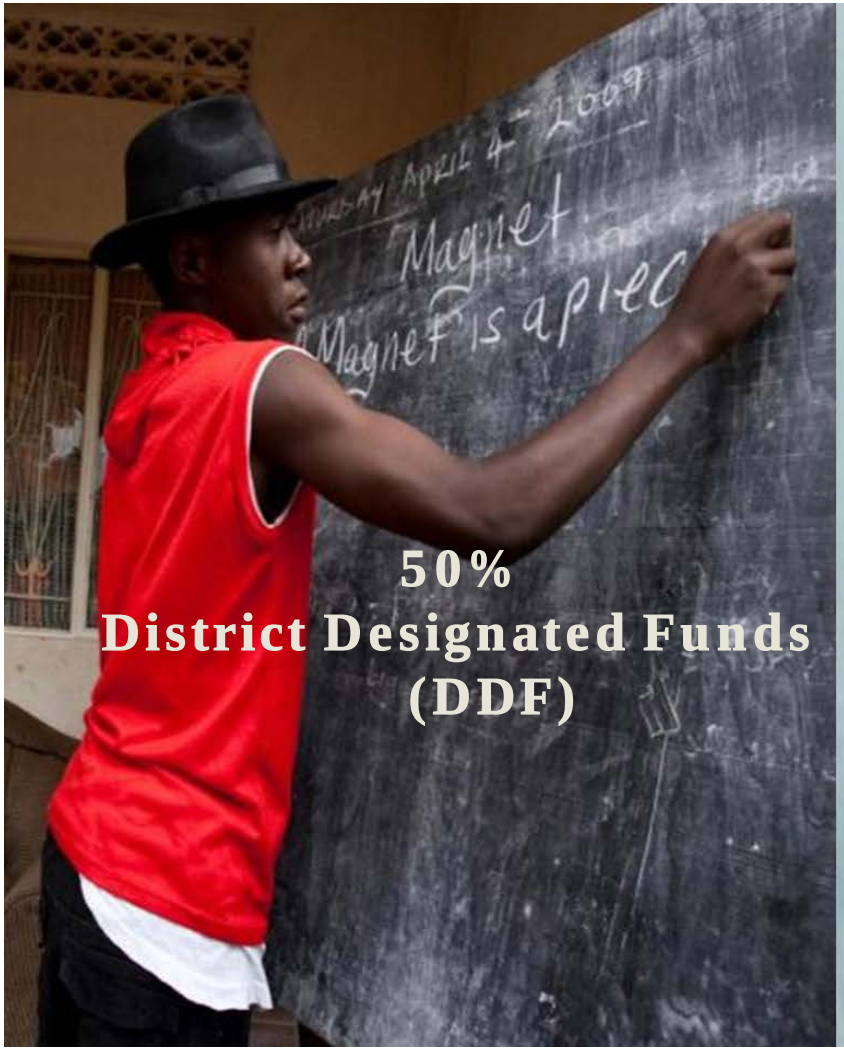
DISTRICT GRANTS UPDATE

DISTRICT 6450 FALL TRAINING 2017

THE ANNUAL FUND

THE ANNUAL FUND-SHARE SYSTEM



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DISTRICT GRANTS THIS YEAR

- Each year, we allocate the maximum permitted dollars that the District receives in District Designated Funds to District Grants, to be used by the Clubs in our District
- Clubs get as they give, receiving back 25% of the funds they & their members previously donated
- This year, Clubs in our District have over $70,000 available to spend on projects funded by District Grants
- Clubs have 55 projects planned for this year using District Grants, plus we have funds available for water, hunger and disaster relief projects

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CHANGES TO OUR DISTRICT GRANT PROCESS

- A few years ago, applications and reports were done by hand.
- We progressed to a email-system, but everything was still done manually
- We tried a system based on Excel that improved the application and reporting process, but was a bit “buggy” and time-consuming to administer
- This year, we adopted a web-based application and reporting system that maintains and improves the ease of applying and reporting, and should greatly reduce the administrative burden of the program

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THE NEW SYSTEM

- At the Atlanta Rotary International Convention this year, we learned of website set up by Rotarian Philippe Lamoise from the Torrey Pines (La Jolla) Rotary Club
- The website, matchinggrants.org, was originally designed to help match Clubs in his District to projects in Ethiopia that needed funding
- Phillipe has added the capability to administer District Grants to the website, and after testing it, we found it matched up very well to our current process

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THE WEBSITE – MATCHINGGRANTS.ORG

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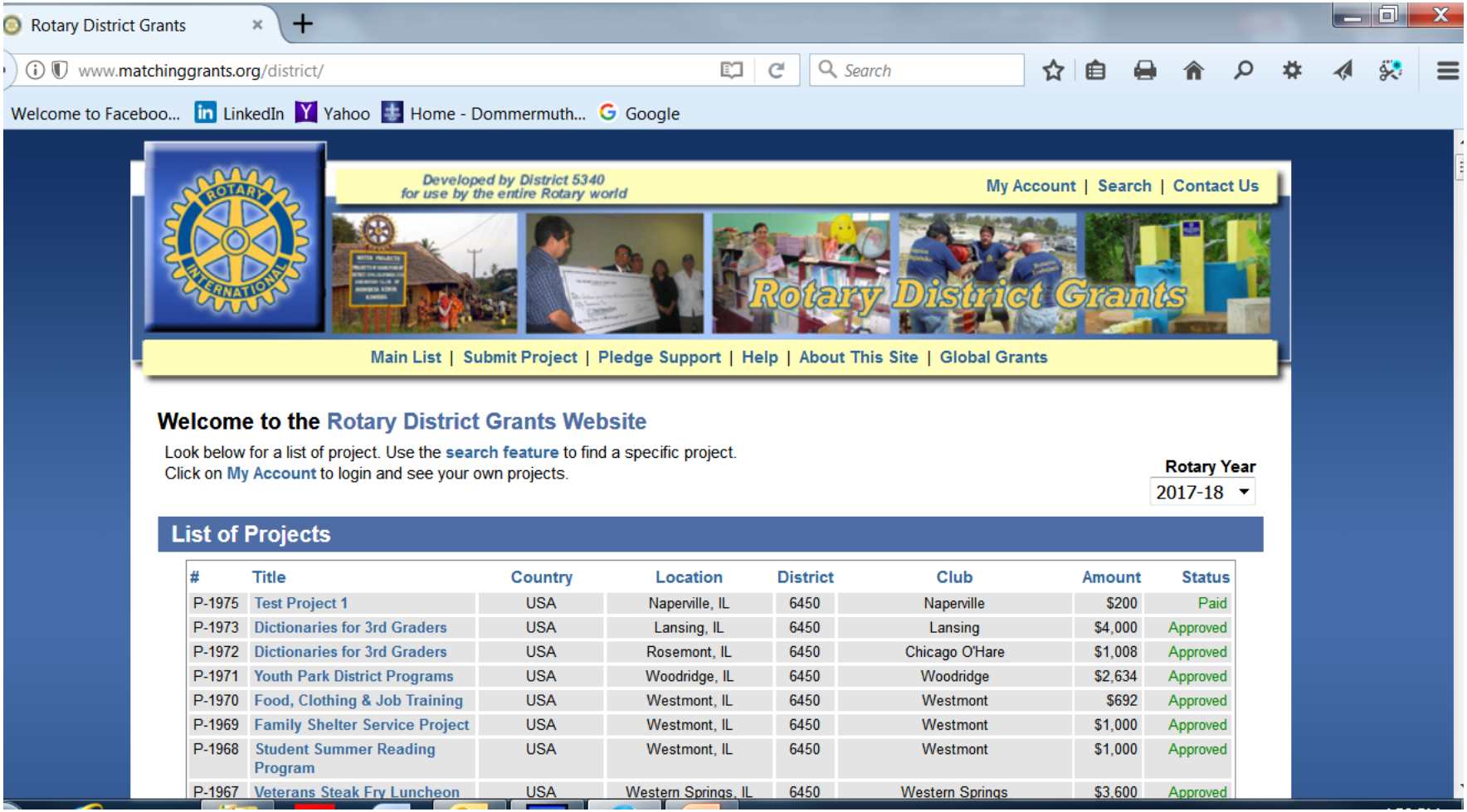
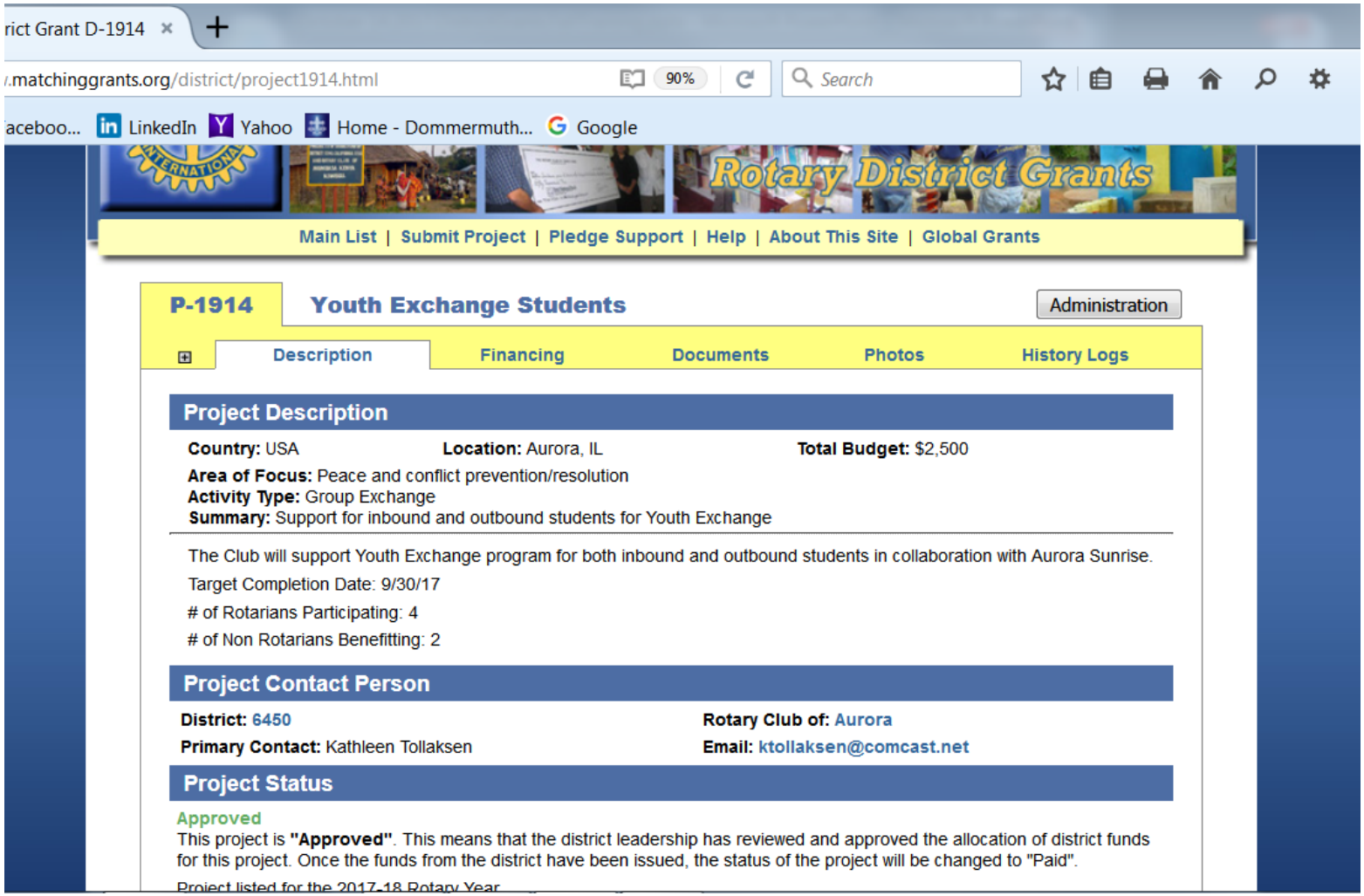
THE WEBSITE – MATCHINGGRANTS.ORG – DISTRICT GRANTS



#	Title	Country	Location	District	Club	Amount	Status
P-1975	Test Project 1	USA	Naperville, IL	6450	Naperville	$200	Paid
P-1973	Dictionaries for 3rd Graders	USA	Lansing, IL	6450	Lansing	$4,000	Approved
P-1972	Dictionaries for 3rd Graders	USA	Rosemont, IL	6450	Chicago O'Hare	$1,008	Approved
P-1971	Youth Park District Programs	USA	Woodridge, IL	6450	Woodridge	$2,634	Approved
P-1970	Food, Clothing & Job Training	USA	Westmont, IL	6450	Westmont	$692	Approved
P-1969	Family Shelter Service Project	USA	Westmont, IL	6450	Westmont	$1,000	Approved
P-1968	Student Summer Reading Program	USA	Westmont, IL	6450	Westmont	$1,000	Approved
P-1967	Veterans Steak Fry Luncheon	USA	Western Springs, IL	6450	Western Springs	$3,600	Approved

PROJECT PAGE



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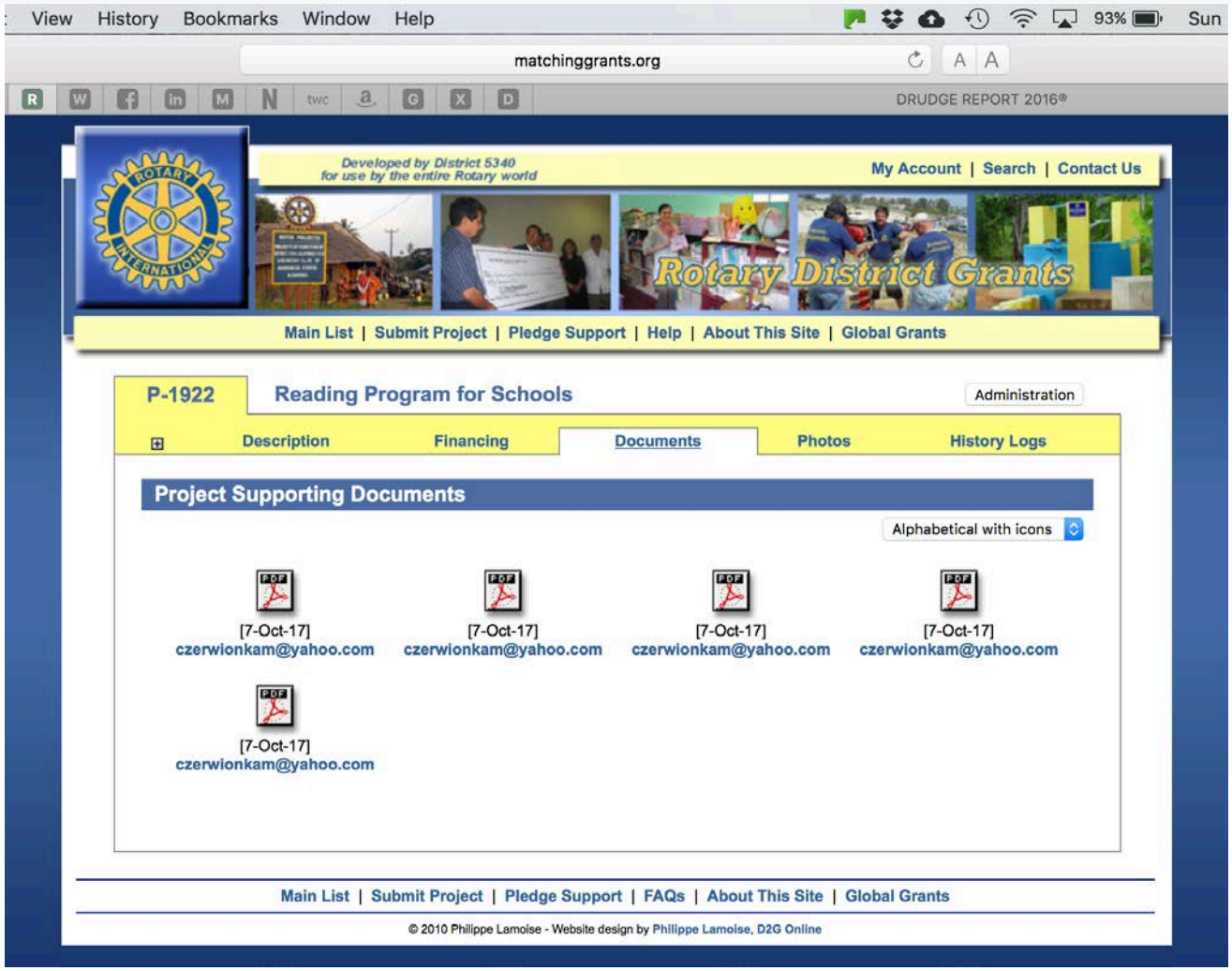
ADDING DOCUMENTS – USING ADMINISTRATION



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ADDING PHOTOS – USING ADMINISTRATION

CLUB ROLES

- All roles are assigned to individuals for a specific Rotary Year.
- Club Presidents are automatically given administrative access and added to the email distribution list for all the projects involving their club during their year and the year prior (as President-Elect)
- Assistant Governors are automatically given administrative access and added to the email distribution list for all the projects involving their clubs
- Primary Contacts receive all emails related to the Grant, and have access to prepare the Final Report
- Additional Contacts can be added to receive emails

WELCOME EMAIL – WHEN YOU START A GRANT OR ARE ADDED TO IT

- Once a Grant is started, or when new Rotarians are added to it, they receive an email from the website with their user name (email address) and a password to use to access the Grant

Welcome to the Rotary Grants Website

An account has been created on the Rotary Grants Website for Sandy Rotarian, **sandy.rotarian@gmail.com**. This is because you are involved in a project listed on this website, or because you have a specific role in your club or district. Here is the information to access your account:

Login Page: **www.MatchingGrants.org/district/login.cgi**
Username/Email: **sandy.rotarian@gmail.com**
Password: 1234

You can change your password after you login.

Go to the Rotary Grants Website

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PROJECT STATUS

- **As a District Grant project progresses from start to finish, it status will change:**
  - **Proposed**
  - **Looking for Funding**
  - **Fully Pledged**
  - **Submitted**
  - **Signed**
  - **Approved**
  - **Paid**
  - **Reported**
  - **Completed**
- **All projects in our District are now either Approved or Paid**

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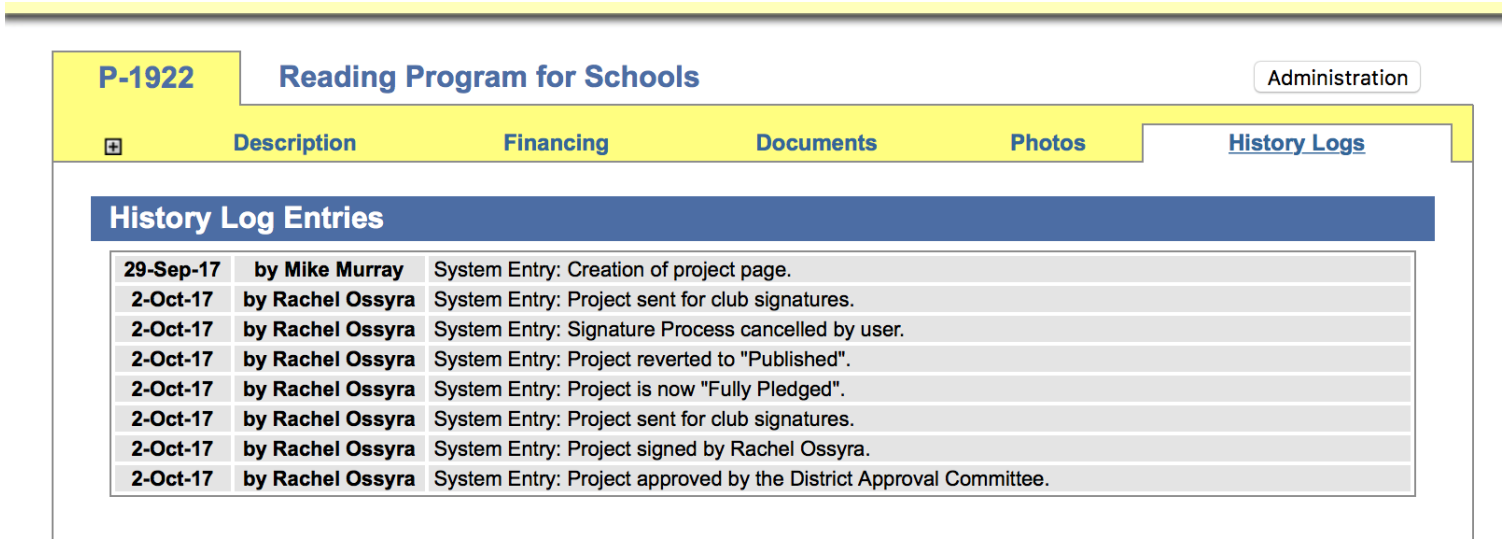
HISTORY TAB

- A handy feature is the History Tab
- Under the History Tab, those with access to the Grant can share information about the Grant, such as what might be missing from a Final Report
- There is both a status update and an email function to the Grant's contacts



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PROJECT STATUS – PAID

- Most District Grants are now marked “PAID”, and checks have been mailed to the Clubs so marked
- If your Club grant is still at the “APPROVED” status, it means you owe something to someone before it is paid
  - E.g., District Dues, RI Dues, Global Grant report, or Annual Fund Goals
- An email goes out to let you know it has been PAID

Rotary District Grants Website - Project P-1808
The District Foundation Treasurer has issued the payment for the DDF for this project. You will receive it shortly. 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. A link to a blank report document can be found on the administration page.
Project title: Scholarships for Community Col Country: USA Location: Naperville, IL Look at www.MatchingGrants.org/district/project1808.html for more details on this project.
Here is a direct link to the administration page: www.MatchingGrants.org/district/admin.cgi?project=1808

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FINAL REPORTS

- Project Final Reports are due within 30 days of project completion
- Final Report forms are downloaded from the website (go to Project / Administration / Description to get the form)
- Complete the form, save it as a pdf. document, and upload on the website (go to Project / Administration / Documents)

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WHAT YOU NEED TO KNOW THIS YEAR

- The Grants Committee has already uploaded all of the District Grants, including Descriptions and Financing
- All Contact Persons on the Grant should have received an email saying the Grant was Approved, and most have received on saying it was Paid
- Next, make sure the check is received, and complete the Project
- Then prepare and submit the Final Report

- Next application cycle (May 2018), each Club will start at the beginning, creating the Grants themselves
- More training will be provided then

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WHAT YOU NEED TO KNOW THIS YEAR

- If web access is available, live demonstration of the website

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THANK YOU