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 acesss to that functionality.

	Trained Member or Grant Contact (As defined in grants module)	Club Executive	Club Member
View Club Grants	Х	Х	Х
Submit Club Grants	Х	Х	
Edit Club Grants	Х	Х	
View All Grants			
Change Grant Status			
Edit All Grants			
Cancel/Delete Grants			
Adjust Settings			
Edit Help Text			

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:

Status Name	Change Made By	Meaning
Initial Request Submitted	Club	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	District	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	District	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	District	The grant application has been approved by the District.
Rejected	District	The grant application has been rejected by the District. Comments can be made at the time of rejection to explain reasoning.
Completed and Closed	District	The project has been completed and this grant is considered closed; no further changes can be made.
Adjustment Requested	District	The club is requesting an adjustment to the grant amount requested.
Cancelled	District	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	District	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.



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

4 Collapse All Expand All			
Name 🔻	Uploaded On 🔻	Uploaded By 🔻	Action
📁 City Sunset	Apr 02, 2014	John Sull	Add Add Multiple more
r 🗀 George	Apr 07, 2014	John Sull	Add Add Multiple more
Receipt1	Apr 07, 2014	John Sull	Edit Dele
🔹 🗀 Jackson	Apr 08, 2014	John Sull	Add Add Multiple more
🔁 Jx-27	Apr 08, 2014	John Sull	Edit Dele
🚡 Jx-27	Apr 08, 2014	John Sull	Edit Dele
🚡 Jx-27	Apr 08, 2014	John Sull	Edit Dele
🔓 Jx-27	Apr 08, 2014	John Sull	Edit Dele
🛛 🗀 Winne	Apr 09, 2014	John Sull	Add Add Multiple more
🗅 Summary:	Apr 09, 2014	John Sull	Edit Dele

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.

					🔶 Go bac
Grant Request Applica	tions				
		« Previous Year 2013-14 Next Y	/ear »		
		Any Status			
Filter by Status: Any Status	T				
Search: Q					
Date	Project Name	Sponsoring Club	Estimated Budget	Grant Amount	
Completed					
Aug 21, 2013 at 4:55 PM	Operation Coats	Rotary Club of Heights	\$2,000.00	\$1,000.00	Open
Showing 1 to 1 of 1 entries					

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.**

	Admin	For Clubs	Grants	Members Memberskip	Organisation	Communication	Website	Reports	Attendance	Events 2.0	Help
	Submit a Grant Request Club Grants District Grants										
ĺ	Lear	rn about our	r new								

Note that only those trained members will have access to enter the module and submit a grant on behalf of the club.



Grants

View Club Grants

contact specified and Grant Committee Members.

Submit a Grant 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

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.

Submit a Grant Request	
Please enter the basic information relating to your Grant	Request below.
f you are submitting a grant request on behalf of multiple sponsoring club. Enter the estimated budget requested a process once this initial request has been submitted and Note that you will need to be a certified member in order District Grants committee.	I clubs, you only need to submit this form once, and there must be one main at this stage; you will be able to refine this number later on in the application d reviewed. Ito submit a request. If you do not have the proper access, please contact the
- Project Details	
Project Name:	*
cannot be changed.	Please select the year this project will be completed. Once selected, the year
Project Year:	2013–14 🔹 *
Sponsoring Club:	Rotary Club of Brentwood Bay
Contact:	Jolly, Darrell
Country:	Canada 🔹
Province/Territory:	British Columbia
Postal Code:	V8M 1C3
City:	Brentwood Bay
Description:	
	*
Estimated Budget:	(USD)

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 Districts states otherwise. Also supply any other partners that your club is working with.

Day Comp for kida			
Jay Camp for Kids			
Pr Re Ilck on any of the tabs below to access and update the Details Application Budget Documents This is a General description of the Grant project. Out only the initial grant request amount, to outline details	Grant Project: Day Camp for kids timary Sponsoring Club: ClubRunner Wessles Contact: Truno, Vinh Date Submitted: Sep 05, 2013 at 5:12 P Project Total Eugers: 50.00 gruested Grant Amount: \$0.00 various sections of this Grant application. Project Overview Individual Project Report Ari ins in detail the humanitarian need your project w	Service M cthrky Log will address, the intent of the project, how the project will be implemented, ar m other funding sources, go to the Budge tab.	Status: Funded Please note, updates to the project and grant information cannot be made the status has been marked completed or archived and how Rotarians will be directly involved in the project. Note that the Estimated budge
Project Nam Count State/Provinc 20/Postal Cod Birlef Description Sponsoring Clu Contat Estimated Budg	Day Camp for kids Canada Li6H 5R7 Oaxille Day Camp for kids Day Camp for kids Cubulte Truong, Vinh truong, Vinh		
-			
Local Club Partners List any partnering clubs within the District. Note that c	only one grant application needs to be made by th	ne main sponsoring club. Contact Name No club specified	Contribution Activ
Local Club Partners List any partnering dubs within the District. Note that of Club Other Partners List any cooperating organizations, clubs outside the	nnly one grant application needs to be made by th	ne main sponsoring dub. Contact Name No dub specified	Contribution Activ
Local Club Partners List any partnering clubs within the District. Note that of Club Other Partners List any cooperating organizations, clubs outside the of Club	only one grant application needs to be made by th	he main sponsoring dub. Contact Name No club specified this project. Contact Name	Contribution Acti

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.

Day Camp for kids	
Grant Project: Day Camp for kids Primary Sponsoring Club: ClubRunner Website Service Contact: Trunon, Vinh Date Submitted: Sep 05, 2013 at 5:12 PM Project Total Blanglet: \$0.00 Project Total Financing: \$0.00 Requested Grant Annownt: \$0.00 Click on any of the tabs below to access and update the various sections of this Grant application.	Status: Funded Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived
Details Application Budget Documents Project Overview Individual Project Report Activity Log	
General Description Community Assessment & Impact Sustainability Cooperating Organizations Implementation Plan Describe specific activities of the sponsoring dub and any partners in implementing the project. What will the Rotarians who are members of the partner clubs do	during the project? Please note that financial support is not considered active involvement.

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.

Helping the kids camp					
Grant Project: He Primary Sponsoring Club: Clu Contact: Mu Date Submitter: Se Project Total Budget: S8, Project Total Budget: S8, Project Total Budget: S8, Requested Grant Amount: S0. Click on any of the tabs below to access and updale the various sections of this Grant	Status: Uno Please note, the status ha	ler Review (Request opened for view updates to the project and grant info) rmation cannot be made after Id		
Details Application Budget Documents Project Overview Individual F	Project Report Activity Log				
Expected Expenses List all anticipated expenses for this project, including those that will be funded outsid	e of the District grant portion.				
Description Supplier	Local Ar	mount Currency	Tax	Total	Amount (USD)
labour costs	\$2,50	00.00 USD \$0	0.00	\$2,500.00	\$2,500.00
Materials	\$6,20	00.00 USD \$0	0.00	\$6,200.00	\$6,200.00
				Total:	\$8,700.00
Expected Income					
List all anticipated income for this project, including funds that will be contributed by th	e club, other partners and the District grant portion.				
List all anticipated income for this project, including funds that will be contributed by th Description	e club, other partners and the District grant portion.		Amount	%	
List all anticipated income for this project, including funds that will be contributed by the Description	e club, other partners and the District grant portion. Funding Source Club/Other		Amount \$8,700.00	% 100.00 %	

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.

Culinary Arts				
Grant Project: Primary Sponsoring Club: Contact: Date Submitted: Project Total Budget: Project Total Financing: Requested Grant Amount: Details Application Budget Documents Project Overview	Culinary Arts Class Rotary Club of T Poth, T Oct 25, 2013 at 9:23 PM 58,000.00 58,000.00 52,000.00 Individual Project Report	Activity Log		Status: Completed Archive Cancel Grant Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived
Project Documents Upload all related documents and files including the Club President's signate	ire and the beneficiary accept	ence signature.		
Search: Q. Go Documents and folders are sequenced alphabetically. Your access level does no Collanse All Expand All	ot allow to modify documents.			Download Ali
Name		Uploaded On 🔻	Uploaded By 🔻	Actions
District Grant prject description		Oct 26, 2013		
District Grant Receipt		Mar 24, 2014		
L+ Collapse All Expand All				

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.

Coats						
	Grant Project: Coats Primary Sponsoring Club: Retary Club of Heights Contact: W Date Submittle: Aug 21, 2013 at 4.56 FM Projet Total Bruandre 21, 2003 00 Projet Total Financing: 21,003,00 Requested Grant Manuel: 31,003,00		Status: Please n marked c	Completed ste, updates to the project and grant infor ompleted or archived	mation cannot be made afte	r the status has been
Details Application Budget Documents	Project Overview Individual Project Report Activity Log					
Project Description						Print Submit
		? 8				
Format - Font - Size - B I	$\underline{U} \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \$					
						Î
						*
						4
Financial Report						Update
Date	Description	Funding Source		Amount	96	Actions
			Total:	\$0.00	-	
All expense items. Please be specific a	and add lines as needed. Edit Help Text					Add Expense Item
Description	Supplier	Local Amount Currency	Tax Total		Amount (USD)	Actions

In the Financial Report section, enter all actual financing that you've received, as well as all actual expenses you have incurred.

Submit Individual Project Report	
Remember to include brief overview in the email body. Edit Help Text	
Subject: Attachment: Recipients:	Project Report Super user grant - notification test 2 * Generating attachment, please wait # Ø Grant Administrators (10/10) # Ø Grant Users (8/7) # Ø Club Contacts (4/4) #
Email Body:	Area Governor O
X C	
	Cancel Send to Yourself Send

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 <u>feedback@clubrunner.ca</u>, submitting a ticket through our Support site at <u>www.clubrunnersupport.com</u>, 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:



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