Vumelana
ADVISORY FUND

*Transaction advisory services
for community private
partnerships*

HOW TO REGISTER AND SUBMIT
AN APPLICATION

JUNE 2014

Contents

1.   Where to start: www.vumelana.org.za

a.   Access all the information on the invitation and the application procedures from the Vumelana website (www.vumelana.org.za).

b.   You can access information on how to submit an application as well as the application form by clicking in the banner **Apply for support** banner on the Home page or by clicking on **Apply for support** menu option on the left.

2.   Transaction Advisory Online Application Form landing page

a.   When you are on the **Apply for support** page on the Vumelana website, and you are ready to submit an application, click on the **Submit an application** block; you will go to the **Transaction Advisory Online Application Form landing page**.

b. Information on how to register and use your user name and password, reminds you to save regularly, informs you that you will be automatically logged out after 20 minutes of inactivity

b.   The landing page contains the following information:

  o   On the left hand side it:
    -    Shows you how to register and use your user name and password
    -    Reminds you to save regularly
    -    Informs you that you will be automatically logged out after 20 minutes if you are inactive

  o   On the right hand side it:
    -    Provides some general background information on Vumelana and who can apply
    -    Provides the deadline for submissions
    -    Provides the application and assessment guide
    -    Provides a read-only copy of the application form

- Provides a contact email address (applications@vumelana.org.za) for queries on the application procedures and/or any technical difficulties you might experience.

3.   How to register as a user

a.   On the **Transaction Advisory Online Application Form landing page** you will see a **Login** block on the right-hand side.

b.   Next to **Username** type in your email address

c.   Then click on the +**click here to register**+link

b. Type in your email address

c. Click to register
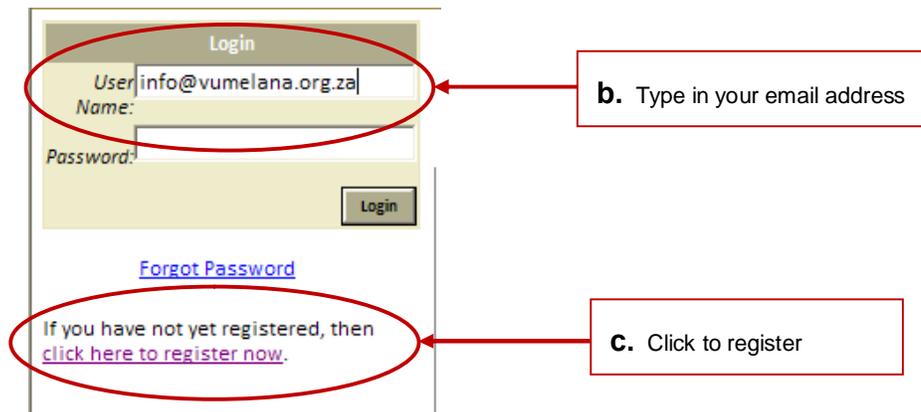
d.   The landing page will open in a new window with a **Registration** block (top left) where you will complete your registration details; once you have completed your details, click on the **Register** button.

d. Click to register

e.   The following **User Registration** pop-up block will appear.

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f.   This pop-up will contain your user name (the email address that you used to register) and your password (generated by the system).

g.   You can change your password once you have logged in by using the **Profile & Password** option (top left)

Home

Profile & Password   ←   **g.** Change your password here

Log out
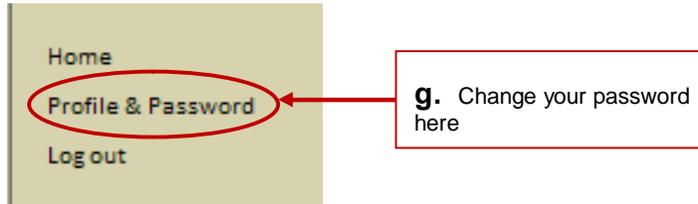
h.   Once you have registered, you will receive an email with your user name and password. Remember to check your junk mail/spam folder if the email does not arrive in your Inbox.

i.   You will use this password to submit this application as well as any future applications in next funding rounds.

j.   If you forget your password, please don't try and register again . enter your email address into the user name box, and click the **Forgot Password** link above and your password will be emailed to you.

4. **Manage your application on the Home page**

a.   Now that you have registered as a user, you can complete and submit an application by using the user name and password provided to you in the **User Registration** pop-up block and the registration email.

b.   You can change your password once you have logged in by using the **Profile & Password** option (top left).

b. Change your password here

c.   Once you have logged in, you will be on the **Home** page of the application. The **Home** page contains important information that will assist you to create and submit an application. The screenshot below provides a summary with more information that follows in points **d** to **f.**

Transaction Advisory Services Online Application Form

Url: oaHomeGeneric/oaHome.aspx Access: FULL User: test@vumelana.org.za Timeout: 23 min and 53 sec

d. Guidelines on how to complete the application form

Click here for guidelines on how to complete this application form, and contact person details if there are problems

e. See the list of applications you are busy working on or have submitted with their status

MY APPLICATIONS AND WORK

Click on ✎ to edit or to view. This list contains all your current applications and review work.
The list of review work includes all submitted in the last 21 days REFRESH

There are no items to display.

CREATE A NEW APPLICATION

Click on the green plus (+) sign on the right hand side of the row to create a new application. You do not have to complete the application in one go - you can work on it, save it, exit, come back later and edit it from the list above.

Reference	Grant Window	Window Description	Type	Closing Date / Time	
FR01	Funding Round 1	Funding Round 1	Application	28/02/2013 12:00:00	
FR02	Funding Round 2	Funding Round 2	Application	01/03/2013 12:00:00	
FR03	Funding Round 3	Funding Round 3	Application	22/02/2013 12:00:00	
FR04	Funding Round Four	Funding Round Four	Application	30/12/2013 11:30:00	+
FR00	Funding Round Initial	Funding round Initial	Application	28/02/2013 10:30:00	

f. Click on the + to create a new application

PREVIOUS CALLS

Click on the Click on 🗔 icon on the right hand side of the row to view submitted applications for the call.

There are no application items to display.

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d.   GUIDELINES ON HOW TO COMPLETE AN APPLICATION FORM (see screenshot on page 8 on where to find this on the **Home** page)**:**

- o   If you click on the guidelines link, you will download a this document that contains some Guidelines on how to complete the application form. A brief summary of the key tips below:
  - -   Fields marked with an astrix (*) are mandatory, and you will not be able to submit your application if these fields are not completed.
  - -   If you have missed a mandatory field, you will see a prompt at the top of the page listing the fields still to be completed.
  - -   You can print a read only copy of the application form before completing and before submitting your application (i.e. directly after registering, once you are on the **Interested Parties** page, you will see a link in the top left corner that reads "**Print read only application form**", this is visible on all pages).
  - -   The application form has a timeout of 20 minutes and you will be automatically logged out . remember to save regularly by clicking on the save button.
  - -   The application form consists of 6 pages, indicated by tabs at the top of the page. After completing each page, save the page before you move onto the next page.
  - -   Some sections require that you upload additional / supporting information . this should be done in the Document Uploads page. All documents should be in word (.doc or .docx), excel (.xls or .xlsx) or PDF . no JPGS will be accepted.
  - -   Do not include spaces when you capture telephone numbers.
  - -   Additional instructions and comments to assist you in successfully completing the application form are provided on the right-hand side of each page.
  - -   If you have any queries, please send an email to applications@vumelana.org.za.

e.   MY APPLICATIONS AND WORK (see screenshot on page 7 on where to find this on the **Home** page)**:**

- o   If you are busy working on or have submitted an application, you will see the list of applications here with their status.
- o   If the application status is **Registered**, it means that you are still working on the application and can click on the ⊕ to view or edit your application.
- o   If the application status is **Submitted by online user**, it means that the application has been submitted. You have 24 hours to change your mind, unsubmit the application and edit it again (as long as its before the closing date deadline). To edit again, just click on the ⊕. If you unsubmit, you still need to submit the application before the deadline date.

Url: oaHomeGeneric/oaHome.aspx **Access:** FULL **User:** lisaherbst@gmail.com **Timeout:** 23 min and 51 sec	

Click here for guidelines on how to complete this application form, and contact person details if there are problems.

MY APPLICATIONS AND WORK

Click on ⊕ to edit or to view. This list contains all your current applications and review work.
The list of review work includes all submitted in the last [21] days **REFRESH**

Number	Grant Window	Project Name	Prog	Type	My Role	Application Status		
FR04/103	Funding Round Four	Testing Locality	VAF	Application	Lead PI	Registered	30/12/2013	⊕
FR01/1062	Funding Round Four	Batlhabine Farms	VAF	Application	Lead PI	Submitted by online user	30/12/2013	⊕

e. See the list of applications you are busy working on or have submitted under **Application Status**

f.   CREATE A NEW APPLICATION (see screenshot on page 7 on where to find this on the **Home** page)**:**

o   You will be able to create a new application for the specific funding round by clicking on the [+] . More detail on how to create an application follows under point 6.

Reference	Grant Window	Window Description	Type	Closing Date / Time	
FR01	Funding Round 1	Funding Round 1	Application	28/02/2013 12:00:00	
FR02	Funding Round 2	Funding Round 2	Application	01/03/2013 12:00:00	
FR03	Funding Round 3	Funding Round 3	Application		
FR04	Funding Round Four	Funding Round Four	Application		
FR00	Funding Round Initial	Funding round Initial	Application		

CREATE A NEW APPLICATION
Click on the green plus (+) sign on the right hand side of the row to create a new application. You do not have to complete the application in one go - you can work on it, save it, exit, come back later and edit it from the list above.

f. Click here to create a new application

5.   Funding Round 6 (open 13 June 2014)

a.   Vumelana is launching its 5th Call for Applications to support the development of Community Private Partnerships (CPPs).

b.   When you are on the **Home** page, you will see a total of 6 funding rounds (*i.e. FR01 – Funding Round 1; FR02 – Funding Round 2; FR03 – Funding Round 3; FR04 – Funding Round Four; FR05 – Funding Round Five; FR00 – Funding Round Initial*) under **CREATE A NEW APPLICATION**

Transaction Advisory Services Online Application Form

Url: oaHomeGeneric/oaHome.aspx **Access:** FULL **User:** test@vumelana.org.za **Timeout:** 23 min and 53 sec

Home
Profile & Password

Click here for guidelines on how to complete this application form, and contact person details if there are problems.

b. Under **CREATE A NEW APPLIOCATION** you will see 6 funding rounds

MY APPLICATIONS AND WORK
Click on 🔍 to edit or to view. This list contains all your current applications and review work. The list of review work includes all submitted in the last [21] days [REFRESH]
There are no items to display.

CREATE A NEW APPLICATION
Click on the green plus (+) sign on the right hand side of the row to create a new application. You do not have to complete the application in one go - you can work on it, save it, exit, come back later and edit it from the list above.

Reference	Grant Window	Window Description	Type	Closing Date / Time	
FR01	Funding Round 1	Funding Round 1	Application	28/02/2013 12:00:00	
FR02	Funding Round 2	Funding Round 2	Application	01/03/2013 12:00:00	
FR03	Funding Round 3	Funding Round 3	Application	22/02/2013 12:00:00	
FR04	Funding Round Four	Funding Round Four	Application	30/12/2013 11:30:00	
FR00	Funding Round Initial	Funding round Initial	Application	28/02/2013 10:30:00	

c. Click on the **+** to create a new application

PREVIOUS CALLS
Click on the Click on 🗐 icon on the right hand side of the row to view submitted applications for the call.
There are no application items to display.

c.   To create an application for Funding Round 5, click on the **+** next to Funding Round Five.

d.   More detail on how to create an application follows under point 6.

6.   How to create a new application

a.   On the **Home** page, under **CREATE A NEW APPLICATION**, click on the ➕ ; this will open the **Vumelana Project Registration Page**.

b.   Complete the details as requested and click on the **Register Application** button . see screenshot below:

c.   You will see a pop-up with a reference number; click **Continue**.

d.   Once you click **Continue**, you will be on the first page of the application form . the **Interested Parties** page.

e.   You can now start to populate your application form.

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7.   What does the application form look like?

a.   The application form consists of <u>6 pages</u>, indicated by tabs at the top of the page. After completing each page, save the page before you move onto the next page.

b.   The 6 pages are:

- o **Interested parties:** This page requests information on the Communal Property Institution, the Investor, Government officials involved and other relevant parties. See the read-only online application form for more information.

- o **Transaction Advisory Team:**   This page requests information on the Transaction Advisor, Community Facilitator, Legal Advisor and CPI Administrator. Please note that additional information should be provided i.e. CVs to demonstrate experience, financials etc. Vumelana reserves its rights to conduct due diligence and checks on information provided and may request additional information. See the read-only online application form for more information.

- o **Community Information:**   This page requests information specific to the community, the land claim, land ownership, beneficiaries and the Communal Property Institution.   See the read-only online application form for more information.

- o **Planned Development:** This page requests information on the proposed project and includes information on the locality of the project, a project description, the proposed investment value, concept feasibility etc. See the read-only online application form for more information.

- o **Risk Management and Finances:** This page requests information on the risks associated with the project as well as the proposed mitigation measures, and the proposed budget against a price ceiling of R600,000.00 per project. See the read-only online application form for more information.

- o **Document Uploads:** You need to upload all the supporting documentation that has been requested throughout the application form onto the **Document Uploads** page. When uploading documents, please remember that you can only upload one document at a time and you must wait for the upload to complete before uploading the next document. See the read-only online application form for a full list of what is required.

| Interested Parties	Transaction Advisory Team	Community Information	Planned Development	Risk Management and Finance	Document Uploads
		INTERESTED PARTIES			
FR04/126	Final test				
Print read only application form			CHANGE PROJECT NAME	VALIDATE	SUBMIT

c.   You move from one page to the next by clicking on the different tabs.

8.   How do I submit my application?

- o Once you have completed all the required information and uploaded all the required supporting documents, you are ready to submit your application (you can click on the **Validate** button to see what information is missing before submitting your application).
- o To submit your application, click on the **Submit** button (top right).

To submit your application, click here

- o Your application will be checked for missing information; if there is any missing information, you will see an **Application Validation** pop-up with a list all the information still outstanding.
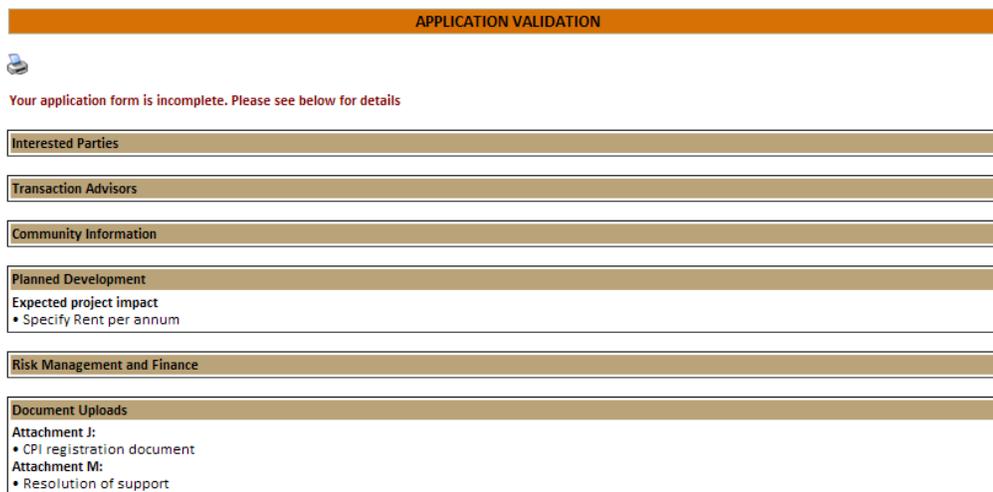
- o You can now go back and make corrections where applicable.
- o Once all corrections have been made, you can click on the **Submit** button again.
- o If your application is complete, you will see an **Application Validation** pop-up that indicates no missing information.

- o Click on the **Submit** button.

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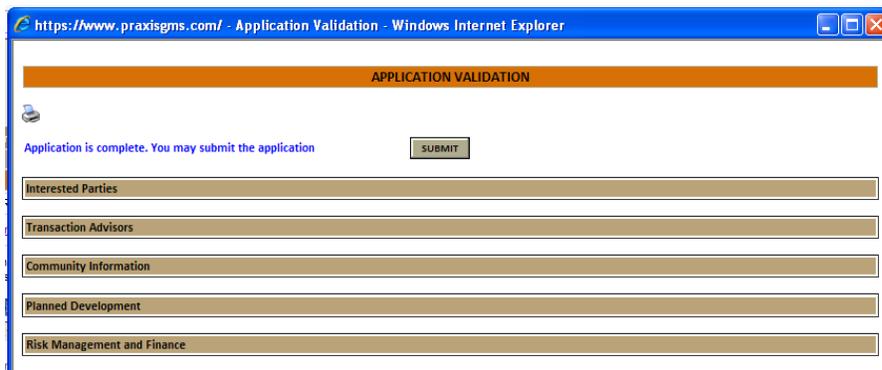
o   You will see the pop-up below:

o   If you go back to the **Home** page, you will see your application under the **MY APPLICATIONS AND WORK** section with the status as **Submitted by online user.**

o   You will receive an email acknowledging receipt of your application.

o   You will also be able to print a read only copy of your completed application by clicking on the **Print read only application form** link.

o   PLEASE NOTE: You have 24 hours to change your mind, unsubmit the application and edit it again (**as long as it's before the closing date deadline**). To edit again, just click on the   .   **If you unsubmit, you still need to submit the application before the deadline date.**

9.   Some general information, guidlines and tips

a.   What if I want to get a list of all the required information before I complete the online application?

- o You can print a <u>read only</u> copy of the application form before completing and submitting your application by clicking on the **Print read only application form** link; this is visible on all pages once you have registered the project.
- o You will also find the <u>read only</u> copy of the application form on the application information page on the Vumelana website (<u>www.vumelana.org.za</u>) and on the Transaction Advisory Online Application Form landing page.

- o See a summary of the required supporting documentation that should be submitted below:

| On the Transaction Advisory team |
| --- |
| CV'ςs for transaction advisor, legal advisor and community facilitator |
| Financial statements of advisory firms |
| **On the land** |
| Proof of the community's rights to the land
This could be a deed of transfer, restitution award or similar, title deeds, permission to occupy or similar documents that confer the right to develop the land |
| **On the CPI** |
| Signed resolution from the CPI supporting the approach to Vumelana |
| Latest Financial statements |
| Record of the most recent Annual General Meeting |

On government approvals
If approvals are required and have been secured the supporting documentation should be provided
On the proposed project
Any additional information on the proposed project. This can include business plans, feasibility studies, financial models etc.

b.   What if I get stuck while completing my application and do not have the user guide with me?

- o   On the right hand side on every page you will find some general instructions that will assist you in completing the application.

c.   How do I know if I have missed required information?

- o   If you click on the **Validate** button, you will see a pop-up screen that provides you with a list of all the fields that you are still to complete.
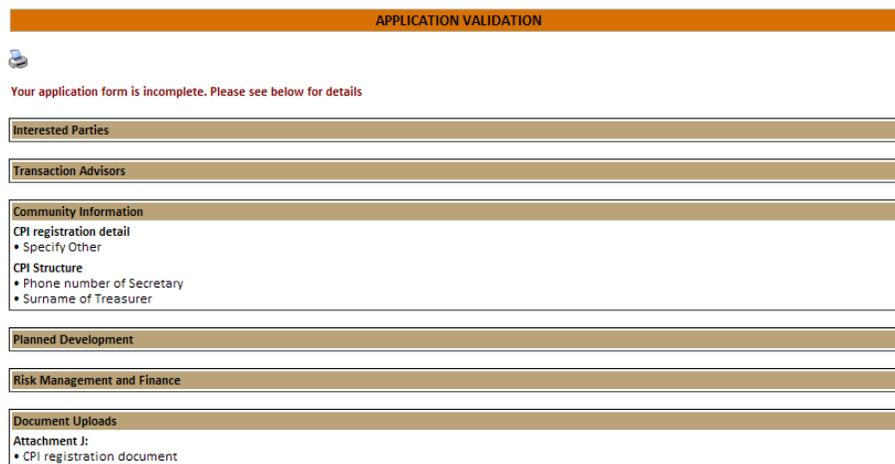
d.   How do I know what is compulsory information?

- o   Fields marked with an astrix (*) are mandatory, and you will not be able to submit your application if these fields are not completed.

e.   What if I need to attach additional / supporting documents?

- o   Some sections require that you upload additional / supporting information . this should be done in the **Document Uploads** page. All documents should be in word (.doc or .docx), excel (.xls or .xlsx) or PDF . no JPGS will be accepted.
- o   You can only upload one document at a time.
- o   Fully complete a section before clicking on the **Document Uploads** page to upload the additional / supporting information. Once you click on the **Document Uploads** page, you will move away from the section that you are busy with and your record will saved as is. You will have to click on the ✏ to complete the record.

f.   How do I save and edit my information?

- o After completing a section, remember to save by clicking on the **Save** button; once you have saved, the information will uploaded onto the system.

- o To change the information after you have saved, click on the ✏ ; once you have made your changes, click on the **Upload** button for the new information to be saved.
- o To delete the record and replace with a information, click on the ✖.

g.   What should I do if I have any queries?

- o If you have any queries when completing the application form, please send an email to **applications@vumelana.org.za**.