

Grant Coordinator User Guide

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Overview


The Amp Impact Grant Applications and Reviews 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 coordinators will learn how to:

- Create a Call for Proposals record
- Assign reviewers and monitor reviews
- Monitor and approve applications (for single-step and two-step application process)
- Monitor grants

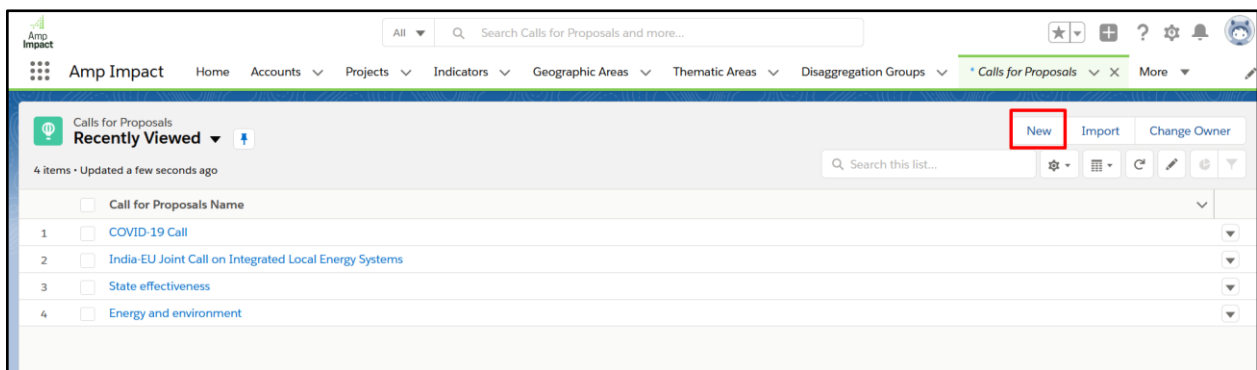
 To learn about how to set up the Grant Applications and Reviews Module in your org, please refer to the Grant Applications and Reviews Module Setup Guide.

 To learn about how to submit an application and report on grants, please refer to the Grant Applicant User Guide and Amp Impact Grantee Reporting User Guide.

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

Create a Call for Proposals

Grant coordinators can create a Call for Proposals record to invite Applications for a funding opportunity. This can be created from the 'Call for Proposals' tab.



Add Details to the Call for Proposals

Once a Call for Proposals has been created, the grant coordinator can navigate to the 'Details' tab to add remaining information, such as Description, Available Funding, Status, etc.

New Call for Proposals

Information

<p>* Call for Proposals Name</p> <input style="width: 90%;" type="text" value="Designing and Developing Energy Storage"/>	<p>Funding Available</p> <input style="width: 90%;" type="text" value="\$450,000.00"/>
<p>Concept Note Due</p> <p>Date: <input style="width: 60%;" type="text" value="11/13/2020"/> </p> <p>Time: <input style="width: 60%;" type="text" value="12:00 AM"/> </p>	<p>Date Opened</p> <input style="width: 90%;" type="text" value="8/12/2020"/>
<p>Application Due</p> <p>Date: <input style="width: 60%;" type="text" value="2/1/2021"/> </p> <p>Time: <input style="width: 60%;" type="text" value="12:00 AM"/> </p>	<p>Decisions Date</p> <input style="width: 90%;" type="text" value="5/1/2021"/>
<p>Status</p> <input style="width: 90%;" type="text" value="Not Yet Open"/>	

Description

Description

Relate Themes to the Call for Proposals

Grant coordinators can also associate Thematic Areas (such as Education, Health, etc) to the Call for Proposals from the 'Thematic Areas' related list on the 'Related' tab. The Thematic Areas added to a Call for Proposals are automatically copied onto all related Applications.

New Call for Proposals Thematic Area

Information

<p>Call for Proposal Thematic Area Name</p> <p>Call for Proposals</p> <input style="width: 90%;" type="text" value="Designing and Developing Energy Storage"/>	<p>Owner</p> <p>Gabriella Espinoza</p>
<p>Thematic Area</p> <input style="width: 90%;" type="text" value="Energy Efficiency"/>	

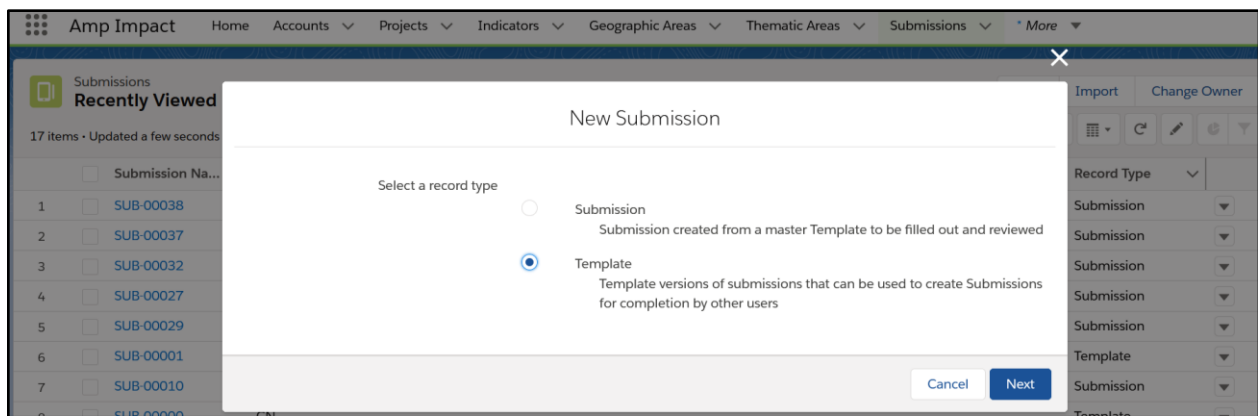
① This feature can be used to set up default indicators for applications related to a call for proposal. In Amp Impact, if an indicator is marked as 'Required' for a Thematic Area, it's automatically added to the grant/application which is related to that Thematic Area.

If some Thematic Areas related to the Call for Proposals record have indicators marked as required, those indicators will automatically be added to the related applications.

Create Narrative Reporting Templates

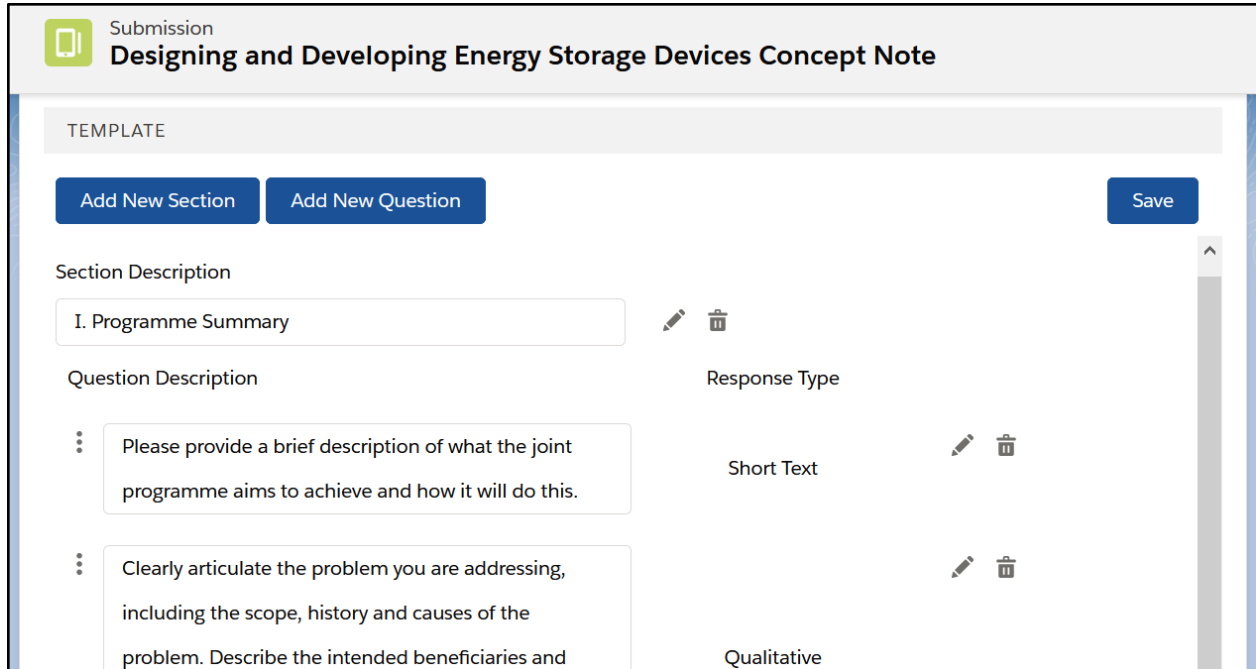
Grant coordinators can specify a narrative report to be filled by grant applicants (while filling out a Concept Note or an Application) and grant reviewers (while filling out a Concept Note review or an Application review) during the grant application process. These narrative reports are based on a Template.

To create a narrative reporting Template, the grant coordinator can navigate to the 'Submissions' object tab and create a new record with the 'Template' record type.



The screenshot shows the 'New Submission' dialog box in the Amp Impact system. The dialog has a title bar with a close button (X) and a subtitle 'New Submission'. Below the subtitle, there is a section titled 'Select a record type' with two radio button options: 'Submission' (unselected) and 'Template' (selected). The 'Submission' option is described as 'Submission created from a master Template to be filled out and reviewed'. The 'Template' option is described as 'Template versions of submissions that can be used to create Submissions for completion by other users'. At the bottom right of the dialog, there are 'Cancel' and 'Next' buttons. The background shows a list of submissions with columns for 'Submission Na...' and 'Submission Na...'. The list includes items 1 through 7 with IDs SUB-00038, SUB-00037, SUB-00032, SUB-00027, SUB-00029, SUB-00001, and SUB-00010.

Once the record has been created, the grant coordinator can start building a Template with the help of Template Builder.



Submission

Designing and Developing Energy Storage Devices Concept Note

TEMPLATE

Add New Section Add New Question Save

Section Description

I. Programme Summary

Question Description

Please provide a brief description of what the joint programme aims to achieve and how it will do this.

Clearly articulate the problem you are addressing, including the scope, history and causes of the problem. Describe the intended beneficiaries and

Response Type

Short Text

Qualitative

① To learn more details about narrative report Templates and how to create them, please refer to the Submission Template Guide section of the Amp Impact Submissions User Guide.

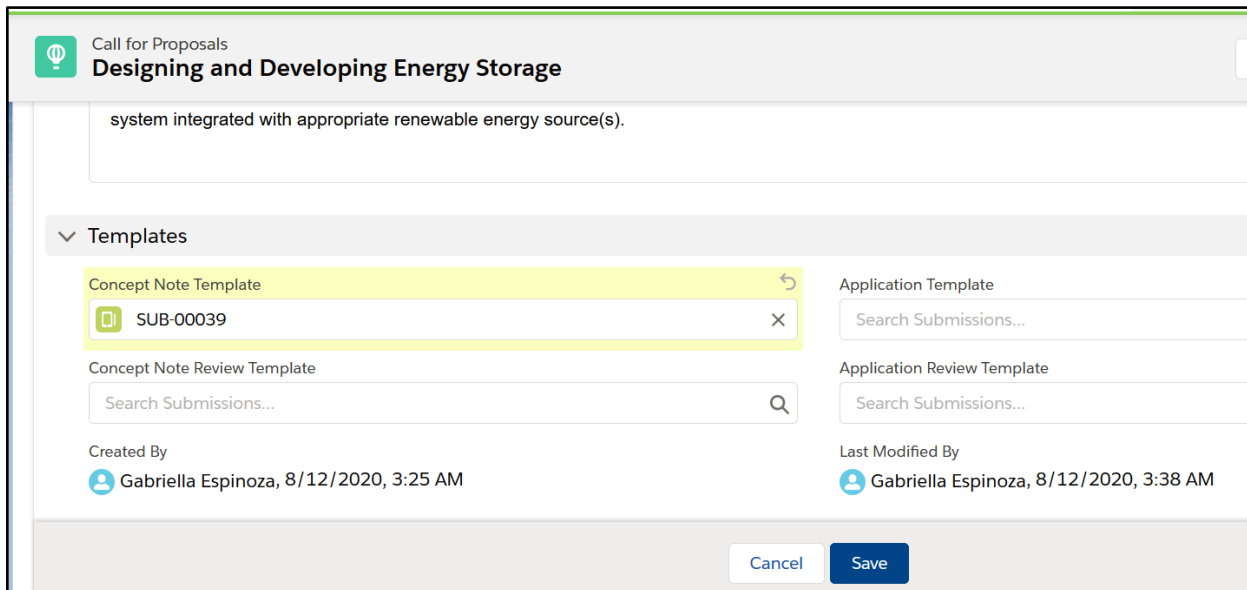
The grant coordinator may create the following narrative reporting Templates for the application process:

- Concept Note Template
- Concept Note review Template
- Application Template
- Application review Template

① Concept Note Template and Concept Note review Template are only needed if the grant-making organization follows a two-step application process

Link Narrative Reporting Templates

Once narrative reporting Templates are created, they need to be linked to the Call for Proposals. The grant coordinator can do that by navigating to the 'Templates' section on the 'Details' tab of the Call for Proposals record and filling out the four Template lookup fields.



Call for Proposals
Designing and Developing Energy Storage

system integrated with appropriate renewable energy source(s).

▼ Templates

Concept Note Template ↶
 SUB-00039 ✕

Application Template
 Search Submissions...

Concept Note Review Template
 Search Submissions... 🔍

Application Review Template
 Search Submissions...

Created By
 Gabriella Espinoza, 8/12/2020, 3:25 AM

Last Modified By
 Gabriella Espinoza, 8/12/2020, 3:38 AM

Cancel Save

Once the Templates are linked to the Call for Proposals:

- All related Concept Notes will be created with a narrative report based on the Template specified in 'Concept Note Template' field.
- All Application Reviews for those Concept Notes will be created with a narrative report based on the Template specified in the 'Concept Note Review Template' field.
- All related Applications will be created with a narrative report based on the Template specified in the 'Application Template' field.
- All Application Reviews for those Applications will be created with a narrative report based on the Template specified in 'Application Review Template' field.


Monitor and Approve Concept Notes (Optional)

Once the grant applicant has created a Concept Note, the grant coordinator can access it and request revisions on it.

📌 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 that's approved, grant applicants submit a full Application. If a one-stage process is used, proceed to [the next step](#).

View all Concept Notes Submitted for a Call For Proposal


To view all the Concept Notes submitted for a Call for Proposals, navigate to the 'Concept Notes' related list on the 'Related' tab on Call for Proposals.



Call for Proposals

Designing and Developing Energy Storage

Related
Details
Review Status
Files


Concept Notes (1)

Concept Note Name	Organization	Concept Note Stage
Develop cost effective solutions for energ...	SLSMW Ventures	In Progress
View All		

Access the Concept Note

To access the Concept Note, click on the Concept Note name in the related list to navigate to the Concept Note.

Assign/Edit Primary Contact to the Concept Note

By default, the primary contact on a Concept Note is the grant applicant who created the Concept Note. If the grant coordinator wants to assign someone else as the primary contact, they can do that updating 'Grant Applicant Primary Contact' lookup field on the 'Details' tab

Request Revisions on Concept Note

If the grant applicant has submitted the Concept Note and any revisions are needed, request revisions on it by sending an email using the Activity timeline on the Concept Note record. The Email Template 'Notify Grantees To Revise Concept Note' is available for grant coordinators to quickly create an email to notify grant applicants of requested revisions.

ⓘ Admin Note

The 'Notify Grantees To Revise Concept Note' Lightning Email Template must be imported before it can be used by grant coordinators. See the Grant Applications and Reviews Module Setup Guide for detailed instructions on how to set this up.

If revisions are requested on the Concept Note, the grant coordinator should:

- Update 'Concept Note Stage' from 'Submitted' to 'In Progress'.
- If revisions are requested in the narrative report, the 'Status' field on Submission record related to the concept note must be updated to be 'In Progress' again so that it becomes editable for the grant applicant.

Admin Note

The process to update Status of related Submission record to 'In Progress' when the Concept Note Stage is updated from 'Submitted' to 'In Progress' can be automated via [Process Builder](#) or a [Flow](#).

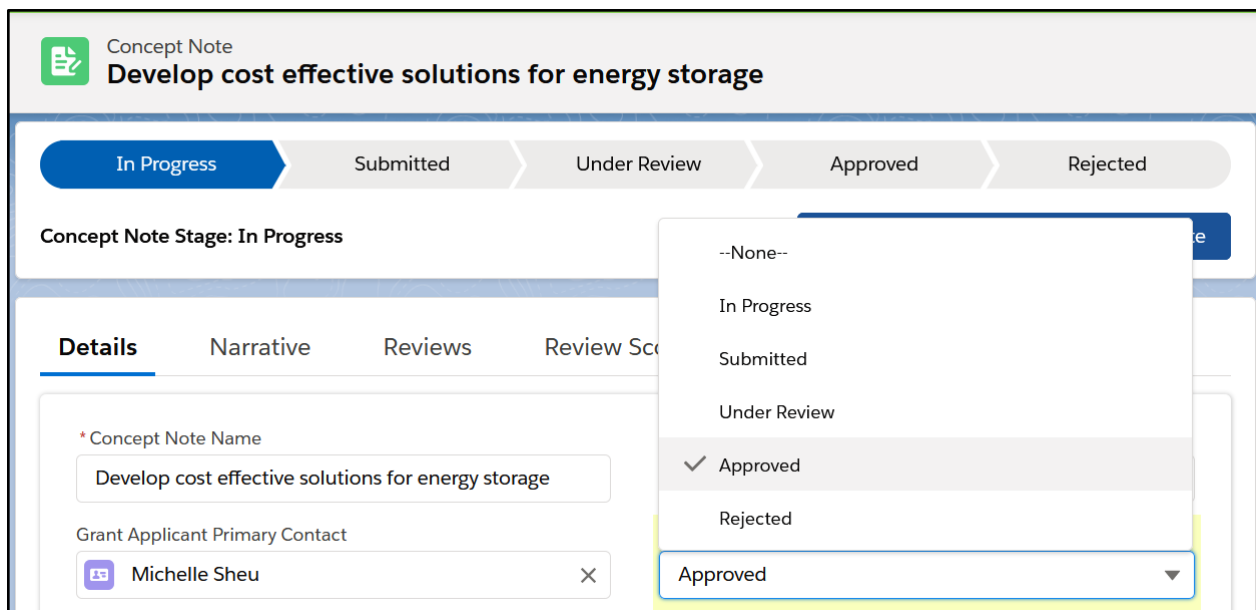
Once the applicant has submitted the concept note, the grant coordinator can [assign a reviewer to it](#), and [monitor the review](#) for the concept note.

Approve/Reject Concept Note

Once the reviewer has submitted the Concept Note review, the grant coordinator can approve the Concept Note by navigating to the 'Details' tab and updating the picklist field 'Concept Note Stage' to 'Approved'.

- If the Concept Note is approved, an Application for the second step of the application process is auto-created and contains the relevant information copied from the Concept Note.

The grant coordinator can also reject the Concept Note by updating the picklist field 'Concept Note Stage' to 'Rejected'.


Admin Note

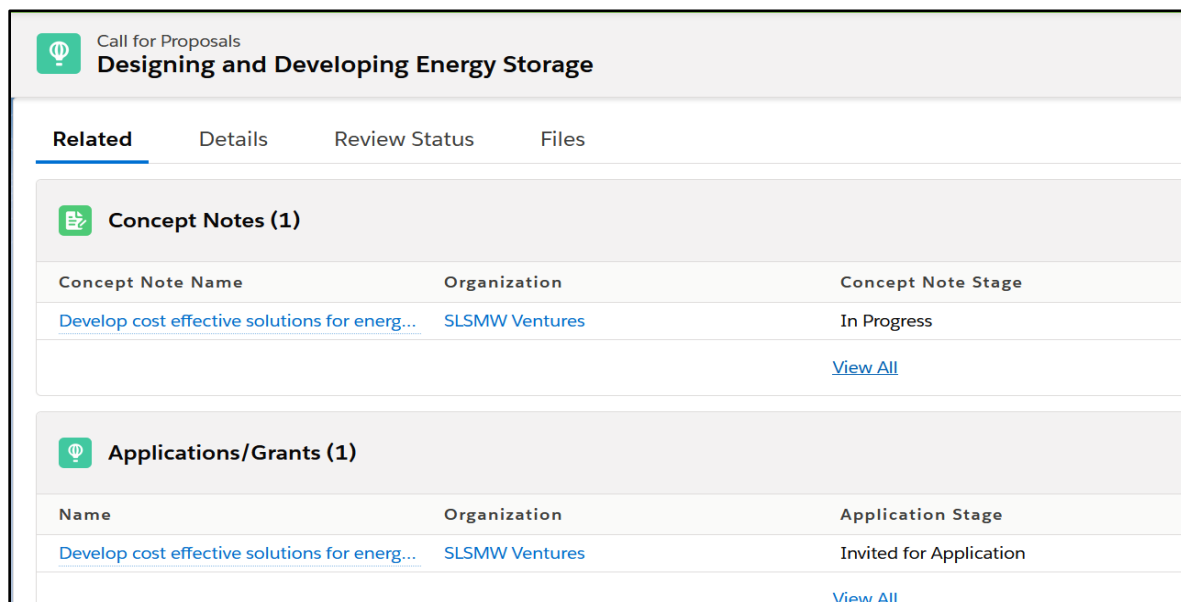
An [approval process](#) may be set up based on the 'Concept Note Stage' field to facilitate an organization's business processes.

Monitor and Approve Applications

Once the grant applicant has created an Application (in case of a single-step application process) or the Concept Note is approved (in case of a two-step application process), the grant coordinator can access it and request revisions on it.

View all Applications Submitted for a Call For Proposals

To view all the Applications submitted for a Call for Proposals, navigate to the 'Applications' related list on the 'Related' tab on Call for Proposals.



Call for Proposals
Designing and Developing Energy Storage

Related Details Review Status Files

Concept Notes (1)

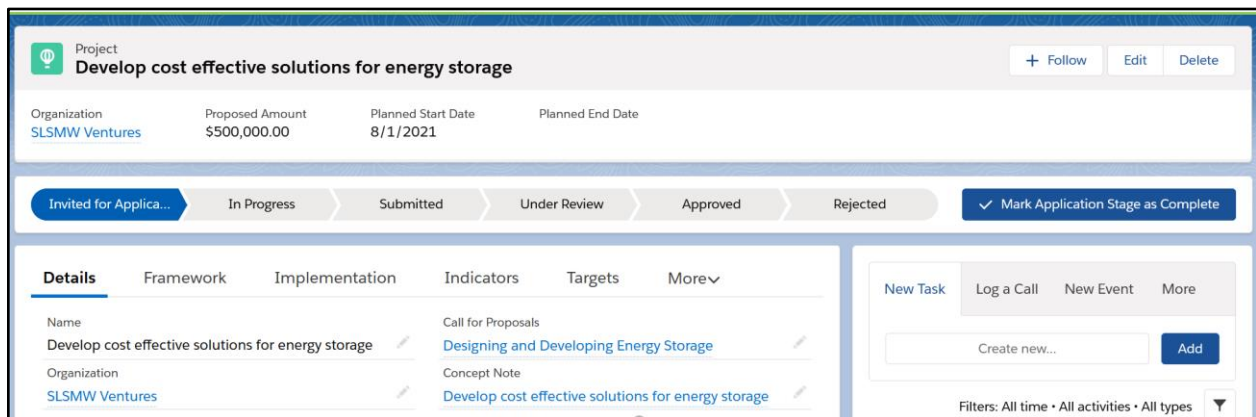
Concept Note Name	Organization	Concept Note Stage
Develop cost effective solutions for energ...	SLSMW Ventures	In Progress
View All		

Applications/Grants (1)

Name	Organization	Application Stage
Develop cost effective solutions for energ...	SLSMW Ventures	Invited for Application
View All		

Access the Application

To access the Application, click on the Application name in the related list to navigate to the Application.



Project
Develop cost effective solutions for energy storage + Follow Edit Delete

Organization: SLSMW Ventures Proposed Amount: \$500,000.00 Planned Start Date: 8/1/2021 Planned End Date:

Invited for Applica... In Progress Submitted Under Review Approved Rejected [Mark Application Stage as Complete](#)

Details Framework Implementation Indicators Targets More ▾

Name	Call for Proposals
Develop cost effective solutions for energy storage	Designing and Developing Energy Storage
Organization	Concept Note
SLSMW Ventures	Develop cost effective solutions for energy storage

New Task Log a Call New Event More

Create new... [Add](#)

Filters: All time • All activities • All types ▾

Assign/Edit Primary Contact to the Application

By default, the primary contact on an Application is:

- The grant applicant who created the Application, in case of a single-step application process.
- The grant applicant who created the Concept Note, in case of a two-step application process.

If the grant coordinator wants to assign someone else as the primary contact, they can do that by updating the 'Grant Applicant Primary Contact' lookup field on the 'Details' tab.

Request Revisions on Application

If the grant applicant has submitted the Application, the grant coordinator can request revisions on it (if any) by sending them an email using the Activity timeline on the Application. The Email Template 'Notify Grantees To Revise Application' is available for grant coordinators to quickly create an email to notify grant applicants of requested revisions.

ⓘ Admin Note

The 'Notify Grantees To Revise Application' Lightning Email Template must be imported before it can be used by grant coordinators. See the Grant Applications and Reviews Module Setup Guide for detailed instructions on how to set this up.

If revisions are requested on the concept note, the grant coordinator should:

- Update 'Application Stage' from 'Submitted' to 'In Progress'
- If revisions are requested in the narrative report, the 'Status' field on Submission record related to the application should be updated to be 'In Progress' again so that it becomes editable for the grant applicant

ⓘ Admin Note

The process to update Status of related Submission record to 'In Progress' when the Application Stage is updated from 'Submitted' to 'In Progress' can be automated via [Process Builder](#) or a [Flow](#).

ⓘ Once the applicant has submitted the application, the grant coordinator can [assign a reviewer to it](#), and [monitor the review](#) for the application.

Approve/Reject Application

Once the reviewer has submitted the application review, the grant coordinator can approve the Application by navigating to the 'Details' tab and updating the picklist field 'Application Stage' to 'Approved'.

- If the Application is approved, the Application is automatically converted to a Grant and contains the relevant information copied from the Application.

The grant coordinator can also reject the Application by updating the picklist field 'Application Stage' to 'Rejected'.

Admin Note

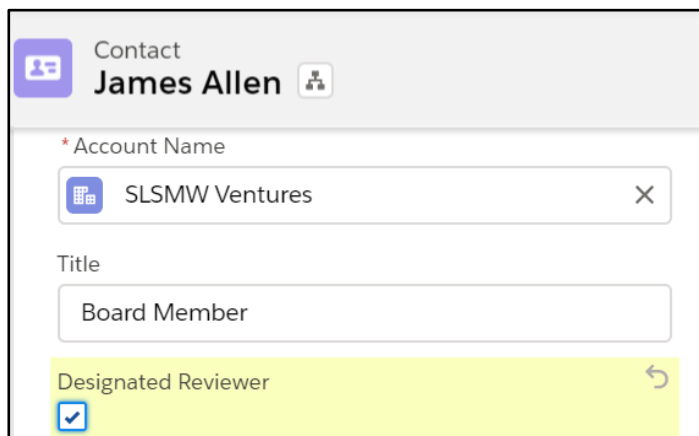
An [approval process](#) may be set up based on the 'Application Stage' field to facilitate an organization's business processes.

Assign Reviewer

Grant coordinators need to assign a reviewer to a Concept Note or Application so that the review process can begin. When a Concept Note or Application is submitted and the reviewer is assigned for them, an Application Review is automatically created and assigned to the reviewer.

Mark Reviewer Contact as a Designated Reviewer

Mark a Contact as a designated reviewer by navigating to the contact record and checking the 'Designated Reviewer' checkbox.

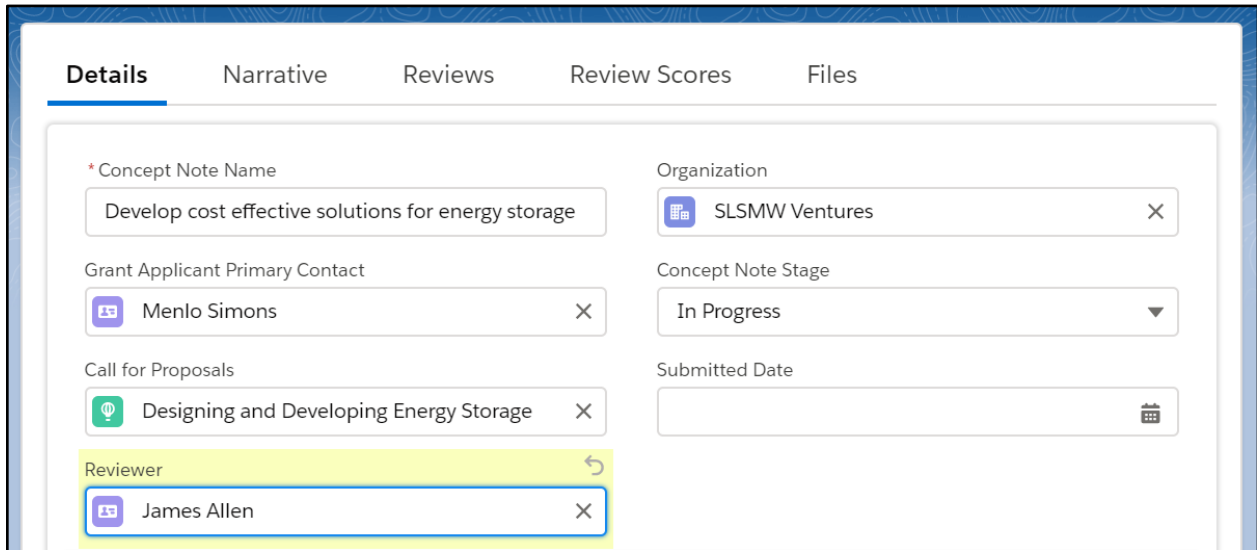


The screenshot shows a contact record for James Allen. The account name is SLSMW Ventures and the title is Board Member. The 'Designated Reviewer' checkbox is checked, and the field is highlighted in yellow.

If a Contact is not marked as a designated reviewer, the grant coordinator won't be able to assign them to a Concept Note or Application as a reviewer.

Add Reviewer to a Concept Note/ Application

Once a Contact is marked as a designated reviewer, assign them to a Concept Note or Application as a reviewer by navigating to the concept note or application record and updating the 'Reviewer' lookup field on the Details tab.



Details | Narrative | Reviews | Review Scores | Files

* Concept Note Name: Develop cost effective solutions for energy storage

Organization: SLSMW Ventures

Grant Applicant Primary Contact: Menlo Simons

Concept Note Stage: In Progress

Call for Proposals: Designing and Developing Energy Storage

Submitted Date: [Calendar icon]

Reviewer: James Allen

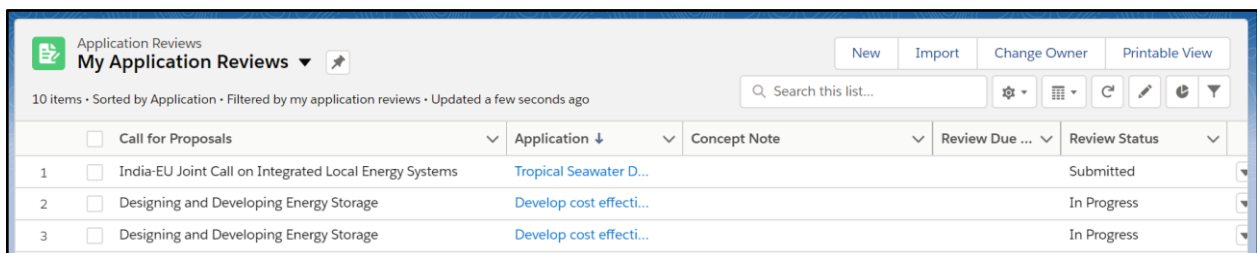
ⓘ If a reviewer is not assigned on a Concept Note or Application, the corresponding review record will not be created when the Concept Note or Application is submitted.

Monitor Reviews

The grant coordinator can monitor the reviews, track their progress, and remind reviewers to submit the reviews on time.

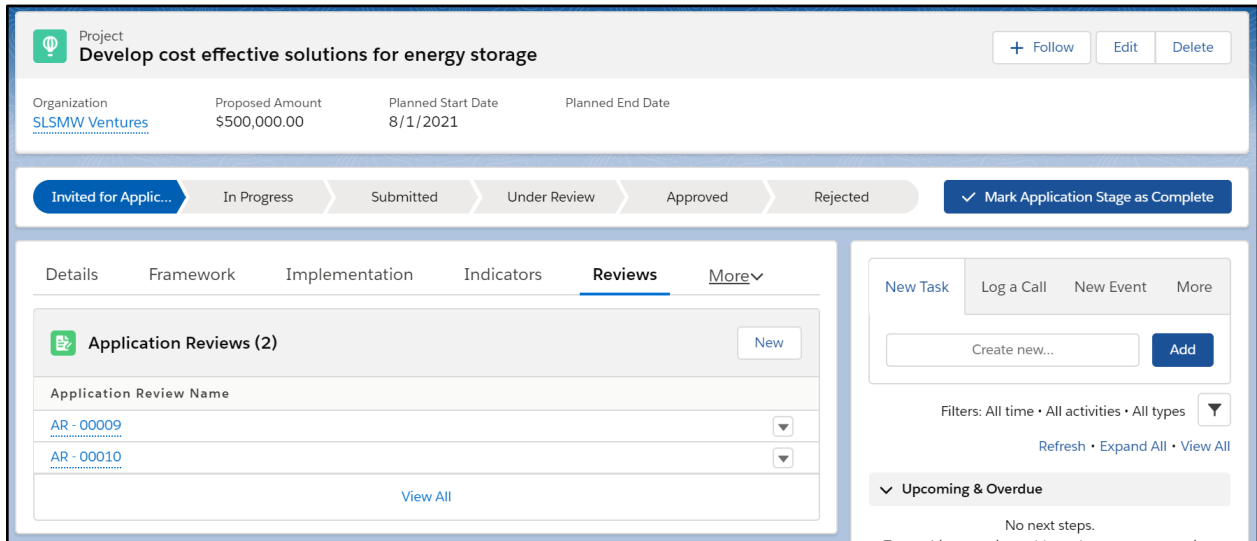
Track Progress of Reviews

Navigate to the 'Application Reviews' object tab to get a summary view of all the Application Reviews in the org.



	Call for Proposals	Application	Concept Note	Review Due ...	Review Status
1	<input type="checkbox"/>	India-EU Joint Call on Integrated Local Energy Systems	Tropical Seawater D...		Submitted
2	<input type="checkbox"/>	Designing and Developing Energy Storage	Develop cost effecti...		In Progress
3	<input type="checkbox"/>	Designing and Developing Energy Storage	Develop cost effecti...		In Progress

Alternatively, to check reviews related to a specific Concept Note or Application, navigate to the 'Reviews' tab on the Concept Note or Application record.



Project: **Develop cost effective solutions for energy storage**

Organization: SLSMW Ventures | Proposed Amount: \$500,000.00 | Planned Start Date: 8/1/2021 | Planned End Date: [blank]

Application Stages: Invited for Applic... | In Progress | Submitted | Under Review | Approved | Rejected | **Mark Application Stage as Complete**

Navigation: Details | Framework | Implementation | Indicators | **Reviews** | More

Application Reviews (2) [New]

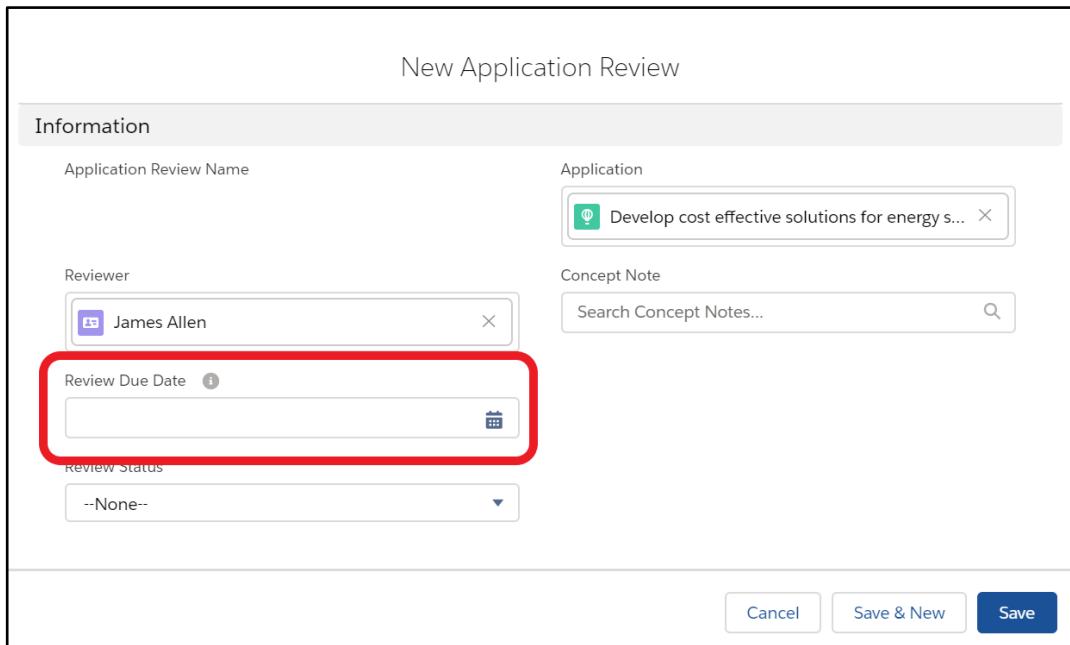
Application Review Name
AR - 00009
AR - 00010

[View All]

Right Panel: New Task | Log a Call | New Event | More
 Create new... [Add]
 Filters: All time · All activities · All types
 Refresh · Expand All · View All
 Upcoming & Overdue: No next steps.

Set Due Date on Reviews

On the concept note review or application review record, the grant coordinator can set a due date for the reviewer to submit the review.



New Application Review

Information

Application Review Name: [blank]

Application: [Develop cost effective solutions for energy s...]

Reviewer: [James Allen]

Concept Note: [Search Concept Notes...]

Review Due Date [calendar icon]

Review Status: [--None--]

[Cancel] [Save & New] [Save]

Remind Reviewers to Submit Review

An email alert is automatically sent to the reviewer 3 days in advance of the due date if concept note review or application review is not submitted.

If the grant coordinator wants to remind the reviewer (apart from the auto-email alert) they can send an email from the corresponding Concept Note or Application using the activity timeline. Email Templates are available for grant coordinators to conveniently send email reminders.

- Email Template 'Remind reviewer to complete the Concept Note review' is available on the Concept Note.
- Email Template 'Remind reviewer to complete the Application review' is available on the Application.

ⓘ Admin Note

The 'Remind reviewer to complete the Concept Note review' and 'Remind reviewer to complete the Application review' Lightning Email Templates must be imported before it can be used by grant coordinators. See the Grant Applications and Reviews Module Setup Guide for detailed instructions on how to set this up.

Check Review Status

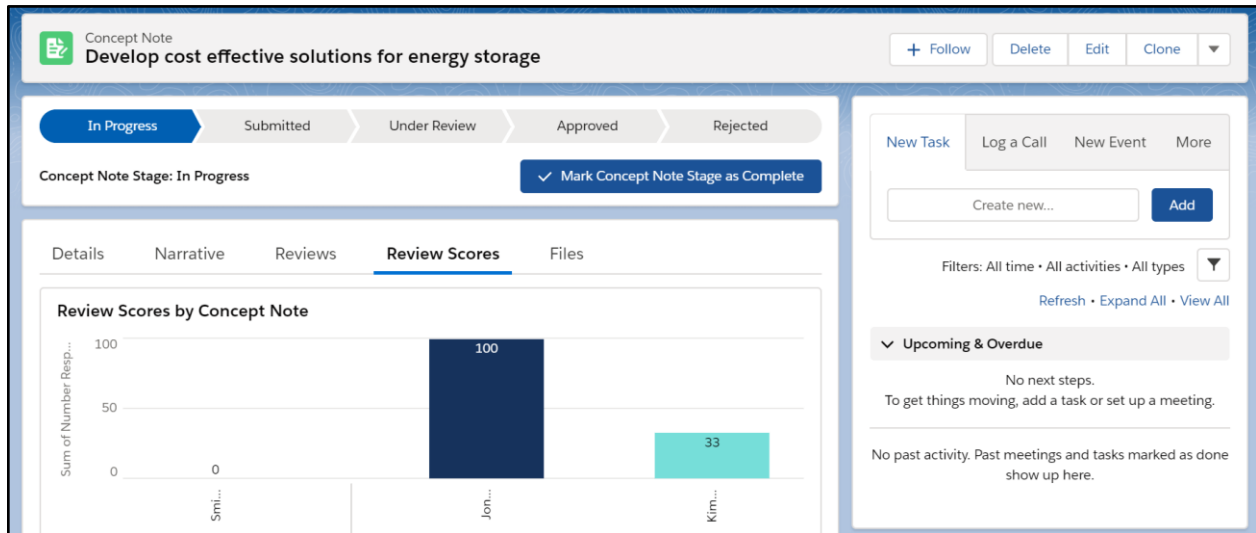
Grant coordinators can check the review status of all the Concept Notes and Applications related to the Call for Proposals by navigating to the 'Review Status' tab on the Call for Proposals record.

- Report chart 'Review Status by Application' displays the review status of all the Applications related to the Call for Proposals.
- Report chart 'Review Status by Concept Note' displays the review status of all the Concept Notes related to the Call for Proposals.



Track Review Scores

Grant coordinators can also track the review scores with the help of report charts on an Application or Concept Note. To view the review scores for an Application or Concept Note record, navigate to the 'Review Scores' tab. The report chart displays the review scores by sections.



ⓘ Out of the box, the report charts display the sum of number type responses by sections (this is based on the assumption that number type questions are used only to collect scores by reviewers).

If your organization uses review Templates with number type questions that collect any other information than review score or section score, please contact the system administrator to customize reports 'Review Scores by Concept Note' and 'Review Scores by Application' based on how review Templates are created.

Monitor Grant

Once an Application is approved and converted to a Grant, the grant coordinator can monitor it, schedule disbursements, approve modifications, and document communication on it.

Access the Grant

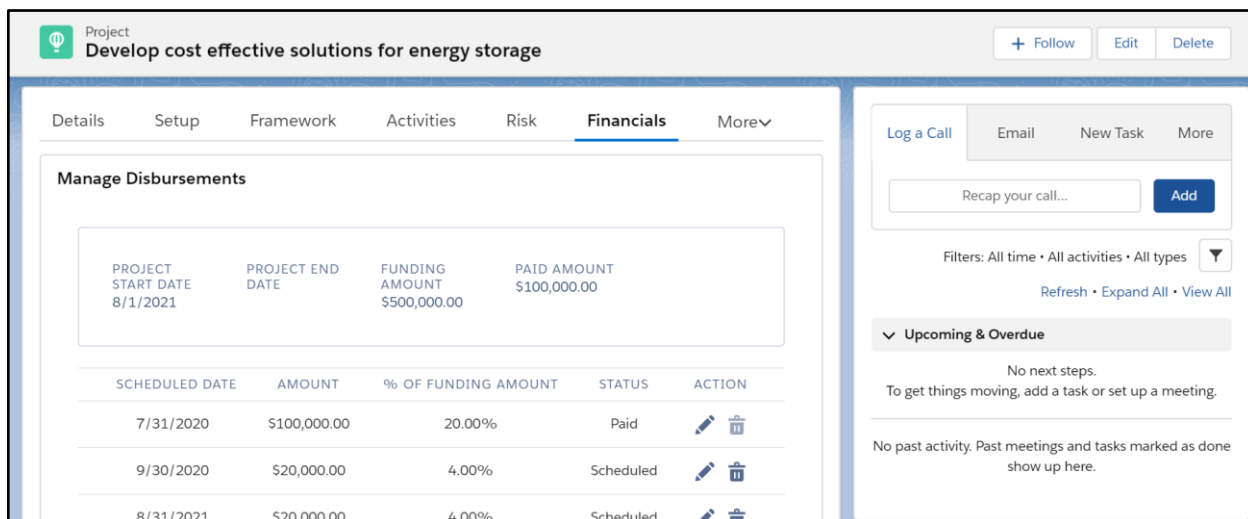
To access the Grant, navigate to the 'Applications/Grants' tab and click on the Grant name.

Schedule and Approve Disbursements

ⓘ Admin Note

An [approval process](#) may be set up based on the 'Status' field on Disbursement to facilitate an organization's business processes.

The grant coordinator can schedule Disbursements using the Disbursement table on the 'Financials' tab of the Grant.



Project: Develop cost effective solutions for energy storage

Details Setup Framework Activities Risk **Financials** More

Manage Disbursements

PROJECT START DATE	PROJECT END DATE	FUNDING AMOUNT	PAID AMOUNT
8/1/2021		\$500,000.00	\$100,000.00

SCHEDULED DATE	AMOUNT	% OF FUNDING AMOUNT	STATUS	ACTION
7/31/2020	\$100,000.00	20.00%	Paid	
9/30/2020	\$20,000.00	4.00%	Scheduled	
8/31/2021	\$20,000.00	4.00%	Scheduled	

Log a Call | Email | New Task | More

Recap your call...

Filters: All time • All activities • All types

Refresh • Expand All • View All

Upcoming & Overdue

No next steps.
To get things moving, add a task or set up a meeting.

No past activity. Past meetings and tasks marked as done show up here.

From the Disbursement table, the grant coordinator can:

- Create and schedule Disbursements using the 'Add New Disbursement' button.
- Edit or delete a Disbursement by clicking on the pencil icon or trash can icon respectively.
- Approve a Disbursement by updating the Disbursement's Status to 'Approved'.

When a Disbursement is approved, an email alert is automatically sent to the accounting team to initiate the Disbursement on the scheduled date.

📌 Admin Note

The term accounting team here refers to the public group added to the email alert `ampgm__Notify_Accounting_Team_to_Initiate_Disbursement` as recipients. For more details, please refer to the section 'Customize Email Automation' in the Grant Apps and Review Module Installation guide.

📌 To learn more about Disbursements, please refer to the Financials section in the Amp Impact User Guide.

Approve/Reject Grant Modification

The grant coordinator can access grant modifications requests by navigating to the 'Modifications' related list on the 'Setup' tab.

Modification Name	Type	Rationale	Status
3-month extension for ...	Costed Extension	Research and developm...	Requested

[View All](#)

To approve or reject the Modification:

- Click on the Modification name.
- Views all the details filled by the grantee
- Update the 'Status' picklist to 'Approved' or 'Rejected' and save the record
 - If the modification is approved, the grant coordinator can either incorporate the changes in the grant record or notify the grantee to make those changes themselves.

ⓘ Admin Note

An [approval process](#) may be set up based on the 'Status' field on Modification to facilitate an organization's business processes.

Update Grant Performance

Once the grantee has reported results for the grant indicators, the grant coordinator can indicate performance by updating the 'Grant Performance' picklist on the Details tab.

Country India	Funding Amount \$500,000.00
Parent Project Search Projects...	Overall Grant Performance --None--
Description Project Description The objective of this grand challenge is to develop cost effective solutions to address the challenge of energy access through an energy storage...	--None-- ✓ --None-- Poor Below Expectations Satisfactory Exceeds Requirements Exceptional
Created By Gabiella Espinoza, 8/12/2020, 4:27 AM	

Update Grant Stage

The grant coordinator can also update the Grant stage by updating the 'Project Status' picklist on the Details tab.