

Grant Applicant User Guide

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
Overview


The Amp Impact Grant Applications and Review module enables organizations to implement the Grant Application process. With this extension, Amp Impact can be used to manage the full Grant Lifecycle. Organizations can announce the funding opportunity by publishing a call for proposal, allow grant applicants to submit an application, review the applications, award grant, and monitor the grant.


In this user guide, the grant applicants will learn how to:

- Log in and access calls for proposals in the grant applicant community.
- Submit a Concept Note (for a two-stage grant application process).
- Submit an application (for either a one- or two-stage application process).
- Revise their applications.
- Report on grants.

 To learn about how to set up the grant management extension in your org, please refer to the Grant Management Extension Setup Guide.

 To learn more about how to report on grants, please refer to the Amp Impact Grantee Reporting User Guide.

 To learn about how grantmaking organizations manage the grant application process, please refer to the Grant Coordinator User Guide.

 To learn about how reviewers access and review applications, please refer to that Grant Reviewer User Guide.

Log in to the Grant Applicant Community

To log in to the grant applicant community:

1. Click on the login link (or enter URL in the browser's address bar) provided by the grant-making organization.
2. On the login screen, enter the Username and Password provided by the grant-making organization.

Access the Call For Proposals

Once logged in to the grant applicant community:

1. Click on the 'My Call For Proposals' tab to view a list of all Calls for Proposals available.
2. Click on the Call for Proposals record they want to apply for and view the relevant details.

Submit a Concept Note (Optional)

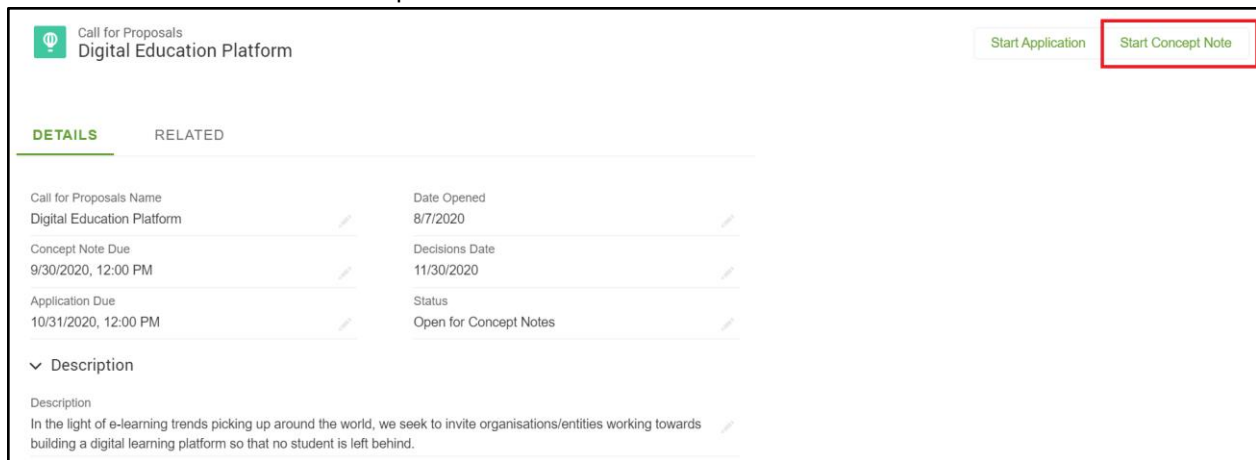
① This step is optional and only applicable when a grant-making organization follows a two-stage application process, i.e. a Concept Note is submitted in the first step, and once approved, grant applicants submit a full application. If a one-stage process is used, move on to [the next step](#).

Once the grant applicant has viewed the details on the Call for Proposals, they can start a Concept Note.

Start a Concept Note

To start a Concept Note:

1. Click on the 'Start Concept Note' button



Call for Proposals
Digital Education Platform

Start Application Start Concept Note

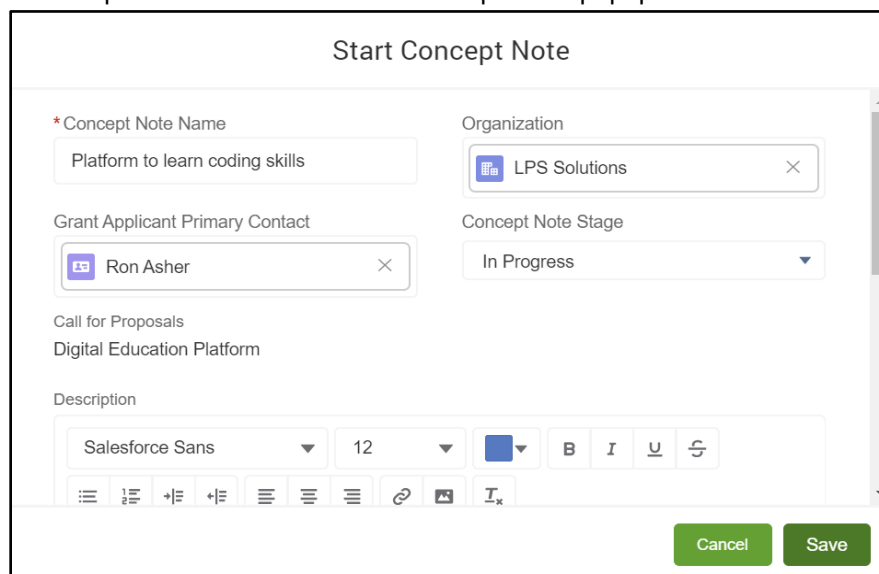
DETAILS RELATED

Call for Proposals Name Digital Education Platform	Date Opened 8/7/2020
Concept Note Due 9/30/2020, 12:00 PM	Decisions Date 11/30/2020
Application Due 10/31/2020, 12:00 PM	Status Open for Concept Notes

▼ Description

Description
In the light of e-learning trends picking up around the world, we seek to invite organisations/entities working towards building a digital learning platform so that no student is left behind.

2. Fill in all the required details in the 'Start Concept Note' popup



Start Concept Note

* Concept Note Name: Platform to learn coding skills

Organization: LPS Solutions

Grant Applicant Primary Contact: Ron Asher

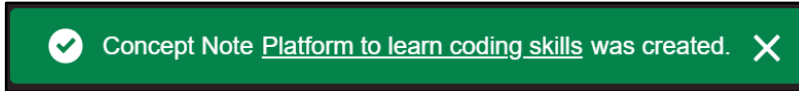
Concept Note Stage: In Progress

Call for Proposals: Digital Education Platform

Description: Salesforce Sans 12

Cancel Save

Once the Concept Note is created, a success message with a link to the Concept Note will display.




The grant applicant can then navigate to the Concept Note by:

- Clicking on the link in the success message, or
- Navigating to the related tab and clicking on the new Concept Note in the 'Concept Notes' related list, or
- Navigating to the 'My Concept Notes' tab in the navigation bar and clicking on the new Concept Note in the list.

ⓘ Please note that the grant applicant might need to refresh the page for the new Concept Note to display in the 'Concept Notes' related list.

Fill Out the Required Details

Once the Concept Note is created, the grant applicant can start to fill out the required details on the 'Details' tab.


 Concept Note
 Platform to learn coding skills

[+ Follow](#)
[Delete](#)
[Edit](#)
[Submit for Approval](#)

In Progress

Submitted

Under Review

Approved

Rejected

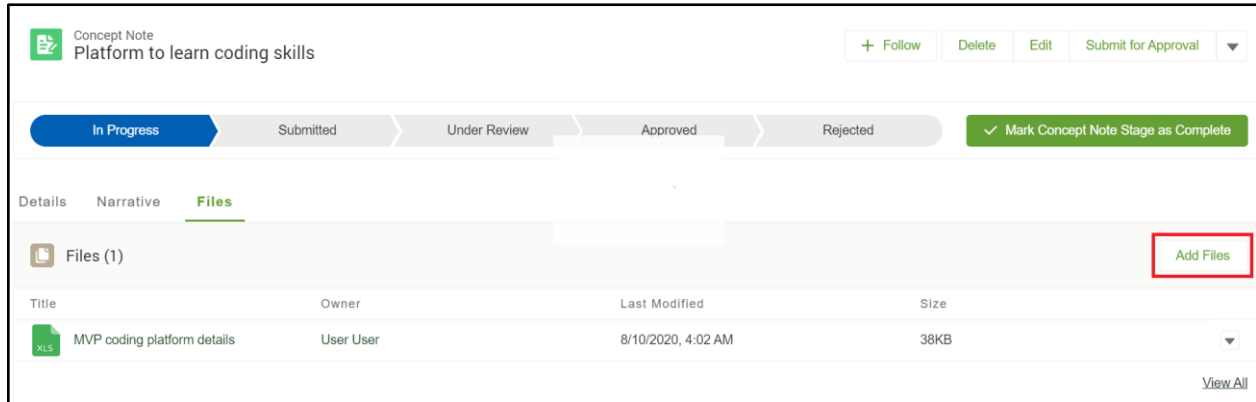
Mark Concept Note Stage as Complete

Details
Narrative
Files

Concept Note Name	Organization												
Platform to learn coding skills	LPS Solutions												
Grant Applicant Primary Contact	Concept Note Stage												
Ron Asher	In Progress												
Call for Proposals	Submitted Date												
Digital Education Platform	8/10/2020												
<div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> ✓ Description </div> <div style="padding: 5px 0 5px 20px;"> Description Goal is to increase labour force participation of women of colour from under-represented communities in STEP fields like programming and computer science </div> </div>													
<div style="margin-top: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> ✓ Proposal </div> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Country</td> <td style="width: 50%;">Proposed Start Date</td> </tr> <tr> <td>Algeria</td> <td>8/31/2020</td> </tr> <tr> <td>Proposed Amount</td> <td>Proposed End Date</td> </tr> <tr> <td>\$20,000,000.00</td> <td>8/30/2022</td> </tr> <tr> <td>Created By</td> <td>Last Modified By</td> </tr> <tr> <td>User User, 8/10/2020, 3:42 AM</td> <td>User User, 8/10/2020, 5:02 AM</td> </tr> </table> </div>		Country	Proposed Start Date	Algeria	8/31/2020	Proposed Amount	Proposed End Date	\$20,000,000.00	8/30/2022	Created By	Last Modified By	User User, 8/10/2020, 3:42 AM	User User, 8/10/2020, 5:02 AM
Country	Proposed Start Date												
Algeria	8/31/2020												
Proposed Amount	Proposed End Date												
\$20,000,000.00	8/30/2022												
Created By	Last Modified By												
User User, 8/10/2020, 3:42 AM	User User, 8/10/2020, 5:02 AM												

Upload Supporting Documents

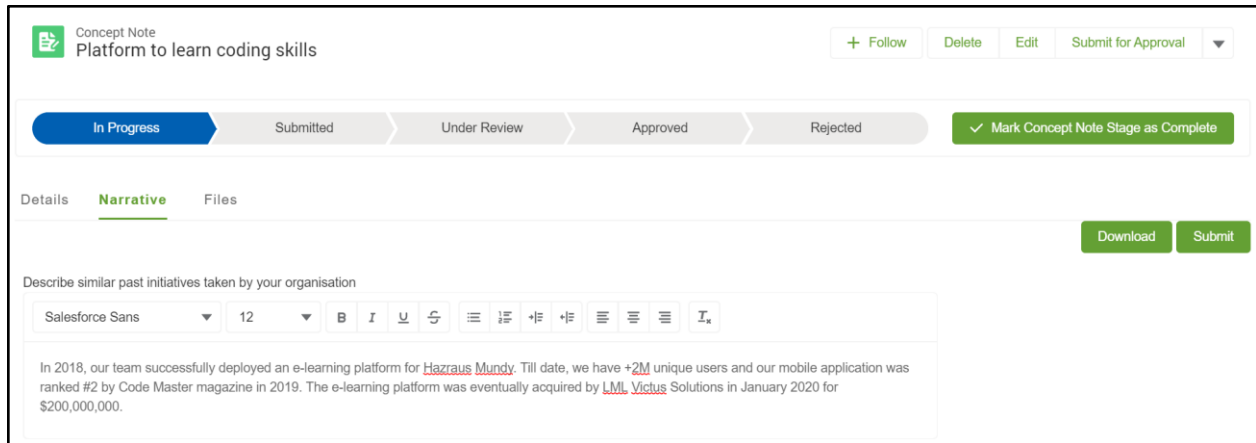
Grant applicants can also upload supporting documents by navigating to the 'Files' tab and clicking on the 'Add Files' button in 'Files' related list.



The screenshot shows the 'Files' tab for a Concept Note titled 'Platform to learn coding skills'. The status is 'In Progress'. A table lists one file: 'MVP coding platform details' (XLS), owned by 'User User', last modified on 8/10/2020 at 4:02 AM, and 38KB in size. A red box highlights the 'Add Files' button in the top right corner of the file list.

Fill Out the Narrative Report

Grant coordinators may set up a narrative report with questions to be answered by the grant applicants while creating a Concept Note. Grant applicants can fill out this narrative report by navigating to the 'Narrative' tab.

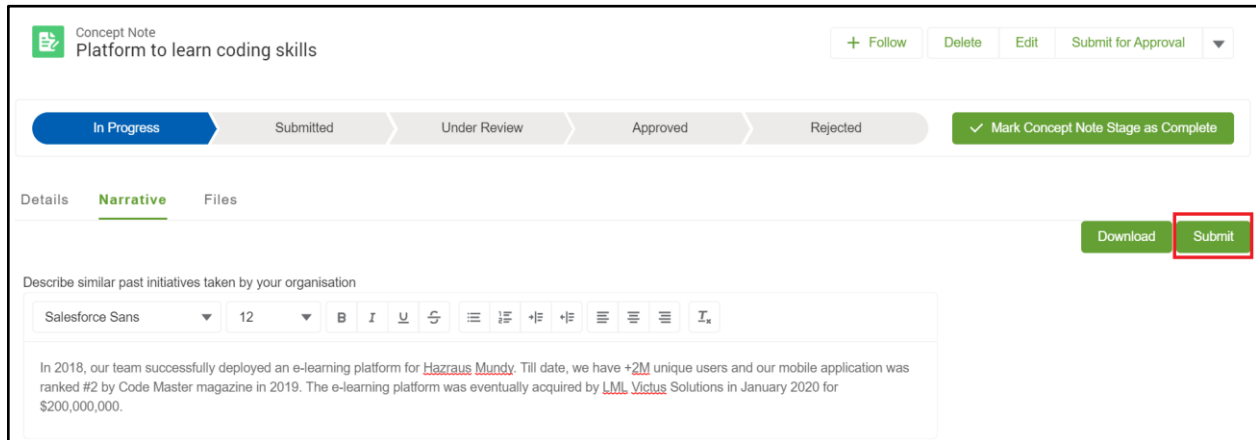


The screenshot shows the 'Narrative' tab for the same Concept Note. It features a rich text editor with a toolbar and a text area containing the following text: "In 2018, our team successfully deployed an e-learning platform for [Hazraus Mundy](#). Till date, we have +2M unique users and our mobile application was ranked #2 by Code Master magazine in 2019. The e-learning platform was eventually acquired by [LML Victus](#) Solutions in January 2020 for \$200,000,000." There are 'Download' and 'Submit' buttons on the right side of the text area.

📌 To learn more about narrative reports and how to fill them out, please refer to the Amp Impact Submissions User Guide.

Submit the Completed Concept Note

Once the grant applicant fills out the narrative report, they can submit the Concept Note by clicking on the 'Submit' button in the Narrative tab.



Concept Note
Platform to learn coding skills

+ Follow Delete Edit Submit for Approval

In Progress Submitted Under Review Approved Rejected ✓ Mark Concept Note Stage as Complete

Details **Narrative** Files

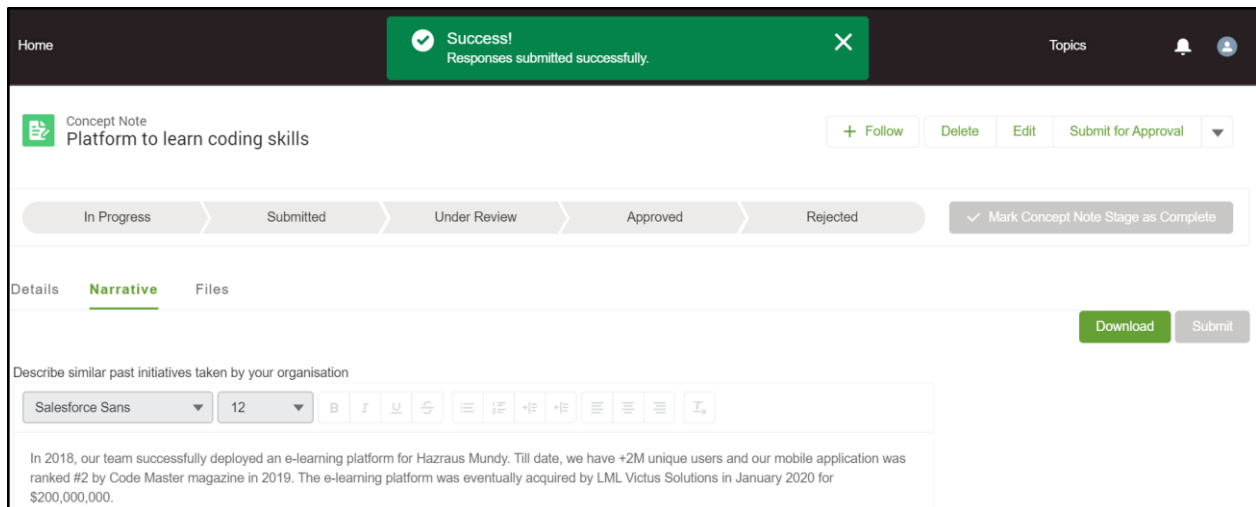
Download Submit

Describe similar past initiatives taken by your organisation

Salesforce Sans 12 B I U S

In 2018, our team successfully deployed an e-learning platform for [Hazraus Mundy](#). Till date, we have +2M unique users and our mobile application was ranked #2 by Code Master magazine in 2019. The e-learning platform was eventually acquired by [LML Victus Solutions](#) in January 2020 for \$200,000,000.

On submitting the Concept Note, a success toast is displayed and the narrative report becomes uneditable.



Home Success! Responses submitted successfully. Topics

Concept Note
Platform to learn coding skills

+ Follow Delete Edit Submit for Approval

In Progress Submitted Under Review Approved Rejected ✓ Mark Concept Note Stage as Complete

Details **Narrative** Files

Download Submit

Describe similar past initiatives taken by your organisation

Salesforce Sans 12 B I U S

In 2018, our team successfully deployed an e-learning platform for [Hazraus Mundy](#). Till date, we have +2M unique users and our mobile application was ranked #2 by Code Master magazine in 2019. The e-learning platform was eventually acquired by [LML Victus Solutions](#) in January 2020 for \$200,000,000.

Revise Concept Note

If any revisions are requested on the Concept Note, the grant coordinator informs the grant applicant via email. On receiving the revision request, grant applicants can:

1. Log in to the community.
2. Access the Concept Note via 'My Concept Notes' tab.
3. Clicks on the Concept Note requiring revision.
4. Make the required changes.
5. Submit the Concept Note.

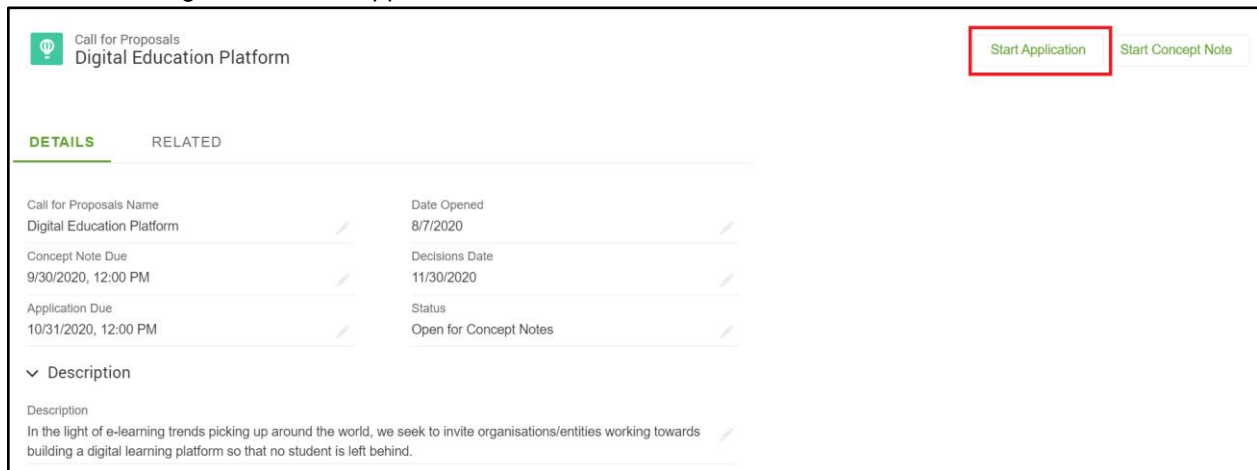
Submit an Application

Start an Application

Single-stage grant application process

If the grant-making organization follows a single-stage application process, grant applicant starts an application from the call for proposal by:

1. Clicking on the 'Start Application' button

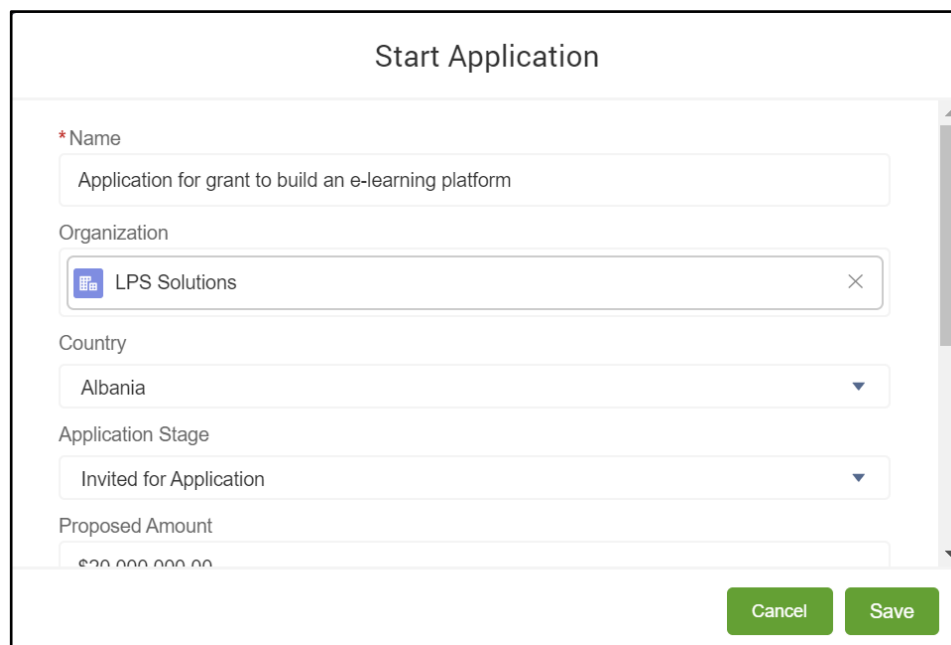


The screenshot shows a web interface for a 'Call for Proposals' titled 'Digital Education Platform'. In the top right corner, there are two buttons: 'Start Application' (highlighted with a red box) and 'Start Concept Note'. Below the header, there are two tabs: 'DETAILS' (selected) and 'RELATED'. The 'DETAILS' section contains a table with the following information:

Field	Value
Call for Proposals Name	Digital Education Platform
Date Opened	8/7/2020
Concept Note Due	9/30/2020, 12:00 PM
Decisions Date	11/30/2020
Application Due	10/31/2020, 12:00 PM
Status	Open for Concept Notes

Below the table, there is a 'Description' section with a downward arrow icon. The description text reads: 'In the light of e-learning trends picking up around the world, we seek to invite organisations/entities working towards building a digital learning platform so that no student is left behind.'

2. Fills in all the required details in the 'Start Application' popup



The screenshot shows a 'Start Application' popup form with the following fields:

- * Name**: Application for grant to build an e-learning platform
- Organization**: LPS Solutions
- Country**: Albania
- Application Stage**: Invited for Application
- Proposed Amount**: \$20,000,000.00

At the bottom right of the form, there are two buttons: 'Cancel' and 'Save'.

Once the Application is created, a success message will be displayed to the grant applicant.

✔ You have successfully started an application for this call for proposal ✕

The Grant applicant can then navigate to the Application by :

1. Navigating to the related tab and clicking on the Application record in the 'Applications' related list, or
2. Navigating to the 'My Applications' tab on the navigation bar and clicking on the new Application record in the list.

ⓘ Please note that the grant applicant might need to refresh the page for the new Application to display in the 'Applications' related list.

Two-stage grant application process (Optional)


ⓘ This step is optional and only applicable when a grant-making organization follows a two-stage application process, i.e. a Concept Note is submitted in the first stage and once that's approved, grant applicants submit a full application.

If the grant-making organization follows a two-stage application process, an application record is automatically created. This application record contains all the relevant information (such as country, name, organization, description, planned start and end dates, the proposed amount of funding, etc.) copied from the Concept Note.

To access the Application:

1. Navigate to the 'My Applications' tab.
2. Click on the Application (Application name will have the same as the Concept Note)

Name of Concept Note


Concept Note
 Platform to learn coding skills

[+ Follow](#)
[Delete](#)
[Edit](#)
[Submit for Approval](#)

In Progress

Submitted

Under Review

Approved

Rejected

Mark as Current Concept Note Stage

Details
Narrative
Files


<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Concept Note Name Platform to learn coding skills </div>	<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Organization LPS Solutions </div>
<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Grant Applicant Primary Contact Ron Asher </div>	<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Concept Note Stage In Progress </div>
<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Call for Proposals Digital Education Platform </div>	<div style="border: 1px solid #ccc; border-bottom: none; padding: 2px 5px;"> Submitted Date 8/10/2020 </div>

▼ Description

Description

Goal is to increase labour force participation of women of colour from under-represented communities in STEP fields like programming and computer science

Name of Application


Applications/Grants
 My Applications

[New](#)
[Change Owner](#)

10 Items • Sorted by Name • Filtered by my applications/grants - Record Type • Updated 2 minutes ago

Q Search this list...

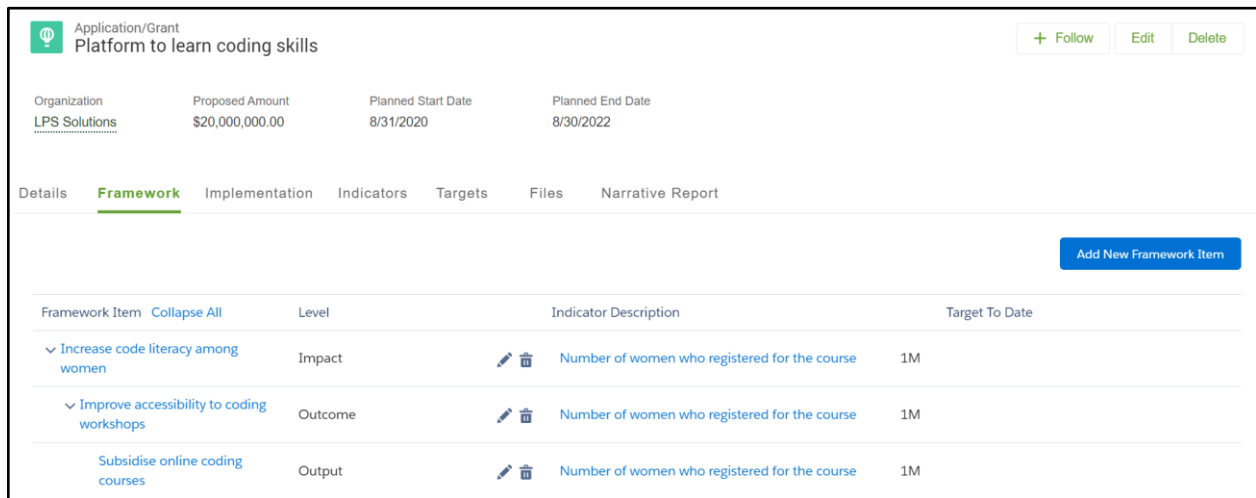
	<input type="checkbox"/>	Name	
1	<input type="checkbox"/>	Platform to learn coding skills	▼
2	<input type="checkbox"/>	Platform for teaching language skills	▼

Fill Out the Required Details

Once the Concept Note record is created, the grant applicant can start to fill out the rest of the required details on the 'Details' tab.

Create a Proposed Logical Framework

To propose a Logical Framework and define Objectives for the Application, grant applicants navigate to the 'Framework' tab on the Application.



The screenshot shows the 'Framework' tab for an application titled 'Platform to learn coding skills'. At the top right, there are buttons for '+ Follow', 'Edit', and 'Delete'. Below this, a summary row displays: Organization: LPS Solutions, Proposed Amount: \$20,000,000.00, Planned Start Date: 8/31/2020, and Planned End Date: 8/30/2022. A navigation bar includes 'Details', 'Framework' (active), 'Implementation', 'Indicators', 'Targets', 'Files', and 'Narrative Report'. A blue button 'Add New Framework Item' is located on the right. Below is a table with columns: Framework Item, Level, Indicator Description, and Target To Date.

Framework Item	Level	Indicator Description	Target To Date
▼ Increase code literacy among women	Impact	Number of women who registered for the course	1M
▼ Improve accessibility to coding workshops	Outcome	Number of women who registered for the course	1M
Subsidise online coding courses	Output	Number of women who registered for the course	1M

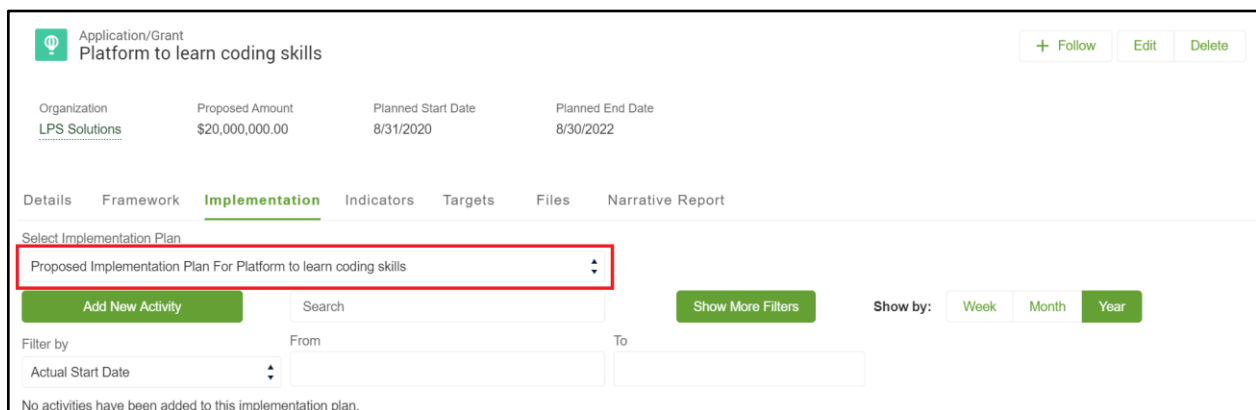
On the Logical Framework tab, grant applicants can:

- Create new Objectives and add them to the application by clicking the 'Add New Framework Item' button on the top right of the Logical Framework tab.
- Edit or delete the Objectives by clicking on the pencil icon or garbage icon respectively.
- Create a hierarchy (represented with nesting) of Objectives by relating them to other Objectives.

📌 To learn more about managing Frameworks and Objectives, please refer to the Manage Framework section in the Amp Impact User Guide.

Create a Proposed Implementation Plan

When an application is created, a default Implementation Plan (named as 'Proposed Implementation Plan For [Application Name]') is already added to it. To create Activities for this Implementation Plan, grant applicants navigate to the 'Implementation' tab on the Application.



The screenshot shows the 'Implementation' tab for the same application. The navigation bar now highlights 'Implementation'. Below the navigation bar, there is a dropdown menu labeled 'Select Implementation Plan' with the selected option 'Proposed Implementation Plan For Platform to learn coding skills'. To the left of this dropdown is a green 'Add New Activity' button. Below the dropdown is a search bar and a 'Show More Filters' button. To the right, there are 'Show by:' options for 'Week', 'Month', and 'Year'. At the bottom, there are 'Filter by' options for 'Actual Start Date' and date range fields 'From' and 'To'. A message at the bottom states: 'No activities have been added to this implementation plan.'

On the Implementation tab, grant applicants can:

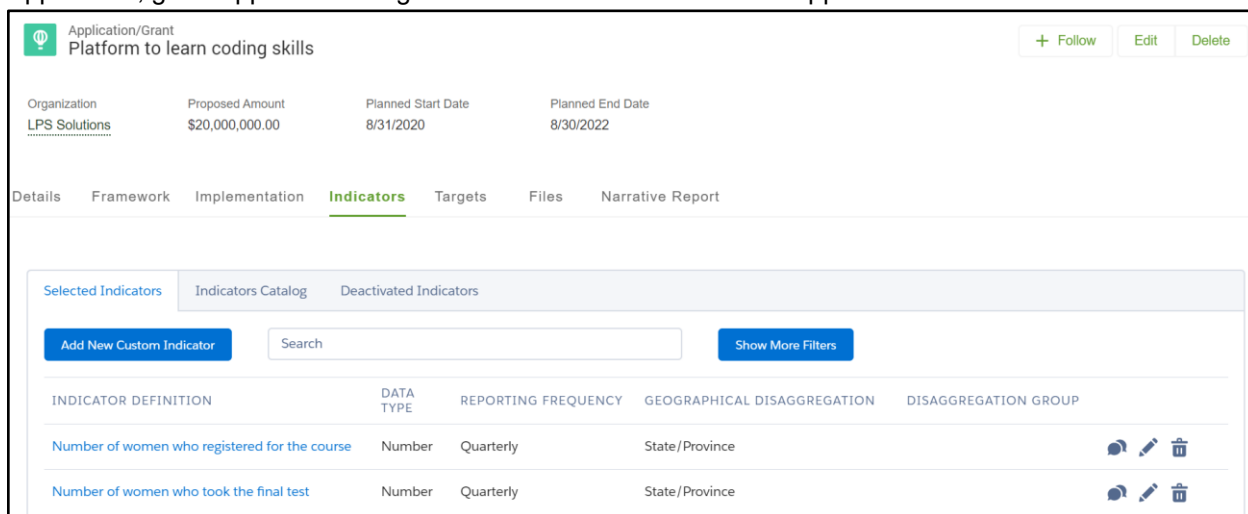
- Add Activities to the Implementation Plan by clicking the 'Add New Activity' button.
- Edit or delete the Activities by clicking on the pencil icon or trash can icon respectively.
- Create a hierarchy (represented with nesting) of Activities by relating them to other Activities.

- Visualize the Activity timeline using the Gantt chart.

📘 To learn more details about managing Implementation Plans and Activities, please refer to the Amp Impact Activities User Guide.

Access Indicators to Measure Impact

On the Call for Proposals, the grant coordinator may define which Indicators should be added to an Application by default. To access these default Indicators or create new custom Indicators for the Application, grant applicants navigate to the 'Indicators' tab on the Application.



The screenshot shows the 'Indicators' tab of an application. At the top, it displays the application name 'Platform to learn coding skills' and provides options to '+ Follow', 'Edit', and 'Delete'. Below this, key application details are listed: Organization (LPS Solutions), Proposed Amount (\$20,000,000.00), Planned Start Date (8/31/2020), and Planned End Date (8/30/2022). A navigation bar includes tabs for 'Details', 'Framework', 'Implementation', 'Indicators' (which is active), 'Targets', 'Files', and 'Narrative Report'. The main content area is divided into 'Selected Indicators', 'Indicators Catalog', and 'Deactivated Indicators'. The 'Selected Indicators' section features an 'Add New Custom Indicator' button, a search field, and a 'Show More Filters' button. A table below lists the selected indicators with columns for 'INDICATOR DEFINITION', 'DATA TYPE', 'REPORTING FREQUENCY', 'GEOGRAPHICAL DISAGGREGATION', and 'DISAGGREGATION GROUP'. Two indicators are listed: 'Number of women who registered for the course' and 'Number of women who took the final test', both with a 'Number' data type and 'Quarterly' reporting frequency. Each indicator has an action menu with icons for edit, deactivate, and delete.

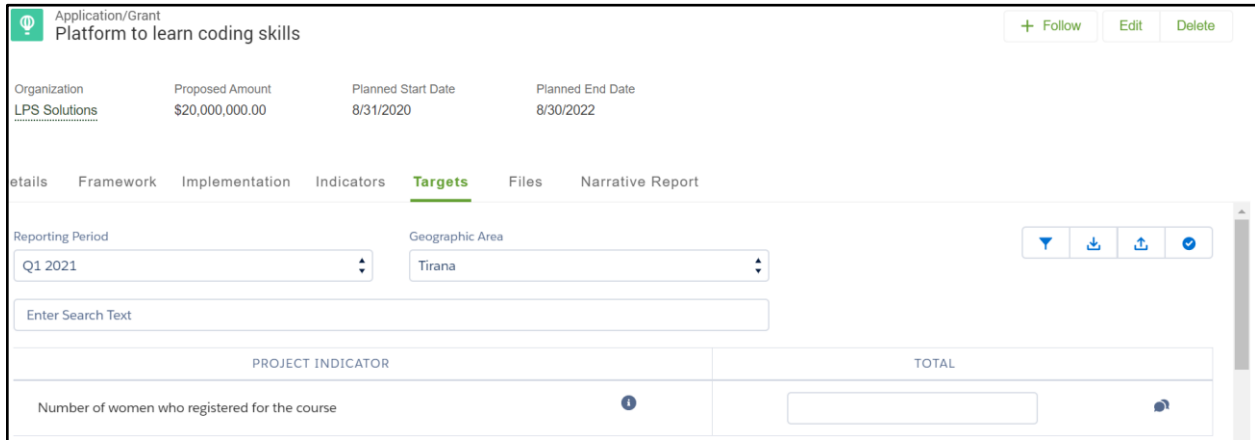
On the Indicators tab, grant applicants can:

- Add Indicators from the 'Indicators Catalog' tab using the 'Add Selected' button.
- Create custom Indicators from the Selected Indicators tab using the 'Add New Custom Indicator' button.
- Edit, deactivate, or delete the Indicators by clicking into the action menu.
- Relate an Indicator to an Objective by clicking on the Edit button in the action menu.

📘 To learn more details about Indicators, please refer to the Manage Indicators section in the Amp Impact User Guide.

Set Proposed Targets for Indicators

To set proposed targets for the Application's Indicators, the grant applicants navigate to the 'Targets' tab.



Application/Grant
Platform to learn coding skills

Organization: LPS Solutions, Proposed Amount: \$20,000,000.00, Planned Start Date: 8/31/2020, Planned End Date: 8/30/2022

Reporting Period: Q1 2021, Geographic Area: Tirana

PROJECT INDICATOR	TOTAL
Number of women who registered for the course	

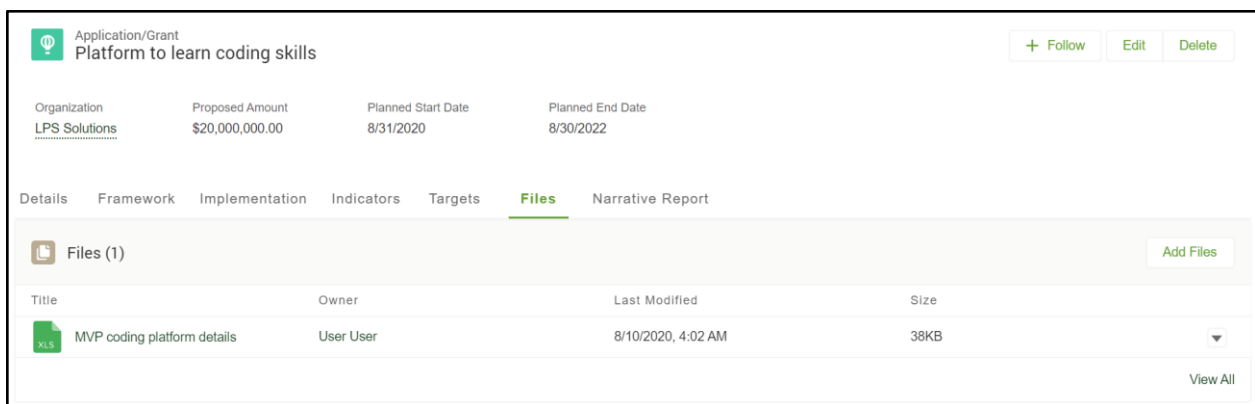
On the Target data tab, the grant applicants can:

- Set targets for defined Indicators for the default Reporting Period and default Geographic Area.
- Download indicators data to an Excel sheet, define targets offline in the sheet, and upload that sheet to set targets in the system by clicking on the 'Download' and 'Upload' icons on the top right of the Targets tab.
- Submit targets for the review by clicking on the 'Check' icon on the top right of the Targets tab.

📌 To learn more details about setting targets, please refer to the Set Targets section in the Amp Impact User Guide.

Upload Supporting Documents

Grant applicants can also upload supporting documents by navigating to the 'Files' tab and clicking on the 'Add Files' button in 'Files' related list.



Application/Grant
Platform to learn coding skills


Organization: LPS Solutions, Proposed Amount: \$20,000,000.00, Planned Start Date: 8/31/2020, Planned End Date: 8/30/2022

Files (1)

Title	Owner	Last Modified	Size
MVP coding platform details	User User	8/10/2020, 4:02 AM	38KB

Fill Out the Narrative Report

Grant coordinators may set up a narrative report with questions to be answered by the grant applicants while filling out an Application. Grant applicants can fill out this narrative report by navigating to the 'Narrative' tab.


Application/Grant
 Platform to learn coding skills

+ Follow Edit Delete

Organization	Proposed Amount	Planned Start Date	Planned End Date
LPS Solutions	\$20,000,000.00	8/31/2020	8/30/2022

Details **Framework** Implementation Indicators Targets Files **Narrative**

Download Submit

Select the primary region of operation

MENA

Please Describe

We choose to operate in MENA region to begin our operations and plan to expand gradually


Once the grant applicant fills out the narrative report, they can submit the narrative report by clicking on the 'Submit' button in the Narrative tab. On submitting the narrative report, a success message is displayed and the narrative report becomes uneditable.

📌 To learn more details about narrative reports and how to fill them, please refer to the Response Guide section of the Amp Impact Submissions User Guide.

Submit the Completed Application

Once the grant applicant has completed the application, they can submit the application for review by:

1. Updating the Application Stage to 'Submitted' on the 'Details' tab, or
2. Select the 'Submitted' Application Stage and click on 'Mark as Current Stage' in the path component.


Application/Grant
 Platform to learn coding skills

Organization	Proposed Amount	Planned Start Date	Planned End Date
LPS Solutions	\$20,000,000.00	8/31/2020	8/30/2022

Details Framework Implementation Indicators Targets Files Narrative Report

Name	Call for Proposals
Platform to learn coding skills	<u>Digital Education Platform</u>
Organization	Concept Note
LPS Solutions	<u>Platform to learn coding skills</u>
Country	Reviewer
Proposed Amount	Application Stage
\$20,000,000.00	Submitted

Revise Application

If any revisions are requested on the application, the grant coordinator informs the grant applicant via email. On receiving the revision request:

1. Log in to the community.
2. Access the Applications via 'My Applications' tab.
3. Click on the Application.
4. Make the required changes.
5. Submit the Application by updating the Application Stage to 'Submitted'.

Report on Grant

Submit Grant Reports


Once the Application is approved, and it has converted to a Grant, grant coordinators may define Reporting Periods on the Grant and assign due dates for reporting on those Reporting Periods. Grant applicants are required to report on Grants based on these Reporting Periods.

Access Grants

To access the Grants:

1. Log in to the community.
2. Access the Grants via 'My Grants' tab.



Clicks on the Grant (same name as the Application).

 Application/Grant
Platform to learn coding skills

Active?	Organization	Funding Amount	Project Start Date	Project End Date
<input checked="" type="checkbox"/>	LPS Solutions	\$200,000,000.00	8/1/2020	8/31/2023

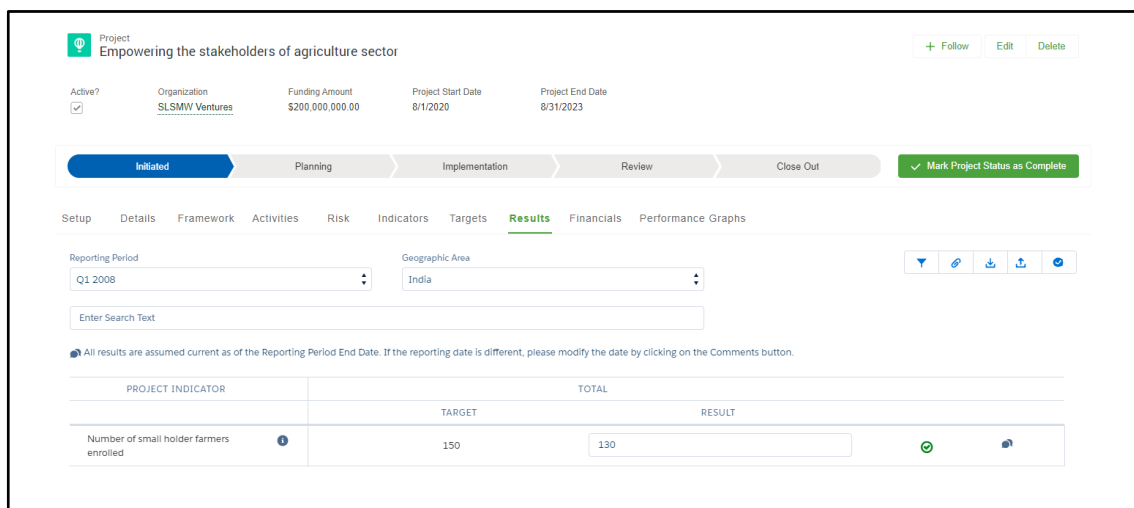
DETAILS

RELATED

Name Platform to learn coding skills	Project Start Date 8/1/2020
Organization LPS Solutions	Project End Date 8/31/2023
Country Algeria	Funding Amount \$200,000,000.00
Parent Project Platform to learn coding skills	Overall Grant Performance Exceeds Requirements
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>▼ Description</p> <p>Project Description</p> <p>The aim of this grant is to create and e-learning platform to increase accessibility of technical skills</p> </div> <div style="width: 45%; text-align: right;"> <p>Created By</p> <p> User User, 8/12/2020, 5:20 AM</p> </div> </div>	
<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p>Last Modified By</p> <p> User User, 8/12/2020, 5:20 AM</p> </div> <div style="width: 45%; text-align: right;"> <p>Record Type</p> <p>Grant</p> </div> </div>	

Add Results

To add results for the Grant's Indicators, the grantees navigate to the 'Results' tab.



On the Results tab, the grantees can:

- Add results for defined Indicators based on the Reporting Periods and Geographic Areas of the Grant.
- Download Indicators to an Excel sheet, add results offline in the sheet, and upload that sheet to add results in the system by clicking on the 'Download' and 'Upload' icons on the top right of the Results tab
- Submit results for the review by clicking on the 'Check' icon on the top right of the Results tab

i To learn more details about adding results, please refer to the Add Results section in the Amp Impact User Guide.

To learn more about how grantees report for a Grant in a community, please refer to the Amp Impact Grantee Reporting User Guide.

Request Modifications in the Grant

Sometimes, the grantees may want to request grant modifications, such as an extension of the Grant, revision of targets, etc.

To request a grant modification:

- Navigate to the 'Setup' tab on the Grant.
- Click on the 'New' button on 'Modification' related list.
- Fill the relevant details.
 - Specify the type of modification by selecting the correct value in 'Type' picklist.
 - Set 'Status' to 'Requested'.
 - Provide the reason for modification in the 'Rationale' text box.
 - Provide a summary of the requested modification in the 'Summary of Modification' text box.
- Clicks on the 'Save' button to create the grant modification request.