**Core Concept: Grants Overview**

|  |
| --- |
| Script |
| Welcome to the AmpliFund Core Concept video focused on a Grants Overview. |
| In AmpliFund you can track grants at all stages, including tracking grants you are planning to apply for, grants you’ve found but ended up deciding they weren’t a good fit, those where you’ve completed an application, and grants you’ve been awarded or denied.  With grants in AmpliFund you’ll be able to link them to both pre and post award performance and budget plans.  You can see analytics both at an individual grant level and your full grant portfolio.  As you build out your grants portfolio you can see historical performance, current trends and also plan for the future.  Finally you’ll be able to generate insightful reporting on grant details, budgets, etc. |
| Before you enter a grant into AmpliFund there are key pieces of master data you need to have added already.  You’ll need the organization or funder already entered in AmpliFund, you’ll need any related staff records entered.  If you intend to use subjects to tag grants, you’ll need the subjects fields in AmpliFund and finally you’ll need the applicable departments entered. |
| Let’s hop over to AmpliFund to enter our first grant and then we’ll dive deep into each data field and the functionality.  After logging into AmpliFund we land on the calendar and I’m going to navigate to Grants, then all Grants |
| To add my first grant I’m going to click on the plus icon in the top right icon tool bar. |
| This takes you to the Create Grant screen.  Let’s dive into the details of how you create a grant record.  First you’ll enter the name of your grant.  Then you’ll select the grantor, as you can see this is a drop down list that pulls from your list of organizations that you entered as master data.  If you’ve not yet entered the funder as an organization, navigate back to the organizations section to add the funder.  The next field is award type, which is defaulted to grant.  There are other options such as Contract or Loan in the drop down.  There is no functional difference in these options but you can filter and sort by this once you have multiple records entered.  Under the award status there are numerous options to accommodate both the pre and post award phases of your grant lifecycle and tracking of grants you are not awarded.  These include pre-award statuses like internal review or to be submitted and then also post award statuses such as Approved or Extended.  For our first example today as a pre-award grant I’ll enter “To Be Submitted”.  Based on the status you select the fields on the rest of the grants details page will change. |
| Next we start to dive into the pre-award information section.  There are numerous optional fields at the top such as RFP ID Number or CFDA Number.  If you indicate that a letter of intent is required and change that field to yes, then a required field will appear asking for the Letter of intent due date.  Populating this due date will make this letter requirement appear on your calendar.  Also here you can enter the open/close date for the proposal – if you enter these they will again appear on your calendar.  The next required field is the projected receipt date. |
| Now we’ll scroll down and see some additional fields.  The next required field is the proposed length of the award.  Enter the number of years and months.  We’ll say this grant is for 1 year.  You’ll note that if I don’t enter a number of months, this red text appears that indicates I need to enter the length.  Since this grant is 1 year, I’ll enter 0 in the months field and that red text will go away.  Next, we can add the grant writer, this drop down pulls from your list of staff.  In this field you can include multiple grant writers.  Grant Writers may view grant details, performance plans, and budget  plans. They cannot create, edit, or delete grant details, goals, or line  items in the budget.  Grant writers are also not able to run reports.  Then we can enter the department or departments.  If a department is assigned to a grant, every user who is assigned to that department will have access to the grant.  To add multiple departments click in the drop down area again.  Next we can add subjects, these are any tags you want to add to your grant, with subjects you can add 0, 1 or many subjects to a grant.  Next, I can add any additional staff that I want to have access to the grant or be assigned tasks for a grant.  These would be people outside of the departments I’ve already selected. Additional Staff may view grant details, performance plans, and budget plans. They cannot create, edit, or delete grant details, goals, or line items.  Additional staff do have access to run reports in AmpliFund.  The next entry option is projects, which is not included in our grant seeker core subscription so you may leave this blank. |
| Next you have options to add different descriptions or details about the grant, these are all optional fields but you can add as much or as little information as your organization desires here. |
| The next section is for our pre-award budget information.  These fields are all optional but can be useful for tracking and reporting.  As you enter information the total projected budget will calculate the total budget.  To break down these fields a bit further, the requested amount is the amount you are asking of the funder.  The cash match requirement is the amount your organization will match and finally, if applicable, the in-kind match requirement is the amount matched for goods or services. |
| The next section is the post award section.  Since I currently have this grant we are entering in a pre-award status, the only required field is the grant manager, who pulls from you list of staff.  Grant Managers have full access to edit grant details, and create, edit, and delete all items related to their grant. These users may also assign responsibility for goals and line items to other users.  While you can assign numerous grant writers and additional staff to a grant, there can only be one grant manager.  We’ll come back and enter a post award grant in just a moment and dive into these post-award fields deeper. |
| At this point I have all my pre-award information populated so I’ll click create and create our first grant.  After clicking create, I land on the grant details page, if you need to edit further you can click the pencil icon in the top right icon tool bar. |
| Now, let’s say we submitted our application for this grant and just heard back that we’ve been awarded the grant.  I’ll come back to this page and click the pencil icon to edit the grant.  This will allow us to view the post award fields, and also at the same time convert this grant to a post award status. |
| First I’m going to change the award status to Approved. |
| As I scroll through the grant details, if for any reason I need to change any of the fields I filled out during the pre-award status, I can update them as needed. |
| I’ll scroll down to the post-award information, and will now see that more fields are required.  Now I need to enter the date we were awarded and the start date of the grant.  You’ll notice the start date is pre-populated based on what I had entered in the projected receipt date and the end date is pre-populated based on the fact that I entered this is a 1 year grant.  Also there is a field for year 1 end date.  This date can be used for grants that start part of the way through the calendar year.  If during the awarding process any of these dates changed, they are editable now.  There is also an optional close out date field for when your final reporting is due for the grant. |
| As we continue to scroll down you can see additional optional fields you may want to use. |
| Next is the post award budget section.  While these are optional, they will feed into and validate against your budget tracking.  Enter your total awarded amount and any cash or in kind match.  The total budget at the bottom will update and total as you enter values in each field.  Finally, I’ll hit Save to update our grant record. |
| This takes me back to the grant details page, where if I need to edit I can hit the pencil icon in the top right icon tool bar.  The items that are in green and underlined you can click and will be taken to that record in AmpliFund.  Also on the grant details page, you’ll notice some new fields that are dynamic, such as total expenses and payments requested.  These are not editable via the grants section but will update as you take other actions in AmpliFund. |
| Through this Core Concept video, we’ve learned a basic overview of grants and how to enter a pre or post award grant record.  For additional information on grant records please visit our support site.  Thank you! |