



# District Grants Training

2019-2020

# URL “matchinggrants.org” and then click on District Grants



# Website tools

- Click Help tab to open the following:

How does this site work?

FAQ Frequently asked questions

Quick Tips

Signature process

# Help on matchinggrants.org website

The screenshot shows a web browser window with the URL [matchinggrants.org/district/faq.html](http://matchinggrants.org/district/faq.html). The page header includes the Rotary logo and text: "Developed by District 5340 for use by the entire Rotary world". A navigation bar contains links: "Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants". Below this, a grey bar contains links: "How Does it Work? | FAQs | QuickTips | Signature Process". Two large red arrows point to the "How Does it Work?" and "Signature Process" links. The page also features a "My Account" link and a "Recently Asked Questions" section with questions like "How can I create an account on this website?". The Windows taskbar at the bottom shows the date as 3/11/2017 and time as 2:27 PM.

Rotary District Grants

Club\_Memorandum\_of\_Und

matchinggrants.org/district/faq.html

My Account | Se

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Rotary District Grants

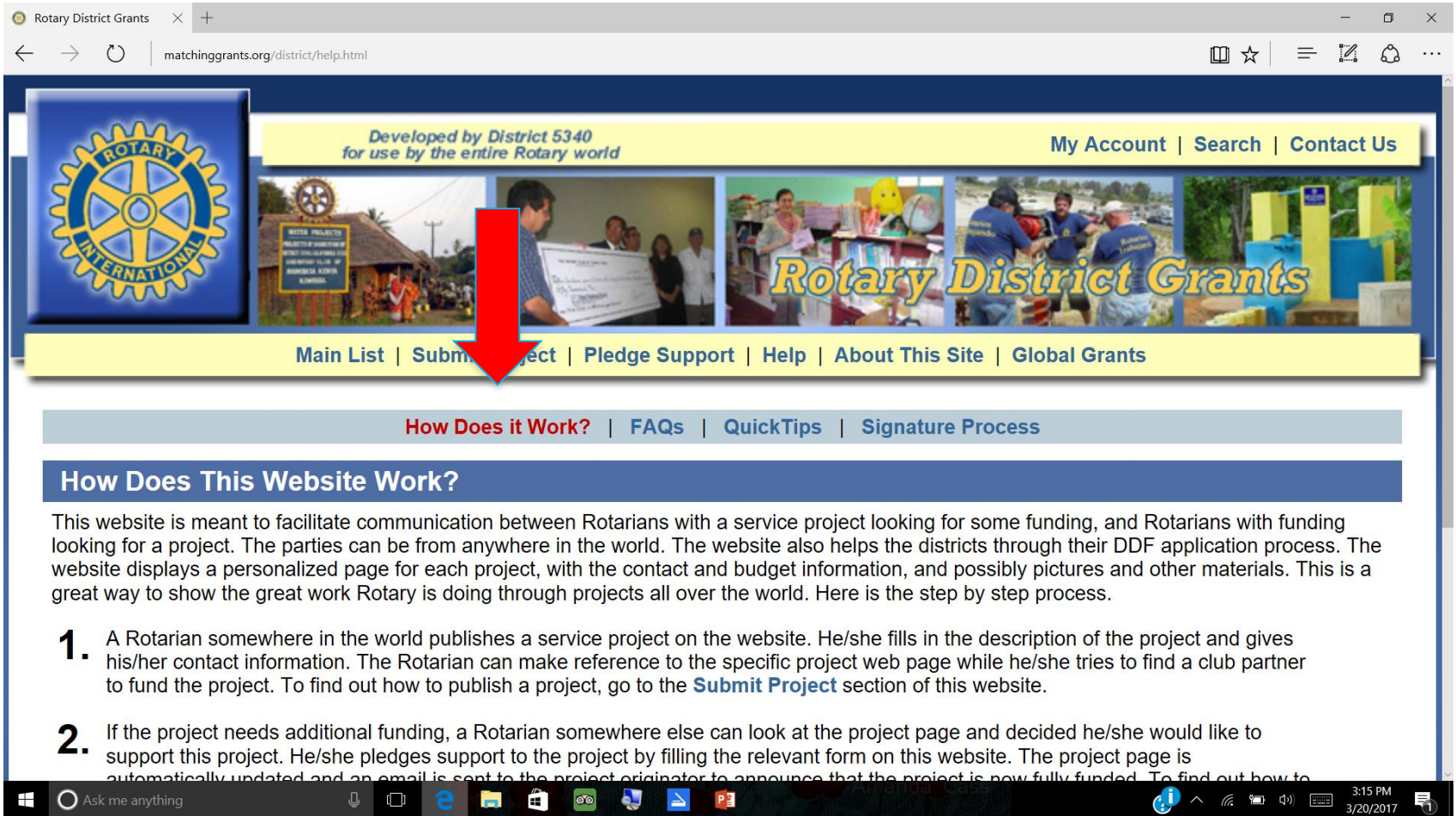
Main List | Submit Project | Pledge Support | Help | About This Site | Global Grants

How Does it Work? | **FAQs** | QuickTips | Signature Process

Recently Asked Questions

How can I create an account on this website?  
If I submit a project, will I be guaranteed funding?  
How long will my project be listed?

# Help Tab, How does it work?



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matchinggrants.org/district/help.html

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Rotary International

Rotary District Grants

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How Does it Work? | FAQs | QuickTips | Signature Process

## How Does This Website Work?

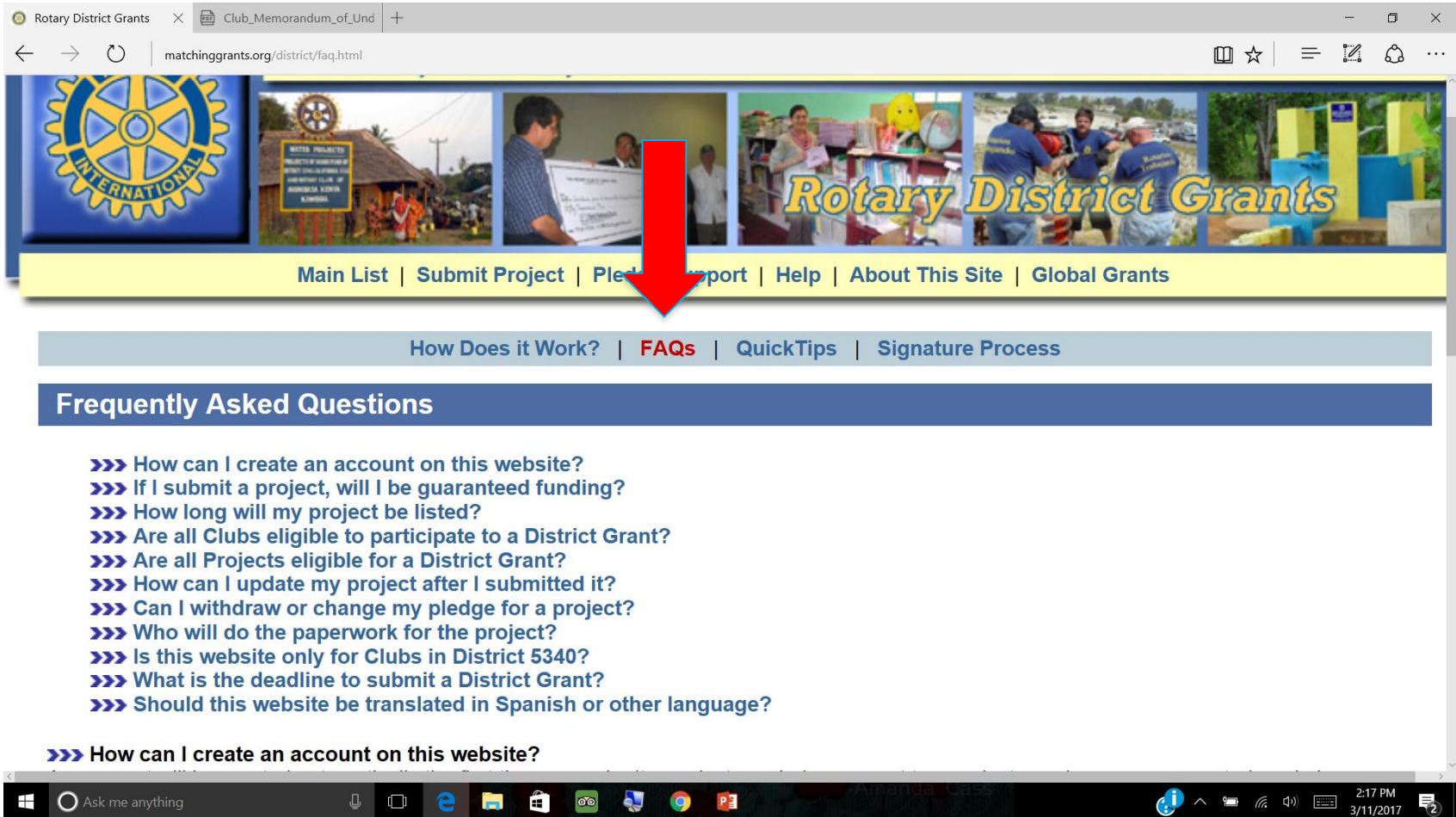
This website is meant to facilitate communication between Rotarians with a service project looking for some funding, and Rotarians with funding looking for a project. The parties can be from anywhere in the world. The website also helps the districts through their DDF application process. The website displays a personalized page for each project, with the contact and budget information, and possibly pictures and other materials. This is a great way to show the great work Rotary is doing through projects all over the world. Here is the step by step process.

1. A Rotarian somewhere in the world publishes a service project on the website. He/she fills in the description of the project and gives his/her contact information. The Rotarian can make reference to the specific project web page while he/she tries to find a club partner to fund the project. To find out how to publish a project, go to the [Submit Project](#) section of this website.
2. If the project needs additional funding, a Rotarian somewhere else can look at the project page and decided he/she would like to support this project. He/she pledges support to the project by filling the relevant form on this website. The project page is automatically updated and an email is sent to the project originator to announce that the project is now fully funded. To find out how to





# Help Tab FAQ, Frequently asked questions.



The screenshot shows a web browser window with the URL [matchinggrants.org/district/faq.html](http://matchinggrants.org/district/faq.html). The page features a banner with the Rotary International logo and several images of projects. Below the banner is a navigation bar with links: [Main List](#), [Submit Project](#), [Pledge Support](#), [Help](#), [About This Site](#), and [Global Grants](#). A red arrow points to the [FAQs](#) link in the secondary navigation bar, which also includes [How Does it Work?](#), [QuickTips](#), and [Signature Process](#). The main content area is titled "Frequently Asked Questions" and lists several questions, each preceded by a blue double arrow icon. The first question is "How can I create an account on this website?".

Rotary District Grants

[Main List](#) | [Submit Project](#) | [Pledge Support](#) | [Help](#) | [About This Site](#) | [Global Grants](#)

[How Does it Work?](#) | [FAQs](#) | [QuickTips](#) | [Signature Process](#)

## Frequently Asked Questions

- >>> How can I create an account on this website?
- >>> If I submit a project, will I be guaranteed funding?
- >>> How long will my project be listed?
- >>> Are all Clubs eligible to participate to a District Grant?
- >>> Are all Projects eligible for a District Grant?
- >>> How can I update my project after I submitted it?
- >>> Can I withdraw or change my pledge for a project?
- >>> Who will do the paperwork for the project?
- >>> Is this website only for Clubs in District 5340?
- >>> What is the deadline to submit a District Grant?
- >>> Should this website be translated in Spanish or other language?

>>> How can I create an account on this website?



# Help Tab, Quick Tips

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← → ↻ | matchinggrants.org/district/quicktips.html

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## QuickTip #11: How Can I Gain Access to a Project?

If you want to make changes to a project page, update the financials, enter history log entries, or upload documents and photos you need to be one of the project partners so that you can have access to the Administration pages. Access can be granted to you by one of the existing project partners. This is done in the "Add People to the Distribution List / Give Administrative Access" section of the "History Logs" tab of the administration page for your project. Just enter the name and email address of the person and click "Add".

### Add People to the Distribution List / Give Administrative Access

All notification email for History Log entries and Email Communications are sent to the **distribution list in green above**. If you wish to add a new contact person for this project please enter the name and email address below and click on "Add". This new contact person will have full access to this project administration pages unless you uncheck the box below.

Name:  Email:

☒ Administrative Access ☒ Email Distribution List

Administrative Access allows the user to make changes to the project, upload documents and photos, and enter history log entries. Email Distribution List allows the user to view restricted documents, and to receive the notification emails for the project.

## QuickTip #10: How do I Remove my Club from a Project?

# Submit a new project on Matchinggrants.org



Rotary District Grants × Club\_Memorandum\_of\_Und +

← → ↻ matchinggrants.org/district/edit.cgi

Rotary District Grants

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Cancel Reset Save

### Submit a New Project

Project Title  Rotary Year

Country  Location

**Areas of Focus** (Check all that apply, if any)

<input type="checkbox"/> Peace and conflict prevention/resolution	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water and sanitation	<input type="checkbox"/> Maternal and child health
<input type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Economic and community development

**Activity Type**

**Project Summary:** Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefitting from the activity, and the name of the location of the project or activity, including the city or country. For example, "Five computers provided to schools for children in Addis Ababa, Ethiopia."

**Project Description:** You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

### Project Contact Person

District Number  Rotary Club of

Contact Name  Email

### Project Budget

Total Budget  Club Contribution  District Contribution (DDF)

### Payment Information

This is the information to provide to your District Leadership to send the check payment after the project is approved.

Contact Phone Number  Make checks payable to

Address  City  State  Zip

☐ Check this box to certify that this project fits within the guidelines of the Rotary Foundation Mission Statement:  
The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.

Cancel Reset Save



# Select the Rotary Year for the project and Activity Type

Rotary District Grants x +

← → ↺ matchinggrants.org/district/edit.cgi

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Cancel Reset Save

### Submit a New Project

Project Title

Country

Rotary Year  

Location

Areas of Focus (Check all that apply, if any)

<input type="checkbox"/> Peace and conflict prevention/resolution	<input type="checkbox"/> Disease prevention and treatment
<input type="checkbox"/> Water and sanitation	<input type="checkbox"/> Maternal and child health
<input type="checkbox"/> Basic education and literacy	<input type="checkbox"/> Economic and community development

Activity Type  

**Project Summary:** Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefitting from the activity, and the name of the location of the project or activity, including the city or country. For example, "Five computers provided to schools for children in Addis Ababa, Ethiopia."

**Project Description:** You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

Windows Taskbar: Ask me anything, 2:40 PM 3/14/2017

# Project Summary and Project Description

Country

Location

## Areas of Focus (Check all that apply, if any)

- |   |   |
|---|---|
| <input type="checkbox"/> Peace and conflict prevention/resolution | <input type="checkbox"/> Disease prevention and treatment   |
| <input type="checkbox"/> Water and sanitation                     | <input type="checkbox"/> Maternal and child health          |
| <input type="checkbox"/> Basic education and literacy             | <input type="checkbox"/> Economic and community development |

Activity Type

**Project Summary:** Short sentence to explain the project. This project description should provide information about what activity is being funded, who is benefitting from the activity, and the name of the location of the project or activity, including the city or country. For example, "Five computers provided to schools for children in Addis Ababa, Ethiopia."

**Project Description:** You should include what needs have been identified, how the project will meet those needs, and the timeline for your project. Please specify what the project funds will be used for and how club members will be involved.

## Project Contact Person

District Number

Rotary Club of

Contact Name

Email

## Project Budget

Total Budget

Club Contribution

Rotary Contribution (RPF)



# Explain your Project Summary

- Short sentences to explain summary.
- What activity is being funded.
- Who is benefitting from the activity.
- Name of the location of the project or activity, including the city or country.
- For example, "Five computers provided for computer lab students in Ecuador."

# Explain your Project Description.

- Short sentences to explain your description.
- What needs have been identified.
- How the project will meet those needs.
- The timeline for your project.
- Please specify what the project funds will be used for.
- How will club members will be involved.



# Project Contact Person and Budget Information

## Project Contact Person

District Number

Rotary Club of

Contact Name

Email

## Project Budget

Total Budget

Club Contribution

District Contribution (DDF)

## Payment Information

This is the information to provide to your District Leadership to send the check payment after the project is approved.

Contact Phone Number

Make checks payable to

Address

City

State

Zip

☐ **Check this box** to certify that this project fits within the guidelines of the Rotary Foundation Mission Statement:

*The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.*

Cancel

Reset

Save



# Proposed Budget and Contact Person

- Very important to have Project Contact Person see the project to its conclusion. All grant communication will be sent via email to that club member.
- Project Total Budget amount includes Club contribution as well as District Contribution (DDF).

## Payment Information is not used by District 5340

- Grants payments will be made directly to the Clubs, not institutions involved in the grant.
- Grant payments will be deposited directly to club bank accounts via ACH transfer.
- Complete Deposit Information form with Account Name, specify Checking or Savings, Bank name, Account number and Bank routing number.

# DDF Funds Deposit Information

## **Rotary District 5340** **District Grant, DDF, Deposit Information**

---

Club Name

---

Project Name, Number(s)

---

Bank Name

---

Bank Routing Number

---

Account Name (Registration)

---

Account Number

Account Type:      ☐ Checking      or      ☐ Savings

---

Contact Person Name

---

Contact Information



## Agree to Rotary Foundation Mission Statement.

- Check off that you agree to to certify that this project fits within the guidelines of the Rotary Foundation Mission Statement:
- *The mission of The Rotary Foundation is to enable Rotarians to advance world understanding, goodwill, and peace through the improvement of health, the support of education, and the alleviation of poverty.*

# Signature Process

- Have correct email for Contact Person(s) and Club officer, plus same from other Clubs that co-sponsor. They are the only ones that sign the grant.
- District Foundation Committee members, **should not** appear for signatures required at this stage of the grant.
- Learn about Starting Signature Process, Signing the projects, Adding or Removing Signatories and after the project is signed.

# Signature Process

Rotary District Grants

matchinggrants.org/district/signature.html

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How Does it Work? | FAQs | QuickTips | **Signature Process**

## Signature Process

The signature process applies to the Districts that have elected to use the Rotary Grants Website to get their clubs to apply for DDF matching funds. After a project is Fully Pledged it needs to be electronically signed to be submitted for DDF approval by your District Leadership. This signature process is done at the **Club level**, not the district. After a project is signed it can be reviewed and approved by the District Leadership.

### Starting the Process

To start the signature process go to your project administration page and click on the "Start Club Signature Process" button. On the next page you need to select the **Club Signatories**. Check with your District Leadership to see who you should select on the proposed list, since the exact process may vary from district to district. My recommendation to the districts is to

#### Project Status Information

Your project is "Fully Pledged". This means the amount of the pledges is equal to the total budget of the project. Please review the project description, and the supporting documents to make sure your project is well defined. Then you can start the club signature process by clicking the button below. This will collect digital signatures from the club for submission to the district leadership. You will not be able to make changes to the project description and financing after starting this process.

Click the button on the right when you are ready to start the club signature process.

**Start Club Signature Process**

## Grant is complete and ready to Submit.

- Once the entire format has been completed, with correct information, box checked, all signatures completed, you can click Save and Submit Grant.
- District Foundation Committee will be notified that your grant has been submitted.
- Grant will be considered for approval at Committee meeting after August 1, 2019.



# Club Grant is approved, what happens next ?

- You will receive District approval notification, via email, with the amount of grant approval.
- All District Grants will be sent to Rotary Foundation for approval. The approval process takes about 4 to 5 weeks.
- Once approved, Club will be notified and DDF will be deposited into your Club account.
- Do not spend any money before funds arrive.

# District matching funds have arrived, what next?

- Document and save proof of all of your expenses like store receipts, cancelled checks, invoices marked paid from vendors, showing funds were spent for the project.
- Scan all to PDF format, then upload to “Document” page of District Grant. Start by clicking “Administration” box.

# Loading PDF Documents

Rotary District Grants


matchinggrants.org/district/admin.cgi?project=1502

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P-1502 Bikes for Kids Back to Project

Description Financing Documents Photos History Logs

### Upload Project Documents

 Documents to upload on this site must be in PDF format. You can generate PDF documents using the paid version of Adobe Acrobat. [Click here](#) to find out more about PDF documents. If you do not have the paid version of Adobe Acrobat and do not want to purchase it, there are some free utilities to generate PDF documents. [Click here](#) to download one of these utilities.

Select the PDF File to upload by clicking the "Browse" button, enter a document name, and click "Upload". **This must be a PDF document.**

Name:

☐ **Restricted Access**

Restricted documents can only be accessed by the project partners. **Make a document restricted if it contains sensitive information.**


### Delete or Rename an Existing Document

Select a Document

## Adding comment to History Log


- You can enter the history of your grant on the “History log” page of the District Grant by clicking “Administration” box.
- Type comment in first box under **red** type.
- When comment is complete, click “Save History Log/send email” button below.
- Copy of comments will be recorded on the History Log and will be emailed to everyone on the email distribution list.

# Adding comment to History Log



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P-1490

Annual Bike Drive

Back to Project

Description

Financing

Documents

Photos

History Logs

### History Log / Email Communication

History log entries are added in the "History Logs" tab of the project page. They cannot be changed after submission. A notification email is sent to all parties to notify them of the new entry.

Date: 7 Sep 2016

**Text of the history log entry to add on the web page:**  
**Please, only submit history log entries for significant information about the project status, this is not a field for comments. (800 characters left)**

To: sarah.cantu@gmail.com  
Cc: jkurth1@san.rr.com, margecole81@gmail.com, marta\_knight@yahoo.com, lora.fisher07@yahoo.com, johnfistere@gmail.com, bwaznis@gmail.com

**Text to add to the notification email (will not be added to the web page):**

Save History Log/Send Email


Add People to the Distribution List / Give Administrative Access



# Adding Photos of your Grant






- Upload photos of your project in various stages on the “Photo” page of the District Grant by clicking “Administration box”.
- Click “Choose File” to select photos to upload.
- Add Caption to your photos.
- Click “Upload”.
- You can also find instructions on the website Help > Quicktips > Tip #7

# Loading Photos



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P-1490 Annual Bike Drive [Back to Project](#)

Description Financing Documents **Photos** History Logs

**Upload Project Photos**

Select the Picture to upload and click "Upload".

[Choose File](#) No file chosen [Upload](#)

Caption:

You are logged in as: Marta Knight, marta\_knight@yahoo.com -- [Logout](#)

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# District Grant is finished and complete. What is next?

- Balance your expenses with the combined grant funds revenue.
- For leftover funds over \$200, return one-half of the amount by check to Rotary District 5340. Copy the check, convert to PDF format and upload to “Documents” page.
- Make notes in History Log.
- Mail check to Rotary District 5340, Attn: District Foundation Committee.

## District Grant is finished and complete, continued.

- Go to “Description” page of grant and click Administration, then “Final Report”.
- This must be done by April 1, 2020.
- Grant will be reviewed by District Foundation Committee and change status to “Completed”.

# Description Page, Grant complete and Reported

**P-2469** **Model UN** [Back to Project](#)

**Description** **Financing** **Documents** **Photos** **History Logs**

**Update Project Information**

Click the button on the right to make changes to the basic project information. [Edit Project Page](#)

**Project Status Information**

Your project is **"Paid"**. This means that the check for the DDF payment has been issued. Please make the necessary arrangements for the project implementation. Please keep all receipts of project expenditure, and upload all the implementation information on the website as supporting documents. The website is used as a centralized repository for stewardship information. Please upload the final report when this project is completed.

Signatory	Email	Sign Date
Fernanda Torres	fernandatorresg@msn.com	Signed on 2-Aug-18
* Jessica Long	j2m24l82@gmail.com	Signed on 1-Aug-18

**Project Contact:** Click the "Final Report" button to fill in the final report. You can partially fill and save the report and get back to it later. **Please make sure you upload all receipts and supporting documents on this website before submitting the final report for signatures.** After submission the district leadership will review the online report and documents and will only change the project status to "Completed" if all the information has been provided.

[Final Report](#)

**Administrator:** Click the button on the right if you wish to drop this project. [Drop](#)

You are logged in as: Mike Whitehurst, mike@mccuen.us -- [Logout](#)

