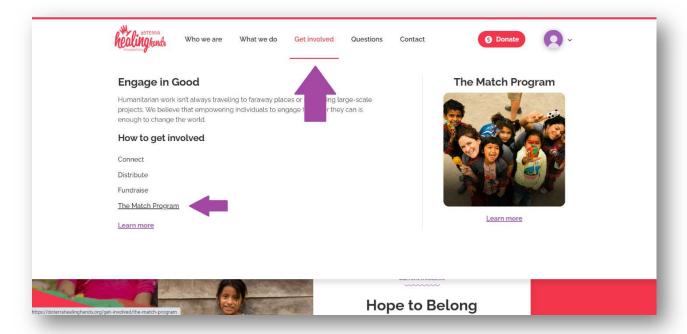
The Match Program

Since the launch of The Match Program in 2015, the dōTERRA Healing Hands Foundation® has been supporting Wellness Advocates in their humanitarian and philanthropic efforts at home and abroad. With the shared mission to empower individuals and communities worldwide, combined efforts to fundraise and complete humanitarian projects enables our dōTERRA® family be the difference that makes all the difference. #EngageInGood

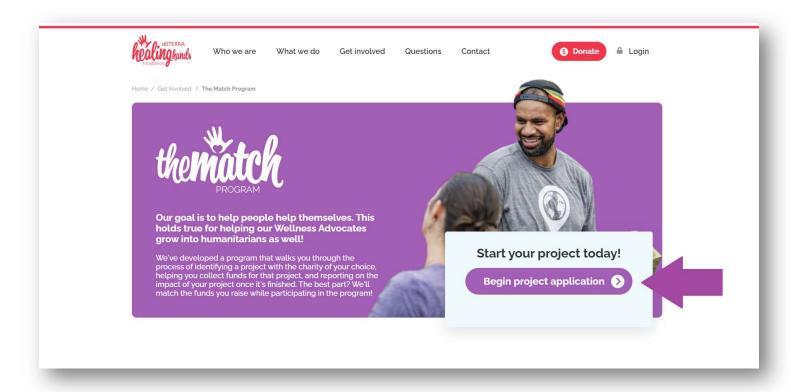
Login

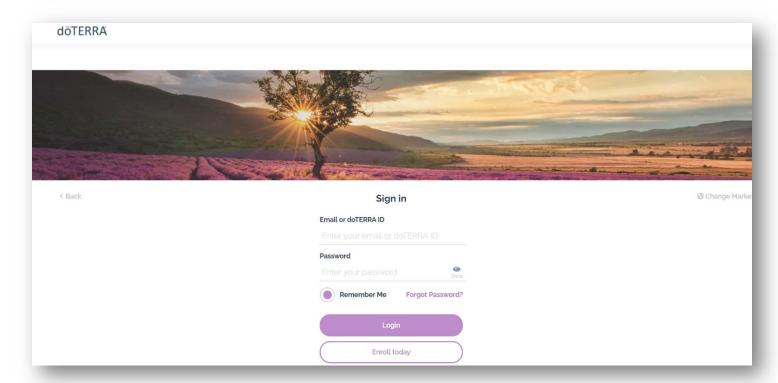
To begin a project proposal for the Match Program, members will visit <u>www.doterrahealinghands.org</u>. A link for the Match Program exists on the main page, but members can also navigate there by hovering over "Get Involved" in the main menu at the top of the screen and selecting "The Match Program."



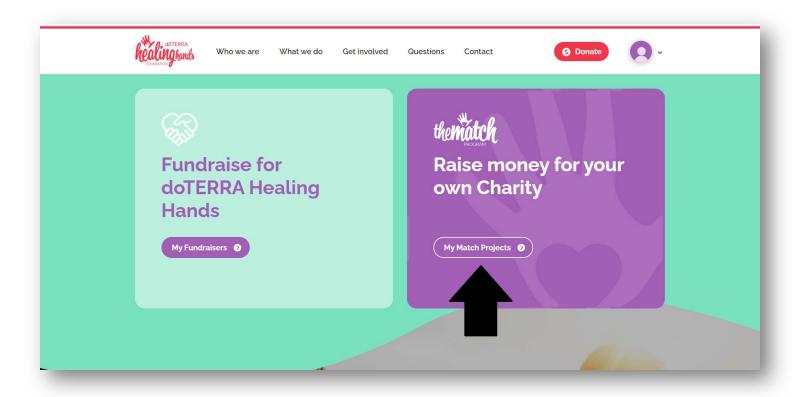


Once the member is looking at the Match Program landing page, they'll select "Begin Project Application" and log in using their doTERRA ID and password (the same one they use to log in to their back office) to start putting together their proposal.

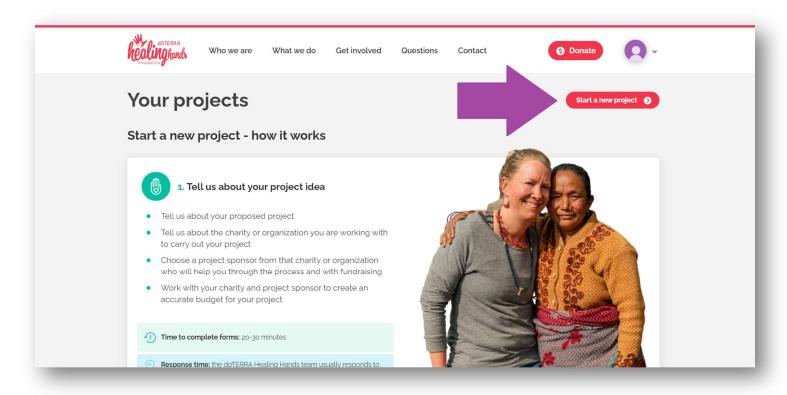




Once they're logged in and looking at the login landing page (called "my homepage"), they'll select the "My Match Projects" button. Members can always click this button to check back up on the status of a project in progress, or see past projects they've already completed.



If the member has not done a Match project before, they'll land on a screen that provides additional information about the Match Program. To begin their project proposal, they'll select "Start a new project."



Once the member starts a new project, they'll begin the process of putting together a project proposal for the doTERRA Healing Hands Foundation (dHHF). The proposal will tell the dHHF about the project they need funding for, which project will benefit from their matching campaign fundraiser and the dHHF match.

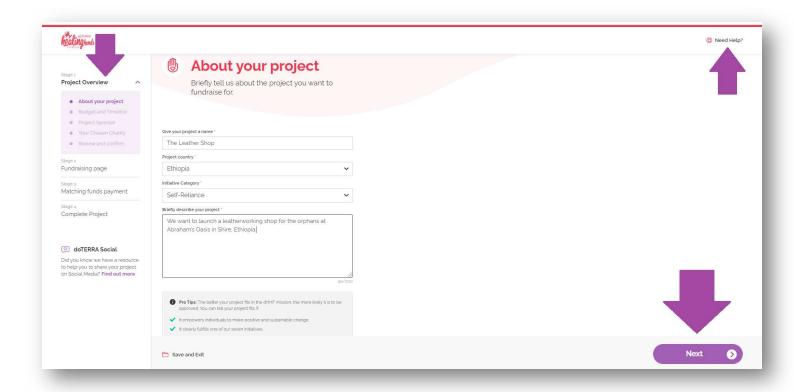
Project Overview

About Your Project

The first step in putting together the project proposal is providing information about the project: project name, project country, and short description of the overall project. Once those details are filled in, the member will click "Next" to move on.

A couple of additional notes here: first, the system will walk the member through each part of the Match program process, but if at any point they would like to revisit a past page, they can navigate to the completed parts of their project by using the menu in the left margin.

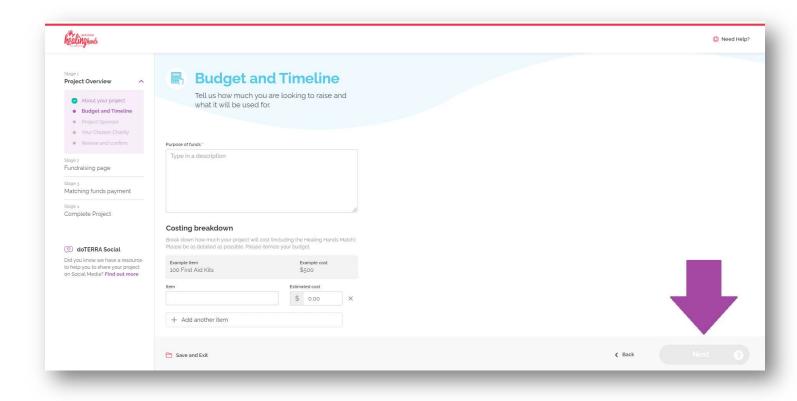
Also at any point during the process, if the member has questions they can click the "Need Help" in the top right corner of the screen to send the dHHF team an email (hhfsupport@doterra.com).



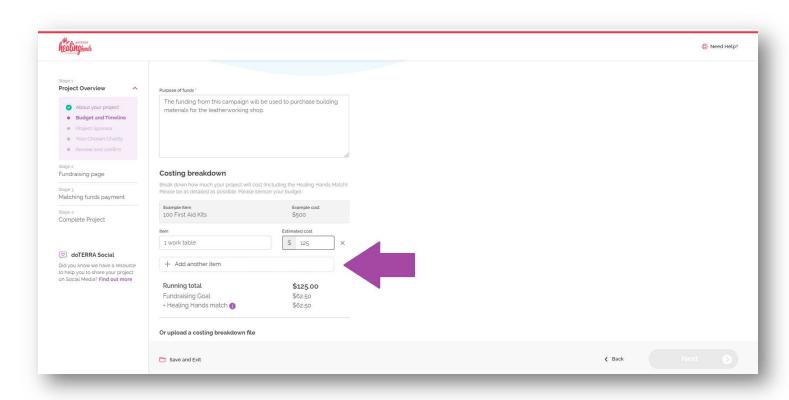
Budget and Timeline

Once the member has moved past the first page, they will next provide a short description specifically about how the funds from their project will be used. They will also need to provide the dHHF with a budget for their project (we need to know how much the project is going to cost, and how the member knows it will cost that much, so that we know how much to approve for the match). For this reason, the budget provided needs to be itemized, rather than one lump sum.

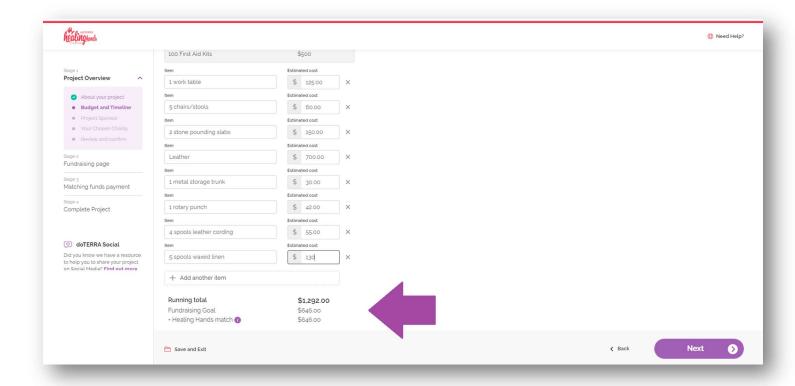
The system won't let a member move forward onto the next page until they've filled out all the required fields on the current page.



To add additional line items to the budget, the member will simply click "Add another item." As many line items as needed can be added.

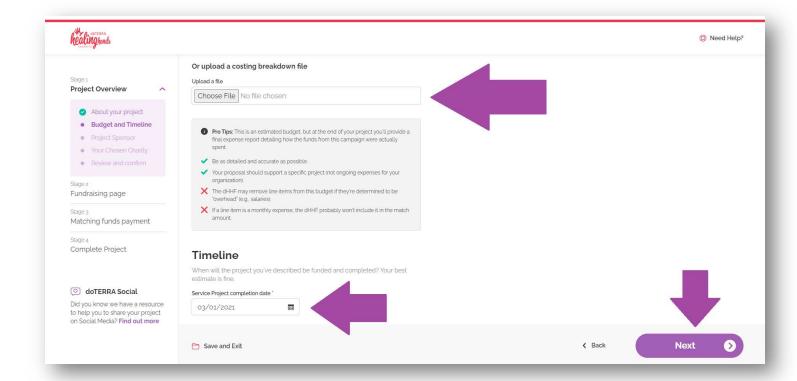


The line items will keep a running total of how much the project is going to cost. The total budget is broken down into halves: one half is the fundraising goal (member), the other is the dHHF match (dHHF).



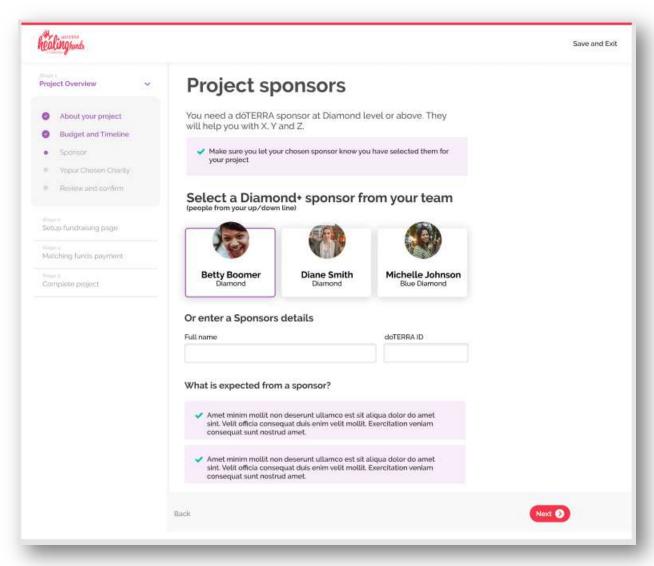
Alternatively, if the member would prefer to upload a budget instead (for example, if they already have a budget for their project written up in an Excel or Word file), they can choose to upload that budget instead of putting each item into the system individually. They must provide one or the other to move forward.

Finally, the member will need to provide a project completion date (i.e., the date by when they anticipate this funding will be spent). *This is not the fundraising deadline*. They'll then move on by clicking "Next."



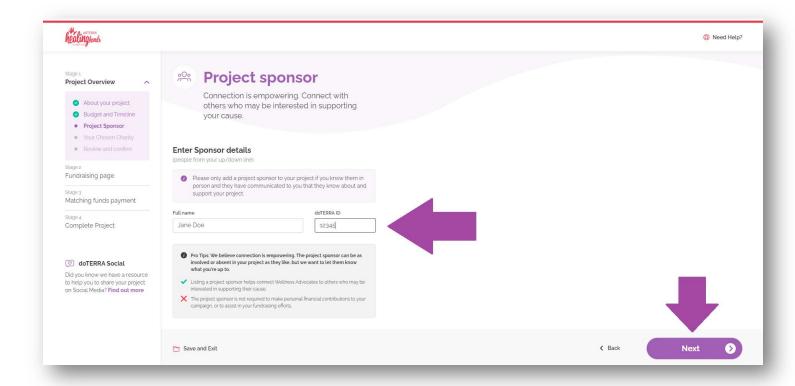
Project Sponsor

The dHHF believes connection is empowering. For this reason, each member is required to select a diamond level or above project sponsor for their project. The project sponsor can be as involved or absent in the project as they wish. The project sponsor will receive an email notification when the project is approved, when the fundraising page goes live, and when the project is complete. A list of diamond level leaders in their organization will automatically display when a member reaches this page. They can choose one from this list, or type in the name and/or ID number of the leader they want if they don't see them on the list. We encourage members not to choose a project sponsor from the list unless they've notified them first.



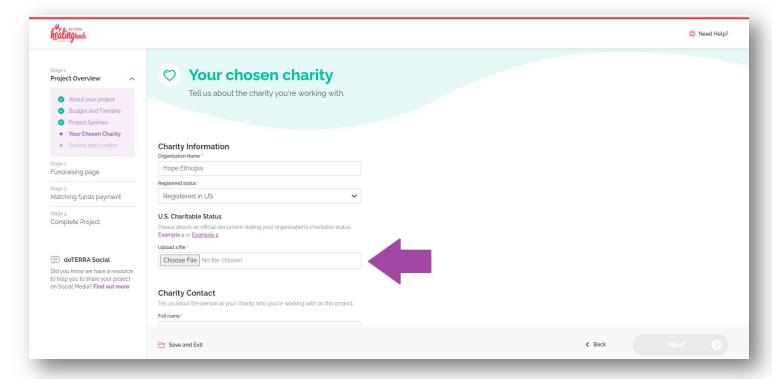
If the member would like to add a diamond level leader that is not in their organization, they will need to type in their name and ID number, and the dHHF team will manually check and approve the project sponsor during the project proposal review.

The member will need to either choose a sponsor from the list, search for a leader in their organization, or provide details for a leader outside their organization in order to move forward.

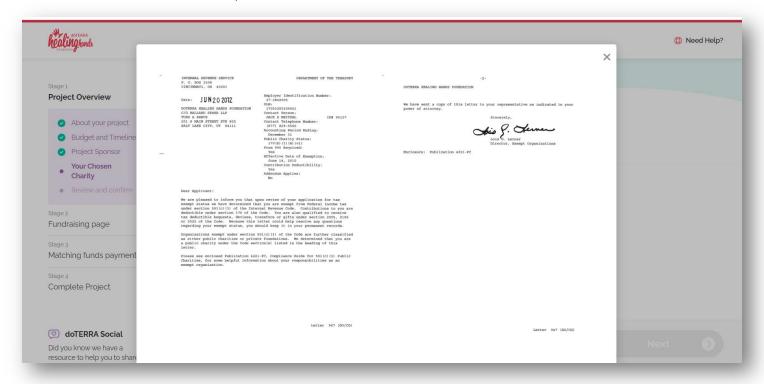


Your Chosen Charity

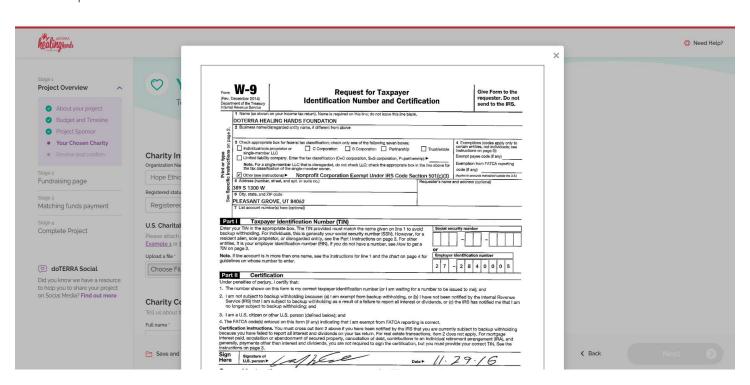
Next, the member will provide information about the charity they're working with on their project. They must be working with a registered nonprofit or NGO in order to qualify for a match (the dHHF cannot make a donation to an individual's bank account). The organization can be registered in or outside the United States. If the member is working with a U.S.-registered nonprofit, they must upload either an IRS tax documentation letter OR a W9 for their organization. They can view examples of each on this page.



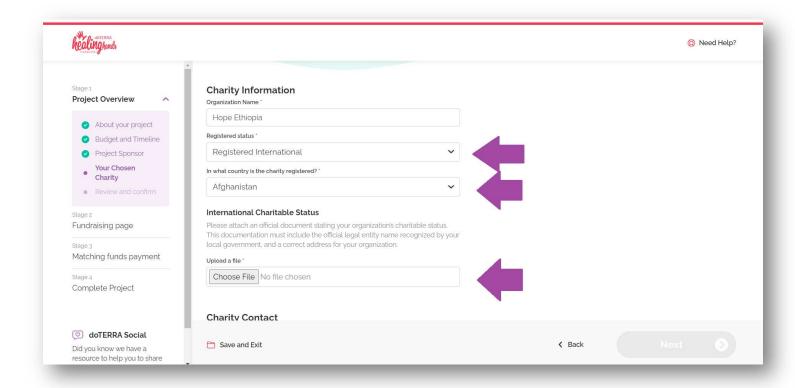
IRS tax documentation letter example:



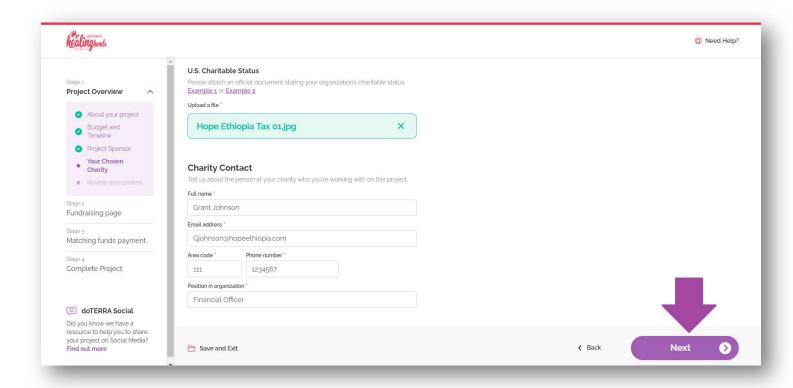
W9 example:



If the member is working with an organization that is registered outside the United States, they'll select "Registered International" from the drop down menu. They'll also need to list the country where the organization is registered, and upload the organization's charitable status documentation. This documentation should be a copy of the government-issued document provided to the organization stating its charitable status, and must include both the registered name of and a physical address for the organization.



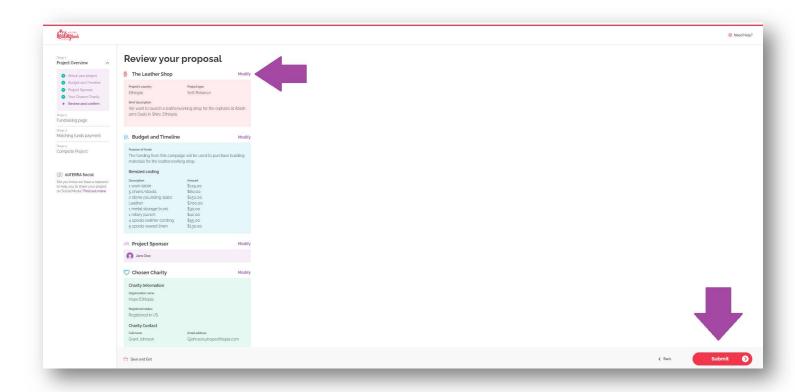
For both U.S.- and internationally-registered organizations, the member will need to provide contact details for a person within the organization they're working with on the project. This is so we can verify the organization is aware of the project, they are planning to spend the money the way the budget describes, and we can work with them to make our matching donation to their organization (the member doesn't usually have the information we need in order to make the physical transfer of money). Once all of these details are provided, the member will click "Next" to review their proposal.



Review and Confirm

On the review page, the member will have a chance to look over all of the information they've put into their project proposal. If they need to make an adjustment to any of the sections, they'll simply click "Modify" on that section to go directly there.

Once the project proposal information is finalized, the member will click "Submit" to submit the proposal to the dHHF team for review.

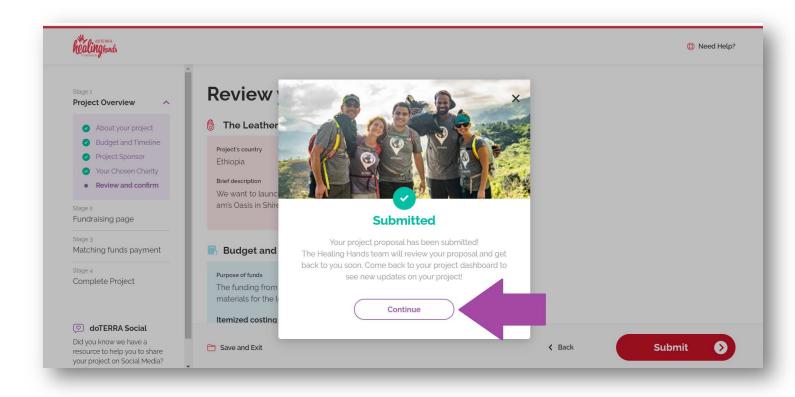


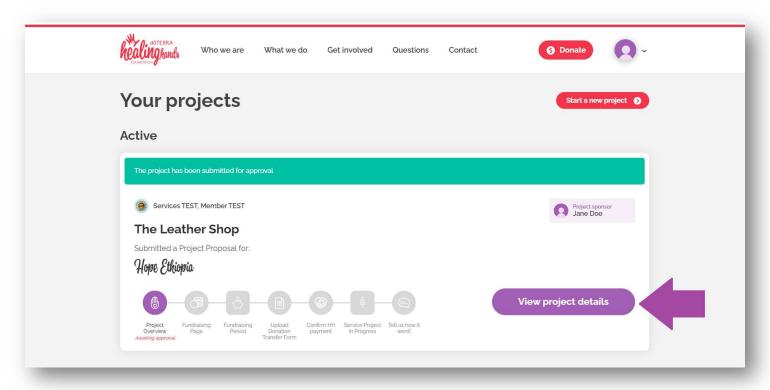
After the project proposal has been submitted, the member will receive an on-screen confirmation letting them know their submission was successful (they'll also receive an email notification).

At this point, the system has created a project card for their project on their dashboard. By clicking "Continue" on the on-screen proposal submission confirmation, the member will be able to access the project card on their project dashboard.

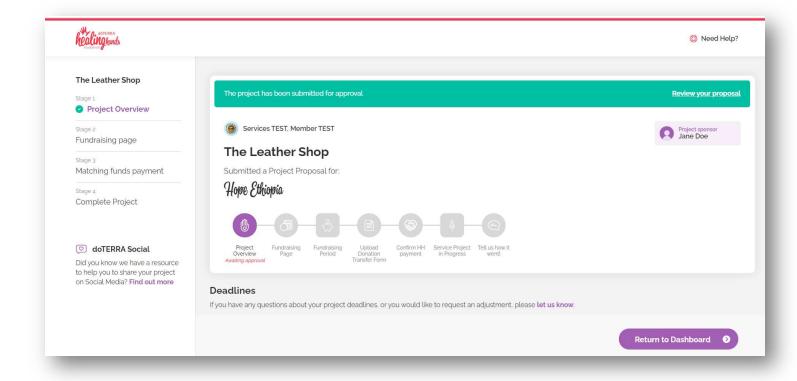
The project dashboard will show the project the member is currently working on, as well as all past projects (if they have any). For current projects, the project card will appear on the dashboard, showing the member which stage of the project they're currently in.

To see details about their current project, the member will click "View project details."





The project details page is where the member will move the project through the process. At this stage, the member doesn't have to take any action because they're waiting on the dHHF to review their proposal. The member knows this because of the bar across the top of the project card isn't currently showing an action item, as well as by the red italicized text below the stage of the project they're in (which is shown on the project card). The member can always log in to their project dashboard to check the status of their project.



Fundraising page

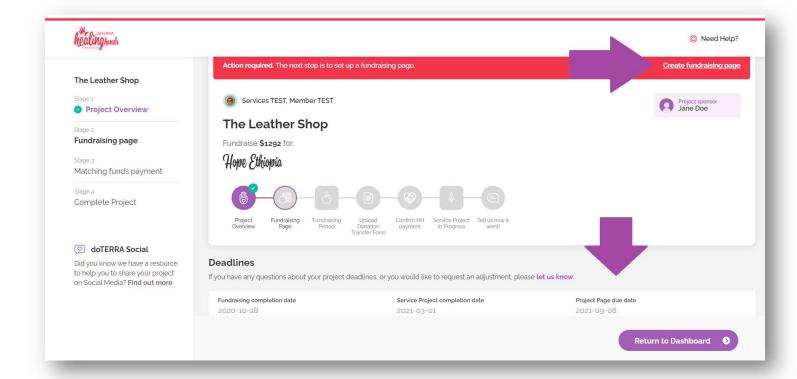
Once the dHHF has reviewed and approved a project proposal for a match, the member will be notified via email. They'll be prompted to visit their project details page to set up a fundraising page for their matching campaign fundraiser.

The member can tell they need to take action on their project because the bar across the top of the project card is now red, and says the project requires action. Also in the bar across the top of the project is a link that will take the member to complete the action item. At this stage in the process, the link takes them to create a fundraising page for their campaign.

At the bottom of the project details page, the member will find important deadlines for their project, namely: fundraising end date, project end date, and project follow-up date. These are set by the dHHF team during the approval process, based on the project end date they provided in their project proposal.

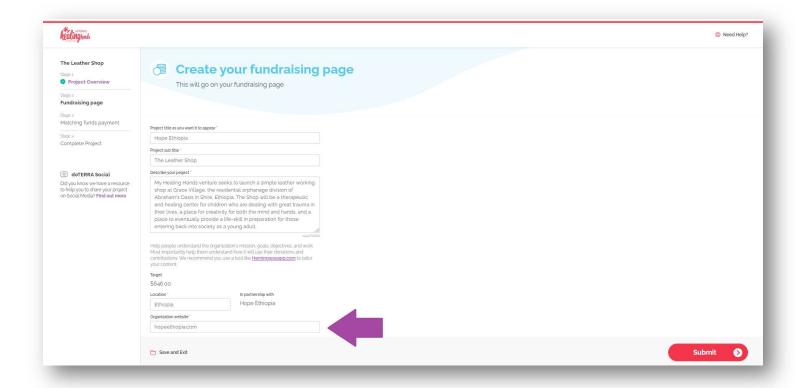
For reference, projects are generally given 4-6 weeks to fundraise. Once the fundraiser is complete, it can take 7-14 business days for the organization to receive the funds raised during the campaign, plus the dHHF match, into their account. The service project end-date is set by the member during the project proposal. The follow-up date is usually 7 days following the service project end date.

These details about the project timeline can be found by members on the <u>Questions page</u> of the dHHF website, in the "Match Program" section.

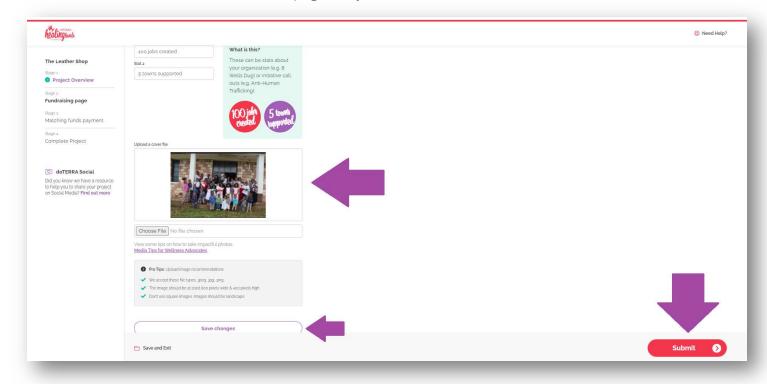


Create your fundraising page

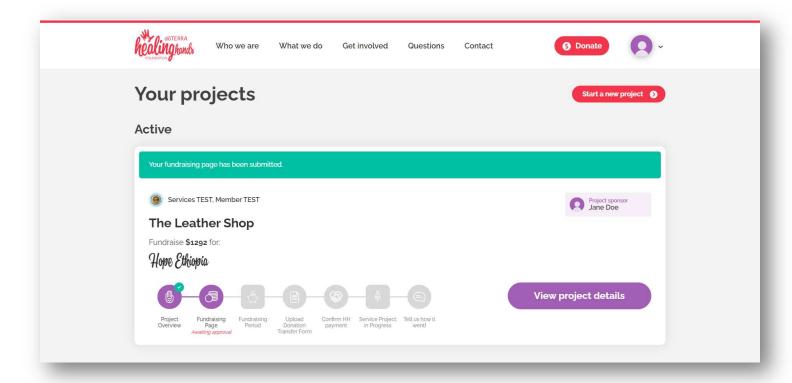
The member will then put the information into the system that they want to communicate on their fundraising page. This includes a project title, project subtitle, project description, project location, and the URL for their organization's website (in case donors want more information about the organization we're supporting with this project). The approved match amount and charity name will populate automatically.



The member will then add a few callout statistics (to generate interest in their project) and add a header image to their fundraising page. They can save their changes and come back to them at any time (not shown in the image is also the opportunity to preview the page before submitting it). Once the member has all of the information entered into the page, they'll click "Submit" so the dHHF team can review it.

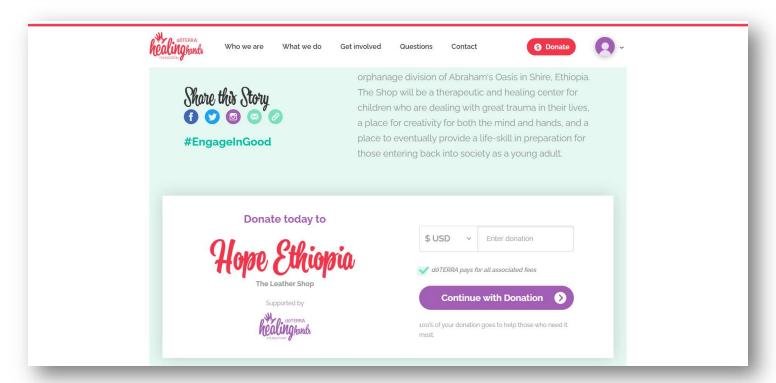


Once they've submitted their fundraising page for review, the project card on the project details page will reflect that they're once again waiting on dHHF approval before they can move forward.

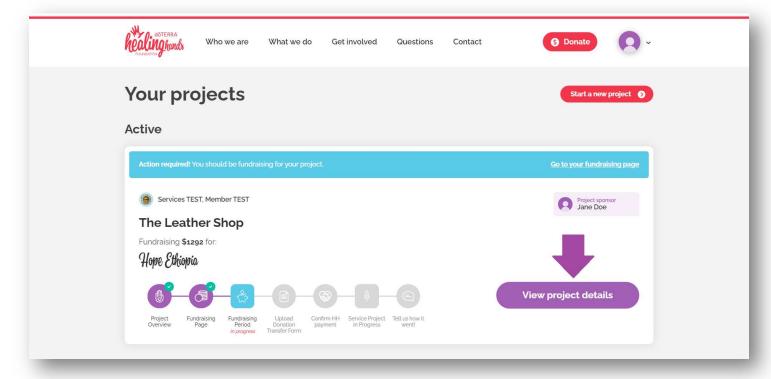


The member will be notified via email when their fundraising page has been approved (we're just checking to make sure they don't say anything non-compliant, the don't say anything inappropriate in their project description, and the page looks professional since it'll be posted to the dHHF website). They'll then share their fundraising page link until their fundraiser is complete. In order for a donation to be included in this specific campaign, the donor will need to scroll down to the *bottom of the page* and submit their donation there. If they click the "Donate" button on the page header, the donation will go to the dHHF general fund and won't be added to this matching campaign.

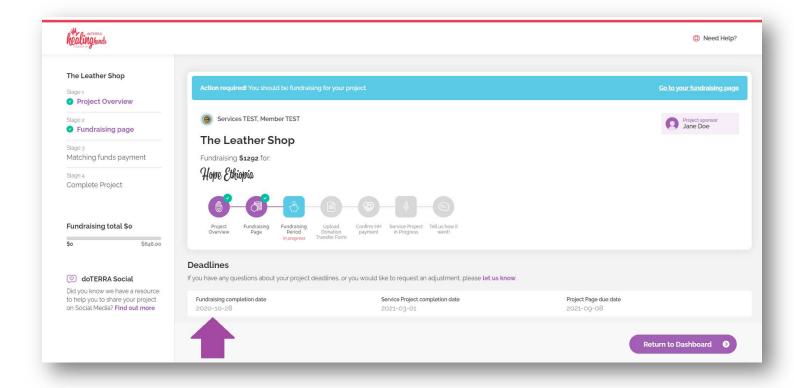




The member will then share the link for their fundraising page to collect donations for their project. The project card will show that the fundraising is "in progress" both on the project dashboard and in the project details, signifying that no action is required in the system in the system at the moment.



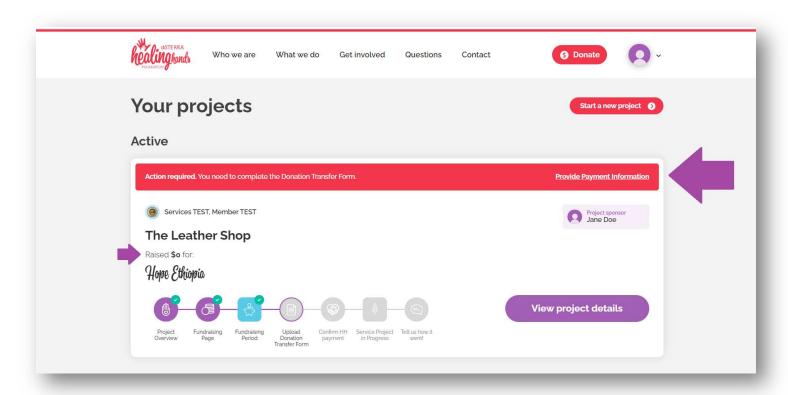
The fundraiser will go until the scheduled fundraising end date (listed at the bottom of the project details card). The member will receive email notifications one week before their campaign is scheduled to close, one day before their campaign is schedule to close, and the last day of their fundraising campaign.



Matching Funds Payment

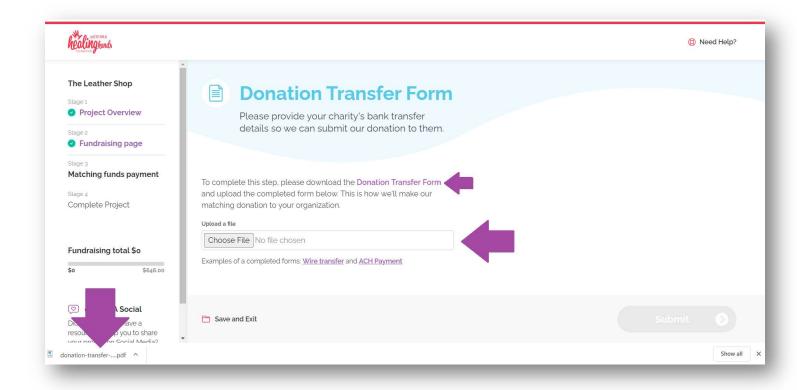
When the fundraising period is over, the member will be notified via email to log in to their project dashboard to download, fill out, and then re-upload the donation transfer form. This is how the dHHF will make our matching donation to the organization (who will use the funding to complete the project). Again, the member knows they have to take action because their dashboard prompts them to "Provide payment information."

The project dashboard will also display the amount that they were able to collect during their fundraiser.

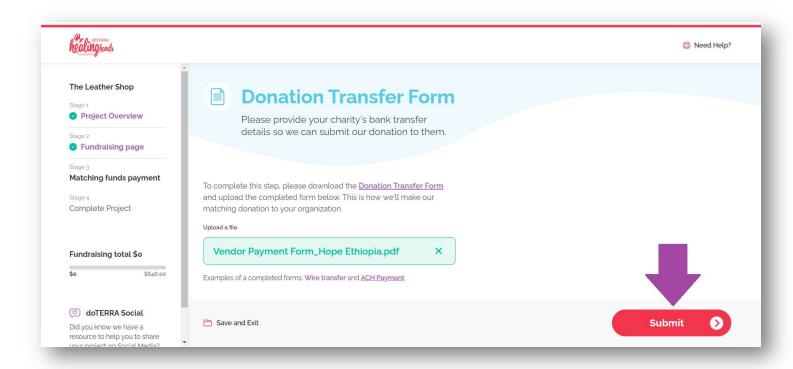


Donation Transfer Form

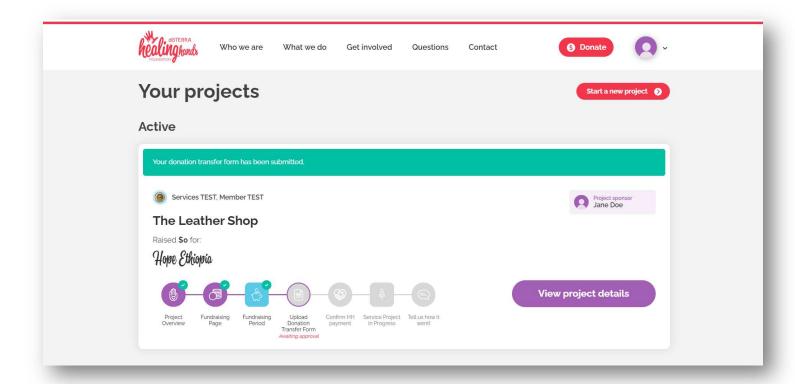
Once the member clicks "Provide Payment Information," they'll be taken to the screen where they can download the donation transfer from. (They can also view examples of how to complete the form on this page if needed.)



Once the form has been downloaded and completed, the member will re-upload it on the same screen, and then submit the form for dHHF review.

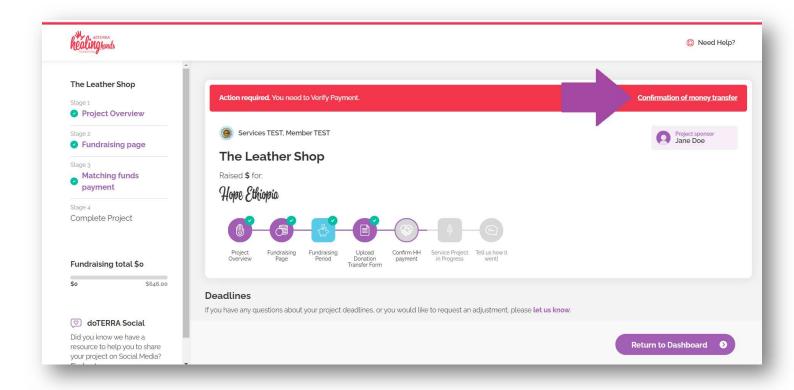


After completing and uploading the donation transfer form, the member will be able to see on their project card that they're now awaiting dHHF review and approval on the form. If any changes are needed, the dHHF team will let them know via email so they can adjust the form and re-upload it.



Payment Verification

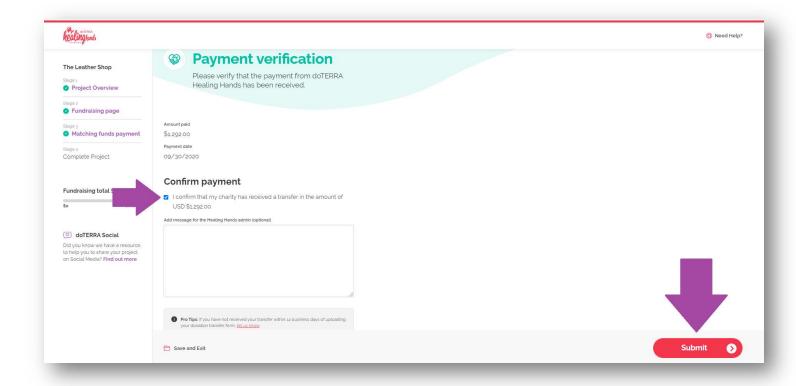
Once the dHHF has received the vendor payment form and all the information is correct, the dHHF will submit the payment to the organization via the finance team. For auditing purposes, the dHHF next needs to verify that the organization received our payment. To do this, the dHHF team will enter the payment amount and date into the system, and then the member will receive a notification email.



The notification email serves two purposes: to inform the member the dHHF made a payment to their organization, and to request that the member confirms receipt of that payment.

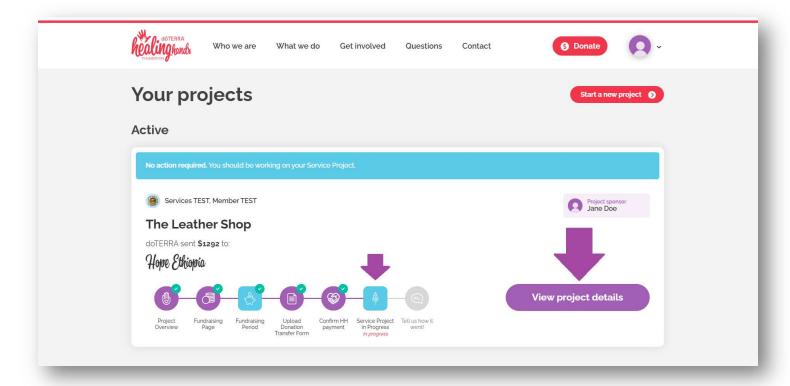
Once the organization receives the payment, the member will log in to their project dashboard and click "Confirmation of money transfer" (pictured above) to take them to the payment confirmation screen.

When there, the member will check the box confirming that their organization received the dHHF donation. An optional message can be left if necessary (e.g., sometimes non-U.S. members like to note the amount they received in their local currency because looks different than the USD amount donated by the dHHF).



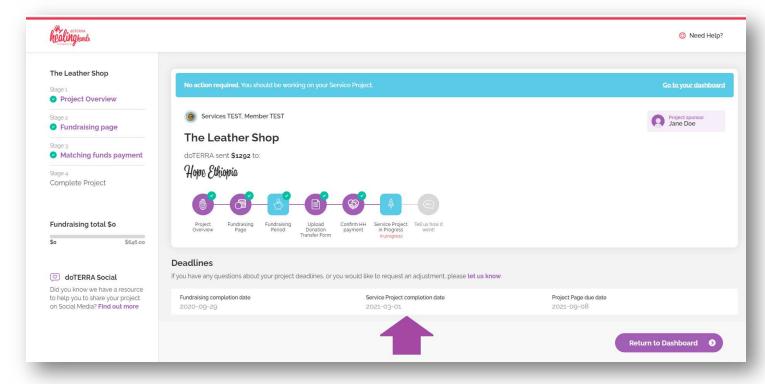
Now the project card shows no action necessary in the system because the member and organization should be spending the money (i.e., completing the "service project").

This is usually the longest period of the process. On average, these service projects can take 4-6 months to complete. At any point during the "service project in progress" stage, the member can log back in to their project dashboard and "View Project Details" to review any of the information submitted through the system so far.



The member will receive a notification email when their service project comes to a close. This is the "Service project end date" that the member provided in their proposal, and is listed at the bottom of their project card when they click "view project details" from their dashboard.

Sometimes the project gets delayed and won't finish on the original schedule. If this happens during the service project period, the member can always reach out to hhfsupport@doterra.com to request an update to their project timeline.

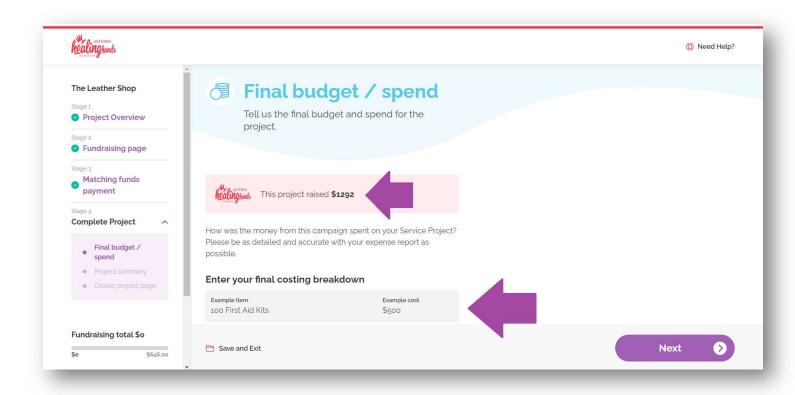


Complete Project

When the member receives the email notification that their project is finished, they'll be prompted to log in to their dashboard to provide follow-up information about the project. This step in the process is what we call an "impact report," and its purpose is to report back to the granting organization (dHHF) about how granted funds were used.

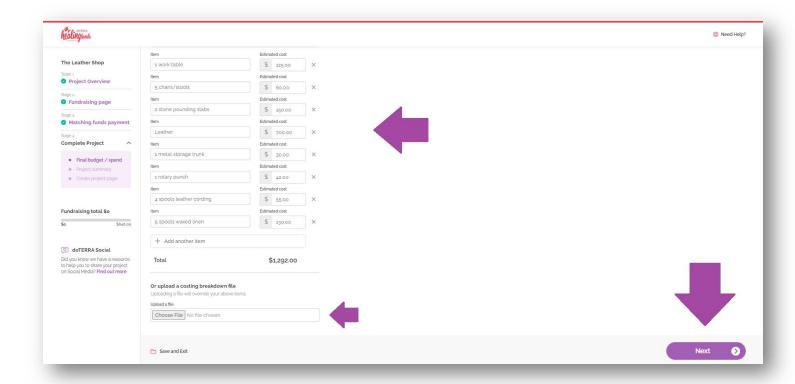
Fundraising budget / spend

First, the member will provide specific details about how the grant money was spent on their project. The grant amount (member fundraising amount plus dHHF match) will autofill at the top of the page so the member knows how much money they need to report back on. They'll then put together a final expense report the same way they put their project budget together at the beginning of the process, but this time it's with the actual figures instead of estimated ones.



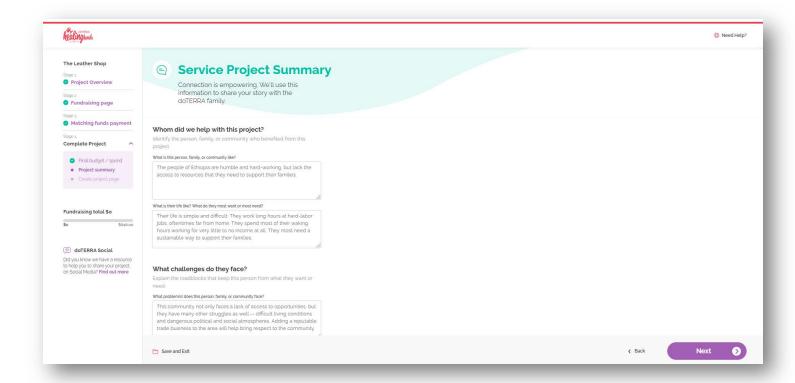
The member can add as many line items to their final expense report as they need. Or, also like at the beginning of the process, they can upload a final expense report document if they've already put one together in another format (e.g., Excel, Word, PDF, etc.).

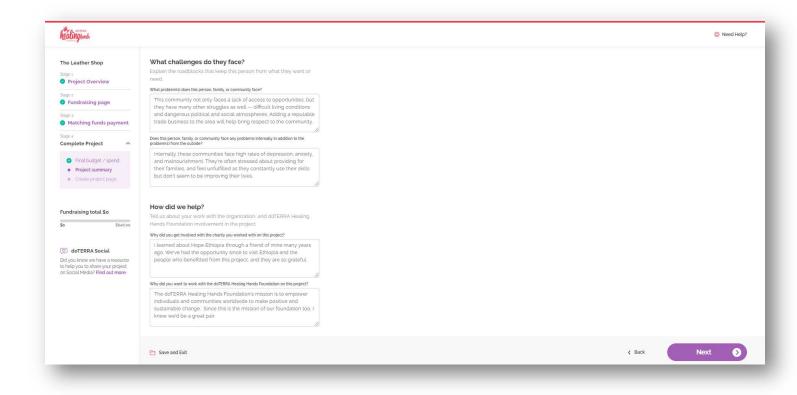
The member will need to either enter the line items or upload a final expense report to continue.

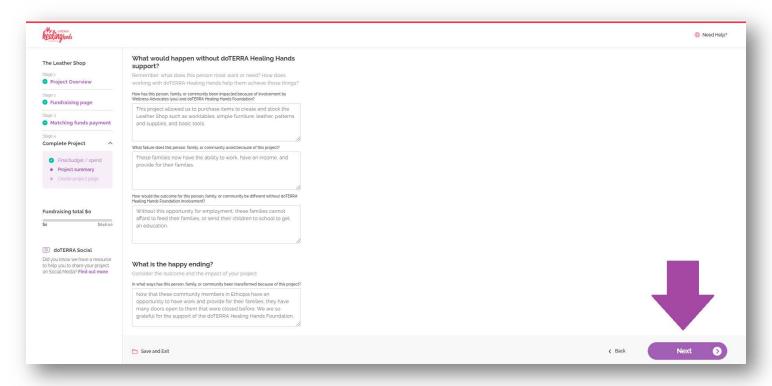


Project Summary

The project summary is where the member will describe, in detail, how the funds they listed in the expense report were used. This information is used for reference, as well as story-telling (the more thorough the responses in this section, the more likely the project is to get featured at convention/leadership, in the dHHF annual report, in the doTERRA year in review, etc.).



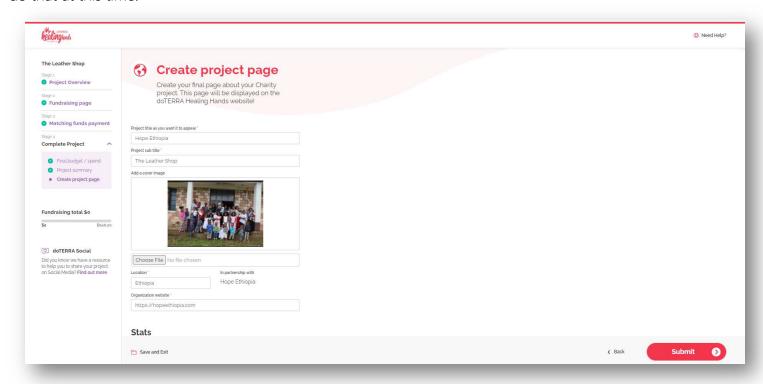




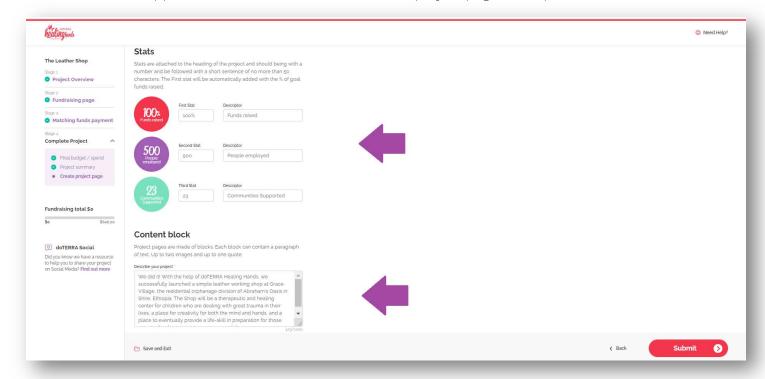
Create a Project Page

The dHHF system has combined the impact report process with the process of putting together a project page that will be published to the dHHF site so other members can appreciate the hard work that went into this project!

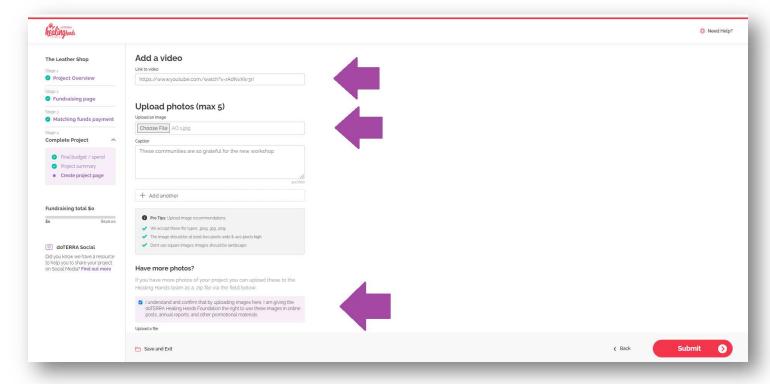
Some of the information for this project page will be auto filled from the fundraising page the member created earlier in the process. If they would like to change out the image or any of the information, they can do that at this time.



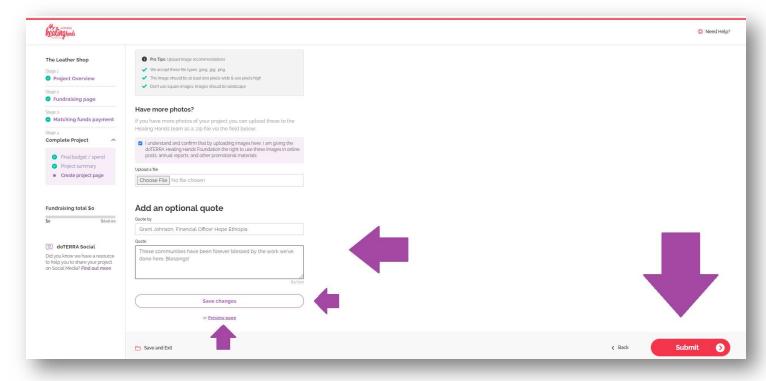
Next, the member will provide some impact statistics or callouts that show, at a glance, the success of the project (and the usefulness of the funds they were granted). They'll also be prompted to write a short follow-up report about what they did with the funding and the impact that it had on the community they served. This text will appear in the main content block of the project page that's published to the dHHF site.



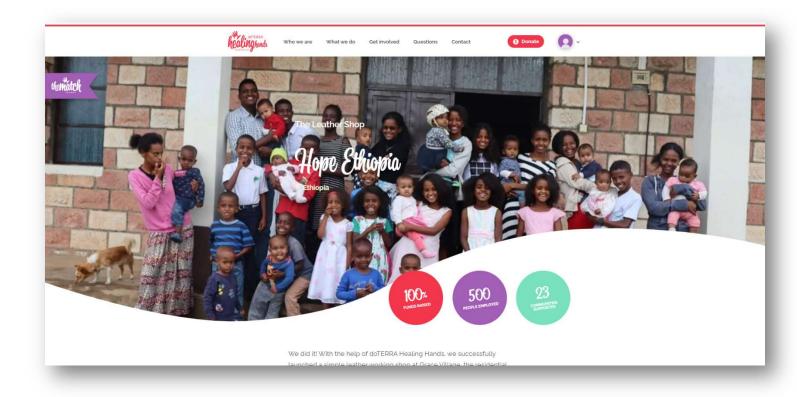
If they like, the member may upload a video about their project for their project page. The system also gives them a space to upload additional imagery – these images will not be posted to the project page, their purpose is to provide the dHHF with images they can use in storytelling and promotional materials (e.g., social media, website, events/convention/leadership) about the project. When uploading additional imagery, the member will also need to select the check box that gives the dHHF permission to use the photos in the aforementioned ways when talking about this project.

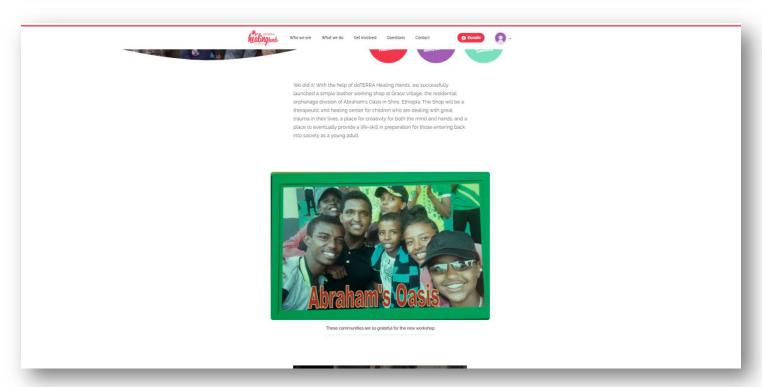


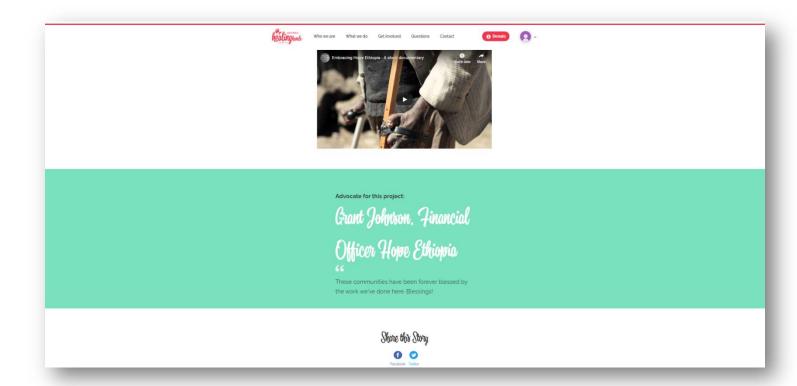
Finally, the member may choose to add a quote. They can then preview the page before submitting.



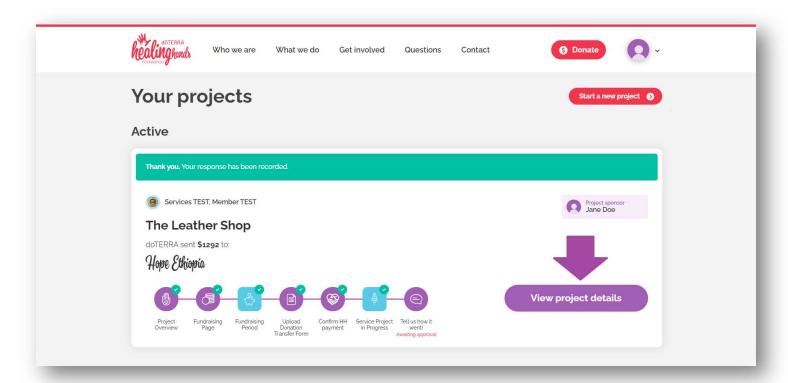
In order to see the changes on the "create page" show up on the preview page, the member will need to click "Save changes." This button also allows them to leave the page and come back to it at a later date to finish and submit. This is what the preview will look like if all fields are complete:



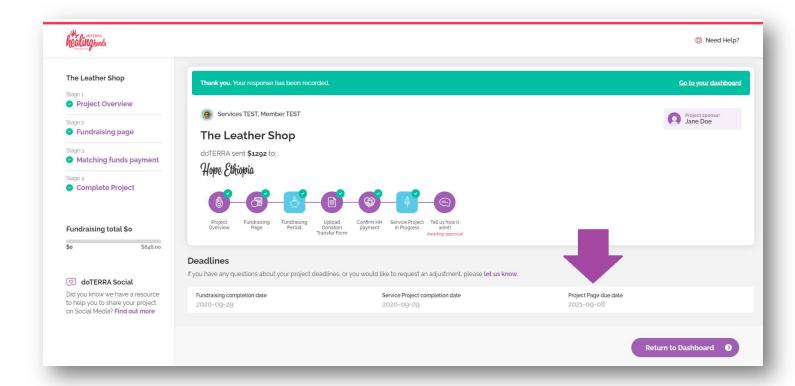




When the follow-up information is complete and the project page has been submitted for review, the member will see on their project dashboard that their project page is awaiting dHHF approval before being published to the dHHF website. If any changes are required, the member will be notified via email.

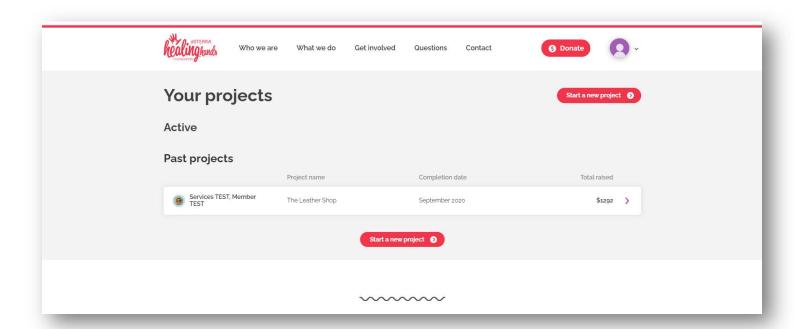


The follow-up material will need to be submitted to the dHHF by a specific date. To see what the deadline is, the member can click "View project details" and refer to the "Deadlines" section at the bottom of the project card.

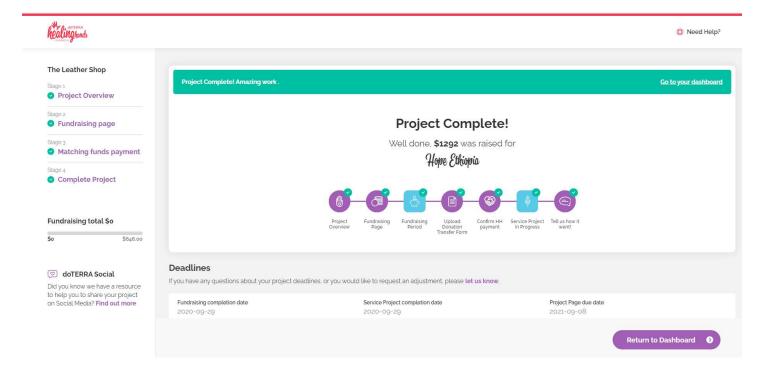


Once the dHHF team has approved the follow-up material (impact report submission), we will publish the project page to the dHHF site, and the member will see in the system that the project is complete on both the dashboard and the project details card.

Dashboard view:



When clicked, the member will be taken to the project view. Which looks like this:



Email List

At several points throughout the process, the member, project sponsor, and organization contact will receive notification emails. Here is a comprehensive list of all the emails involved in the process.

Wellness Advocate Emails

- 1. Proposal submitted
- 2. Proposal approved > Create fundraise page
- 3. Proposal not approved > requires amends
- 4. Proposal not approved > rejected
- 5. Fundraise page approved > Start fundraising period
- 6. Fundraise page not approved > requires amends
- 7. Fundraise reminder (1 week left)
- 8. Fundraise reminder (1 day left)
- 9. Fundraise period over > Send Donation Transfer Form
- 10. Donation Transfer Form received > Verify payment
- 11. Donation Transfer Form requires amends
- 12. Verify payment received > Start project period (good luck!)
- 13. Project period over > Tell us how it went / Create project page
- 14. Project page approved > complete (congrats!)
- 15. Project page not approved > requires amends

Project Sponsor Emails

- 16. Selected as Sponsor
- 17. Fundraising page has been approved
- 18. Project page approved

Charity (Organization Contact) Notifications

- 19. The proposal has been approved
- 20. When the fundraising page goes live
- 21. When the fundraising period ends and the WA needs to fill out the vendor form
- 22. When the WA confirms that the payment was received
- 23. When the final project page has been approved