

Grant Module Guide For Districts

2014

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Welcome to the Grants Module

Introduction

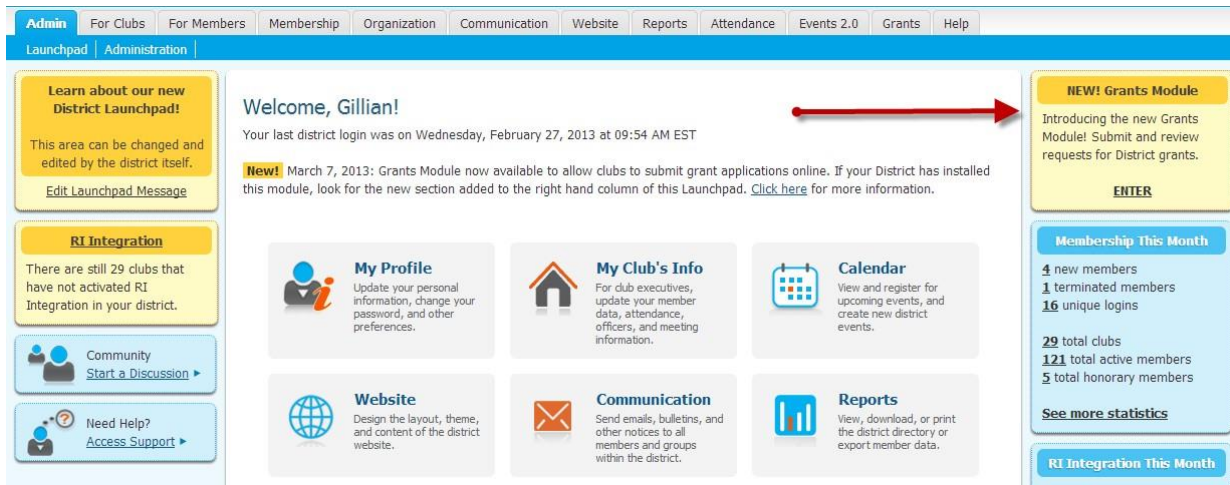
The Grants module is an add-on module for the District version of ClubRunner. This module allows all clubs in the District to apply online for grants, and for Grant Committee members to login and review all active and archived grants in their District. The approval process includes a workflow that allows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

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.

This manual is intended for District Grants Administrators, or members of the District Grants Committee. If you are a club looking for help on how to use the Grants Module, please ask your Grants Committee Chair for the appropriate manual.

Accessing the Module

Your District website will now have a Grants section at the top right of the **Launchpad** page:



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

Update Member Access Right

Member: **Mark Smith**

Roles:

- Administrator [List](#)
- Home Page Editor [List](#)
- Attendance Editor [List](#)
- Membership Editor [List](#)
- Club Information Editor [List](#)
- District Communication [List](#)
- Event [List](#)
- District Bulletin [List](#)
- MyEventRunner Administrator [List](#)
- District Beta Tester [List](#)
- Download Member Data [List](#)
- Grant Administrator [List](#)
- Grant User [List](#)
- MER Read Only Access [List](#)

Understanding the Member Access Rights:

	Grants Administrator	Grants User
View Club Grants	X	X
Submit Club Grants	X	X
Edit Club Grants	X	X
View All Grants	X	X
Change Grant Status	X	X
Edit All Grants	X	
Cancel/Delete Grants	X	
Adjust Settings	X	
Edit Help Text	X	

Note: Updating a Members Access Rights is a completely different process from giving clubs access to the Grants Module. To provide a club with trained member's access to submit Grants, please view the section marked **Club Qualification**.

Getting Started

Club Qualification

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 have trained members assigned. The number of required trained members is flexible and done through the Settings page. 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.

How 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 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**.

How 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. Specify the date that member will be able to start adding Grants by filling the **Effective date**.
5. Specify an **Expiry Date** (Optional) – ***note: the expiry date will disable the trained member from adding or modifying a Grant once the date has passed.**
6. Upload any **Certification Document** if applicable (this is optional).
7. 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.

How to view Trained Members for each Rotary year:

1. Click on the **View Members** link page to see the trained members for each Rotary year.
2. To view all members (expired, currently active, and pending) then click on the **Show All** checkbox.
3. Use the **<< Previous Year** and **Next Year >>** link to cycle through the qualified members of each year.

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:

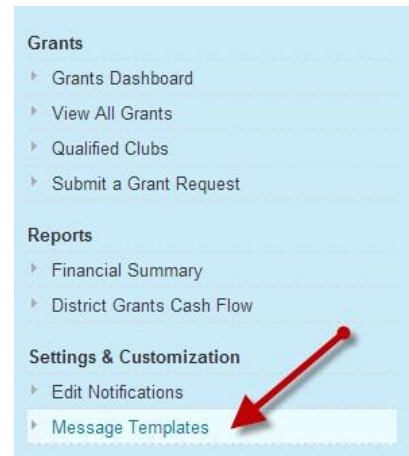
Status Name	Change Made By	Meaning
Initial Request Submitted	Club	The initial request to submit a grant application has been submitted by the club, but the full application has not yet been completed. The club would submit a very simple form indicating the nature of the project in brief, and once the 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.

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 **Mail Merge Fields** section. Press **Add**.
6. Once you have finished composing your message, press the **Update** button at the bottom right.

The screenshot shows the 'Edit Message Template' form. It has a 'Template Details' section with 'Name' (Your Grant Has Been Funded) and 'Subject' (Grant Funded) fields. Below that is a 'Mail Merge Fields' section with dropdown menus for 'Account' (Account Short Name), 'Grant' (Grant project name), 'Recipient' (Recipient Title), and 'Sender' (Sender First Name), each with an 'Add' button. A rich text editor below contains a sample email message: 'Dear \$FIRST_NAMES \$LAST_NAMES \$FULL_CLUB_NAMES Re: \$GRANT_PROJECT_NAMES We are pleased to advise you that the funds for your District Service Grant have been sent to your Rotary Club. Sincerely, District Grants Committee District 51'. At the bottom right are 'Cancel' and 'Update' buttons.

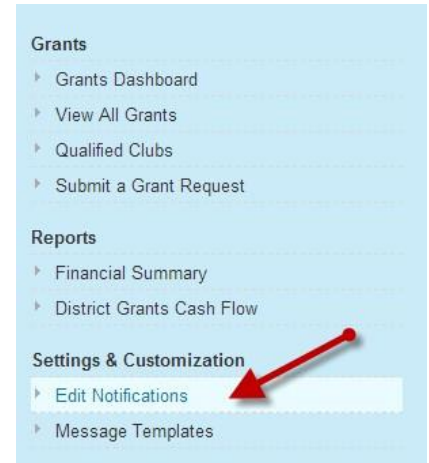
Please Note: Once the project has been completed and this grant is considered closed; no further changes can be made.

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	Grant Administrator	Grant Users	Club Contact	Area Governor	
	View Users	View Users			
Any Status → Initial Request Submitted			✓		Edit Delete
Any Status → Cancelled	✓	✓			Edit Delete
Any Status → Awaiting Further Information	✓	✓			Edit Delete
Any Status → Under Review	✓	✓			Edit Delete
Awaiting Further Information → More Information Provided	✓	✓			Edit Delete
Any Status → Awaiting Further Information			✓		Edit Delete

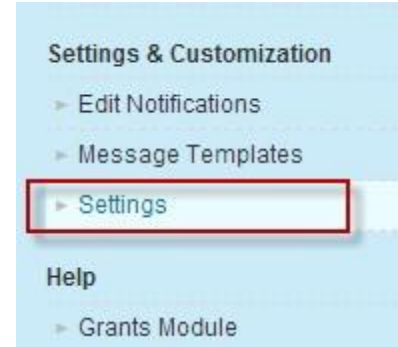
Settings

To ensure that your Grant Module is optimized to your number of qualified members required. Click on the **Settings** link from the left hand menu:

To modify the required number of qualified members per club:

1. Under Club Qualification, change the number that appear in the box to the number you wish to have to qualify a club.

Note: By Default, the Minimum number of trained members required is always set to 2. If the number of trained members is changed partway through the year, it will only affect the grants submitted going forward, and doesn't affect grants that have already been submitted.



Settings

By Default, the system requires two trained members in every club in order to qualify a club. Please note once a club is qualified, any member in the club is able to submit a grant request. However, only trained members can be considered the grant's contact person.

Club Qualification

Specify the number of required trained members:

Cancel

Grant Application

An empty grant application can be generated based on your custom help text. This is meant as a guide or worksheet for clubs to help them prepare a grant application before submitting it.

District Grant Documents

This section is used for the district to add universal grant documents. An example of these document types are Blank MOU form, Eligibility requirements, Sensitive dates and timelines, Grant Committee terms and conditions to for clubs to participate.

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	Add Add Multiple more... ▾
▼ George	Apr 07, 2014	John Sull	Add Add Multiple more... ▾
Receipt1	Apr 07, 2014	John Sull	Edit Delete
▼ Jackson	Apr 08, 2014	John Sull	Add Add Multiple more... ▾
Jx-27	Apr 08, 2014	John Sull	Edit Delete
Jx-27	Apr 08, 2014	John Sull	Edit Delete
Jx-27	Apr 08, 2014	John Sull	Edit Delete
Jx-27	Apr 08, 2014	John Sull	Edit Delete
▼ Winne	Apr 09, 2014	John Sull	Add Add Multiple more... ▾
Summary.	Apr 09, 2014	John Sull	Edit Delete

Please note: clubs may confuse this function for their own project, and find they can't add a document. Providing help text with a clear statement saying this is not the area to add project-specific documents would provide clarification.

Districts can generate a blank Application form to use as a template for clubs. They can download it from the Settings page, and then add it to the documents area. That's because clubs don't have access to the Settings page.

Update your Help Text

You may have noticed that throughout the various screens of the Grants module, there is help text at 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: 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

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 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.



Note: If you are adding on behalf of the Club, select the club from the Sponsoring Club field and select the trained member that submitted the grant under Contact.

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 you specified as if they had entered it themselves.

Submit a Grant Request

Read these tips to ensure proper approval!

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: *

Please select the year this project will be completed. Once selected, the year cannot be changed.

Project Year: *

Sponsoring Club:

Contact:

Country:

Province/Territory:

Postal Code:

City:

Description:

* Estimated Budget: (USD)

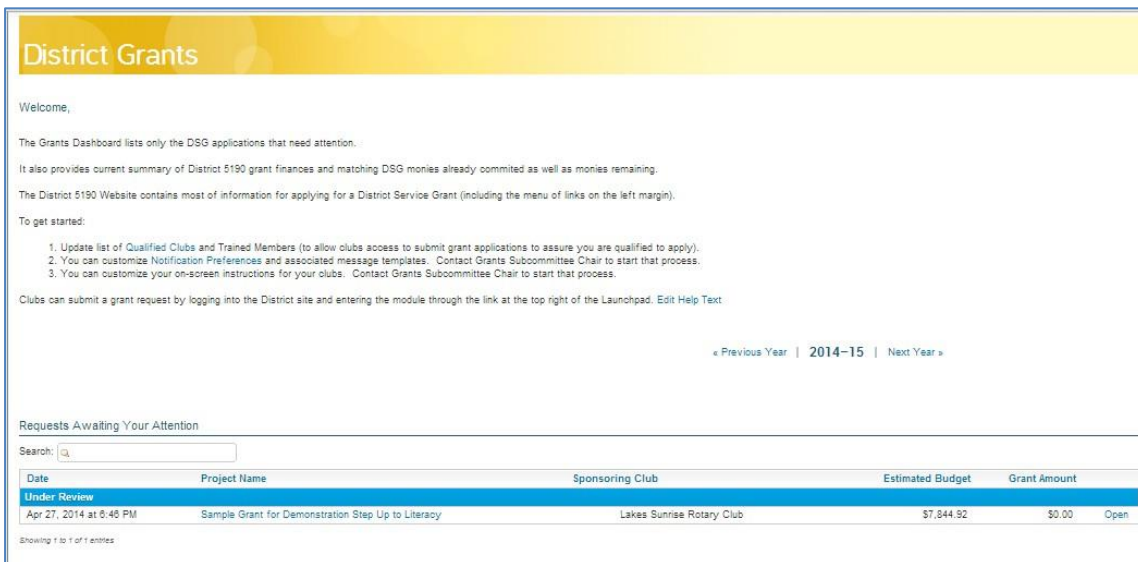
[Cancel](#) [Submit](#)

Frequently Asked Questions:

- I. Can a district do this to circumvent a club’s qualification or put untrained members as contacts? No.
- II. Why can’t I see the club name or contact in the dropdown fields when trying to add a grant request? This is because they are not qualified *for that grant year*; double-check the year of the grant.
- III. Once a grant is added, can I change the grant year later? No. The grant has to be deleted and re-entered in the correct year. This is the same whether it is done by a club or a district on behalf of a club.

Using the Module as the Grants Committee

Within the District, the Grants Committee should have access to the module. The picture below shows a summary Grants submitted to the District. Please note, that everything is divided by the grant year (Jul 1 to Jun 30). You can also see that the system selects which default year to show. For convenience, on Jan 1st the page shows the next year. Thus, the default year is not always the *current* Rotary year. You can always move back or forward.



Requests Awaiting Your Attention: This list indicates that a grant needs action from the District. Any projects that are awaiting further information from the club, or are in the process of being completed will not appear in this list. Click on the **Project Name** or the **Open** link to open the application and review the information.

Requests Awaiting Your Attention					
Search: <input type="text"/>					
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

The Dashboard

Status Summary: The status summary box is intended to show the amounts of grants listed within the year by Status.



Budgeted 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.

Allocated: Total budget for grants this year.

Pending: Requested grant funds being reviewed (includes the following statuses: Request Submitted, Under Review, Awaiting Further Information and Adjustment Requested).

Approved: Requested grant funds approved (includes the following statuses: Approved, Completed, Funded and Archived)

Available: Remaining budget available.



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).

Received: Actual Funds Received

Spent: Expenses (includes cheques to clubs for grants)

Available: Remaining Funds Available



Defining the allocated funds for a Grant Year

When the District knows the amount of funds it will be receiving for the year, use the **Enter Amount** link

under the budgeted funds chart to enter this amount. You will be provided with a window where you can indicate the amount and currency type received. You will also be able to enter a description about the funds. Once an amount is



entered, the number will become a link to allow you to edit the amount.

Navigate to the dashboard, and find the Budgeted Funds pie chart. The first row is allocated, and if it is blank, the link will say Enter Amount.

Once an amount is entered, the number will become a link to allow you to modify the amount.

Financial Summary

Rotary District Annual Financial Summary			
◀ Previous Year 2013-14 Next Year ▶			
This Financial Summary represents the inbound and outbound funds committed by the District for this year's grants allocations.			
Incoming Funds		Budgeted^[1]	Actual^[2]
[+] General Transactions			\$79,000.00
Total:		\$0.00	\$79,000.00
Outgoing Funds (Hide Details)		Project Total Financing^[3]	Requested Grant Amount^[4]
[+] Breakfast Rotary Club	\$8,750.00	\$3,750.00	\$3,750.00
[+] Towns Rotary Club	\$2,100.00	\$1,000.00	\$1,000.00
[+] Noon Rotary Club	\$7,500.00	\$2,500.00	\$2,500.00
[+] Sunrise Rotary Club	\$16,000.00	\$6,250.00	\$6,250.00
[+] Rotary Club	\$10,350.00	\$1,000.00	\$1,000.00
[+] Breakfast Rotary Club	\$3,700.00	\$1,000.00	\$1,000.00
Total:	\$258,350.00	\$79,100.00	\$81,850.00
Balance Available		Budgeted^[5]	Actual^[6]
Available		\$79,100.00	\$2,850.00

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:

Incoming Funds: This is the District's anticipated allowance for this year. The District can also enter expenses that are part of the operating cost such as training materials and office supplies, and they will appear under Actual. When using the Incoming funds section, the following terms are used:

Budgeted: Total budget for grants this year

Actual: Actual Funds Received

Outgoing Funds: Indicates both funds that are committed and actual money sent to clubs. 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.

Project Total Financing: Project Total Financing (includes funds from club and other sources).

Requested Grant Amount: The requested Grant Amounts from the Approved, Completed and Archived Grants.

Actual: Expenses (includes cheques to clubs for grants).

Outgoing Funds (Hide Details)	Project Total Financing ^[2]	Requested Grant Amount ^[2]	Actual ^[2]
[+]  Any Club	\$8,750.00	\$3,750.00	\$3,750.00
[+]  Money Club	\$2,100.00	\$1,000.00	\$1,000.00

When the details are grouped by the club; initially each club’s activity is collapsed into one line with a total, but you can click the **[+]** sign to expand. Your printer-friendly version will match the level of data you have on the screen.

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.

Other terms to know:

Budgeted: Remaining Budget Available

Actual: Remaining Funds Available

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).

District Grants Cash Flow

◀ Previous Year | **2013-14** | Next Year ▶

This Cashflow statement represents all actual transactions completed by the District within its Grants Account, including payments received by RO, payments made to the clubs, and any District expenses related to Grants.

Search: Show: 25 entries [Print](#) [Return to Dashboard](#) [Add a Transaction](#)

Date	Description	Club	Project	Deposit (USD)	Withdrawal (USD)	Actions
Mar 28, 2014	Holiday Party	ROTARY CLUB OF			\$1,500.00	Delete
Mar 28, 2014	Coats	Rotary Club of			\$1,000.00	Delete
Mar 28, 2014	Project	Rotary Club of			\$3,750.00	Delete
Sep 21, 2013	Scholarships	Rotary Club of Park			\$2,000.00	Delete
Total:				\$80,000.00	\$82,850.00	
Balance:				-\$2,850.00		

When adding a transaction to the Cash flow, you have the option of associating the transaction to a project or not. Please note, that any expenses that are used are not required to be added to a project.

To apply a payment to a Club, the transaction associated with a project needs to be set to "Yes". Select the club project from the Project dropdown. Once selected, the payment will apply directly to the grant.

Add Transaction

Details

Date: Apr 29, 2014 *

Description:

Amount: 0.00 * (USD)

Payment Type: Withdrawal (payment) Deposit *

Is this transaction associated with a project? Yes No

Project: *

[Cancel](#) [Create](#)

Grant Project Data

When a Grant has been submitted by the clubs, all information will be stored on a page with several tabs. The following description is a breakdown of the information stored in each tab.

Sample Grant

Grant Project: Sample Grant
 Primary Sponsoring Club: Sunrise Rotary Club
 Contact: D
 Date Submitted: Apr 27, 2014 at 6:46 PM
 Project Total Budget: \$7,844.92
 Project Total Financing: \$2,000.00
 Requested Grant Amount: \$0.00

Status: **Awaiting Further Information** (This is still a test. Budget does not match date)

[Provide Information](#) [Reject](#) [Cancel Grant](#)

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

By entering the Project Name you are assuming the position of 'Primary Contact' and are certifying that you have already received the approval of the Sponsor Club ('Primary Club'). You confirm that you are a member of that Primary Club, that you agree to the Terms and Conditions, and agree to implement the project (assuming that it is approved).

You agree to use acceptable accounting methods, including saving all receipts, and to submit the Final Report by March 31 of the same Rotary year.

As you complete each section be sure to click the Orange 'Update' button. [Edit Help Text](#)

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

Details: This is a general description of the Grant project. Within this tab, you will be providing the name of the project, contact details, estimated budgets, Local Club Partners and Other Partners affiliated with the Grant.

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 provides a General Breakdown of the **Expected Expenses** that the Grant will be spent on. You can provide the details of how much money the grant is expecting to receive within the **Expected Income section**.

Documents: Within this section, you will be able to store any related files, images, or documents relating to the Grants you have submitted.

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

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

Details Application Budget **Documents** Project Overview Individual Project Report Activity Log

Project Documents

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

Search: Go 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		

Collapse All Expand All

Coats

Grant Project: Coats
 Primary Sponsoring Club: Rotary Club of Heights
 Contact:
 Date Submitted: Aug 21, 2013 at 4:55 PM
 Project Total Budget: \$2,000.00
 Project Total Financing: \$2,000.00
 Requested Grant Amount: \$1,000.00

Status: **Completed**

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

Click on the Print button to obtain a hard copy of this Grant application and all associated information.

Include activity log Print

PROJECT DESCRIPTION

GENERAL DESCRIPTION

COMMUNITY ASSESSMENT & IMPACT

SUSTAINABILITY

IMPLEMENTATION PLAN

EXPECTED EXPENSES

EXPECTED INCOME

LOCAL CLUB PARTNERS

COOPERATING ORGANIZATIONS

Project Overview: Within this section, is an overview of the information that has been provided within the previous tabs (Details, Application and Budget). Within this page, you can print a copy of the information provided in the Grant. Simply click the **Print** button on the right-hand side.

The following is a description of the headings available with the Project Overview tab:

- **Project Description:** This is a General description of the Grant project. This section outlines briefly the 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.
- **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:** Describe 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?
- **Expected Expenses:** Provides both requested district funds in addition to other funding sources you have already obtained elsewhere.
- **Expected Income:** Supplies all anticipated expenses you think you will need. If you are basing an expense on a proposal or estimate.
- **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.
- **Cooperating Organizations:** these are groups or organizations other than partnering Rotary clubs that are working with the sponsoring club in either funding or implementing the project.

Individual Project Report: Within this section, 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.

Activity Log: This section is intended to keep track of all status changes with the Grant Approval process. Any changes or comments made will be tracked in an ascending list on this page.

Training & Support

Knowledgebase

To get more information about the Grants module from a District perspective, please visit the following link:

<http://clubrunner.helpserve.com/Knowledgebase/List/Index/514/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>

Club Manual

There is an accompanying manual to assist clubs in using the grants module. We encourage you to distribute it to clubs as part of your training. You may also download the Word version to customize it to your own District's procedures.

<http://clubrunner.helpserve.com/Knowledgebase/Article/View/896/0/grants-module-guide-club>

For the latest ClubRunner updates, follow us on:



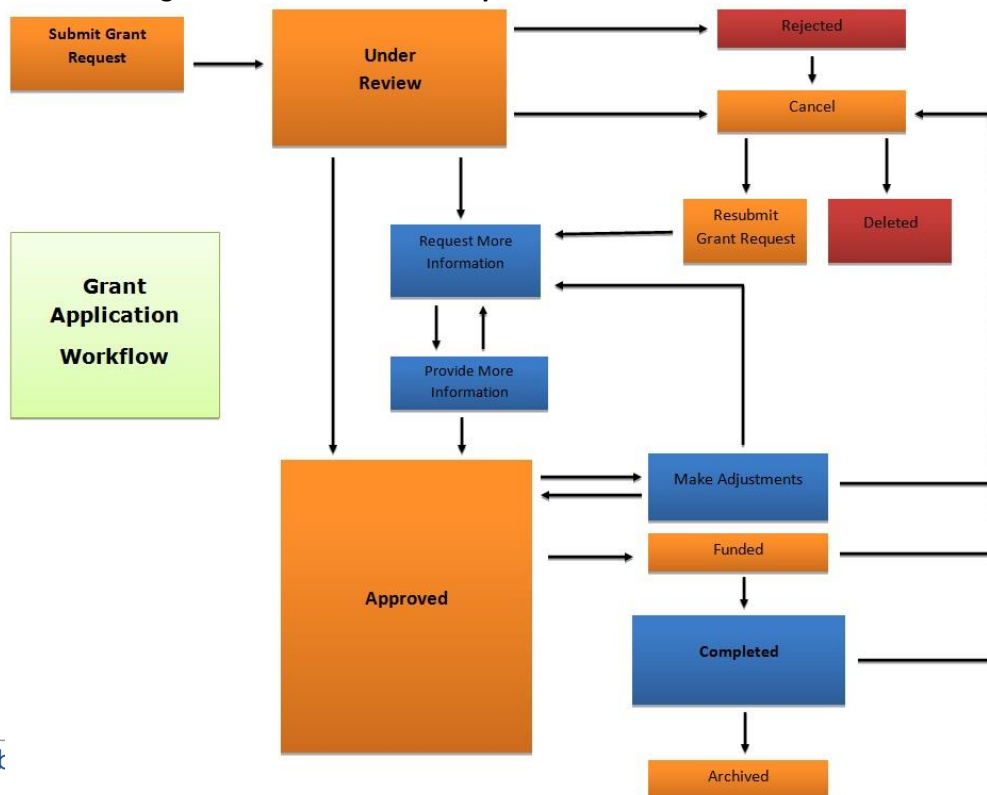
Appendices

Access and Permissions:

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

Workflow:

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**.



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