

# **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

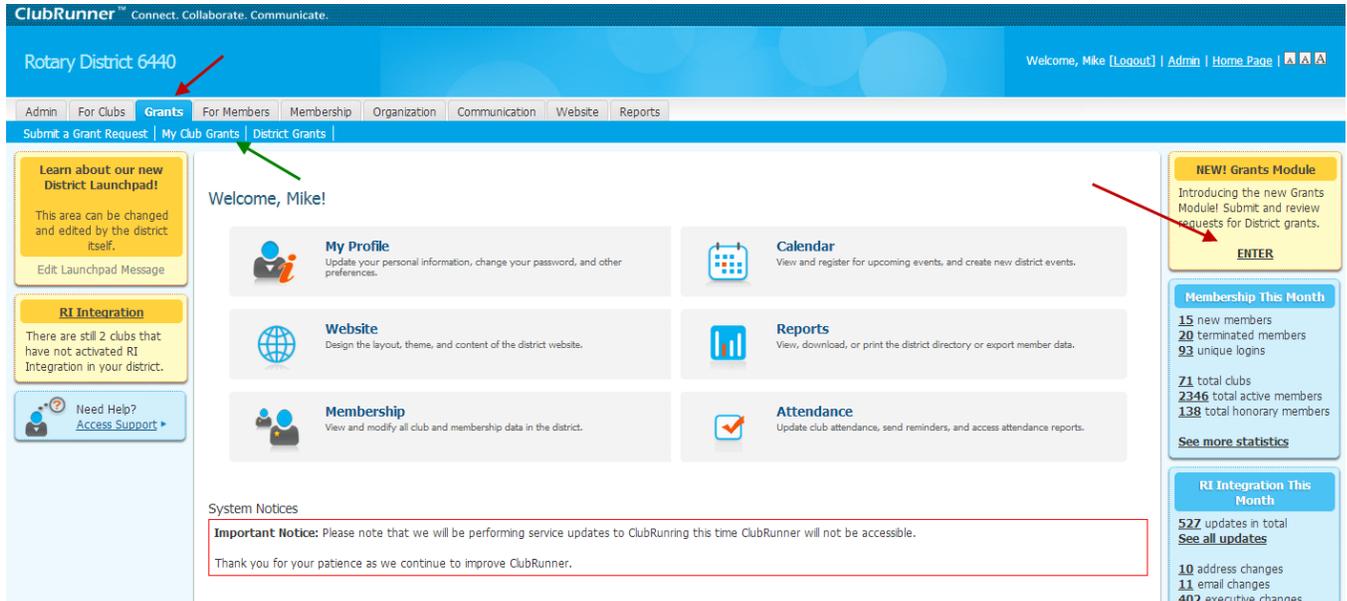
This module is accessible from your District website. If you haven't logged in before, you can use the same login name and password as your club's site. **FAQ: I don't know my user name and password, how do I login?**

**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.

|                             | <b>Trained Member or Grant Contact<br/>(As defined in grants module)</b> | <b>Club Executive</b> | <b>Club Member</b> |
|-----------------------------|--|-----------------------|--------------------|
| <b>View Club Grants</b>     | X  | X                     | X                  |
| <b>Submit Club Grants</b>   | X  | X                     |                    |
| <b>Edit Club Grants</b>     | X  | X                     |                    |
| <b>View All Grants</b>      |  |                       |                    |
| <b>Change Grant Status</b>  |  |                       |                    |
| <b>Edit All Grants</b>      |  |                       |                    |
| <b>Cancel/Delete Grants</b> |  |                       |                    |
| <b>Adjust Settings</b>      |  |                       |                    |
| <b>Edit Help Text</b>       |  |                       |                    |

### 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.

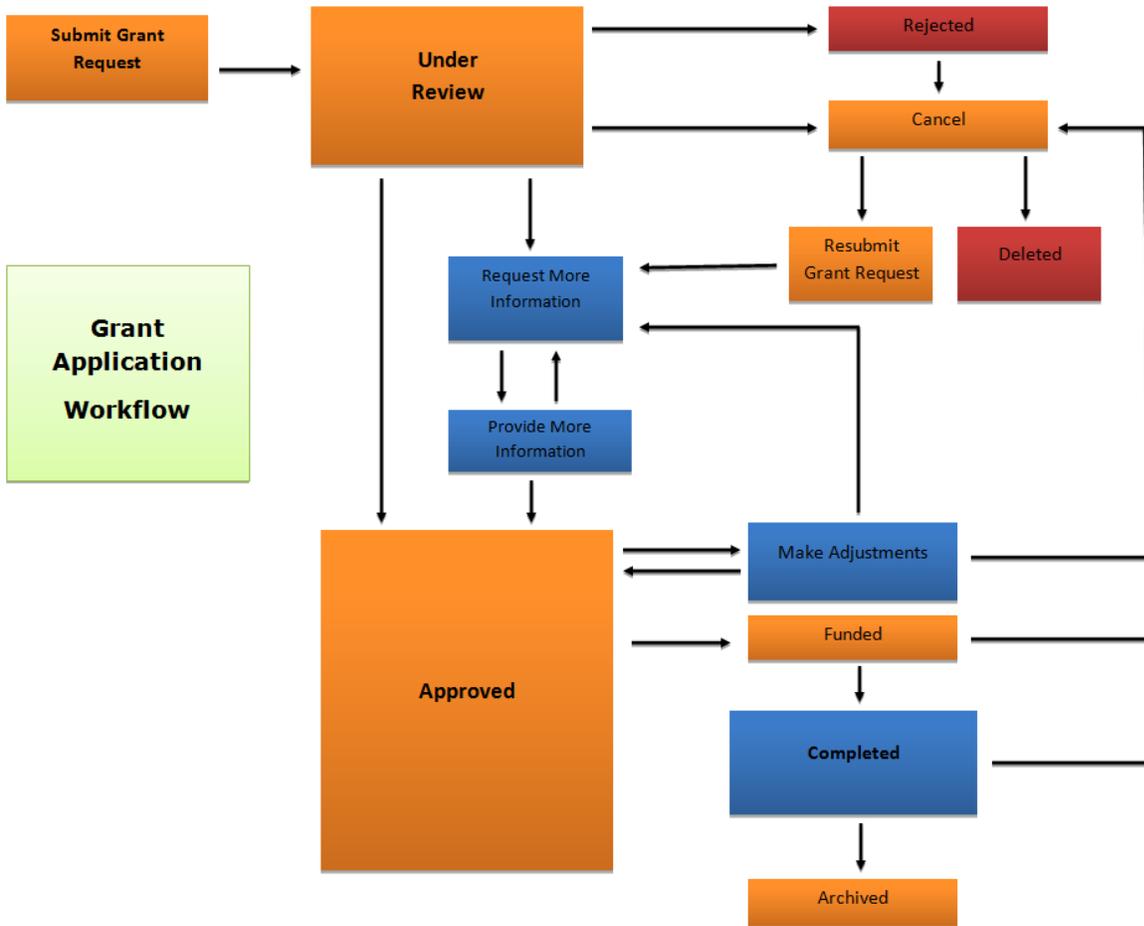
## Understanding the Workflow

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

Search:

*Documents and folders are sequenced alphabetically. Drag and drop to change the document and folder structures.*

| Name ▾      | Uploaded On ▾ | Uploaded By ▾ | Actions  |
|-------------|---------------|---------------|--|
| City Sunset | Apr 02, 2014  | John Sull     | <a href="#">Add</a>   <a href="#">Add Multiple</a>   <a href="#">more...</a> |
| ▼ George    | Apr 07, 2014  | John Sull     | <a href="#">Add</a>   <a href="#">Add Multiple</a>   <a href="#">more...</a> |
| Receipt1    | Apr 07, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |
| ▼ Jackson   | Apr 08, 2014  | John Sull     | <a href="#">Add</a>   <a href="#">Add Multiple</a>   <a href="#">more...</a> |
| Jx-27       | Apr 08, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |
| Jx-27       | Apr 08, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |
| Jx-27       | Apr 08, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |
| Jx-27       | Apr 08, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |
| ▼ Winne     | Apr 09, 2014  | John Sull     | <a href="#">Add</a>   <a href="#">Add Multiple</a>   <a href="#">more...</a> |
| Summary:    | Apr 09, 2014  | John Sull     | <a href="#">Edit</a>   <a href="#">Delete</a>                                |

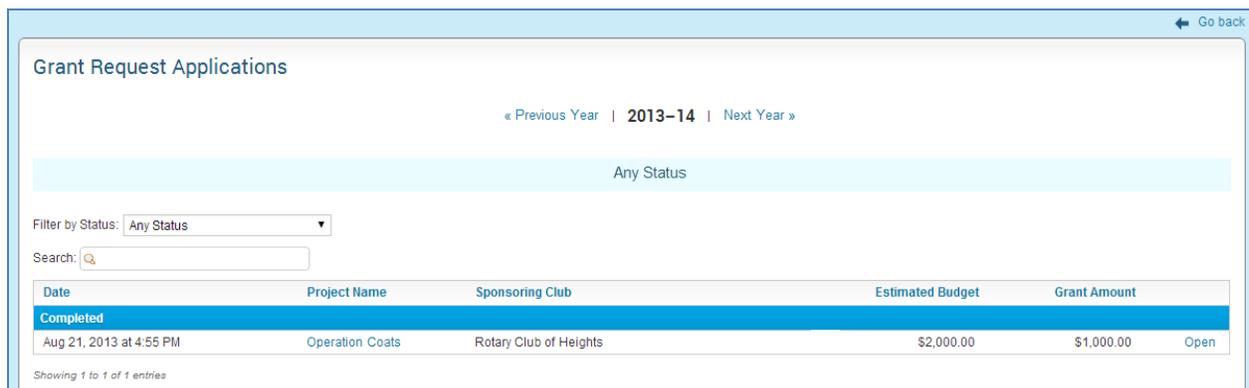
**Please Note:** This documents page is not the place to upload documents related to your grant project. This is done in the documents tab inside your grant, which is covered later in this manual.

## 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.

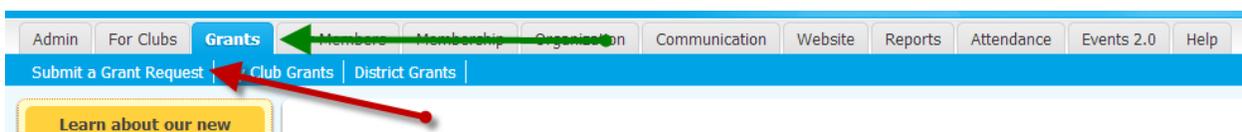


## Applying For a Grant

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.

### 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.

Project Details

Project Name:  \*

cannot be changed.

Please select the year this project will be completed. Once selected, the year

Project Year:  \*

Sponsoring Club:

Contact:

Country:

Province/Territory:

Postal Code:

City:

Description:  \*

Estimated Budget:  (USD)

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

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 Camp for kids

Grant Project: Day Camp for kids  
 Primary Sponsoring Club: ClubRunner Website Service  
 Contact: Truong, Vinh  
 Date Submitted: Sep 05, 2013 at 5:12 PM  
 Project Total Budget: \$0.00  
 Project Total Financing: \$0.00  
 Requested Grant Amount: \$0.00

Click on any of the tabs below to access and update the various sections of this Grant application.

[Details](#) | [Application](#) | [Budget](#) | [Documents](#) | [Project Overview](#) | [Individual Project Report](#) | [Activity Log](#)

This is a General description of the Grant project. Outline 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. Note that the Estimated budget is only the initial grant request amount; to outline details on the various budget items, including those from other funding sources, go to the Budget tab.

**Project Name:** Day Camp for kids  
 Country: Canada  
 State/Province: L6H 5R7  
 Zip/Postal Code: Oakville  
 City: Day Camp for Kids  
**Brief Description:**  
 Sponsoring Club: ClubRunner Website Service  
 Contact: Truong, Vinh  
 Estimated Budget: \$100.00

Status: **Funded**

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

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**Local Club Partners**

List any partnering clubs within the District. Note that only one grant application needs to be made by the main sponsoring club.

| Club              | Contact Name | Contribution | Actions |
|-------------------|--------------|--------------|---------|
| No club specified |              |              |         |

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**Other Partners**

List any cooperating organizations, clubs outside the district, or other partners that are participating in this project.

| Club              | Contact Name | Contribution | Actions |
|-------------------|--------------|--------------|---------|
| No club specified |              |              |         |

**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: Truong, Vinh  
 Date Submitted: Sep 05, 2013 at 5:12 PM  
 Project Total Budget: \$0.00  
 Project Total Financing: \$0.00  
 Requested Grant Amount: \$0.00

Status: **Funded**

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived.

Click on any of the tabs below to access and update the various sections of this Grant application.

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 club 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: Helping the kids camp  
 Primary Sponsoring Club: ClubRunner Website Service  
 Contact: Murrell, Ron  
 Date Submitted: Sep 05, 2013 at 4:57 PM  
 Project Total Budget: \$8,700.00  
 Project Total Financing: \$8,700.00  
 Requested Grant Amount: \$0.00

Click on any of the tabs below to access and update the various sections of this Grant application.

[Details](#) | [Application](#) | **[Budget](#)** | [Documents](#) | [Project Overview](#) | [Individual Project Report](#) | [Activity Log](#)

Status: **Under Review** (Request opened for view.)

Please note, updates to the project and grant information cannot be made after the status has been marked completed or archived

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#### Expected Expenses

List all anticipated expenses for this project, including those that will be funded outside of the District grant portion.

| Description   | Supplier | Local Amount | Currency | Tax    | Total             | Amount (USD)      |
|---------------|----------|--------------|----------|--------|-------------------|-------------------|
| labour costs  |          | \$2,500.00   | USD      | \$0.00 | \$2,500.00        | \$2,500.00        |
| Materials     |          | \$6,200.00   | USD      | \$0.00 | \$6,200.00        | \$6,200.00        |
| <b>Total:</b> |          |              |          |        | <b>\$8,700.00</b> | <b>\$8,700.00</b> |

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#### Expected Income

List all anticipated income for this project, including funds that will be contributed by the club, other partners and the District grant portion.

| Description   | Funding Source | Amount            | %               |
|---------------|----------------|-------------------|-----------------|
|               | Club/Other     | \$8,700.00        | 100.00 %        |
| <b>Total:</b> |                | <b>\$8,700.00</b> | <b>100.00 %</b> |

**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: Culinary Arts Class  
 Primary Sponsoring Club: Rotary Club of T  
 Contact: Poth, T  
 Date Submitted: Oct 25, 2013 at 9:23 PM  
 Project Total Budget: \$8,000.00  
 Project Total Financing: \$8,000.00  
 Requested Grant Amount: \$2,000.00

Click on any of the tabs below to access and update the various sections of this Grant application.

[Details](#) | [Application](#) | [Budget](#) | **[Documents](#)** | [Project Overview](#) | [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

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#### Project Documents

Upload all related documents and files including the Club President's signature and the beneficiary acceptance signature.

Search:  [Download All](#)

Documents and folders are sequenced alphabetically. Your access level does not allow to modify documents.

| Name                               | Uploaded On  | Uploaded By | Actions |
|------------------------------------|--------------|-------------|---------|
| District Grant project description | Oct 26, 2013 |             |         |
| District Grant Receipt             | Mar 24, 2014 |             |         |



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

The screenshot shows the 'Submit Individual Project Report' interface. At the top, it says 'Remember to include brief overview in the email body. [Edit Help Text](#)'. Below this is a 'Subject' field containing 'Project Report Super user grant - notification test 2'. An 'Attachment' section shows a status of 'Generating attachment, please wait...'. The 'Recipients' section is expanded, showing a list of groups: 'Grant Administrators (10/10)', 'Grant Users (5/7)', 'Club Contacts (4/4)', and 'Area Governor'. Below the recipients is an 'Email Body' section with a rich text editor toolbar and a large text area for composing the email. At the bottom right, there are three buttons: 'Cancel', 'Send to Yourself', and '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. Once your notification email has been composed, click the **Send** button.