Shaala Sarathi

a State – NGO - Corporate/CSR portal

User manual

10/ 07/ 2018

Version 2

Contents

1. How to register?

The Shaala Sarathi website has the registration forms for NGOs (non-profit organizations) and for Corporates/ CSRs/ Corporate Foundations. All states have been registered and logins have been shared with the respective Nodal officers. The following are the step to register your organization on Shaala Sarathi website:

Step 1: Click on ‘Login’ on the top right-hand side of the website.

Step 2: Pick your respective user category.
For e.g. if you represent an NGO, click on the blue box marked ‘NGO’.

Figure 1.1: Login page 1

Step 3: Click on ‘Create an account’ to open the respective application/ registration form.

Figure 1.2: Login page 2

If you are an NGO representative, jump to section 1.1. If you are a Corporate/ CSR/ Corporate Foundation, jump to section 1.2.

1.1 NGO application form

Overview of NGO application:

NGO registration criteria:

There are two types of NGOs on Shaala Sarathi:

I. *Category A:* NGOs that clear just the Shaala Sarathi criteria
II. Category B: NGOs that clear the Shaala Sarathi criteria and MCA's CSR funding eligibility criteria

Minimum criteria for NGOs to be able to register (Category A qualifications):

- The NGO should be working in the field of school education.
- The organization must have **signed an MoU with the government** on a school education project OR
  The organizational **spend on education** should total least 1 crore in the past two financial years (as per financial audit report) OR
  The organization should have **registered on the DARPAN Portal** of NITI Aayog.
- The organization should not have been blacklisted/debarred by any government or affiliated agencies.
- The organization must be registered as a trust, society or Section 8 company.

Two qualify for Category B, the NGO needs to fulfil an additional second criterion, which is as follows:

- The NGO must have **a registered office** and operations based **in India**.
- The organization must be **at least 3 years old.**
- The organization must possess a **valid 12A and 80G certificate.**

On clicking on 'NGO' in Step 2, gives you the NGO application form.

Step 4: On the first page of the NGO application form, select the conditions applicable to you. Details below:

1. On selection of 'I fulfil all of the above criteria' on both the *Shaala Sarathi Eligibility criterion* and of 'I do not fulfil all of the above criteria' on the *CSR funding eligibility criterion,* the user would access the Category A form
2. On selection of 'I fulfil all of the above criteria' on both the *Shaala Sarathi Eligibility criterion* and on the *CSR funding eligibility criterion,* the user would access the Category B form

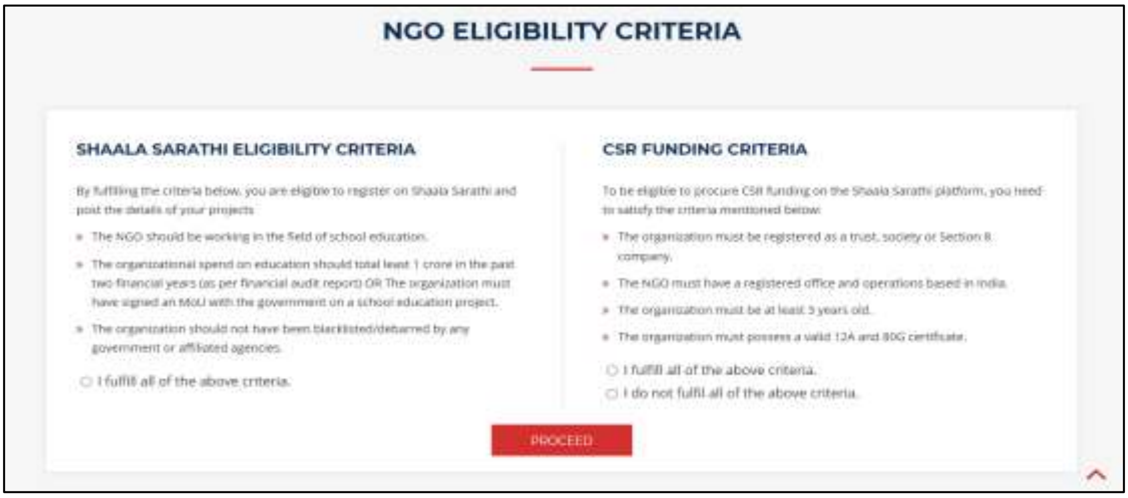


Figure 1.3: First page of the NGO application form

1.1.1 NGO application form for the Category A NGOs

…. continued after step 4 from the previous sub-section

Step 5: Fill the basic information of the NGO, that includes ‘Name of the Organization’; ‘Registered office address’; ‘Date of registration’; ‘Type of organization’ and ‘Registration number’.

Step 6: Upload the incorporation certificate of your NGO at the space mentioned as ‘Upload registration certificate’.

Step 7: You can also upload your NGO’s logo if you wish to.

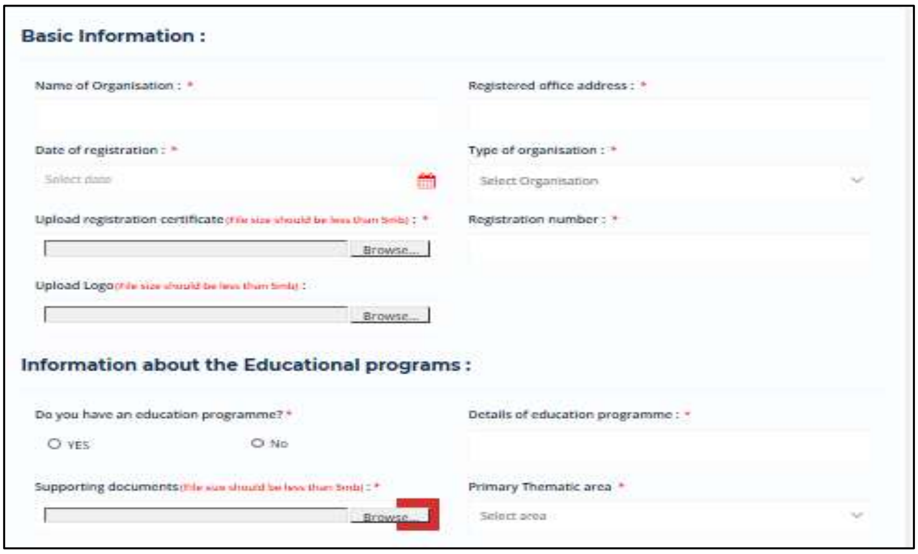


Figure 1.4: ‘Basic information’ and ‘Information about the Educational program’ parts of the NGO application form

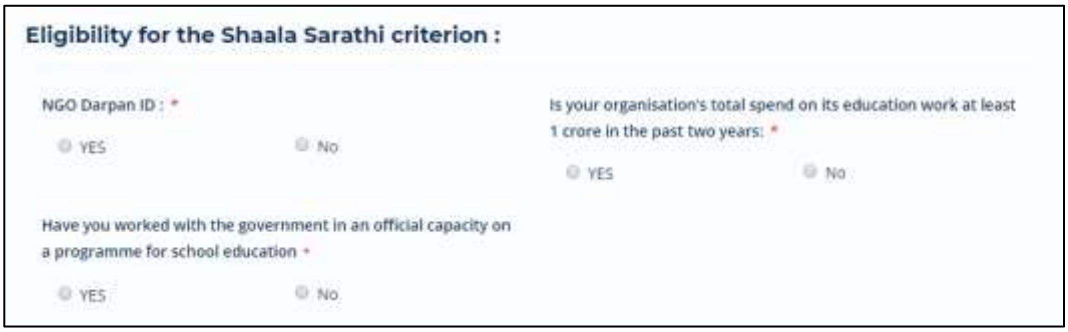
Step 8: Fill in the detailed description of the work you do, that includes the details of your Educational program, and the primary thematic area.

Step 9: Upload the soft copy of the collateral that you use to showcase your education program at the ‘supporting documents’ field.

Step 10: In the section ‘Eligibility for the Shaala Sarathi criteria’:

I. If you have an NGO Darpan ID, answer ‘Yes’ and then input your NGO Darpan text; otherwise click on ‘No’.
II. If you have more than 1 Crore budget in education, click on ‘Yes’ and upload the audited financial statements for the last two years; otherwise click on ‘No’.
III. If you have an existing partnership with any state government or other governmental body (not an autonomous government unit), click on ‘Yes’ and upload the copy of MoU with the government; otherwise click on ‘Yes’.

Note: You need to fulfil at least one of the three above mentioned criteria to be eligible to be on Shaala Sarathi.



Eligibility for the Shaala Sarathi criterion :

NGO Darpan ID : *
YES No

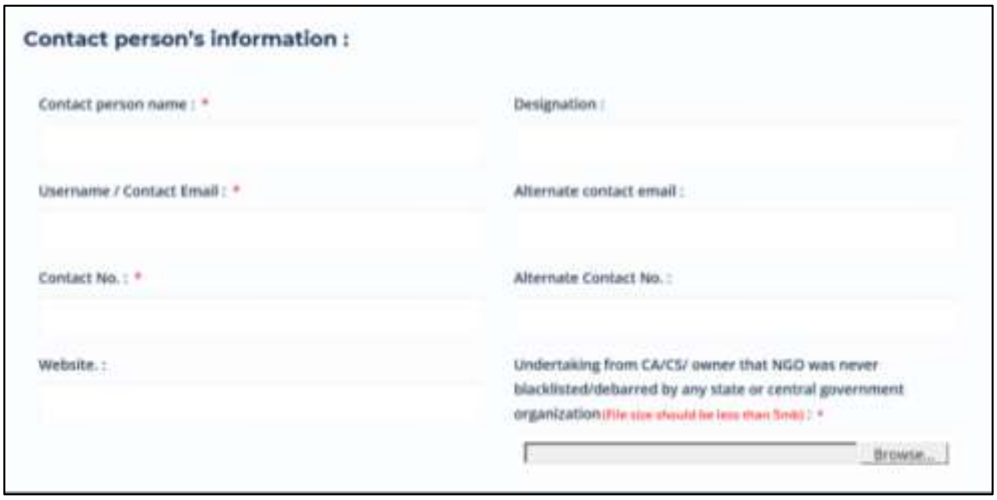
Is your organisation's total spend on its education work at least 1 crore in the past two years: *
YES No

Have you worked with the government in an official capacity on a programme for school education *
YES No

Figure 1.5: Section three of the NGO application form

Step 11: In the section 'Contact person's information', input:

Contact person's name
Designation,
Primary email id (username),
Alternate email id,
Contact numbers
Signed undertaking from NGO's Owner/ CA/CS declaring that they are not blacklisted by any state or central government.



Contact person's information :

Contact person name : *
Designation :
Username / Contact Email : *
Alternate contact email :
Contact No. : *
Alternate Contact No. :
Website. :
Undertaking from CA/CS/ owner that NGO was never blacklisted/debarred by any state or central government organization (File size should be less than 5mb) : *
Browse...

Figure 1.6: The fourth section of the NGO application form

1.1.2 NGO application form for the Category B NGOs

Note: NGOs applying for Category B, need to fill an additional section 'Eligibility for CSR funding' in addition to the same form as the Category A NGOs. The steps to fill the NGO application form for the Category B NGOs are as below:

Repeat the steps 1 to 11 from the section '1.1.1 NGO application form for the Category A NGOs'.

Step 12: Enter your 12A registration number in the field '12A registration number'.

Step 13: Upload your 12A certificate at the field 'Upload 12A'.

Step 14: Enter your 80G registration number in the field '80G registration number'.

Step 15: Upload your 80G certificate at the field 'Upload 80G'.

Figure 1.7: The 'Eligibility for CSR funding' section in the Category B NGO application form

__Step 16:__ Click on 'I am not a robot' captcha. Wait for it to load and show a tick mark. Then click on 'Submit'.

1.2 Corporate/ CSR/ Corporate Foundation registration form

At Shaala Sarathi, all corporates which have a CSR mandate or a philanthropic bend are eligible to register on Shaala Sarathi. The organizations are expected to have an interest in investing/ grant making/ donating/ funding in education focused projects.

Note: 1. The contact person's information is not made public. An email would be sent to this address in case of any notification about Shaala Sarathi as well as on expression of interest on the projects created by the corporate in concern.

2. Although the corporate registration process does not require an approval from the MHRD as it does for the NGO applications. The MHRD reviews the corporate entries on regular basis and reserves the right to terminate an account in case any discrepancies or wrong doings are noted.

The steps to fill the Corporate registration form are as follows:

__Step 1:__ Input the name of the company, corporate Identity number, sector and the estimated budget of the current financial year.

__Step 2:__ Input the details of interest in education by filling the thematic areas of preference in education, target beneficiaries and the geographical areas in focus.

__Step 3:__ If you wish to, input the TAN and the image of the corporate's logo.

__Step 4:__ In the second section 'Contact details', input the contact person's name, designation, primary email address and your password request.

The password needs to be of at least 8 characters, and have a capital letter, a special character and a number.

__Step 5:__ Acknowledge the declarations as mentioned.

__Step 6:__ Click on 'I am not a robot' captcha. Wait for it to load and show a tick mark.

__Step 7:__ Click on 'Submit.

2. How to log in to your account?

Once you have your account gets active, you can use the following steps to log in to your account:

Step 1: Click on 'Login' on the top right of the menu shelf.

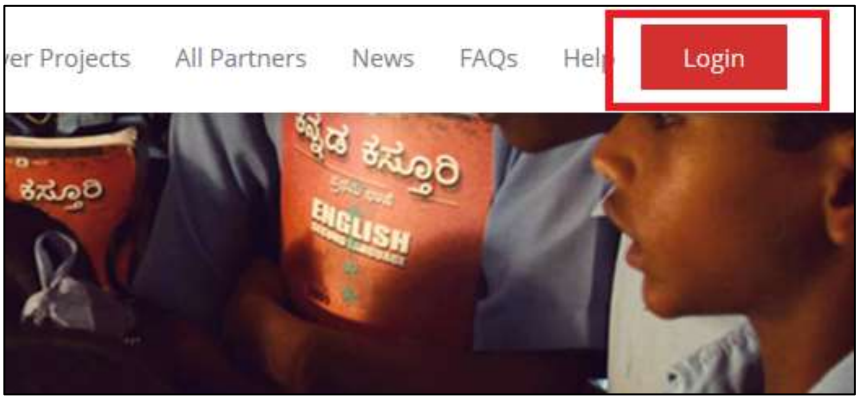


Figure 2.1: Login button

Step 2: Click on your respective user category.
For e.g. If you are a state government representative, click on 'State'.

Figure 2.2: Chose your category page post login

Step 3: Enter your login details in the space provided.

Figure 2.3: Main login page

Step 4: Click on 'I am not a robot' captcha. Wait for it to load and show a tick mark.

Step 5: Click on 'Submit.

3. How to create projects?

Post the login, use the following steps to create a project:

Step 1: Click on 'My account' on the top right of your webpage to open your profile menu.

Figure 3.1: My Account button post Login

Step 2: Click on 'Create project' in the menu.

Figure 3.2: Create Project button in 'My account' menu

Step 3: In the 'Create project' form, input the 'Project title'; upload a cover image.

Step 4: Mention the details of the problem that you are trying to solve in the field 'Problem statement'.

Step 5: Mention the details of the solution the project plans to implement to the problem mentioned in the 'Proposed solution' field.

Step 6: Mention the metrics on which you will evaluate the success of the project in the field 'Key success indicators'.

Figure 3.3: Project description part 1 of the 'Create project' form

Step 7: Input the expected start date and end date of the project in the respective fields.

Step 8: In Status, select the current state of the project. Here you mention if the project has 'not yet started', 'started' or 'completed'.

Step 9: Mention the estimated cost and upload the document which shows the breakdown of the costs.

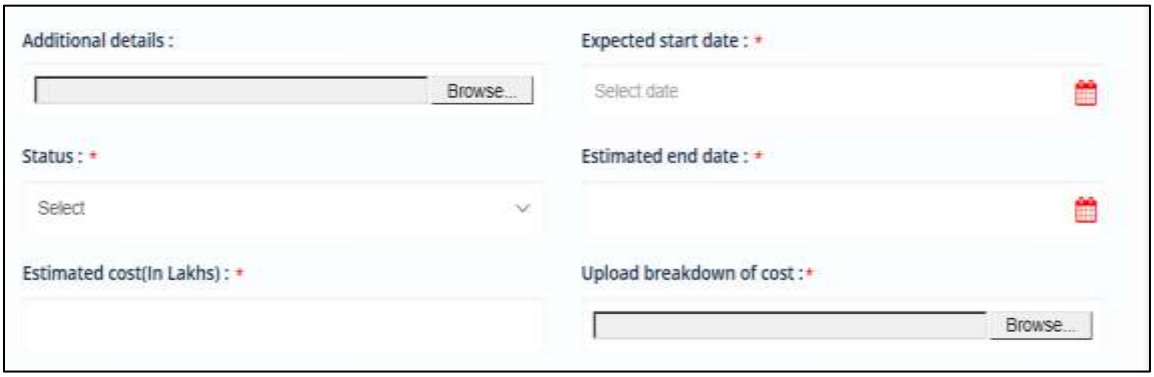


Figure 3.4: Project description part 2 of the 'Create project' form

Step 10: Select the states where the project is functioning at 'States where operational' field and specify weather the project is for certain areas (urban, rural) or for whole state in the 'Primary location' field. Mention the names of the districts in 'Specific location' field.

Step 11: Select the most relevant thematic area (up to 3) in the field 'Thematic area' and beneficiaries in the field 'Beneficiary'.

Step 12: If you want, you can mention the terms relevant to the project in 'Tags' and cost per beneficiary in the field 'Cost per beneficiary'.

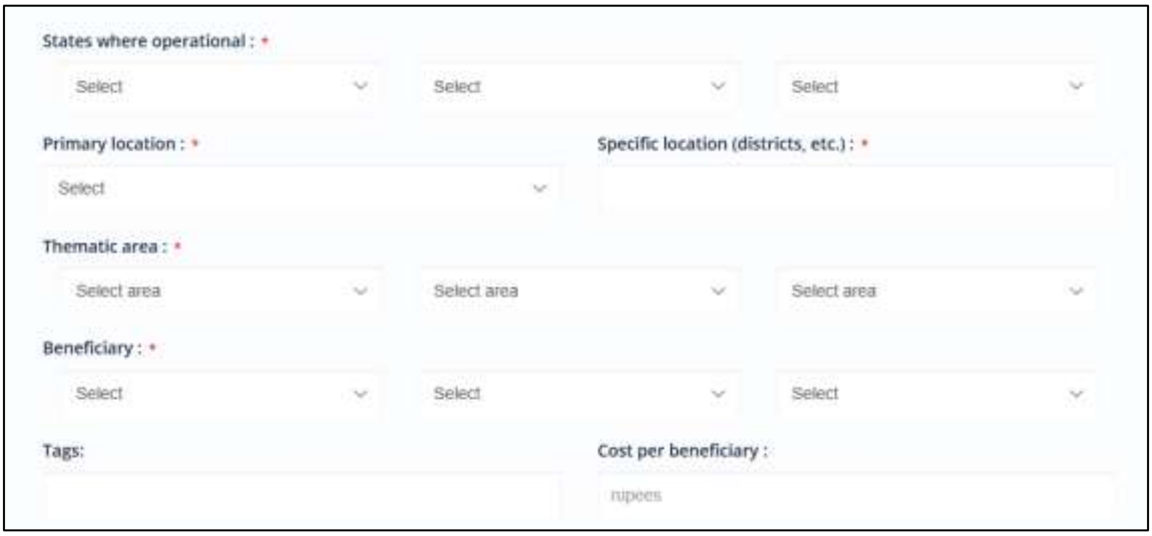


Figure 3.5: Project description part 3 of the 'Create project' form

3.1 How to add existing partnerships on the project profiles?

<u>Step 13:</u> If you are working with any other organization or state government on the project and that partner organization is registered on Shaala Sarathi, mention the names of the partners in the fields 'Existing NGO partner(s)'; 'Existing CSR partner(s)'; and 'Existing State partner(s)' depending on the type.

- Select the registered partner organization's name by selecting their names from the drop-down menu in the 'Name of NGO'; 'Name of CSR'; 'Name of State' columns.
- Input the basic information regarding the partnership, by sharing a brief in the field 'Description of the partnership'.
  For e.g. If an organization is funding your project with Rs. 1 crore for 50 schools, you can write 'funded 50 schools with Rs. 1 crore' in the column 'Description of partnership'
- You can input more details about the partnership in 'Additional details' column.
- In case of State partnership, you need to mention the names of the nodal official and nodal officer at the state government office in the column 'Nodal Agency'.
- To add more partners in the same category, click on 'Add more' in the column 'Action'.

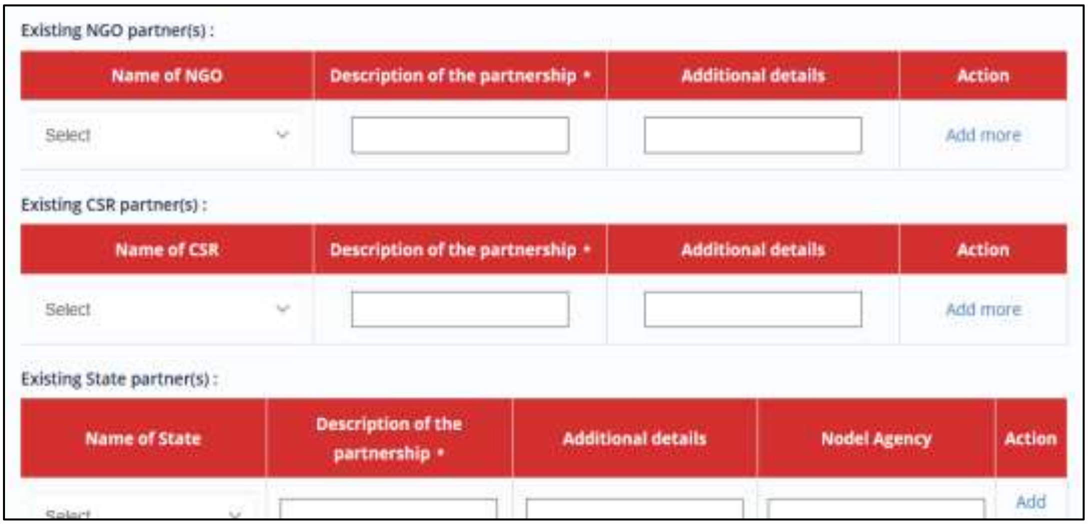


Figure 3.6: Adding exisiting partners part of the 'Create project' form

<u>Step 14:</u> If you are working with another organization and that is not registered on Shaala Sarathi, send them an invitation to join 'Shaala Sarathi' by clicking on the 'invite' button (figure 3.7). A pop-up as shown in figure 3.8 will open up where you can fill the details of the person you want to invite and send a message.

Figure 3.7: Invite button to send Shaala Sarathi invitations

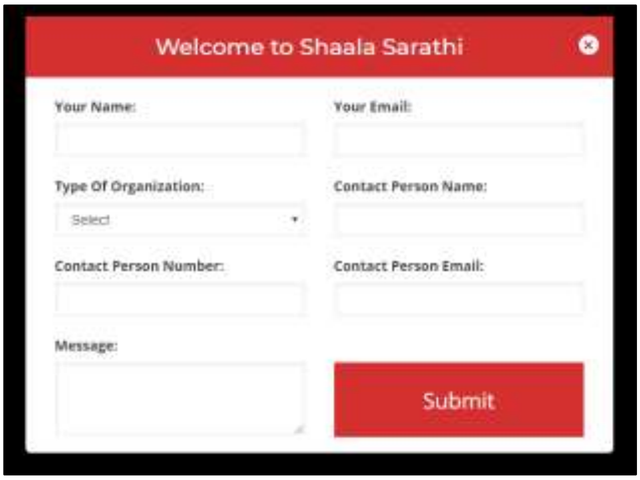


Figure 3.8: Inviting partners request pop-up

Step 15: Mention the contact details of the contact person by stating the name of the person in 'Project lead'; their contact details in 'Email' and 'Phone number' field.

Step 16: Mention the project's requirements in the field 'What is needed?'.

Step 17: You can mention the project's reporting structure in the 'Preferred reporting structure' and if there is any video, then the video link at the 'Video link' field.

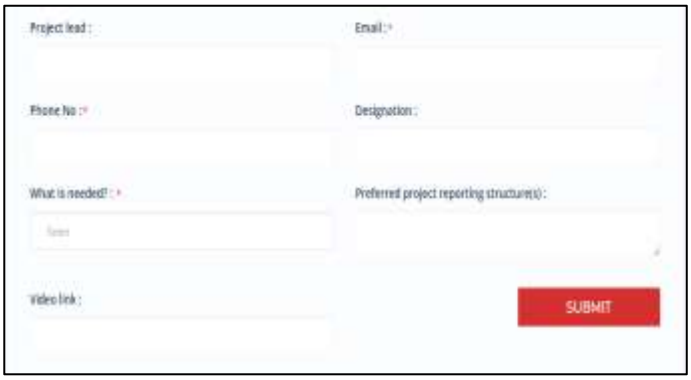


Figure 3.9: The contact person's detail part of 'Create Project' form

Step 18: Click on 'Submit'. On clicking on submit, the project is created and a request is sent to the mentioned partner organization to confirm their affiliation on the project with your organization.

4. How to track projects?

4.1 How to access the 'Track projects' page.

Step 1: Click on 'My account' on the top right of the website after logging in.

Step 2: Click on 'Track projects'.

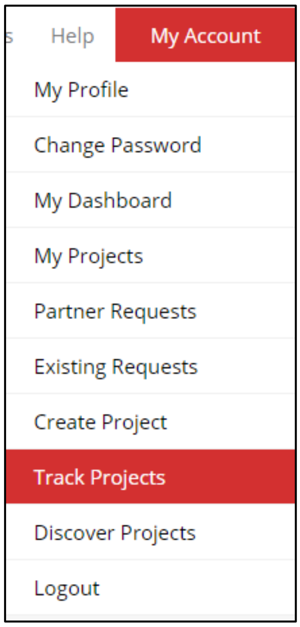


Figure 4.1: 'My accounts' menu

On the 'Track project' page, you can do the following three things:

(i) Update the implementation status of your project.
(ii) Add the activities associated with the projects and their implementation status.
(iii) View the activities and the status of implementation of the activities of the project that you are partnering on.

4.2 Update the implementation status of your project

Step 1: Click on the drop-down menu below the 'Status' column next to the project.

Step 2: Chose the status most representative of the current implementation status of the project.
For e.g. if the project implementation is underway, chose 'On track'.

Step 3: Click on submit on the right-side column

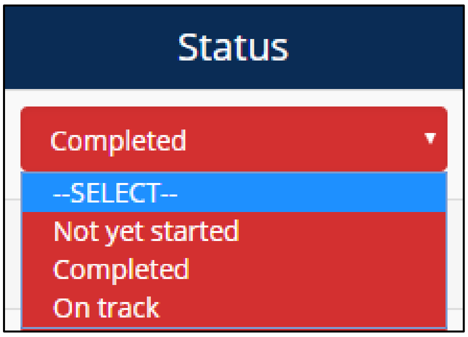


Figure 4.2: Status column on the project listing

4.3 Add the activities associated with the projects and their implementation status.

Step 1: Click on 'View' against the project name to view the project summary and the current listing of activities.

Figure 4.3: Project listing on the 'Project tracking' page

Step 2: Click on 'Add Activity' to add the details of tasks that form the part of the project.
By clicking on 'Add Activity', the box shown in the image on right opens up.

Step 3: Input the title of the activity with brief details of the activity in the field 'Details of activity'.
For e.g. If a project includes teacher training as one of the tasks, then 'Teacher training for 5 schools in Delhi' could be put in the details of the activity.

Figure 4.4: Adding an activity part on the 'Project tracking' page

Step 4: In the documents field, you can add a documented report of the activity, or task list or other relevant details around the task.

Step 5: Choose the privacy setting of the task, input the 'Start date'; 'End date'; and the 'Status' of the activity.

Step 6: After inputting all details, click on 'Submit'.

Step 7: The activity on submission would be presented in the manner as shown on the image on right.

Figure 4.5: Activity listing on the 'Project tracking' page

You can click on 'Edit' to edit the contents of the activity and 'delete' to delete the activity from the list.

4.3 View the activities and the status of implementation of the activities of the project that you are partnering on.

The projects that you are partnering on (you did not upload but have been added as a partner) would be shown as the image below:

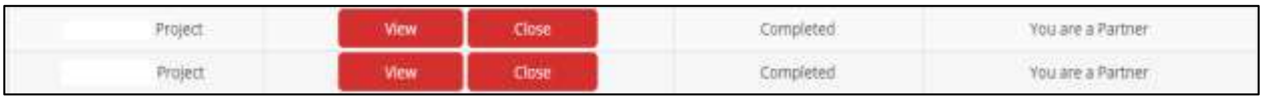


Figure 4.6: Project listing of partner projects

Step 1: Click on 'View' to view the activities related to the project as uploaded by uploader.

Step 2: To close the view, click on 'Close'.

If there have been no activities added to the project, follow up with the uploader to add the activities using the steps mentioned in this guide in section 4.2.

5. How to discover projects and express interest in a project?

At discover projects, you can view the complete project listing on the website. The projects posted are uploaded by the registered State governments, or NGOs or Corporates/ CSRs. You can filter the projects to find the ones more relevant to you by using the advanced filter function.

Step 1: You can filter the projects based on your preferences on thematic areas, location, beneficiary, project status, funding, state of project etc. to find a project of your interest.

Figure 5.1: Advanced project filtering option

Step 2: When you find a project of your interest, click on 'View' to view the details of the project as uploaded by the uploader.

Figure 5.2: 'View' button on project details

Step 3: To show interest in a project, click on 'Show interest' on the right side blue box titled 'Contact'. After you click on 'Show interest', an interest notice is sent to the person managing the project.

Figure 5.3: 'Show Interest' button on project details page

6. How to take an action on a received partnership request

On the Shaala Sarathi web-portal, there are two types of partnership requests.

1. Existing partnership request: The existing partnership request is sent to you by an organization claiming to be in partnership with you through a signed formal MoU. This is the request that is sent through the process mentioned in Section 3.1. You are expected to 'Accept' the request to confirm that your organization is in a formal partnership on that particular project with the organization sending the request and to 'Decline' if your organization is not working with the organization sending the request.
2. Interest request: An Interest request is sent to you by an organization that 'wants' to work with you on a project that you have initiated. You can communicate with the organization offline to see if their interests align with your requirements. If the communication leads to a formal partnership, you can update the status on the request on the portal by accepting it. If you decide to not to go ahead with conversations with the interested party, you can decline the request on the portal.

6.1 How to take an action on a received 'Existing partnership request'.

<u>Step 1</u>: Post login, click on 'Partnership request received' under the 'Existing partnerships' in the drop-down under 'My account'.

The page that opens highlights which organization has sent you a request, for which project, and the possible actions that can be taken by you on the request.

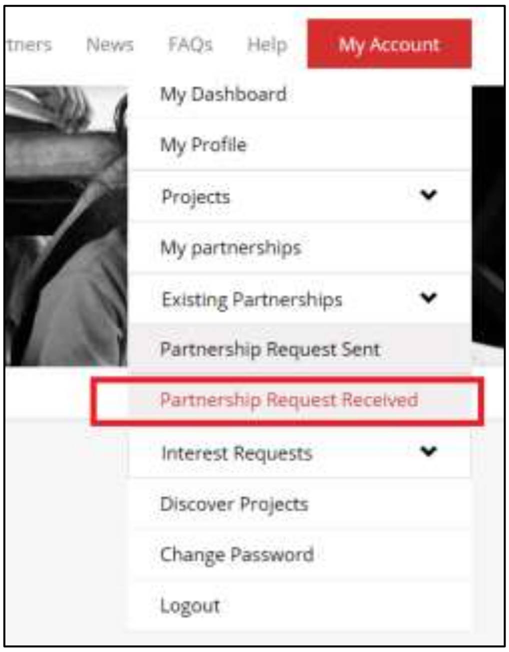


Fig 6.1.1: 'Partnership request received' button

<u>Step 2</u>: If you are working with the organization that sent the request on the project as mentioned under the 'Project name', click on 'Accept'.

<u>Step 3</u>: If you are not working on the organization that sent you the request, click on 'Decline'.

Fig 6.1.2: 'Partnership requests received' page

6.2 How to take an action on the received 'Interest request'.

<u>Step 1</u>: Post login, click on 'Interest request received' under the 'Interest Requests' in the drop-down under 'My account'.

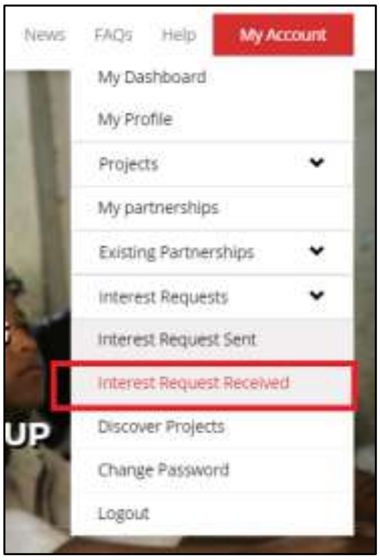


Fig 6.2.1: 'Interest request received' button

The page that opens highlights which organization has sent you an Interest request, for which project, and the possible actions that can be taken by you on the request.

You can connect with the interested party offline by using their email address and phone numbers.

<u>Step 2</u>: If the negotiation does not lead to a partnership, click on 'Decline' to remove the request from your dashboard.

Fig 6.2.2: 'Interest requests received' page

<u>Step 3</u>: If the negotiation leads to a formal partnership (an MoU is signed), click on 'Proceed'.
On clicking on 'Proceed', a new page window that asks you to confirm if the MoU has been signed.

Fig 6.2.3: Confirming your partnership on the 'Interest request'

<u>Step 4</u>: Chose the appropriate option to the question 'Have you signed an MoU?' and click on 'Accept'.