School in India	Kingsbridge	\$12,300.00	Open
Oct 19, 2012 at 04:31 AM GMT	Children's Trauma Unit in Turkey	Kingsbridge	\$42,500.00	Open
Oct 19, 2012 at 04:33 AM GMT	Computer lab for primary school children	Kingsbridge	\$12,500.00	Open
Oct 19, 2012 at 04:34 AM GMT	Kidney Dialysis Unit	Oakville South	\$31,900.00	Open
Under Review				
Oct 11, 2012 at 03:50 PM GMT	Thesaurus Signing	Another Test Club	\$1,000.00	Open
Oct 15, 2012 at 03:45 PM GMT	Handicapped Access For Rural School in India	Kingsbridge	\$12,300.00	Open
Oct 16, 2012 at 04:08 PM GMT	Handicapped Access For Rural School in India	Kingsbridge	\$12,300.00	Open

Showing 1 to 7 of 7 entries

Inbound Funds


Report Details



Allocated	\$150,000.00
Received	\$100,450.00
Spent	\$15,000.00
Available	\$85,450.00

Outbound Funds

Details



Total	\$208,400.00
Pending	\$142,100.00
Approved	\$54,000.00
Completed	\$12,300.00

ClubRunner™ © 2002-2012. All rights reserved. Privacy Statement | Online Help

Grants Details

- Track finances
- Print grant form
- Documents and photos
- Activity log

The screenshot shows the ClubRunner interface for a grant titled "Post-flood ICU Restoration". The page is for District 9998 and is accessed by Gillian Anderson. The grant status is "Approved".

Grant Summary:

- Grant Project: Post-flood ICU Restoration
- Primary International Club: Kingsbridge
- Date Submitted: Oct 19, 2012 at 03:46 AM GMT
- Total Payment: \$0.00
- Total Budget: \$0.00

Actions: Make Adjustments, Complete and Close, Reject

General Information:

- Project Name: Post-flood ICU Restoration
- Country: Afghanistan
- State: Phuket
- City: Thailand
- Brief Description: economy. For Phranakhoenri Ayutthaya Hospital in Thailand, respiratory effected illness is one of the major health problems, in 2011, there were 493 cases per thousand populations. In addition, there are several chronic diseases which effect to the respiratory system and require giving oxygen also; there are several patients who need respirators. In the critical situations, caring by giving oxygen and respirator in time can reduce brain damage and save patient's life.
- International Club: Kingsbridge
- Contact: Gillian Anderson
- Estimated Budget: \$23,500.00 (USD)

International Partners:

Club	Contact Name	Contribution	Actions
Kingsbridge	Gillian Anderson	3,000.00	Edit Delete
Oakville South	Donna Harrison	1,400.00	Edit Delete

Host Partners:

Club	Contact Name	Actions
Prasnisuiyethai-Ayutthaya	Boonsom Watcharakorn	Edit Delete

Budget

- Build a detailed budget
- Track payments

The screenshot displays the ClubRunner web application interface for District 9998. The user is logged in as Gillian Anderson. The main navigation menu includes Admin, For Clubs, For Members, Membership, Organization, Communication, Website, Reports, Attendance, Events 2.0, Grant, and Help. The current page is titled "My Club Grants" and "District Grants".

The main content area shows details for a grant project titled "Post-flood ICU Restoration". Key information includes:

- Grant Project: Post-flood ICU Restoration
- Primary International Club: Kingsbridge
- Date Submitted: Oct 19, 2012 at 03:46 AM
- Total Payment: \$2,200.00
- Total Budget: \$0.00
- Status: **Approved** (Local Amount: \$1,200.00)

Action buttons for the grant status include "Make Adjustments", "Complete and Close", and "Reject".

The "Budget" tab is active, showing a "Project Budget" section with a search bar and a table of budget items:

Description	Supplier	Currency	Amount	Tax	Total	Amount (USD)	Actions
Packing supplies for crew	XYZ Ltd.	USD	\$150.00	\$150.00	\$300.00	\$150.00	Edit Delete
Fedex	Fedex	USD	\$125.00	\$125.00	\$250.00	\$125.00	Edit Delete

Below the budget table is a "Project Payment" section, also with a search bar and a table:

Date	Description	Local Amount	Currency	Deposit (USD)	Withdrawal (USD)	Actions
No payment specified						
Total:				\$2,200.00	\$0.00	\$2,200.00

The footer of the application includes the ClubRunner logo, copyright information (© 2002-2012), and links to the Privacy Statement and Online Help.

Documents

- Centralized place for photos and documents
- Backup and archive

The screenshot displays the ClubRunner web interface for District 9998. The top navigation bar includes 'Admin', 'For Clubs', 'For Members', 'Membership', 'Organization', 'Communication', 'Website', 'Reports', 'Attendance', 'Events 2.0', 'Grant', and 'Help'. The 'Grant' section is active, showing 'My Club Grants' and 'District Grants'. A sidebar on the left lists navigation options: Grant (District Dashboard, Request for Grant), District Settings (Bank Accounts), and Messages & Notification (Notifications, Message Templates). The main content area shows a grant titled 'Post-flood ICU Restoration' with a status of 'Approved (Local Amount: \$1,200.00)'. It includes details for the grant project, primary international club (Kingsbridge), and date submitted. A 'Project Documents' section is visible, featuring a search bar, 'Create Folder', and 'Create Document' buttons. Below this is a table listing documents and folders.

Name	Created On	Created By	Actions
Correspondence	Oct 20, 2012	Gillian Anderson	Add File Create Subfolder Edit Delete
Email communication	Oct 20, 2012	Gillian Anderson	Download Edit Delete
Invoices	Oct 20, 2012	Gillian Anderson	Add File Create Subfolder Edit Delete
DHL	Oct 20, 2012	Gillian Anderson	Download Edit Delete
Fedex	Oct 20, 2012	Gillian Anderson	Download Edit Delete
Photos	Oct 20, 2012	Gillian Anderson	Add File Create Subfolder Edit Delete
Photo 1	Oct 20, 2012	Gillian Anderson	Download Edit Delete
Photo 2	Oct 20, 2012	Gillian Anderson	Download Edit Delete
Photo 3	Oct 20, 2012	Gillian Anderson	Download Edit Delete

Activity Log

- Track changes and comments
- Audit trail

The screenshot shows the ClubRunner interface for a grant titled "Post-flood ICU Restoration". The user is logged in as Gillian Anderson. The grant status is "Approved". The interface includes a navigation menu, a sidebar with "Grant" and "Messages & Notification" sections, and a main content area with tabs for "Details", "Application", "Budget", "Documents", "Reports", and "Activity Log". The Activity Log shows three entries:

Date	Action	By
Oct 19, 2012	Status Changed from "Under Review" to "Approved"	Gillian Anderson
Oct 19, 2012	Status Changed from "Initial request submitted" to "Under Review" <i>Gillian Anderson: Request opened for view.</i>	Gillian Anderson
Oct 19, 2012	Grant Request Submitted. <i>Gillian Anderson:</i>	Gillian Anderson

Additional details shown include: Grant Project: Post-flood ICU Restoration, Total Payment: \$0.00, Total Budget: \$0.00, Primary International Club: Kingsbridge, and Date Submitted: Oct 19, 2012 at 03:46 AM GMT. Action buttons include "Make Adjustments", "Complete and Close", and "Reject".

Reports

- Grant application
- Financial reports
- Reports to RI

1800R12

of at least three Rotarians must be established to oversee the project. All three committee members must belong to the primary club identified below for club-sponsored projects or belong to clubs in the district for district-sponsored projects. The committee members must be committed for the duration of the project. If you are a Rotarian who is not a member of a club, you must contact your club or the district office for more information. If you are a Rotarian who is not a member of a club, you must contact your club or the district office for more information.

Club: Kingsbridge Oakville South

Description	Sup
Packing supplies for crew	XYZ Ltd.
Fedex	Fedex
Total	

Explanation: For detailed information on what TRF funds, please see The Guide to Matching Grants (144-EN). Official RI exchange rates can be found at www.rotary.org. Please use the most recent rate. Please provide purchase order numbers for all budget items that will be purchased.

1800R12

Grant Application Report

PROJECT DESCRIPTION

Explanation: Matching Grants support the humanitarian service projects of Rotary clubs and districts. In this section, describe in detail the humanitarian need your project will address, the intent of the project, how the project will be implemented, and how Rotarians will be directly involved in the project. Involvement is required of both the host and international partners.

District 9998
Future Vision Annual Financial Summary
Year 2012-13

Inbound	Budgeted	Actual Received
Budgeted for Year 2012-13	\$150,000.00	
Check from RI		\$100,000.00
Interest Redeemed from bank		\$450.00
Total Inbound:	\$150,000.00	\$100,450.00
Balance:	\$49,550.00	

Outbound	Budgeted	Actual Paid
Total Outbound :	\$150.00	\$17,200.00

Balance Available	Budget	Actual
Available	\$149,850.00	\$83,250.00

Powered by ClubRunner Report Date: Oct 20, 2012 at 03:42 PM GMT

Project Name: Post-flood ICU Restoration
Thailand
Phuket
Country: Afghanistan

PROJECT DESCRIPTION

Describe the project and the problem or need it will address, including the intended beneficiaries and how the project will benefit the community in need. Provide the estimated length of time needed to complete the project.

COMMUNITY ASSESSMENT

Describe how the benefiting community will maintain this project after grant funding has been fully expended.

IMPLEMENTATION PLAN

Describe specific activities of the host and international partners in implementing the project. What are the roles of the Rotarians who are members of the partner clubs during the project? Please note that financial support is not considered active involvement. (See the Matching Grant application instructions for suggestions.)

PROJECT BUDGET

13

Notifications

← Go back

Notification Messages

[+ Add Event](#)

Search:

Show entries

Transition		Template Name	Actions
Under Review	→ Approved	Grant request approval	Edit Delete
	→ Under Review	-- No Message --	Edit Delete
	→ Rejected or Cancelled	-- No Message --	Edit Delete
	→ Need more information	-- No Message --	Edit Delete
	→ Grant application is archived	-- No Message --	Edit Delete
	→ Completed and Closed	-- No Message --	Edit Delete

Showing 1 to 6 of 6 entries

[First](#) [Previous](#) **1** [Next](#) [Last](#)

Editable Email Templates

Edit Message Template

Name:

Subject:

Body:

Variable Fields:

Normal **B** *I* U abc x_2 x^2 **A** **A**

Dear \$FIRST_NAMES,

Your grant request that we have received has been reviewed and is approved. Please log in to the District website to start the application process and provide all the details required.

Once that has been submitted, we will review it and get back to you.

Thank you,
\$SENDER_FIRST_NAMES

body p

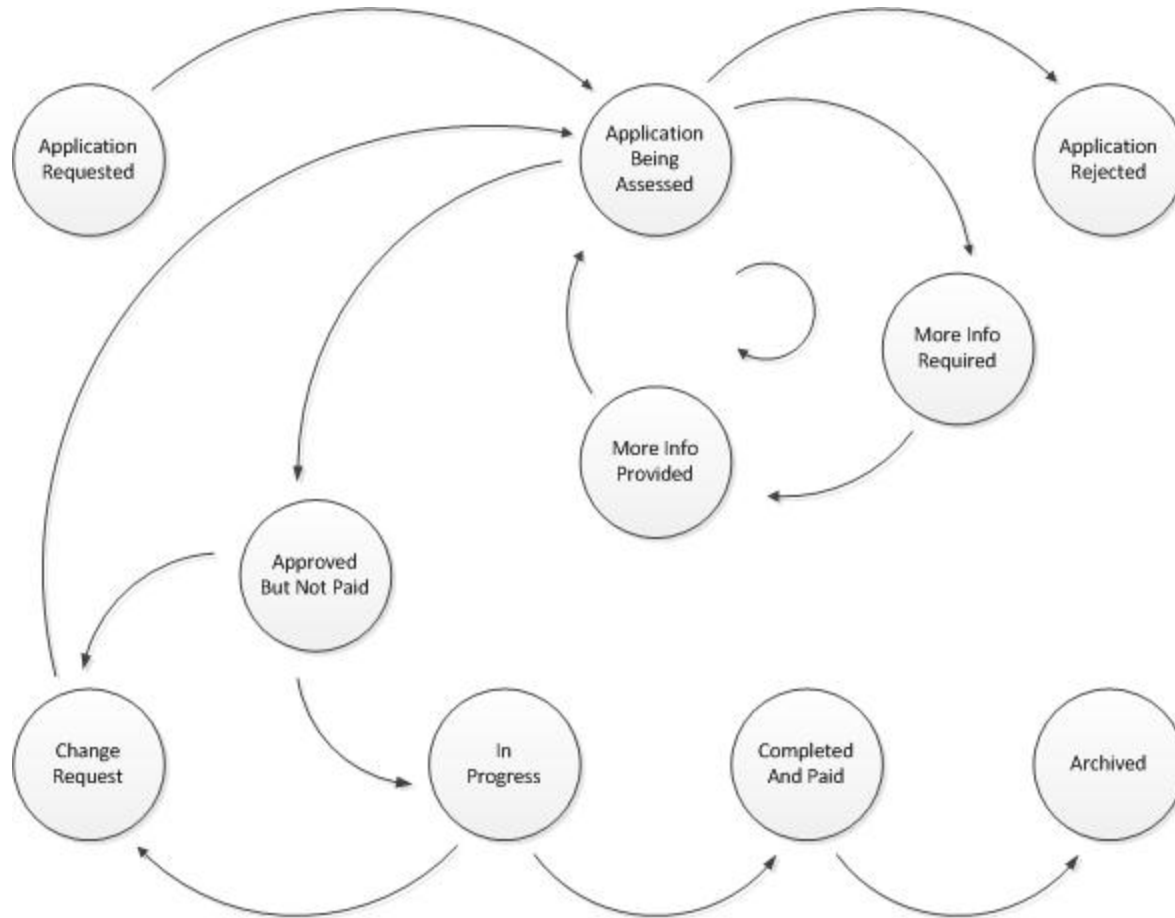
Summary

District Grants

Flexibility

- Custom email notifications
- Editable message templates
- Custom fields (*planned*)
- Custom workflow (*planned*)
- Ranking/voting (*planned*)
- Online signatures and authentication

Customizable Workflow



Architecture

- **The Grants Module has been developed fully on the Microsoft Azure platform**
- **Fully redundant and reliable server infrastructure**
- **All documents and stored files are backed up (all files are soft-deleted and retrievable)**
- **Records kept for 7 years**
- **Audit trail to keep track of crucial changes**

Early Access Program

- **Help us make this module perfect for you:**
 - Early access
 - Provide feedback
 - Join the discussion with other Districts
 - Influence decision-making and priorities
- Email rotary@myclubrunner.com for info on participating
- View features still in development