**Core Concept: Project Overview**

|  |
| --- |
| Script  |
| Welcome to the AmpliFund Core Concept video focused on Project Overview.  |
| The project module in AmpliFund, allows you to link one or more grant to a overall project and/or segment a grant into multiple projects.  Through setting up projects you can plan and track both performance and budgets at the project level giving you access to advanced analytics and reporting.  Let’s review some examples of how you might use projects.  |
| First, you can take multiple grants and link them in AmpliFund to one project.  In the box is a visualization of how that could look.  If you have a project or initiative focused around a larger goal with multiple grants feeding that goal, this can be a great use for project.  You can link initiatives, locations, years and issues via project.  If you receive multi year grants where the awarded amount changes year to year or you don’t know what each years’ award will be, using project with separate grants per year can enable more robust reporting.    |
| In our first example the customer is focused on improving their city infrastructure, they’ve received grants for roads, parks and buildings.  This customer built a project to link those 3 grants together.  In our next example, we have a customer with an initiative on senior community outreach.  Each year they receive a separate grant from a foundation supporting this initiative.  This customer set up a project to tie these grants together.  In our final example, we have a health system customer focused on improving patient education, each hospital in their system receives a grant to fund improvements in patient education.  This customer created a project to link together all the hospital grants.  |
| With this first use of project where we can link multiple grants to one project, you can tie performance plans and budgets from each grant to the project and vice versa – you can have a performance plan and budget at the project level.  Additionally, it is not required to have all items in your grant/project link together, so if you have a situation where a grant funds something not related to the project it is linked to you can report that separately from the project budget.  |
| This is how a budget could look if not all categories are reflected in the grants and project.  In the project you could have categories that are broken into numerous grants – like here with supplies, construction and personnel.  These grants each have one additional category that is not related to the grant of travel and training.  Those categories can still appear under the grant and reporting can be leveraged at the grant level, but you do not need to link those categories or line items to your project budget.  |
| Another way to use project is to breakout multiple initiatives that are funding by a single grant.  In the box you can see how multiple projects can be linked to one grant in AmpliFund.  You can also use projects to breakout multiple locations supported by one grant.  |
| Some examples of how customers are using this might be, if you receive a grant from the department of transportation then use that to fund initiatives of highway resurfacing, improving signage and accident reduction, those can be separate projects linked to one grant.  Next could be a grant by the department of economic development where there are projects focused around small businesses, career placement and training.  Finally, you could have a grant that supports initiatives at numerous sites like in our third example where a health system received a grant for drug safety and wants to track projects at each of their hospitals.  |
| The performance and budget capability are the same for using the project features to link multiple projects to a grant.  You can have linked performance and budget plans from the projects to the grant, but again it is not required for every goal or line item to be linked.  |
| By using project there are some other important features to be aware of.  There are user roles associated with projects, users can be assigned as a project admin or user.  Project admins can create, view, and edit all project records. In addition, Project Admin can view all grants linked to their projects.  Project users can add achievements and expenses assigned to them, and can view and edit all projects assigned to them. They can also view any grants linked to their projects. Project Users are classified as Salary or No Salary. Project Users (No Salary) cannot create, view, or edit personnel line items on a grant’s or project's budget.  Also at the project level you assign a project manager and have the option of assigning additional project staff.  Project Managers have full access to edit project details, and create, edit, and delete all items related to their project. These users may also assign responsibility for goals and line items to other users.  Project Additional Staff can view project details, performance plans, and budget plans. They cannot create, edit, or delete project details, goals, or line items.  Projects have tools available including tasks, notes, documents and the email manager.  If you assign grants to a project you can add the project column to your grants grid.  And finally, we have a project budget report available where you can track budgeted funds and actuals at the project level.  |
| Now that you know a bit about how projects can be used, consider how this might fit with your grant portfolio and consult with AmpliFund on potential uses.  After you’ve worked with your implementation team to identify your goals with using project, how you’d map projects and grants together and the structure, then you’ll be ready to build out your project portfolio in AmpliFund.  |
| Through this Core Concept video, you’ve learned about projects in AmpliFund.  Should you have any additional questions, please reference our support site.  Thank you!  |