

How to submit a project to the District Grants Committee

11 January 2012

Where do I Go?

- All forms can be obtained from the DGC website www.rotary5360.org
- International projects should be submitted via the RI website www.rotary.org
- District projects should be submitted via the DGC website, www.rotary5360.org

Logging on to the DGC Website

 Rotary International District 5360 Grants Committee

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District 5360 Grants Committee

EVENTS
[Add an event](#)
[Modify an event](#)

District 5360 has created a **District Grants Committee (DGC)** as required by The Rotary Foundation in the Future Vision initiative. Our District is one of the 100 Pilot Districts which are proving out new procedures for the use of SHARE funds entering the **District. SHARE Funds**, also known as **District Designated Funds (DDF)**, may be accessed by qualified clubs.

- You do not need to log in to view the projects on the database, or to read or download the documentation.
- You only need to log in to enter project data, to make changes to the database, or to access any personal data such as email addresses.
- The DGC database is updated periodically from the Clubrunner database, so most District 5360 Rotarians will already be in this system
- Click on the Login button

Logging-in (contd.)

 Rotary International District 5360 Grants Committee

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LOGIN

You may log in using one of the following: your Username, your Rotary email address or your unique RI number, together with your password.

Login:

Password:

Forgot your password or don't know your username? [Click here](#)

New user or don't know what to do? Get the [webmaster to register you](#).

- Enter your username, email address or RI number together with your password. Your username will not necessarily be the same as on the Clubrunner site, but you can change it to be the same, if you wish.
- If you don't know your password or don't have one, click on the "Click here" link.
- If you are not yet on the system, contact the webmaster via the link provided and we'll get you set up.

Getting a password

 Rotary International District 5360 Grants Committee

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Roger Hough logged in

Reset Password

Use this form to have a password emailed to you.
For security reasons, a password will only be sent to an email address registered to you in the database.
Because the password is stored in encrypted form, it is not possible for an existing password to be sent,
so a new one will be generated.
If you have no email address registered, please contact the [Webmaster](#) for a new password.

Your user name, your Rotary email or your RI number:
You can find your username by clicking [here](#).
Your RI number is printed on the front of your Rotarian magazine or its transparent mailing envelope.

- Enter your user name, email address or RI number and click on the “Email password” button
- You will receive a computer generated password. As this is not easy to remember, you can change it to one of your choice after you have logged on.

Changing your User Data

Welcome, Gromit Wearbushing,

Gromit Wearbushing logged in

Modify Member Data

mbs_id: 7826
enepass: RwgOnLV1CZu2M
Status:
Member's username:
Title:
First Names*:
Last Name*:
Honours:
Rotary email address:
Member's R.I. Number*:

This can be obtained from your Rotary Foundation receipts.
It is also on the address slip attached to your Rotarian magazine above your name.

Access privileges:
Privilege: 2 = Normal member access - can only modify own data.
3 = Club officer - can modify club member, club and attendance data.
Club:
Partner's First Name:
Partner's Last name:

- Click on “Modify my personal data. You can change your personal data as you see fit. Only D5360 Rotarians logged in can see this data.
- You can also change your email address and username, but not to ones that are already in use by others.

Changing your Password

Welcome, Gromit Wearbushing,

[Return](#)

[Modify my personal details](#)

[Change personal password](#)



Change Password:

Use this form to change your password to one of your choosing:

Old Password:

New Password:

New Password:

[Change password](#)

- Immediately after logging in you have the opportunity to modify your personal data and to change your password to something more memorable.
- To change your password, click on “Change personal password”
- Enter the old password and the new one (twice) and click “Change password”.

Member password changed

Success!

Your password has been changed! Your new password is **mynewpassword**.

Downloading Forms

 **Rotary International District 5360 Grants Committee**

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District 5360 Grants Committee

District 5360 has created a **District Grants Committee (DGC)** as required by The Rotary Foundation in the Future Vision initiative. Our District is one of the 100 Pilot Districts which are proving out new procedures for the use of SHARE funds entering the **District. SHARE Funds**, also known as **District Designated Funds (DDF)** may be accessed by qualified clubs in our District as part of the new **DISTRICT GRANTS** and **GLOBAL GRANTS**. These Grants apply domestically and internationally for projects, scholarships and vocational training teams.

Mandate

The DGC mandate is to:

- Qualify clubs annually to be eligible for District and Global Grants from Rotary Foundation
- Determine assignment of District SHARE allocation (DDF) among eligible grant types
- Report to clubs and the DG and District Foundation Committee on use of these District Designated Funds
- Keep records for all District Designated Funds
- Report & resolve misuse of SHARE funds
- Educate clubs on Foundation Grants and Community Initiative Programs (Alberta Lottery funds)
- Advise clubs in completion of their forms and reports and advise clubs in the management of their projects, if requested.
- Liaise regularly with clubs in the District regarding information, updates, and changes related to DDF allocation of District and Global Grants.

You are encouraged to educate yourself on the various types of grants and the role of the DGC by studying the materials accessed via the [DOCUMENTATION](#) tab above. District Designated Funds are generated by donations originating in our District; let's make sure we put them to good use. Start your project planning early!
The committee chairperson for 2010-2011 is Walter Haessel whaessel@gmail.com

Notice Board

[Add a notice](#)
[Modify a notice](#)

[Email Webmaster:](#)

EVENTS
[Add an event](#)
[Modify an event](#)

Downloading a Form

 Rotary International District 5360 Grants Committee

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Roger Hough logged in

District Grants Committee

Please note that Future Vision is a pilot project, and that the documentation below is subject to change as we gain experience in its management.

Presentations

2011 Webinar Handouts

[Overview](#) - Walter Haessel

[DDF Global Grants](#) - Bob Wiens

[Club Memorandum of Understanding](#) - Bob

[Scholarships](#) - Barry Litun

[District Project Grants](#) - Glen Christensen

Reports

[Clubs Qualified for 2010-2011](#) (September 2011)

[DDF Allocations 2010-2011](#) (Aug 2011 Bulletin)

[DDF Allocations 2011-2012](#) (July 2011)

Grants Documentation

[Future Vision Plan - How to apply online for a Rotary Foundation Grant](#)

Document from TRF showing all the various steps one has to follow (including the application course).

[District Grants Manual](#)

[RI Comprehensive list of Future Vision documents](#)

[Sample Global Grant--proposal stage-Step 1 \(New\)](#)

[Sample Global Grant--application stage-Step 2 \(New\)](#)

[District Grants Committee Manual](#)

[Policies Governing the Use of District Designated Funds](#)

[Clubs qualified for 2011 - 2012](#) (May 26, 2012)

[District Grants Committee contact list for 2010-2011](#) (September 2011)

[District International Service Directors](#)

[Club Memorandum of Understanding](#) (Oct 24, 2011)

[Terms and Conditions for Rotary Foundation District Grants and Global Grants](#)

Grants Forms

[Expense Claim](#) (February 2011)

[Global Project Grant DDF Application Form](#) (Aug 30, 2011)

[Canadian Revenue Agency Project Agreement Form](#) (September 2010)

[District Scholarship Application](#) (April 2011)

[Global Scholarship Application](#)

[District Vocational Training Teams Application Form](#)

[District Vocational Training Team Grant Evaluation Form](#)

[District Vocational Training Team Grant Proposal Form](#)

[Global Vocational Training Team Participant Application Form](#)

[District Project Grant Application](#) (Feb 22, 2011)

[District Project Grant - Final Report](#)

[District Travel Grant](#) (14 Oct 2011)

MOU

- The Memorandum of Understanding should be downloaded, completed and signed and sent to Sue Williams
- All forms related to district grants should be downloaded, filled in electronically and submitted to the DGC website <http://www.rotary5360.org>. It is also acceptable to print a copy of the form, fill it in by hand, scan it, and then submit it electronically.
- Applications for DDF for Global Grants may also be downloaded from the DGC website and submitted to the DDF subcommittee.
- Global DDF is accessed through proposals, applications, and reports on the RI website.

Submission Procedure (District Forms)

- From the DGC website home page <http://www.rotary5360.org/> choose "Database" from the navigation toolbar:

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- You will see:

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D5360 Grants Committee Project Catalogue

Future Vision Projects
Project list
Project Status Spreadsheet
Add a District project
Add a Travel Grant Project
Add a Scholarship proposal
Add a Vocational Travel Team (VTT) proposal
DGC Incumbents
Archived projects

- Then click on Project List

Displaying a Project

- To display a project, click on its title:

 [Rotary International District 5360 Grants Committee](#)

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Rotary District 5360 Future Vision Project List

Select project type to be displayed

All Projects District Projects Scholarships Travel

Global Projects are administered on the RI Website.

Project ID	Name	Type	Project Country	Sponsor Club	Rotary Year	Approved?
CCENT-DT-2012-15	Afghan test project	District Travel	Afghanistan	Calgary Centennial	2012	
MHSUN-DP-2011-16	Mexican Schools Project elementary school	District Project	Mexico	Medicine Hat Sunrise	2011	yes
STETT-DP-2011-17	Guatemala Water Filter Project	District Project	Guatemala	Stettler	2011	yes

- This will bring up the printable version of the form

Application Form - Example

[16] Mexican Schools Project - elementary school

[Edit Document](#)

Sponsor/Rotary Club: Medicine Hat Sunrise

Location of the Project: Cabo Correntes, Jalisco, Mexico

Type of project: District

Project ID = MHSUN-DP-2011-16

Total cost of Project: 20000

Application date: 2011-05-07

Rotary year for which this application applies: 2011

Anticipated project start date: 0000-00-00

Project Committee

Primary contact: Sue Masterman, Email: smasterman@shaw.ca, Phone: 403-526-5487

Secondary contact: Laurence Johnson, Email: Larry.Johnson@mnp.ca, Phone: (403) 526-9708

Supporting Documentation:

ID	Document Title	URL
40	District Project Grant Application	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_16_40.pdf

- The application form can be downloaded for viewing by clicking on the URL
- To edit the project, click on "Edit Document"

Adding a New Project

D5360 Grants Committee Project Catalogue

The project is now live, but there may be teething troubles.

If you wish you can enter fictitious projects to try out the system, but please make it clear that this is the case (e.g. Test: Project Name) so that the DGC treat it as such.

Future Vision Projects
Project list
Project Status Spreadsheet
Add a Global project proposal
Add a District project proposal
Add a Travel Grant proposal
Add a Scholarship proposal
Add a Vocational Travel Team (VTT) proposal
DGC Incumbents
Archived projects

To add a new district Project, Travel, Scholarship or VTT proposal, click on the relevant link from the Catalogue page.

Adding a Project

Project Participation

Your Rotary Club: **Help**

Name of the Project:

Type of project: District

Location of the Project: City or Area Country:

Project ID = ---

URL of picture of project
(This can be an existing picture on the internet or one that you upload from your computer)

Click on the button to upload a picture: **Upload Picture**

Total cost of Project: \$

Application date: (YYYY-MM-DD)

Rotary Year for which this application applies:

Anticipated project start date (YYYY-MM-DD)

Project Committee

Primary contact:

Secondary contact:

- Airdrie
- Banff
- Brooks
- Calgary
- Calgary Centennial
- Calgary Chinook**
- Calgary Crowchild
- Calgary East
- Calgary Eau Claire
- Calgary Fish Creek
- Calgary Heritage Park
- Calgary Millennium
- Calgary North
- Calgary Olympic
- Calgary Sarcee
- Calgary South
- Calgary West
- Canmore
- Cardston

Untitled Document

This is the D-5360 club responsible for managing the project, and may or may not be the sponsor. In RI terms, it is the International partner that has a Primary or Primary/Contributor involvement.

- The data requested allows the project to be classified and retrieved from the system. The application form will be uploaded to this file as an attached document, and it is this attached form that will be the formal application.
- Any window that has up and down arrows has a pull-down menu. (the appearance may differ depending on your browser). Clicking on "Help" will bring up a help window.
- To upload a picture, click on the "Upload Picture" button

Saving the Document

- Complete all the fields in the form (picture optional) and then press the "save" button. The system will register the project and give it a unique number.
- If you click on the "Upload Picture" button from the screen above, you can choose a picture from your hard drive:

Click on "Browse" to select a photo from your files for uploading to the database.
Please note that the larger the original picture, the slower will be the upload...

Browse... **Upload**

- Browse the drive and choose the picture file.
- Then click on "Upload"
- When the upload completes, return to the application form.

Documentation

- To add the documentation you will need to use the upload box as shown below.
- Click on “Add Row” to add an empty box.
- Enter a title. The URL box will be empty. If you know the URL of the document you can enter it. Otherwise you can upload it from your hard drive.
- To upload a document, click on the “Upload Doc” button, which will give you an upload page similar to the one above describing the uploading of a picture.

Documentation

Use the table below to upload the application form and any supporting documentation, such as a spreadsheet of the budget (if separate from the applications form).

The Rotary Club receiving the Rotary District 5360 District Project Grant has the obligation of providing reports to the Rotary District 5360 Project Grants subcommittee within 2 months of the date of completion of the project or two years from the date the funds are received by the district, whichever is earlier. These reports will be filed using the reporting forms provided for this purpose and the club will provide receipts for any expenditures over \$75. You may file this information using the Upload feature below, including the final report and any scanned receipts.

ID	Document Title	URL	Upload	Modify
40	District Project Grant Application	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_16_4	Upload Doc	Delete Row
<input type="button" value="Add Row"/>				

- Above you see the form after a document has been uploaded. The URL box now contains the address of the document you just uploaded. Don't worry if it looks complicated. If you have further supporting documents, click on “Add Row” and repeat the process. To remove a document click on “Delete Row”.

Saving and Forwarding to the Club President

- You may pause the inputting at any time and resume later. However make sure to hit “Save Changes” to save your work.

Reimbursement

I/We understand that the funds will be sent to our club shortly after the funds are received from TRF.

This will save any changes you have made.

- As soon as you have all the necessary information uploaded to proceed with the application, you can forward it to your club President for approval. Click on “Send to President”.

Authorisation

Click on "Send to President" when the form is ready to be frozen and sent to the Club President for authorisation:

The system will send an email to the club President requesting authorisation to submit the application to the District Grants Committee.

(You can always withdraw the document for further editing afterwards, but you will then have to go through the approvals process again.)

Club President's Approval

- At this point the club president will receive an email message, which looks like this:

To: President - Philip Uglow, RC of Calgary Centennial:

You are requested to authorise the above travel application to be submitted to the District Grants Committee.

Click on the link below to be connected to the project:

http://www.rotary5360.org/php/wcs/fv_travel_print.php?fv_proj_id=21...

- If the President clicks on the link, it will bring up the project information:

Documentation

ID	Document Title	URL
50	Travel application form	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_21_50.docx

Club President Approval

Once authorised, if you change your mind, you will need to have the club withdraw the project and, if necessary, resubmit it.

/We understand that the funds will be sent to our club shortly after the funds are received from TRF.

Authorised by: Philip Uglow, President of Calgary Centennial for submission to the DGC Travel Subcommittee Chair

- Again clicking on the blue link will download the application for review
- The President will then click on "Authorise" or "Do not Authorise" as appropriate. Only the President will get these buttons.

DGC Approval

- Authorising the project now generates a similar email to the appropriate subcommittee chair who can approve or reject the application in a similar fashion.
- This is the email message received by the subcommittee chair:

To: Emil Tarka, District Projects Subcommittee Chair,

You are requested to approve the above project. Click on the link below to be connected to the project.

http://www.rotary5360.org/php/wcs/fv_travel_print.php?fv_proj_id=21

- Clicking on this link will bring up the project again, but with the DGC approval buttons instead:

Documentation

ID	Document Title	URL
50	Travel application form	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_21_50.docx

Authorised by: Philip Uglow, President of Calgary Centennial for submission to the DGC.

DGC Approval

Once approved, if you change your mind, you will need to have the club withdraw the project and, if necessary, resubmit it.

- After downloading and reviewing the application the DGC subcommittee chair will approve or reject it.

Approval

- Clicking on either button will send an appropriate response to the club president.
- At this stage the project will be flagged as approved in the system and displayed as “yes” in the “Approved?” column of the project list. If the project has been rejected it will display as “rej” in the project list:

DP-2011-18	Permaculture Project	Project					
KINDE-DP-2011-19	Well Project	District Project	Tanzania	Kindersley	2011	wdn	Delete
LURSP-DP-2011-20	Karim Children Care Centre Expansion Project	District Project	Tanzania	Lethbridge Urban Spirits	2011	rej	Delete
CCENT-DT-2012-21	Hospital equipment - Kampala	District Travel	Uganda	Calgary Centennial	2012		Delete
CCENT-DS-2012-24	Nigerian scholar	District Scholarship	Nigeria	Calgary Centennial	2012	yes	Delete
ICAI GY-							

Withdrawal of an application

- Once a project has been submitted, it is frozen and can no longer be edited. If for some reason the project needs to be modified, either at the behest of the club or DGC, the originators of the document and the club president may withdraw the application. Its status is listed as “wdn”.

[15] Afghan test travel project

Document frozen - editing no longer allowed unless application is withdrawn.

It may be withdrawn by clicking on the Withdraw Application button but will then need to be resubmitted

NOTE: when the system goes live, editing will only be allowed by members of the sponsor club, and this button will only be visible to them.

[Withdraw Application](#)

- The project now has the status of a new application and will need to be resubmitted if that is the intention.

Reporting

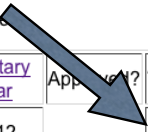
To submit a report, go to the projects list, and in the column “Add Report”, click on “Add” for the relevant project.

Note - only the originator of the report or the project champions may submit reports.

Select project type to be displayed

After funding has been allocated, Global Projects will be administered on the RI Website

Project ID	Name	Type	Project Country	Sponsor Club	Rotary Year	Approved?	Add Report
CCENT-DT-2012-15	Afghan test travel project	District Travel	Afghanistan	Calgary Centennial	2012		Add
MHSUN-DT-2011-16	Mexican Schools Project - elementary school	District Travel	Mexico	Medicine Hat Sunrise	2011		Add
STETT-DP-2011-17	Guatemala Water Filter Project	District Project	Guatemala	Stettler	2011	yes	Add
CWEST-	Vergenoeg	District			2011		Add



Reporting (2)

- Since the project application has been frozen, it is only possible to change the project champions and the attached photo.
- To add a report, click on “Add Row” and then upload the report in the same manner as you previously uploaded the application.
- The original application and any of its supporting documentation will be listed as links, but cannot be changed

Documentation

Use the table below to upload your reports and any supporting documentation, such as a spreadsheet of the costs.

The Rotary Club receiving the Rotary District 5360 District Project Grant has the obligation of providing reports to the Rotary District 5360 Project Grants subcommittee within 2 months of the date of completion of the project or two years from the date the funds are received by the district, whichever is earlier. These reports will be filed using the reporting forms provided for this purpose and the club will provide receipts for any expenditures over \$75. You may file this information using the Upload feature below, including the final report and any scanned receipts.

ID	Document Title	URL	Upload	Modify
41	Applicarion form	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_15_41.doc		
86	Final report	http://www.rotary5360.org/php/wcs/fv_upload_files/fv_file_15_86.doc	<input type="button" value="Upload Doc"/>	<input type="button" value="Delete Row"/>

This will save any changes you have made.

Reporting (3)

Once the report is ready for submission, it may be forwarded to the Club President in the normal manner.

Authorisation

Click on "Send to President" when the final report is ready to be sent to your club president for approval:

The system will send an email to the club President requesting authorisation to submit the final report to the District Grants Committee.