

# USER GUIDE

## DISTRICT GRANTS MANAGEMENT SYSTEM



### INTRODUCTION

Welcome to the district grants management system user guide. The intent of this guide is to provide you with all the information you need to access and use District 7010's online district grants management system easily and effectively.

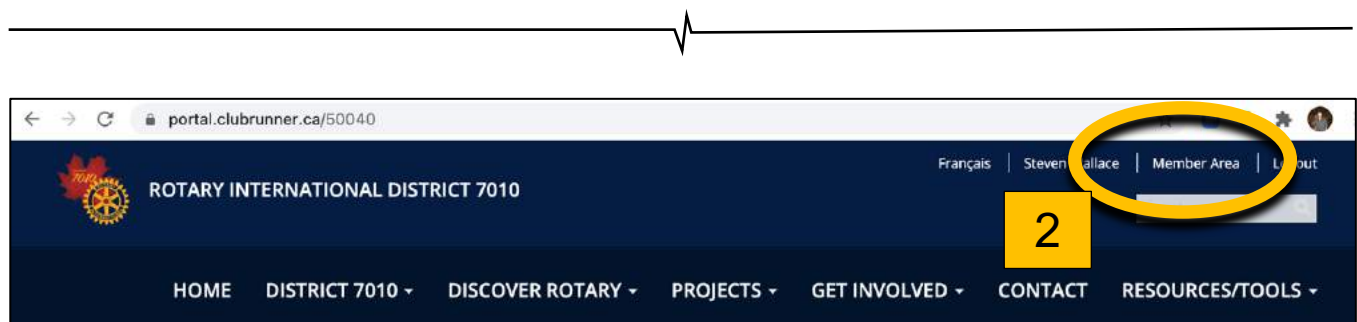
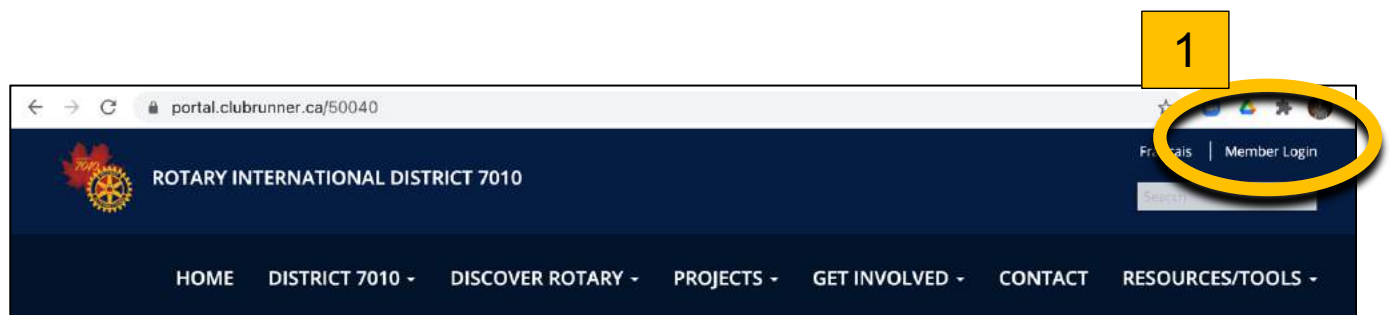
Clubs "qualify" each Rotary year to participate in District 7010's District Grants Program. Clubs must meet the following criteria to qualify:

1. one member (preferably 2) must complete the online [Foundation Grants Certification Training](#),
2. appoint a Foundation Chair and input his/her name into Rotary Club Central and ClubRunner,
3. establish a goal to support Annual Fund and Polio Eradication on Rotary Club Central,
4. Club President and President Elect sign and implement the [Club Memorandum of Understanding](#) (MOU),
5. be current with District and RI dues, and
6. be current with all District and Rotary Foundation grants (reports and closeout).

The district grant program is administered using an online management system. Qualified Club members create and submit grant applications and reports using the online system. District grant administrators process and manage those applications and reports using the same system.

### GRANT SYSTEM ACCESS

Only people who have completed the annual grants training will have access to the District's online grant management system. To access the system, qualified Rotarians login to District 7010's website at <https://portal.clubrunner.ca/50040> and complete steps 1 through 6 shown below. Contact your assigned District Grants Sub-Committee Chair if you have difficulty getting into the system.



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### NAVIGATION TABS

The online grant management system is made up of 7 Sections. You will learn about the function of each of those sections on the next page of this document. The grant system includes a section tab bar that looks like this:

To navigate to a particular section, users simply click on the tab associated with the desired section.

Each section contains instructions that allows users to successfully enter the information required to create a district grant application and also to file a project's final report. Please read the instructions closely - They are very detailed and highly effective when followed.

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### DISTRICT GRANT APPLICATION PROCESS

Follow the instructions provided within the system and enter all the information requested in each of these 3 system sections to complete a district grant application:

- ◆ *Details* section (tab A below): This tab creates an executive summary of the grant application information
- ◆ *Application* section (tab B below): This section contains the bulk of the information about the grant project
- ◆ *Budget* section (tab C below): This section is where expected income and project expenses are shown

Grant application information is consolidated and presented in the *Project Overview* section. The entire application can be reviewed, printed or downloaded from within this section.



### DISTRICT GRANT PROJECT FINAL REPORT PROCESS

Follow the instructions provided within the system and enter the information requested in each of the following 2 grant system sections to complete a district grant project final report:

- ◆ *Individual Project Report* section (tab 1 below): Written and financial reports are created in this section
- ◆ *Documents* section (tab 2 below): Project photos & receipts are uploaded in this section

The written report and the financial report can be reviewed, printed or downloaded within the *Individual Project Report* section.



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### EMAIL SYSTEM

Email can be sent to district grant program administrators, mentors and club contacts from within the grant management system. Access the email function through the *Individual Project Report* tab, then select the orange-coloured SUBMIT button to enter the email system. Once inside the email section, simply **follow the instructions** to select addressees and send your message.

District grant mentors are listed in the GRANT USERS sub-section.

Details Application Budget Documents Project Overview Individual Project Report Activity Log

Pr **Submit**

Subject Alpha Bravo Charlie \*

Attachment winter-meals-for-food-bank-bracebridge.pdf

Recipients

- Grant Administrators (0/4)
  - Rotary Club of Bracebridge Expand (0/1)
  - Rotary Club of Collingwood South Georgian Bay Expand (0/1)
  - Rotary Club of North Bay Expand (0/1)
  - Rotary Club of Wasaga Beach and Area Expand (0/1)
- Grant Users (0/12)
  - Barrie Expand (0/1)
  - Barrie-Huronina Expand (0/1)
  - Bracebridge Expand (0/2)
  - Elliot Lake Expand (0/1)
  - Haliburton Expand (0/1)
  - Kawartha Rotary Club Expand (0/2)
  - North Bay Expand (0/1)
  - Orillia Expand (0/1)
  - Penetanguishene Expand (0/1)
  - Timmins-Porcupine Expand (0/1)
- Club Contacts (0/5)
  - Bracebridge Expand (0/5)

District Grants Sub-Committee Chair

District Grant Mentors

Club Contacts