



# District Grant Training

## District 5440



Be a gift to the world

# Introductions



Jim  
Epstein

Fort Collins  
Rotary Club

# Introductions

- Nancy Pettus – Jackson Hole Breakfast
- Tom Dunn – Greeley Centennial
- Wilton Lyles – Fort Collins Breakfast
- Krishna Murthy – Fort Collins Breakfast
- Joe Schon – Scottsbluff/Gering
- Ron Hogan – Loveland
- Ron Hammel - Cheyenne

# Who is this training for?

This training is for any Rotarian  
who will be applying for a district  
grant from District 5440

# General Information

- Starting in the 2016/17 Rotary year, all district grant applications and reports will be submitted online on the [matchinggrants.org](http://matchinggrants.org) website
- There are no more planning forms
- Before starting an application, go to <http://www.rotary5440.org/SitePage/grants> and
  - Check for dates to submit applications
  - Check for maximum grant amount allowed
  - Make sure your club is qualified
  - Review district grant terms and conditions
  - Review district grant guidelines
  - Review Rotary Foundation terms and conditions

# Grant Process

- Project view
- Application view
- Submit an application
- Enter financial details
- Sign an application
- Make changes before approval
- Make changes after approval
- Submit a report

# Project View

There are two views of an application: project view and application view. In the Project View you can see the project details but not change them. When you are in the Project view, the button will indicate Administration so you can click on it to change to the Administration view.

The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/project1130.html](http://www.matchinggrants.org/district/project1130.html). The page features the Rotary International logo and a banner for "Rotary District Grants" with the text "Developed by District 5340 for use by the entire Rotary world". Navigation links include "My Account", "Search", and "Contact Us". Below the banner are links for "Main List", "Submit Project", "Pledge Support", "Help", "About This Site", and "Global Grants".

The main content area displays project details for "P-1130 Community Garden". A yellow arrow points to the "Administration" button in the top right corner of the project details section.

Description	Financing	Documents	Photos	History Logs
<b>Project Description</b> Country: USA      Location: Loveland, CO      Total Budget: \$5,000 Area of Focus: None Activity Type: Community Development: General Summary: Build a community garden at the new home of Loveland Youth Gardeners  Loveland Youth Gardeners is dedicated to cultivating skills and promoting service in young people through sustainable gardening and healthy living practices. LYG focuses on at-risk youth and special needs students and also supports Loveland Plant a Row for the Hungry.				
<b>Project Contact Person</b> District: 5440      Rotary Club of: Loveland Mountain View Primary Contact: Jim Epstein      Email: james.epstein@gmail.com				
<b>Project Status</b> <b>Signed</b> This project is "Signed". This means that the signatures from the club leadership have been collected. This project is now being reviewed by the district leadership for approval. Once a decision is made, the status of the project will be changed to "Approved". Project listed for the 2015-16 Rotary Year.				

# Administration View

In the Administration view of the project you can change the project details. When you are in the Administration view, the button will indicate Back to Project so you can click on it to change to the Project View.

The screenshot shows the Rotary District Grants Administration View for project P-1130, titled "Community Garden". The page is developed by District 5340 for use by the entire Rotary world. It features a navigation bar with links: Main List, Submit Project, Pledge Support, Help, About This Site, and Global Grants. The project details section includes tabs for Description, Financing, Documents, Photos, and History Logs. A yellow arrow points to the "Back to Project" button located next to the project title. Below the tabs, there is a section for "Update Project Information" with an "Edit Project Page" button. A message states: "Click the button on the right to make changes to the basic project information." Below this, a note explains that if the project is "Signed", the signature process must be canceled to make changes. A "Cancel Signature Process" button is provided. The "Project Status Information" section indicates that the project is "Signed" and is being reviewed by the district leadership. A table lists the signatories: Jim Epstein (james.epstein@gmail.com) and Krishna Murthy (kmurthy5@comcast.net), both signed on 10-Dec-15. A form allows adding a new signatory, with Ken Small (<d5440dg2015@gmail.com>) entered in the dropdown. A final note states: "If the name you want to add is not in the pulldown list you first need to add him/her as a project partner on the 'History Logs' tab."

Signatory	Email	Sign Date
Jim Epstein	james.epstein@gmail.com	Signed on 10-Dec-15
Krishna Murthy	kmurthy5@comcast.net	Signed on 10-Dec-15

You can add a signatory on the list if there is one missing.  
Ken Small <d5440dg2015@gmail.com> Add

If the name you want to add is not in the pulldown list you first need to add him/her as a project partner on the "History Logs" tab.

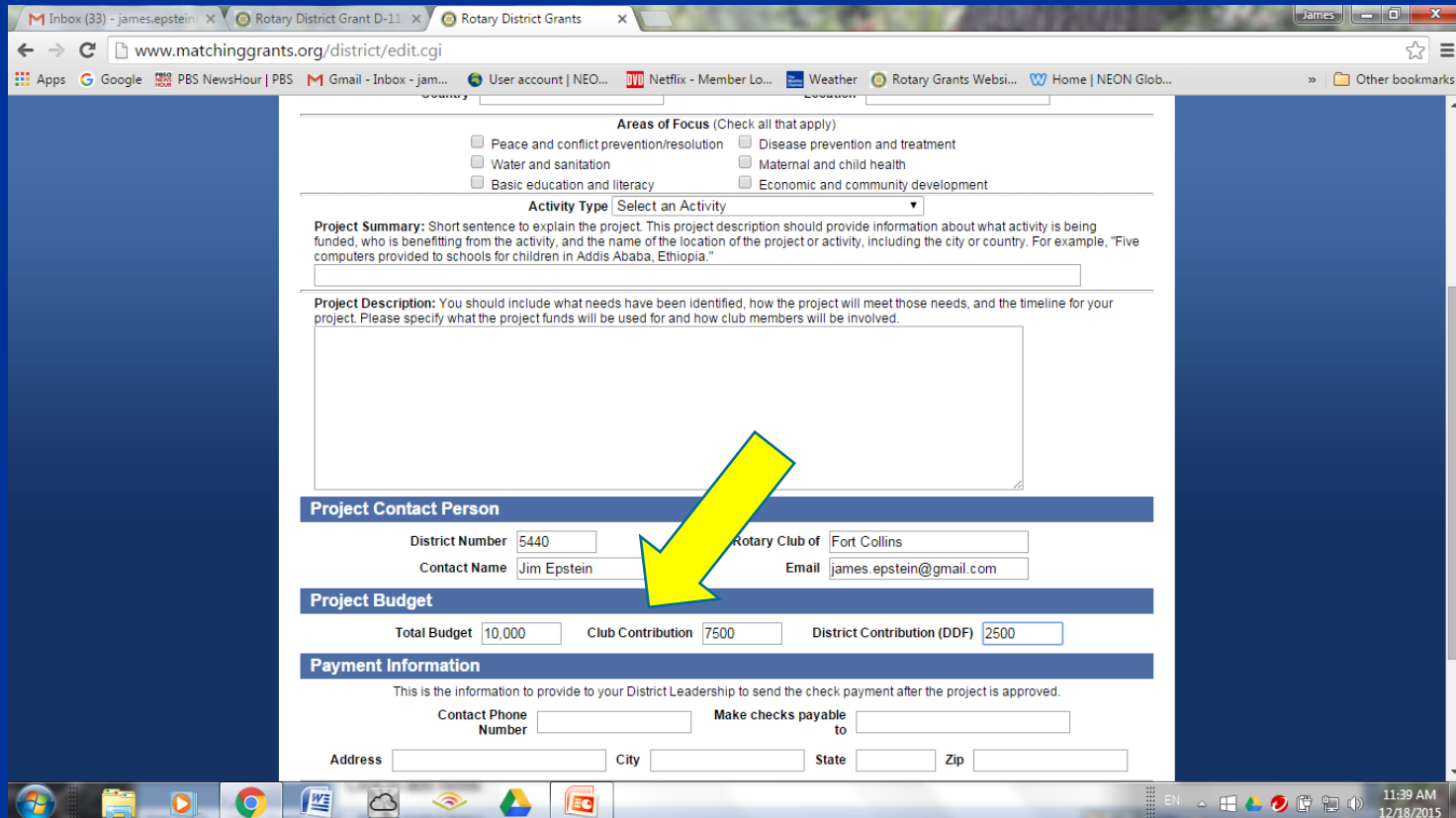


# Submit an application

- If you are submitting the application in May or June be sure to pick the next Rotary year.
- Select the closest activity type
- District DDF cannot exceed club contribution
- Checks will only be made out to a Rotary club
- The address is where the check will be sent

# Financial Details – Project Budget

When entering the project budget, the box labeled Club Contribution should include all contributions other than DDF from the district. This includes contributions from all clubs and also from outside sources. The further breakdown of the sources of the contributions is done on Financing page.



The screenshot shows the Rotary Matching Grants website interface. The browser address bar displays [www.matchinggrants.org/district/edit.cgi](http://www.matchinggrants.org/district/edit.cgi). The page contains several sections for project entry:

- Areas of Focus (Check all that apply):** Includes checkboxes for Peace and conflict prevention/resolution, Disease prevention and treatment, Water and sanitation, Maternal and child health, Basic education and literacy, and Economic and community development.
- Activity Type:** A dropdown menu labeled "Select an Activity".
- Project Summary:** A text box for a short sentence explaining the project. Example: "Five computers provided to schools for children in Addis Ababa, Ethiopia."
- Project Description:** A larger text box for details on needs, project goals, and timelines.
- Project Contact Person:** Fields for District Number (5440), Contact Name (Jim Epstein), Rotary Club of (Fort Collins), and Email (james.epstein@gmail.com).
- Project Budget:** Fields for Total Budget (10,000), Club Contribution (7500), and District Contribution (DDF) (2500). A yellow arrow points to the Club Contribution field.
- Payment Information:** Fields for Contact Phone Number, Address, City, State, Zip, and Make checks payable to.

The Windows taskbar at the bottom shows the time as 11:39 AM on 12/18/2015.

# Financial Details

## Financing Page

On the financing page, you can breakdown the sources of the contributions by first clicking on the icon right next to the total amount. This will take you to the edit box.

The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/admin.cgi?project=1136&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb](http://www.matchinggrants.org/district/admin.cgi?project=1136&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb). The page is titled "Rotary District Grants" and features a navigation bar with links: Main List, Submit Project, Pledge Support, Help, About This Site, and Global Grants. The main content area displays the "Test Project" (P-1136) with tabs for Description, Financing, Documents, Photos, and History Logs. The "Financing" tab is active, showing a table of "Proposed Financing".

Description	Date	Cash	DDF	Total
Existing Contributions Towards This Project				
Fort Collins (5440)	18-Dec-15	\$7,500	\$2,500	\$10,000
<b>Total</b>		<b>\$7,500</b>	<b>\$2,500</b>	<b>\$10,000</b>

To change an existing contribution use the "Edit" icon (✎) on the right of each contribution.  
DDF contributions in grey are pending approval of the corresponding district committee.

**Payment Information**

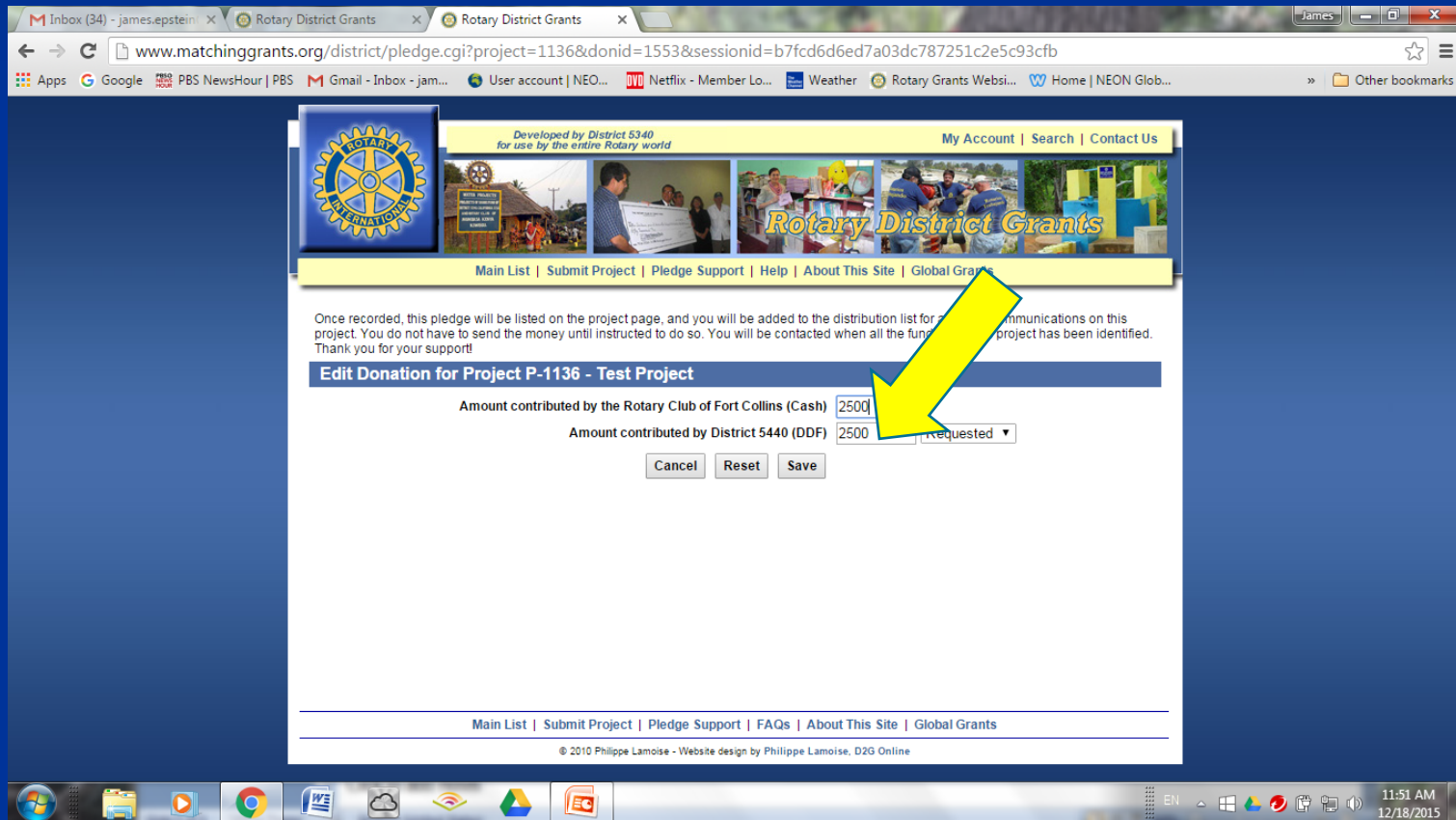
Contact Phone Number: 970-777-0099  
Make Check Payable to: RC  
Send Check to: af, f CO 80525

You are logged in as: Jim Epstein, james.epstein@gmail.com -- Logout

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# Financial Details - Edit Box

You can now enter the actual amount contributed by the club in the box indicated by the arrow below and then click on the save button.



The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/pledge.cgi?project=1136&donid=1553&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb](http://www.matchinggrants.org/district/pledge.cgi?project=1136&donid=1553&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb). The page features the Rotary International logo and a navigation bar with links: [Main List](#), [Submit Project](#), [Pledge Support](#), [Help](#), [About This Site](#), and [Global Grants](#). A yellow arrow points to the 'Amount contributed by the Rotary Club of Fort Collins (Cash)' input field, which contains the value '2500'. Below this, the 'Amount contributed by District 5440 (DDF)' is also set to '2500'. The 'Save' button is visible at the bottom of the form.

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Once recorded, this pledge will be listed on the project page, and you will be added to the distribution list for communications on this project. You do not have to send the money until instructed to do so. You will be contacted when all the funding for the project has been identified. Thank you for your support!

**Edit Donation for Project P-1136 - Test Project**

Amount contributed by the Rotary Club of Fort Collins (Cash)

Amount contributed by District 5440 (DDF)

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

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# Financial Details - Edit Box (cont)

Repeat the process for the contribution that came from outside sources but do not include any DDF for this contribution. Note that the contribution is still listed as coming from your club even though it came from outside sources. This is because your club is the primary contact for the project.

The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/pledge.cgi?project=1136&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb](http://www.matchinggrants.org/district/pledge.cgi?project=1136&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb). The page is titled "Rotary District Grants" and features the Rotary International logo. The main content area is titled "Pledge Support for Project P-1136 - Test Project". Below the title, there is a form with the following fields:

- District Number:
- Rotary Club of:
- Contact Name:
- Contact Email:  (A yellow arrow points to this field)
- Amount contributed by this Club (if any) (Cash):
- Amount contributed by this District (if any) (DDF):

At the bottom of the form are three buttons: "Cancel", "Reset", and "Save". The footer of the page includes the text "© 2010 Philippe Lamoise - Website design by Philippe Lamoise, D2G Online".

# Financial Details

## Financing Section modified

The financing section will now show the two contributions. The first from your club that is matched by DDF and the second from outside sources (even though your club is indicated) that is not matched with DDF

The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/admin.cgi?project=1136&msg=don\\_save&tab=2&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb](http://www.matchinggrants.org/district/admin.cgi?project=1136&msg=don_save&tab=2&sessionid=b7fcd6d6ed7a03dc787251c2e5c93cfb). The page is titled "Test Project" and shows the "Financing" tab. A green box indicates "Donation saved." Below this, the "Proposed Financing" section displays a table of contributions.

Existing Contributions Towards This Project	Date	Cash	DDF	Total
Fort Collins (5440)	18-Dec-15	\$2,500	\$2,500	\$5,000
Fort Collins (5440)	18-Dec-15	\$5,000	-	\$5,000
<b>Total</b>		<b>\$7,500</b>	<b>\$2,500</b>	<b>\$10,000</b>

To change an existing contribution use the "Edit" icon (✎) on the right of each contribution.  
DDF contributions in grey are pending approval of the corresponding district committee.

**Payment Information**

Contact Phone Number: 970-777-0099  
Make Check Payable to: RC  
Send Check to: af, f CO 80525

You are logged in as: Jim Epstein, james.epstein@gmail.com -- Logout



# Submitting the Project Budget

The project budget is a detailed budget in which every item over \$500 is listed on a separate line. It must be in .pdf format before uploading. This is done under the Documents tab when you are in Administration mode. Name the document Project Budget, choose the file and then click on Upload.

The screenshot shows a web browser window with the URL [www.matchinggrants.org/district/admin.cgi?project=1130](http://www.matchinggrants.org/district/admin.cgi?project=1130). The page is titled "Rotary District Grants" and is developed by District 5340. The user is logged in as Jim Epstein (james.epstein@gmail.com). The page displays the "Community Garden" project (P-1130) with tabs for Description, Financing, Documents, Photos, and History Logs. The "Documents" tab is active, showing the "Upload Project Documents" section. Instructions state that documents must be in PDF format and provide a link to find out more about PDF documents. A yellow arrow points to the "Upload" button. The "Name" field is empty, and the "Choose File" button is labeled "No file chosen". A "Restricted Access" checkbox is also visible.

Rotary District Grants

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P-1130 Community Garden Back to Project

Description Financing Documents Photos History Logs

Upload Project Documents

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:

Choose File No file chosen

☐ Restricted Access Upload

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

You are logged in as: Jim Epstein, james.epstein@gmail.com -- Logout

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

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# Sign an application

- You need to enter the people in your club that will sign the application
  - Primary contact
  - Club president
  - Club grants chair (or second person if you don't have one)
- You enter their names and contact info under History Logs when in the Administrative mode
- Review “Signature Process” under Help
- Be sure to upload a project budget and check the box to include it in the signature emails
- Then check the boxes next to your project budget and all of the names on the list.
- Then click “Send Application for Signatures”



# Make changes before approval

- After the project is signed, you cannot make changes to the project
- If the project has not yet been approved, you can unsign the project by clicking on the “Unsign” button under Description when in Administrative mode which will allow you to make changes
- You then need to go through the signature process again

# Make changes after approval

- After the project has been approved you can only make addendums to the project.
- Under Description when in Administrative mode, click on “edit project” and enter the changes in the “Add an addendum” box
- Prior to implementing a change, wait for approval from the grants committee in the history log.

# Submit a report

- Reports are submitted by first downloading the required report form under Description when in Administrative mode.
- Fill out the report form and then upload it under Documents.
- You can also upload other supporting documents such as receipts and pictures under Documents
- Return to Description and click “Reported” to notify the grants committee that the report is submitted
- After the report is accepted, the project status will be changed to “Completed”

# Submit a report

- Reports are due by June 1<sup>st</sup> of the first year after the grant was approved.
- If the project is not completed by June 1<sup>st</sup>, a progress report must be uploaded by June 1<sup>st</sup>.
- Final reports must be filed within 30 days of completion of the project or by June 1<sup>st</sup> of the second year after the grant was approved.