

Rotary Charities – Assets for Thriving Communities Grant – Applicant User Experience Guide

Created 7/9/2018, Updated 8/27/2018

1. URL <https://rotarycharities.smapply.io/> - This is the homepage for our grant applications.

The screenshot shows the homepage of the Rotary Charities grant application portal. At the top, the browser address bar displays <https://rotarycharities.smapply.io/>. In the top right corner, there are two buttons: "Log In" and "Register". The "Register" button is highlighted with a blue circle. Below the navigation bar is the Rotary Charities logo, which consists of a colorful circular pattern of dots and the text "ROTARY CHARITIES Resources for change." Below the logo is the text "Rotary Charities".

Welcome to our grant application portal. To learn more about our grant programs or to begin preparing an application, simply click the "MORE" button beneath the desired grant program below.

First time users: You will need to register yourself or your organization before you can prepare an application. Click the "REGISTER" button above to begin.



Returning users: Simply log in above to prepare or view your application(s).

Programs

Search programs..

Program Name	Application Period	Amount	Action
Seed Grant	Accepting applications on May 29 2018 12:00 AM (EDT)	Up to \$10,000	MORE >
Assets for Thriving Communities	Accepting applications from May 29 2018 12:00 AM (EDT) to Sep 14 2018 11:59 PM (EDT)	Up to \$150,000	MORE >

2. On the page, you can scroll down to view all four of our current grant programs.

Programs  

Seed Grant
Accepting applications on May 29 2018 12:00 AM (EDT)
Organizations and individual applicants can apply.
Up to \$10,000 [MORE >](#)

Assets for Thriving Communities
Accepting applications from May 29 2018 12:00 AM (EDT) to Sep 14 2018 11:59 PM (EDT)
Organizations and individual applicants can apply.
Up to \$150,000 [MORE >](#)

Systems Change Accelerator
Accepting applications from May 29 2018 12:00 AM (EDT) to Sep 14 2018 11:59 PM (EDT)
Organizations and individual applicants can apply.
Up to \$150,000 [MORE >](#)

Changemaker Fellowship
Accepting applications on May 29 2018 12:00 AM (EDT)
Individual applicants can apply.
Up to \$20,000 [MORE >](#)

3. You can either A) click “MORE” to view a little more detail about a grant program, or B) click “Log In” or “Register” to access or create your account. By clicking “MORE” you are directed to the following grant program page...



Assets for Thriving Communities

Purpose: Support for **community assets** that help create prosperity that is **broadly experienced**.

Value
Up to \$150,000

[APPLY](#)

Open to
Organizations and individual applicants can apply.

Opens
May 29 2018 12:00 AM (EDT)

Deadline
Sep 14 2018 11:59 PM (EDT)

4. And then click "APPLY" to enter the name of your project and begin the application process...

The screenshot shows the Rotary Charities website interface. At the top right, it says "You are currently". The Rotary Charities logo is centered at the top, with the text "ROTARY CHARITIES" and the tagline "Resources for change." below it. A modal dialog box titled "Name your application" is open in the center. It has a close button (X) in the top right corner. Inside the dialog, there is a text input field labeled "Title of Project" containing the text "Assets Test 5". Below the input field are two buttons: "CANCEL" and "CREATE APPLICATION". The "CREATE APPLICATION" button is highlighted with a blue circle. In the background, there is a card titled "Assets for Thriving" with the text "Purpose: Support for com... experienced." and another card titled "Value Up to \$150,000" with an "APPLY" button. Below the "APPLY" button, there is text: "Open to organizations and individual applicants can apply.", "Opens May 29 2018 12:00 AM (EDT)", and "Deadline Sep 14 2018 11:59 PM (EDT)".

5. Once you have named your project, click "CREATE APPLICATION", at which point you may be redirected to log in with Survey Monkey Apply...

[Return to Rotary Charities](#)

Apply

Log in with

f t G

OR

Email

Password

Forgot your password?

LOG IN


Don't have a SurveyMonkey Apply account? [Register here](#)

6. Simply fill in the fields if you are a returning user, or click the small link at the bottom to register yourself or your organization.

7. Back at the homepage, if you choose to log in or register first (number 3 from above), before viewing a specific grant program and naming your project, simply click on “Log In” or “Register” at the top of the homepage...

https://rotarycharities.smapply.io/

Log In Register


ROTARY CHARITIES
Resources for change.
Rotary Charities

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Programs

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8. Which will take you to the log in page shown above, or to the following registration page...

[Return to Rotary Charities](#)

Register with

[f](#) [t](#) [G](#)

OR

Register as an individual
 Register as an organization


First name Last name

Email

Password

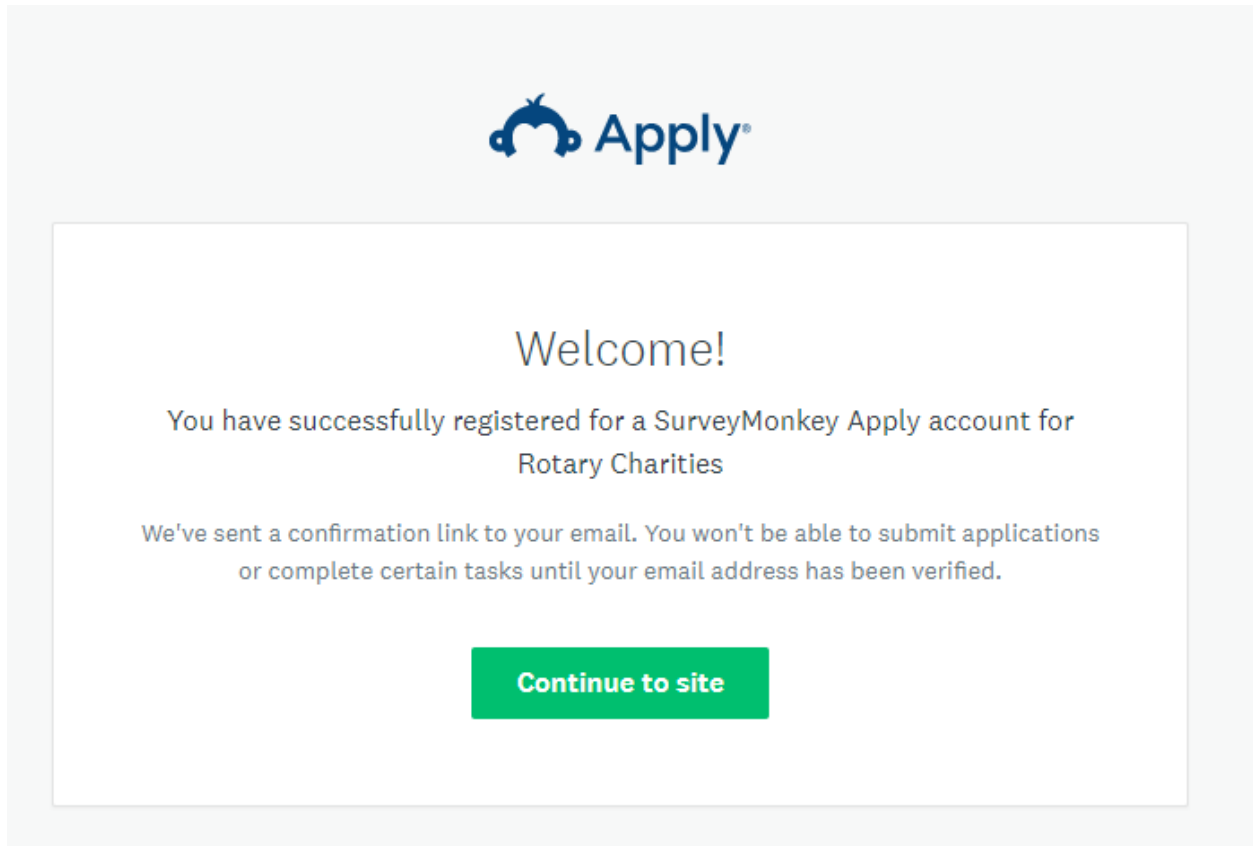
Confirm password

By registering for an account, you agree to our [terms of service](#) and [privacy policy](#).

I'm not a robot  reCAPTCHA
Privacy - Terms

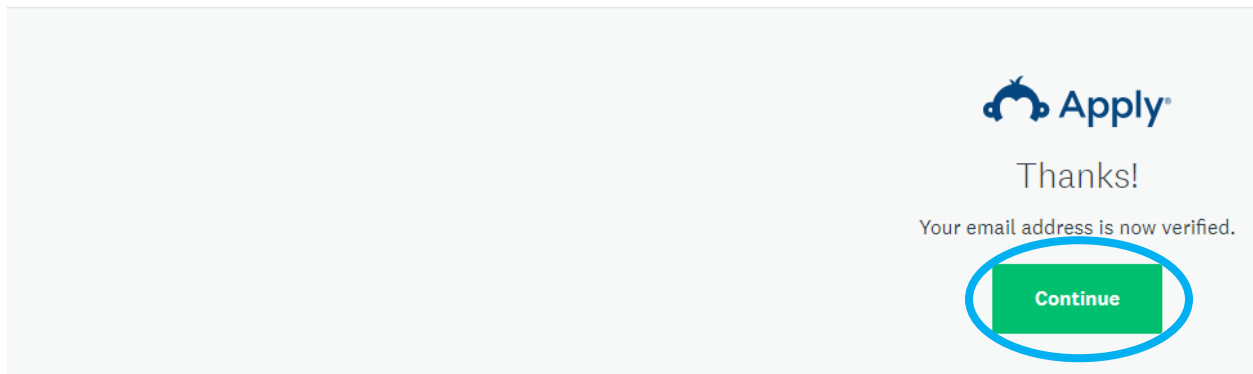
CREATE ACCOUNT

- Simply register to create a new account for yourself OR your organization, (**PLEASE NOTE:** If you or your organization has ever used Survey Monkey Apply or Fluid Review to apply for funding, even if through a different foundation, try using those login credentials first – they should work).



- And then follow the prompts via email to complete your account setup. Once you've clicked through your email prompts, click "Continue" to access the Rotary Charities site.

[Return to Rotary Charities](#)



No applications.

Please choose a program from our program listings page to get started

[View programs](#)

11. Click the “View programs” button to access the grant programs page. Then, click “MORE” on the grant program of choice, to start your application...



Programs

Search programs..



Seed Grant

Accepting applications on May 29 2018 12:00 AM (EDT)

Organizations and individual applicants can apply.

Up to \$10,000

[See my application](#)

[MORE >](#)

Assets for Thriving Communities

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[See my application](#)

[MORE >](#)

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Accepting applications on May 29 2018 12:00 AM (EDT)

Individual applicants can apply.

Up to \$20,000

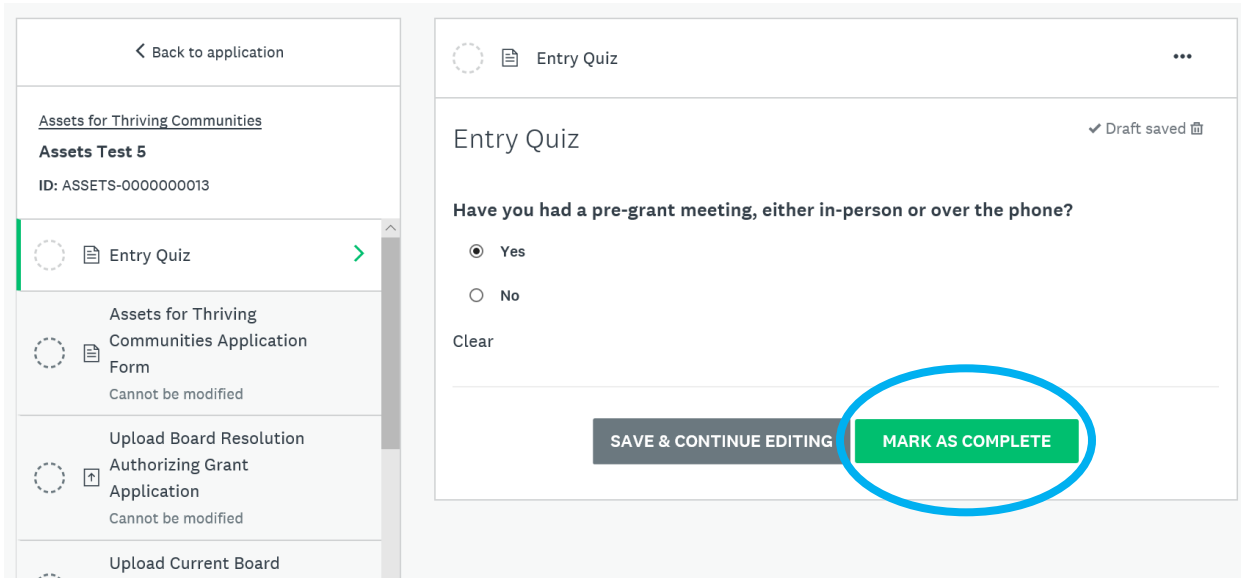
[MORE >](#)

12. You will be brought to your application dashboard which displays your progress (upper left), your basic project information (upper right), and your application tasks (lower right). You can also add collaborators (lower left) to contribute to your application...

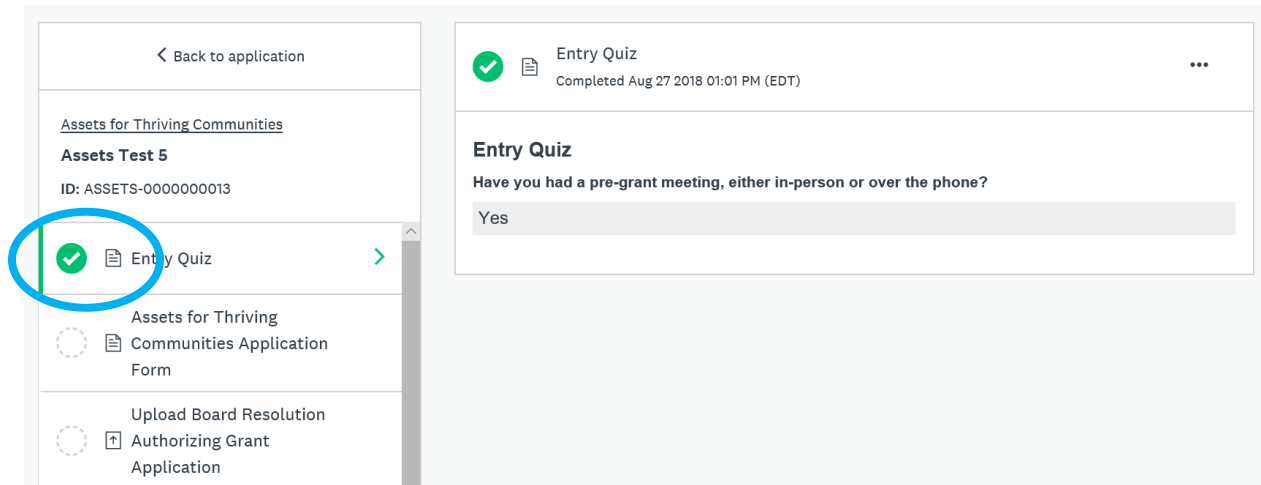
The screenshot shows a dashboard for 'Assets for Thriving Communities'. On the left, a progress bar indicates '0 of 7 required tasks complete'. Below it, a 'REVIEW & SUBMIT' button is highlighted with a blue circle. The user's name 'Evan Gray (Owner)' and email 'evanjgray@gmail.com' are shown, with an 'Add collaborator' button also highlighted. The main content area shows 'Assets Test 5' with ID 'ASSETS-000000013'. Below this is a 'Your tasks' list where the 'Entry Quiz' task is highlighted in yellow. Other tasks include 'Assets for Thriving Communities Application Form', 'Upload Board Resolution Authorizing Grant Application', 'Upload Current Board Members and Affiliations', 'Upload Most Recent Tax-Year Audit or Return', 'Upload Current and Most Recent Tax-Year Balance Sheet', and 'Upload Current Operating Budget, Including Expenses and Revenues'. The URL '/prog/assets_for_thriving_communities/' is visible at the bottom left.

13. Click on the top task, "Entry Quiz," from your task list.

14. Complete the entry quiz questions. Then, to truly complete each task, click the green “MARK AS COMPLETE” button....



15. A green check mark will then appear on your task bar showing that task as complete...



16. Select the next task in the task bar and work your way through the application. After completing all the tasks, your progress tracker will show “7 of 7 required tasks complete.” At this point you can review and submit the application...

Assets for Thriving Communities

Assets Test 5
ID: ASSETS-0000000013

- ✓ Entry Quiz
- ✓ Assets for Thriving Communities Application Form
- ✓ Upload Board Resolution Authorizing Grant Application
- ✓ Upload Current Board Members and Affiliations
- ✓ Upload Most Recent Tax-Year Audit or Return

Upload Current and Most

7 of 7 required tasks complete

Last edited: Aug 27 2018 01:11 PM (EDT)

REVIEW & SUBMIT

Deadline: Sep 14 2018 11:59 PM (EDT)

Upload Current Operating Budget, Including Expenses and Revenues
Completed Aug 27 2018 01:11 PM (EDT)

Grant App - Test Upload XLS
Added: Aug 27 2018


17. Which allows you to review your application, download it, submit it officially, and also see that it is 100% complete...

[← Back to application](#)

Assets for Thriving Communities [🔗](#)

Assets Test 5



ID: ASSETS-0000000013 Last edited: Aug 27 2018 01:11 PM (EDT)

 Evan Gray (Owner)
evanjgray@gmail.com



[📄 Download](#)

Your tasks

Application Stage 100.0% complete ⌆
Last edited: Aug 27 2018 01:11 PM (EDT)

  **Entry Quiz** Completed: Aug 27 2018 | ⌆

Entry Quiz
Have you had a pre-grant meeting, either in-person or over the phone?

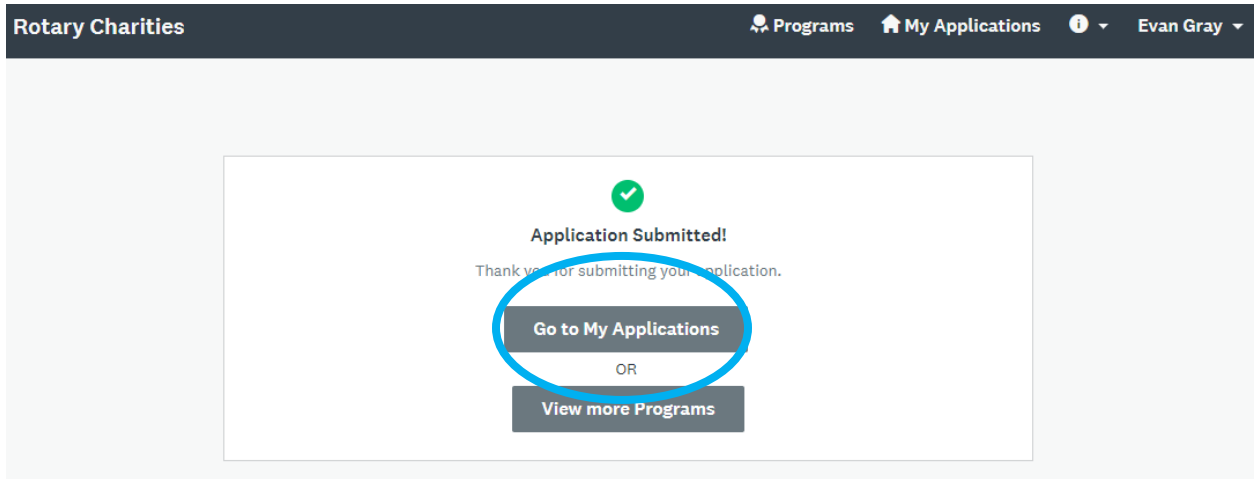
  **Assets for Thriving Communities Application Form** Completed: Aug 27 2018 | ⌆

Assets for Thriving Communities Application Form
Applicant Information

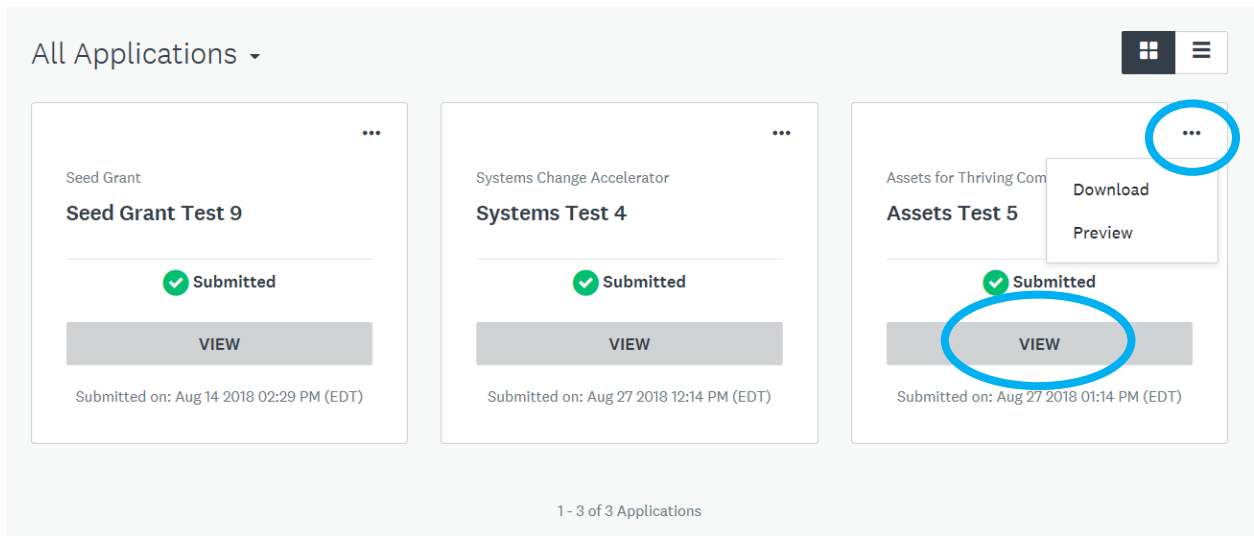
Organization Name

[SUBMIT YOUR APPLICATION](#)

18. After you've submitted your application, you will not be able to make changes, but you will be able to view or download your work...



... By clicking on the three dots in the upper right of the application link, you will see options to Download or Preview (meaning simply to view) your complete application.



19. After submitting you will also receive a Thank You email and your application will now be available to the team at Rotary Charities for review...

Assets for Thriving Communities Grant Application Received ▶ Inbox x

noreply@smapply.io [Unsubscribe](#)

1:14 PM

 to me ▾

Rotary Charities

Hello Evan Gray,


Thank you for submitting your grant application. We will begin our initial review of applications soon, and will reach out if we have any questions. Once our initial review is complete, we will let you know if your application has been selected to move forward to our second round of reviews.

All the best!

Rotary Charities Staff

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