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Welcome to the Grants Module

Introduction

The Grants module is an add-on module for the District version of ClubRunner that 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.

Documents and other files, budgets and payment breakdowns, as well as a District cash flow summary are all tracked. Information changes are logged, and an audit log allows the committee to see the lifecycle of a particular grant.

We understand that the elements and workflow of each Grant will be unique to the districts over time; therefore this module has been designed with a flexible infrastructure that will accommodate customizations by District. Furthermore, each District is able to customize the help instructions throughout the different stages with their own wording to best assist their clubs with following the correct procedures.

Free Evaluation Trial

Up until July 1, 2013, all Districts can take advantage of a free trial, whereby you can evaluate the system, including the ability to accept applications from clubs. You will have to however opt into the module so that we can enable the link on your Admin page and Launchpad. You can do so by sending us an email at rotary@myclubrunner.com. Please indicate who in your District should have access to the module (from a District Grants administrator point of view), and whether you would like this to be a public trial (to allow clubs to see the module) or a private trial (only visible to the Grant Administrators at District level). You can always start out with a private trial, and then contact us if and when you wish to make it public.

By July 1, 2013 if your District would like to continue with the module, you will have to notify us so that we can keep your module available on production. As 2013-14 will be the first Rotary year that this module is introduced, it will be offered at a reduced charge to subscriber Districts. If you do not wish to continue with the module, you simply do nothing. You will still have access to the module in Read Only mode so that you can access the grant applications and any information uploaded during the trial, however no further updates can be made. The module would be accessible until July 1 2014 in that case.

Ordering the Grants Module

Orders for the Grants module will be done by Rotary year, rather than a 12-month period. For example, if your District decides to use the module for accepting applications during the 2013-14 year, you can

order it at any time during that year, and it will be available until July 1 2014. To continue being able to use it, you would have to renew it for the 2014-15 year, and so on, regardless of when you initially ordered it.

Accessing the Module

Once you have requested for the Grants module to be installed, your District website will now have a Grants section at the top right of the **Launchpad** page:

The screenshot shows the ClubRunner Launchpad interface. At the top is a navigation menu with items: Admin, For Clubs, For Members, Membership, Organization, Communication, Website, Reports, Attendance, Events 2.0, Grants, and Help. Below this is a sub-menu with 'Launchpad' and 'Administration'. The main content area is titled 'Welcome, Gillian!' and includes a login timestamp: 'Your last district login was on Wednesday, February 27, 2013 at 09:54 AM EST'. A red arrow points from the 'Welcome' text to a new section on the right titled 'NEW! Grants Module'. This section contains the text: 'Introducing the new Grants Module! Submit and review requests for District grants.' and a button labeled 'ENTER'. Below the main content are several utility tiles: 'My Profile', 'My Club's Info', 'Calendar', 'Website', 'Communication', and 'Reports'. On the left side, there are three vertical panels: 'Learn about our new District Launchpad!', 'RI Integration' (noting 29 clubs not activated), and 'Community' (with a 'Start a Discussion' link). On the right side, there are two more panels: 'Membership This Month' (showing 4 new members, 1 terminated member, 16 unique logins, 29 total clubs, 121 total active members, and 5 total honorary members) and 'RI Integration This Month'. A 'See more statistics' link is also present.

When you request for the module to be installed, we will grant the proper access to those people that you have requested. Should you wish to grant more members access to the District view, you can have your Site Administrator give them the 'Grants Administrator' role from **Member Access Rights**.

During a trial period, if you indicate you want this module on a *Private Trial*, clubs will not be able to see this section.

If you are undergoing a *Public Trial*, all clubs will be able to see this section, but only trained members of qualified clubs will be able to access the Grants module and submit a grant request. You will be able to specify these clubs and members from the within the module. See the next section for detailed instructions.

Getting Started

Review Your Qualified Clubs and Members

The first step to launching the Grants module to your clubs is setting up your qualified clubs – these are the clubs that have submitted their Memorandum of Understanding (MOU) and trained at least two

members. You can track these items in the Grants module and once these two criteria are both met, the system will automatically allow the club to submit grants.

To manage your qualified clubs:

1. From the District Grants left menu, click on **Qualified Clubs**.
2. This will show you a list of all your clubs. Look for the checkmark under the Qualified column to see if they have met all the criteria. You will also be able to see how many trained members they have, and view further details on this club’s qualification. To manage this club, click on their club name or the **Edit** link.
3. To indicate that this club has signed their MOU, select the **Signed MOU** option, then press **Submit**.

To indicate which members have been trained within this club:

1. Click on the **Add** button below the **Trained Club Members** section.
2. Select the member from the dropdown menu, which should display all active members within that club.
3. Enter the date that this member was trained under **Trained On**.
4. Upload any **Certification Document** if applicable (this is optional).
5. Press **Save**.

These members will now automatically get access to enter the Grants module and be able to submit an application on behalf of the club.

Tip: Ensure that your Grants module is live and not in Trial mode to ensure that clubs will be able to access it.

Understanding the Workflow

Before we can setup the notifications, 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:

Status Name	Meaning
Initial Request Submitted	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.
Under Review	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.

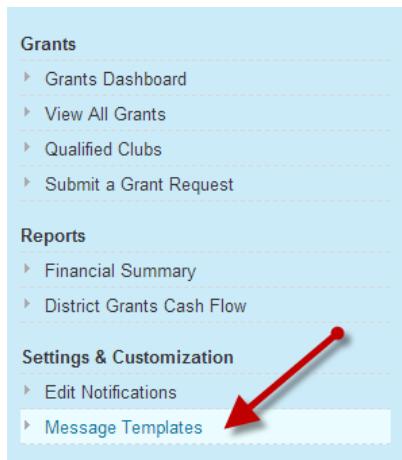
Awaiting Further Information	The District is requesting further information from the club. This normally follows the initial request being submitted, and may be repeated several times if inadequate information was supplied. During the information gathering stage, the grant application will typically go back and forth from Under Review to Awaiting Further Information, until a decision is made by the District.
Approved	The grant application has been approved by the District.
Rejected	The grant application has been rejected by the District. Comments can be made at the time of rejection to explain reasoning.
Completed and Closed	The project has been completed and this grant is considered closed.
Adjustment Requested	The club is requesting an adjustment to the grant amount requested.
Cancelled	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.
Archived	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.

Review your Notifications and Message Templates

As part of the grants application process, certain people will get notified whenever a grant is received, reviewed, information is requested, approved, rejected, and so on. You can customize this to send out an automatic email to the Grants module administrator, all District grant committee members, and/or the club contact. This can be done for any status change, for example if the application goes from Under Review to Approved. You can also customize the actual message that is sent out.

Message Templates

To access the message templates section, click on Message Templates on the left hand menu. Ensure you are under the District Grants section, and not My Club Grants:

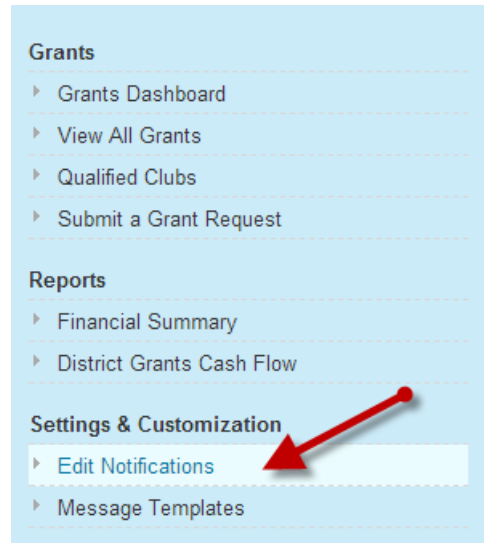


To add a new message template:

1. Click on the **Add** button located at the top right.
2. Provide a **Name** for the template. This will only be seen by administrators.
3. Provide a **Subject** for the template. This will be the email subject for the notification.
4. In the text area provided, compose the message you would like for that particular notification. For example, the email that confirms a grant request has been initially received, or that further information is being requested.
5. If you would like to insert a mail merge field, position your cursor in the location where you want it to appear within your message, then choose the field from the **Variable Fields** section. Press **Insert**.
6. Once you have finished composing your message, press the **Create** button at the bottom right.

Notifications

Next, let's identify the various stages where you would want to issue a message. To access the notifications area, click on the **Edit Notifications** link from the left hand menu:



To add a new notification:

1. Click on the **Add Notification** button at the top right.
2. Indicate the **From Status** and **To Status**. This is the transition in the workflow for which you want to issue an email. For example, From Initial Request Submitted to Awaiting Further Information.
*Note that you can also choose **Any Status** as an option.*
3. Select your **Message Template** that you wish to send for this particular notification.
4. Indicate the **Recipients** for this notification. Your options are:
 - Grant Administrators (usually the Grants committee chairperson)
 - Grant Users (usually the Grants committee members)
 - Grant Club contact (the trained club member who is submitting the grant for their club)
5. Click on the **Create** button to save this notification.

Note that within this module you can also view the various members that make up each of the Grant Administrators and Grant Users:

Notifications

This screen allows you to create various notifications to the users as each activity is triggered, such as a status change. Click on the Add Notification button to create a new notification. [\[Edit Help Text\]](#)

[+ Add Notification](#)

Activity / Trigger	Grants Management Administrator	Grants Management User	Club Contact	
	View Users	View Users		
Under Review → Need more information	✓			Edit Delete
Any Status → Initial Request Submitted	✓	✓	✓	Edit Delete
Any Status → Approved	✓	✓	✓	Edit Delete
Approved → Adjustment Requested	✓			Edit Delete
Any Status → Under Review	✓	✓	✓	Edit Delete

Update your Help Text

You may have noticed that throughout the various screens of the Grants module, there is help text at the top of the page that explains how to use that feature. For example, on the **Submit a Grant Request** page:

Submit a Grant Request

Please enter the basic information relating to your Grant Request below.

If you are submitting a grant request on behalf of multiple clubs, you only need to submit this form once, and there must be one main sponsoring club. Enter the estimated budget requested at this stage; you will be able to refine this number later on in the application process once this initial request has been submitted and reviewed.

Note that you will need to be a certified member in order to submit a request. If you do not have the proper access, please contact the District Grants committee. [\[Edit Help Text\]](#)

Project Details

Project Name:

Sponsoring Club:

Contact:

Country:

Province:

City:

Description:

Estimated Budget: (USD)

For Year:

[Cancel](#) [Submit](#)

If you are logged in as a Grants Administrator, you will see **[Edit Help Text]** immediately after this help text. This allows your District to customize the messaging used throughout the Grants module to better assist your clubs in completing their forms and ensuring your District policies are met. You can also use

this feature to provide hints and tips as well as contact information for the various Grants committee members in case of any questions.

To edit the help text:

1. Go to the page where you wish to edit the help text.
2. Click on the **Edit Help Text** link located at the end of the text.
3. You will see a popup appear with a text editor containing the default help text. Make any changes necessary. Note that you are able to format the text using the icons provided.
4. Click on the **Submit** button located right below the editor to save your changes.

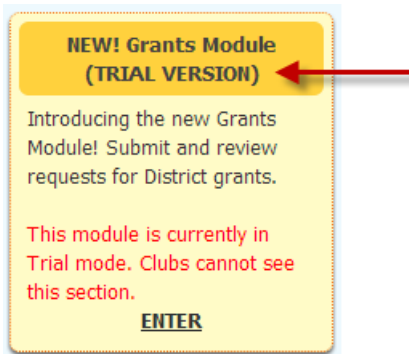
***Tip:** Note that help text is also available within an actual grant application, within each tab, and in some cases for each section. You may wish to create a test grant application in order to gain access to those sections. You can always cancel this test application and subsequently delete it.*

Launching to Clubs

Live vs. On Trial

If you started out in Trial mode, you want to ensure that you notify us to install your module in production mode prior to announcing this feature to your clubs. You can find out if you are in Trial mode by looking at the Launchpad and seeing if the Grants module section on the right side says Trial Mode in red. If you are unsure, please contact our support team.

On Trial:



Live:



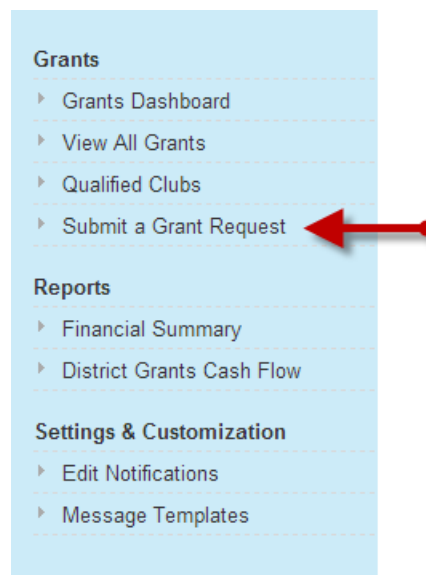
How Clubs Can Submit Grants

Once you have setup your qualified clubs and trained members and ensured you have gone live, clubs would simply need to login to the District site and enter the grants module using the yellow section at

the top right of the Launchpad page. Note that only those trained members will have access to enter the module and submit a grant on behalf of the club. We recommend that the District provide additional guidance by customizing the Launchpad message located at the top left of the page, including contact information of the grants committee in the case of clubs being unable to access the module.

Submitting Grants on Behalf of a Club

The District can still use the module if they have already received grant requests via another method such as PDF forms. If you are logged in as a Grants Administrator, you can submit a grant on behalf of a club by selecting the option on the left hand menu.



Simply fill in the appropriate fields within the initial application, and press Submit. 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 you specified as if they had entered it themselves.

Review Grants

The District Grants committee can login to the Grants module at any time and review all items that are awaiting attention within the Grants Dashboard. This is the screen that you first land on when you enter the module.

Status Summary: This shows you an overview of how many grants are in each step of the workflow.

Status Summary

- [1 Approved](#)
- [1 Rejected](#)
- [1 Completed and Closed](#)
- [1 Awaiting Further Information](#)
- [2 Cancelled](#)

[List of all grants](#)

Requests Awaiting Your Attention: This displays a listing of all grants that have come back to the Grants committee for some action. Click on the **Project Name** or the **Open** link to open the application and review the information.

Requests Awaiting Your Attention

Search:

Date	Project Name	Sponsoring Club	Estimated Budget	Grant Total Budget	
Awaiting Further Information					
Feb 28, 2013 at 05:13 PM GMT	Water Wells in Cambodia	Kingsbridge	\$1,000.00	\$0.00	Open

Showing 1 to 1 of 1 entries

Expected Funds: This pie chart represents the allocated funds that the District has to give to clubs and how many have already been committed. It is automatically generated by totaling all funds for all approved grants.

Expected Funds [Details](#)



■ Approved ■ Available

Allocated	\$30,000.00
Pending	\$0.00
Approved	\$293.00
Available	\$4,148.00

Cash Flow: This represents the actual District Grants account status which compares the funds that have been received from RI and funds that have been spent (including any expenses incurred by the Grants committee).

Reports

Financial Summary

A number of reports are available to Districts to monitor the finances of the Grants committee. The first one is Financial Summary, which gives the committee the opportunity to keep track of all budgeted and actual funds relating to the Grants account.

There are three main sections to this report:

Inbound: This represents all incoming funds that the District Grants committee has budgeted for (ie, is expecting to receive from RI) and the actual funds that have been received.

Outbound: This represents all outgoing funding that have been committed and made by the District Grants committee, including a breakdown by club and by grant. This report automatically displays the grants that have been approved and their corresponding amounts to be paid out to the club. Totals are available at the bottom of this section to show the budgeted and actual amounts.

Balance Available: This takes the total allocated funds available and subtracts any committed funds, giving the resulting amount still available for clubs to apply for. Similarly, it will show the actual funds that have been received and subtract what has already been paid.

District Grants Cash Flow

This report gives the committee the opportunity to keep track of all activity relating to the actual District Grants bank account. Transactions can be added by clicking on the **Add a Transaction** button and specifying the description of the transaction, and the nature (whether it is a withdrawal or a deposit).

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>

For the latest ClubRunner updates, follow us on:

