



**ROTARY**  
**CHARITIES**  
*Resources for change.*

# Using Survey Monkey Apply to manage your grant applications



Login or register at  
[rotarycharities.smapply.io](https://rotarycharities.smapply.io)

Use this link  
or access the link at the  
bottom of each grant page on  
our website

The screenshot shows the Rotary Charities website navigation and content. The top navigation bar includes: About Us, Impact Areas, Grants & Investments (highlighted), Learning & Coaching, and Resources & Support. A dropdown menu for 'Grants & Investments' lists: Our Grants, Seed Grants, Assets for Thriving Communities, Systems Change Accelerator, Changemaker Fellowship, Learning Fund, Our Grantees, Guidance for Grant Seekers, Grant Criteria, and Investing for Impact. The main content area features a 'Getting Ready' section with the text: 'We have additional resources to support the convening, engagement, and preparation activities that will prepare your initiative for a strong application.' Below this is a bulleted list: 'Seed Grants fund preparatory work.', 'Learning about ways to build better community assets through the Changemaker Fellowship.', and 'We offer learning experiences for changemakers to build the skills to work better together and build community assets that are responsive to community needs. We make an effort to keep these fresh, and there is always something new to learn - check out our Learning Experiences to see what's coming up.' The 'Get Started' section follows, with text: 'Begin by scheduling a Pre-Grant Meeting with Kristin. Before you meet with our staff, please review the Grant Seeker's FAQ.' 'Prepare for your application by reading through the application questions.' 'Watch our 2020 grant training and the breakout session for this grant category.' 'When you're ready, apply online (troubleshooting guide here)'. The 'apply online' link and its associated text are circled in red in the original image.

# Log into an existing account or register as a new user

**Apply**

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Rotary Charities

Log In Register ⓘ

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).

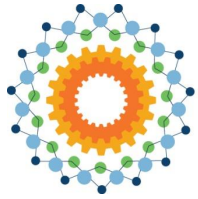
Programs  [Grid Icon] [Menu Icon]

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

Up to \$10,000 [MORE >](#)

**Assets for Thriving Communities**  
Accepting applications from Jan 18 2022 07:00 AM (EST) to Mar 1 2022 11:59 PM (EST)

Up to \$50,000 [MORE >](#)



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# How to register for the first time

Register for an applicant account

Register with

OR

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 

1. Click Register
2. Fill in the name & email of the best contact for grants at your organization.  
Note: This person will become the *primary administrator* for your organization's Survey Monkey Apply account.
3. Save your username & password.
4. Follow the prompt to verify your account with the email provided.

Note: We are not able to help you recover your login info or assist with any other account logistics. You will need to contact SurveyMonkey Apply directly. Please do not create more than one account for your organization.

# Create your organization

To apply for programs on behalf of an organization, we need the following information about your organization.

**Organization name**


**Address (optional)**

**City (optional)**  **Country (optional)**

**Organization phone number (optional)**  **Organization email (optional)**

**Website (optional)**

[CONTINUE](#)

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- Fill in your organization's information
- If you plan on applying as a collaborative/network, the fiscal agent should register their organization.



# Select your grant type

- Select the type of grant you are applying for by clicking More
- Complete application directions
- Once you start an application, you can access it at any time before it's submitted to edit information

The screenshot displays the Rotary Charities website interface. At the top, there is a dark navigation bar with the text 'Rotary Charities' on the left and 'Programs', 'My Applications', and 'Kendra Luta' on the right. Below this is a white header area with a lock icon and 'Tester Organization' on the left, and 'Manage organization' on the right. The main content area features the Rotary Charities logo and tagline. A 'Programs' section is visible, containing a search bar and a grid of four grant cards. Each card includes the grant name, application dates, and a 'MORE >' button.

Grant Type	Amount	Application Period
Seed Grant	Up to \$10,000	Accepting applications on May 29 2018 12:00 AM (EDT)
Assets for Thriving Communities	Up to \$50,000	Accepting applications from Jan 18 2022 07:00 AM (EST) to Mar 1 2022 11:59 PM (EST)
Systems Change Accelerator	Up to \$150,000	Accepting applications from Jan 18 2021 07:00 AM (EST) to Mar 1 2022 11:59 PM (EST)
Changemaker Fellowship	Up to \$20,000	Accepting applications on May 29 2018 12:00 AM (EDT)



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# Where is my application??

Access previous grants or grants not yet submitted

Rotary Charities Programs My Applications Kendra Luta

Tester Organization Manage organization

If you see the "No Applications" notification and you believe you have started one, please look to the upper left of your screen and select the organization for which you are applying - there should be an arrow for a drop-down list with your associated organizations. Click on the organization. You should then see a list of your current applications.

All Applications ▾

Assets for Thriving Communities  
**Test for SM Apply process**  
ASSETS-0000000096  
Tester Organization  
Deadline: Mar 1 2022 11:59 PM (EST)

0 of 8 required tasks complete

**CONTINUE**

Last edited: Jan 24 2022 03:41 PM (EST)

1. Click My Applications in the upper right of the page
2. Click Continue on an open grant you'd like to edit
3. Click on the grant name to look at grants already submitted



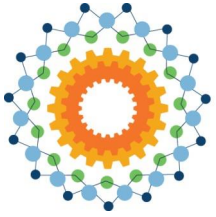
## Using *Teams* in SM Apply

A screenshot of the Rotary Charities SM Apply web interface. The top navigation bar includes "Rotary Charities", "Programs", "My Applications", and a user profile for "Kendra Luta". Below this, the "Tester Organization" page is shown, with a "Manage organization" button circled in red. The main content area has tabs for "Profile", "Members", and "Teams", with "Teams" also circled in red. Under the "Teams" tab, there is a "Create team" button circled in red, a search bar, and a table with columns "Name" and "# of members". The table is currently empty, displaying "There is no data to display". At the bottom, there is a pagination control showing "Page: 1 (1 - 0 of 0)" and a refresh icon.

1. Select Manage organization on your organization's main page.
2. Select Teams
3. Click Create team
4. Create a team name that is reflective of your internal program OR your network

This may be useful for:

- Organizations that have multiple program administrators who may apply for grants in different program areas over the years.
- Organizations who have multiple contributors for the same application
- Those applying for a grant on behalf of a network/collaborative initiative.



# Adding members to your organization

Rotary Charities

Programs My Applications Kendra Luta

Tester Organization Manage organization

Profile **Members** Teams

0 Actions Add member Search...

<input type="checkbox"/>	Name	Email	Role	Teams	Last login	Signup date	Active
<input type="checkbox"/>	KL Kendra Luta	luta.kendra@gmail.com	Primary administrator		Today	Today	✓

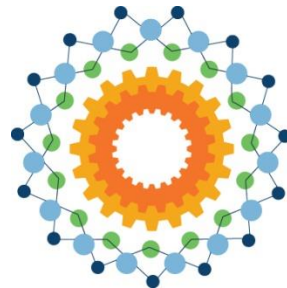
Page: 1 (1 - 1 of 1) 25

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1. Select Manage organization on your organization's main page.
  2. Click Members.
  3. Select Add member.
    - Fill in member name
    - Determine role\*\*
    - Add to a team
- Check the Box "Notify member by email that they have been added"

\*\*Only *primary administrator* for your organization's account can create *teams* and invite *members*. Only a primary administrator can assign another member as an *administrator*. Only administrators can **create** or **submit** applications. Members can **edit** applications.





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If you have questions throughout the application process, reach out to Kendra Luta at [kluta@rotarycharities.org](mailto:kluta@rotarycharities.org).



## Using *Teams* in SM Apply

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