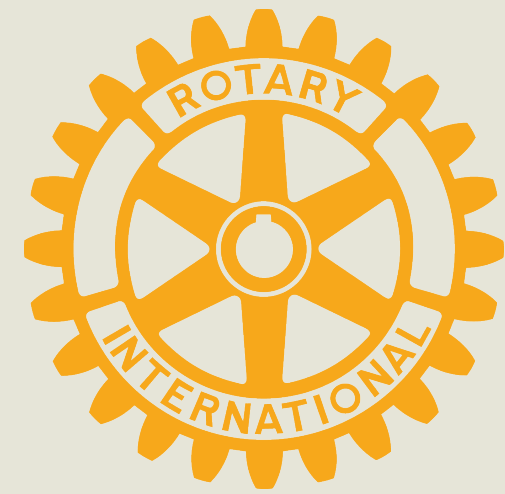


# Reporting & Closing your project



## District Grant Education Seminar

**2024 – 2025**

**District 6270**

**Revised: Nov. 9, 2024**

# Requirements for Reporting

Once a project has been completed...

- Final Project Report must be submitted
  - Due: May 15, 2025
  - Include report of number of hours of service contributed to the project by Rotarians and number of Rotarians participating in project
  - Include relevant receipts, invoices, documentation of all expenditures with report.
  - Include at least one photo and Public Image example
  - Include Press Release on project
- Submit information in ClubRunner Grant Module.

# ClubRunner Grant Module

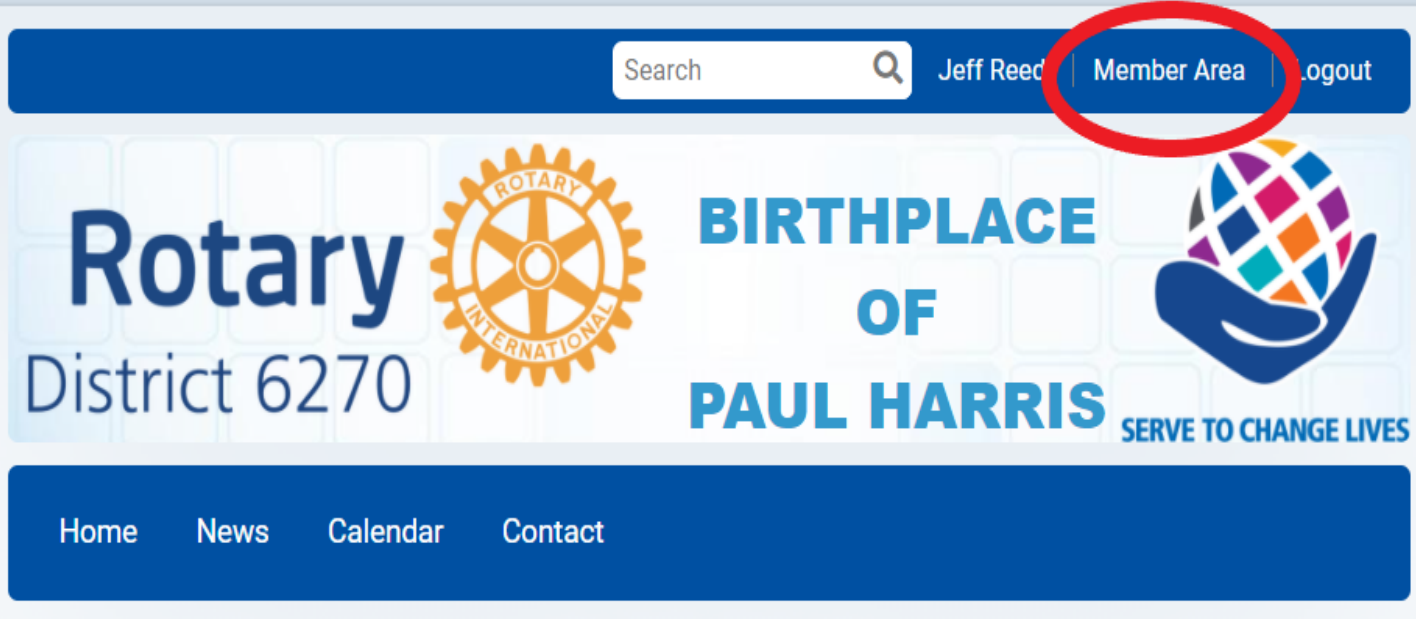
- Access on D6270 website (**Member Area**)  
[www.rotary6270.org](http://www.rotary6270.org)
- Use for Entry of:
  - Application information
  - Supporting documents
  - ✓ Final Report

# Entry to Grants Module

[www.rotary6270.org](http://www.rotary6270.org)

Enter “Member Area”  
in D6270 website.


*You may need to login*




Search  Jeff Reed **Member Area** Logout

# Rotary

District 6270



## BIRTHPLACE OF PAUL HARRIS



SERVE TO CHANGE LIVES

Home News Calendar Contact

### District 6270 Information

[Organization Chart](#)

[Organization Chart \(Photos\)](#)

[Club Directory & Contacts](#)

[Map of Clubs in District](#)

### Accepting Applications for 2023 Rotary Peace Fellowships

The 2023 Rotary Peace Fellowship application is now available, and we need your help finding the next cohort of global peace and development leaders.



Up to 130 fellows are selected every year in a globally competitive process based on personal, academic, and professional achievements. Fellows earn either a master's degree or a post-



### Foundation News- 14th Consecutive Year!



# Access Your Grant

- 1) Select "Grants" tab
- 2) Select "My Club Grants"
- 3) Select "View Club Grants"
- 4) Select "2024-25"
- 5) Select and Open your club's grant

The screenshot shows the District 6270 website with the following elements:

- Header: District 6270 logo and "Welcome, Jeff Reed [Logout] Home English" dropdown.
- Navigation Bar: Admin, For Clubs, **Grants** (circled in red), For Members, Membership, Contacts, Organization, Communication, Website, Documents, Reports.
- Sub-Menu: Attendance, Events, Bulletin, Donations, Help.
- Secondary Navigation: Submit a Grant Request, **My Club Grants** (circled in red), District Grants, Grant Documents.
- Left Sidebar: Grants (circled in red), View Club Grants (circled in red), Submit a Grant Request, Documents, District Grant Documents, Help, Grants Module.
- Main Content: "Grant Request Applications" section with a "Back to Landing Page" button and a year selector showing "2024 - 25" (circled in red).
- Filter: "Any Status" dropdown menu.
- Filter by Status: Input field containing "Any Status".
- Filter records: Input field with a search icon.
- Table of Grant Applications:

Submitted	Project Name	Sponsoring Club	Estimated Budget	Grant Amount	
<b>Under Review</b>					
Mar 06, 2024	Test - Grant Manager Jeff Reed	Fond du Lac-Morning	\$3,000.00	\$3,000.00	Open
<b>Funded</b>					
May 14, 2024	Bilingual Books for Schools	Fond du Lac-Morning	\$3,200.00	\$3,000.00	Open

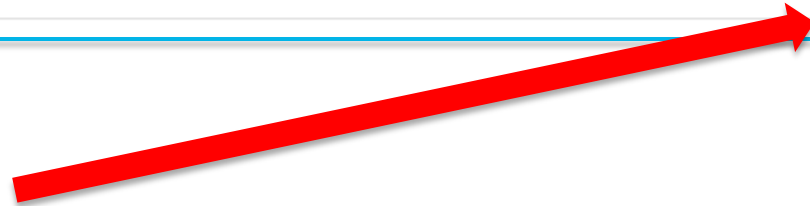
A red arrow points to the "View Club Grants" link in the sidebar.

# FINAL REPORTING

Details   Application   Budget   Documents   Project Overview   Individual Project Report   Activity Log

## A. Narrative Report

1. Provide information in: “**Individual Project Report**” tab in Project Description.



# FINAL REPORTING

Details   Application   Budget   Documents   Project Overview   Individual Project Report   Activity Log

## A. Narrative Report

1. Provide information in: **“Individual Project Report”** tab in Project Description.

## B. Financial Report

2. Summary of Actual Income and Actual Expenses.

- Grant Module in **“Individual Project Report”** tab

3. Expense documents (e.g., receipts)

- Upload to **“Documents”** tab

# FINAL REPORTING

Details   Application   Budget   Documents   Project Overview   Individual Project Report   Activity Log

## A. Narrative Report

1. Provide information in: **“Individual Project Report”** tab in Project Description.

## B. Financial Report

2. Summary of Actual Income and Actual Expenses.

- Grant Module in **“Individual Project Report”** tab

3. Expense documents (e.g., receipts)

- Upload to **“Documents”** tab

## C. Supporting Materials

4. Public Image examples

- Upload to **“Documents”** tab

5. Press Release

- Upload to **“Documents”** tab

6. Photos

- Upload to **“Documents”** tab



# Final Report Content

## The Final Project Report addresses:

1. Describe the Project - What was done?
2. Describe recipients.
3. Describe impact of project.
4. How many Rotarians participated in this project?
5. How were Rotarians involved - what did they do?
6. How many hours of service were contributed to the project?
7. When was the project completed?
8. How was the project publicized (Public Image). 24-25 Grants: Must include Media (Press) Release to the District, and information to the General Public.
9. If a cooperating organization was involved, what was its role?

# Final Report (Narrative)

- Select “Individual Project Report” tab
- Provide Responses in Project Description section of “Individual Project Report” in edit window.

Details Application Budget Documents Project Overview **Individual Project Report** Activity Log

Print Submit

### Project Description

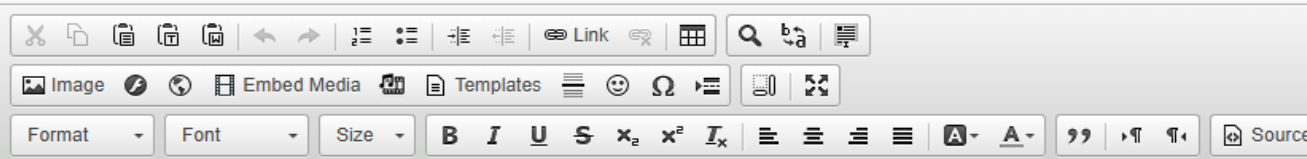
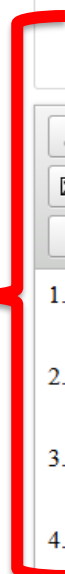
**Post-project, final report.** Answer in the textbox below:

1. Describe the Project - What was done?
2. Describe recipients.
3. Describe impact of project.
4. How many Rotarians participated in this project?
5. How were Rotarians involved - what did they do?
6. How many hours of service were contributed to the project?
7. When was the project completed?
8. How was the project publicized (Public Image). 24-25 Grants: Must include Media (Press) Release to the District, and information to the General Public.
9. If a cooperating organization was involved, what was its role?

Provide your summary Financial Report below.  
-----

Also upload the following in the "Documents" tab:

- >>> Expense report documentation (e.g., receipts, paid invoices, etc.)
- >>> Public Image examples (must include Press Release)
- >>> Photos



1. Describe the project. What was done, when, and where did the project activities take place?
2. How many people benefited from this project?
3. Who were the beneficiaries, how were they impacted by this project, and what humanitarian need was met?
4. How many Rotarians participated in this project?

# Reporting:

## B Financial Report - Summary

Provide a Summary of actual

- Income and
- Expenses

for the project.

One line for each major item.

(at bottom of Individual Project Report window)

### Financial Report

All sources of actual income for the project. Add income items as needed.

Date	Description	Funding Source	Amount	%	
Nov 30, 2023	Donation from Meijer - Oak Creek Store	Club/Other	(\$2,000.00)	40.00%	<input type="checkbox"/>
Nov 30, 2023	Initial Grant	District Grant	(\$3,000.00)	60.00%	<input type="checkbox"/>
Total:			\$5,000.00	100.00%	

All actual expense items for the project. Please be specific and add lines as needed.

Description	Supplier	Local Amount	Currency	Tax	Total	Amount
Food Items for for 76 Families Thanksgiving Dinner	Meijer Grocery Warehouse	\$4,235.68	USD	\$0.00	\$4,235.68	\$4,235.68
Food Items, Local purchase	Meijer - Oak Creek	\$551.03	USD	\$0.00	\$551.03	\$551.03
Cardboard Boxes (75), box tape	Lowes	\$111.46	USD	\$6.13	\$117.59	\$117.59
Envelopes, paper, tape	Office Depot	\$30.18	USD	\$1.66	\$31.84	\$31.84
Total:					\$4,936.14	\$4,936.14

# Add Item

- When you select “Add Expense Item” or “Add Income Item”
  - a window opens (see at right)
- Provide information.
- Select “Submit” to add this item to your expense report.

**Add Budget Item**

Budget Item Details

Date: Dec 14, 2022

Description\*:

Supplier:

Local Amount:  US Dollar (USD) ▾

Local Tax:  (USD)

Exchanged Amount:

[Cancel](#) [Create](#)

[← Go back](#)

# Reporting: C Supporting documents: upload

- Expenses
- Photos
- Public Image Information

Use "Add Folder" to create folders to store

- Expenses
- Public Image documents
- Photographs

Upload documents here

Details Application Budget **Documents** Project Overview Individual Project Report Activity Log

### Project Documents

Attach all related documents and files.

Search  Go Add Folder Add Add Multiple

Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

Collapse All Expand All

Name	Updated On	Updated By	Actions
<span>Collapse All</span> <span>Expand All</span>			

Folders Created

Details Application Budget Documents Project Overview Individual Project Report Activity Log

### Project Documents

Attach all related documents and files.

Search  Go Add Folder Add Add Multiple

Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.

Collapse All Expand All

Name	Updated On	Updated By	Actions
Expenses	Nov 09, 2024	Jeff Reed	Add   Add Multiple   more...
Photos	Nov 09, 2024	Jeff Reed	Add   Add Multiple   more...
Public Image	Nov 09, 2024	Jeff Reed	Add   Add Multiple   more...

Collapse All Expand All

# Reporting: B Financial – Expense docs

Upload to “Documents” tab

- Receipts
- Paid Invoices
- Other expense documentation

-----  
*Use “Add Folder” to create folder to store expense documents*





## Project Documents

Attach all related documents and files.

 Download All

*Documents and folders are sequenced alphabetically. Your access level does not allow you to modify documents.*

		<input type="button" value="Collapse All"/>	<input type="button" value="Expand All"/>			
Name	Updated On	Updated By	Actions			
 Expenses	Jan 13, 2024	Paul Roekle				
 23/24 District Grant Expense Report, Paid Invoices	Jan 14, 2024	Paul Roekle	<a href="#">Get Link</a>			
 Photos	Jan 13, 2024	Paul Roekle				
 Public Image	Jan 13, 2024	Paul Roekle				

# Reporting: C Supporting documents

- Public Image Information
- Photos

-----  
*Note: Recommend – use “Add Folder” to create folder to store*

- *Public Image documents and*
- *Photographs*  
*(Upload these here)*

Details Application Budget **Documents** Project Overview Individual Project Report Activity Log

### Project Documents

Attach all related documents and files.

Search  Go Add Folder Add Add Multiple Download All

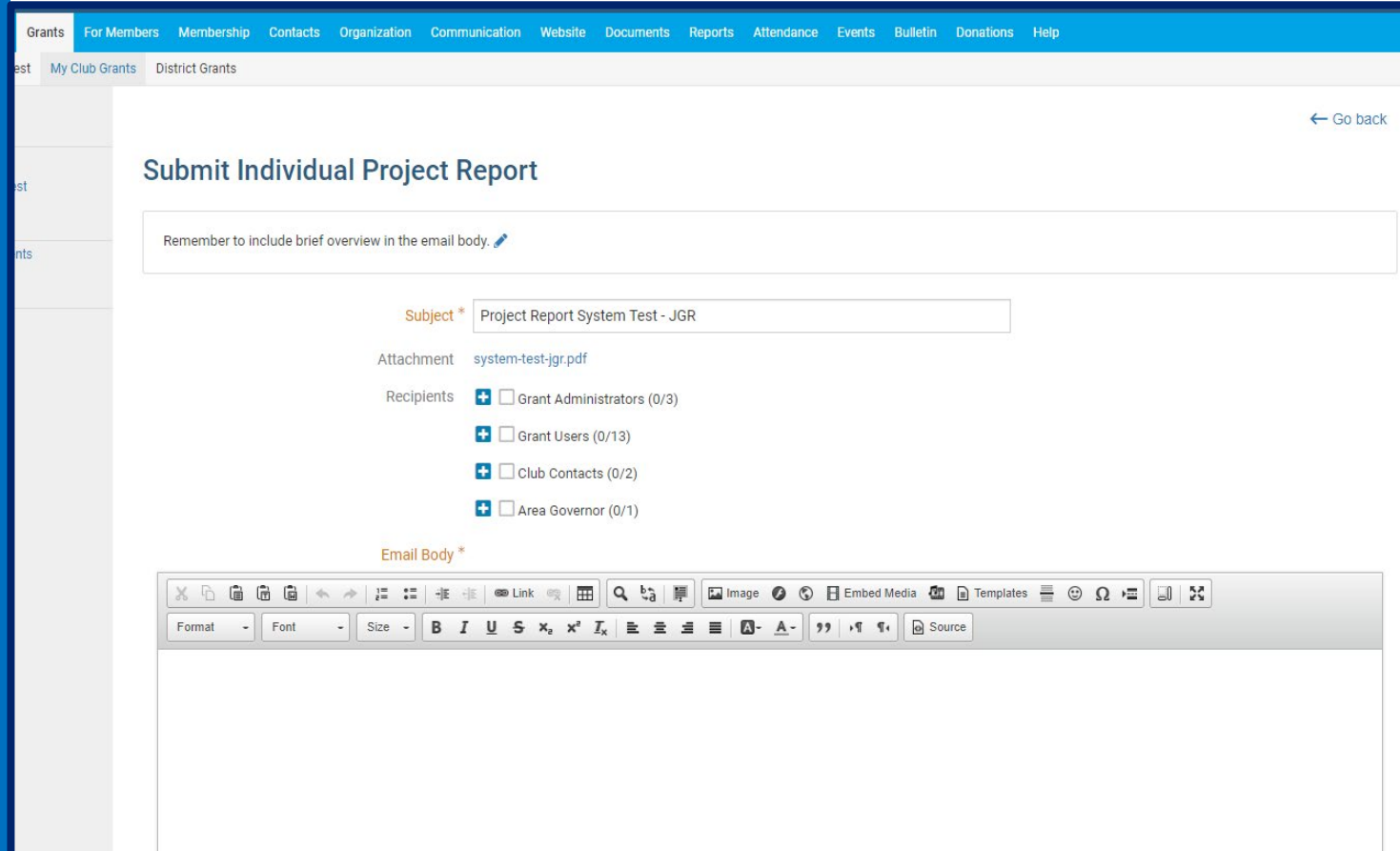
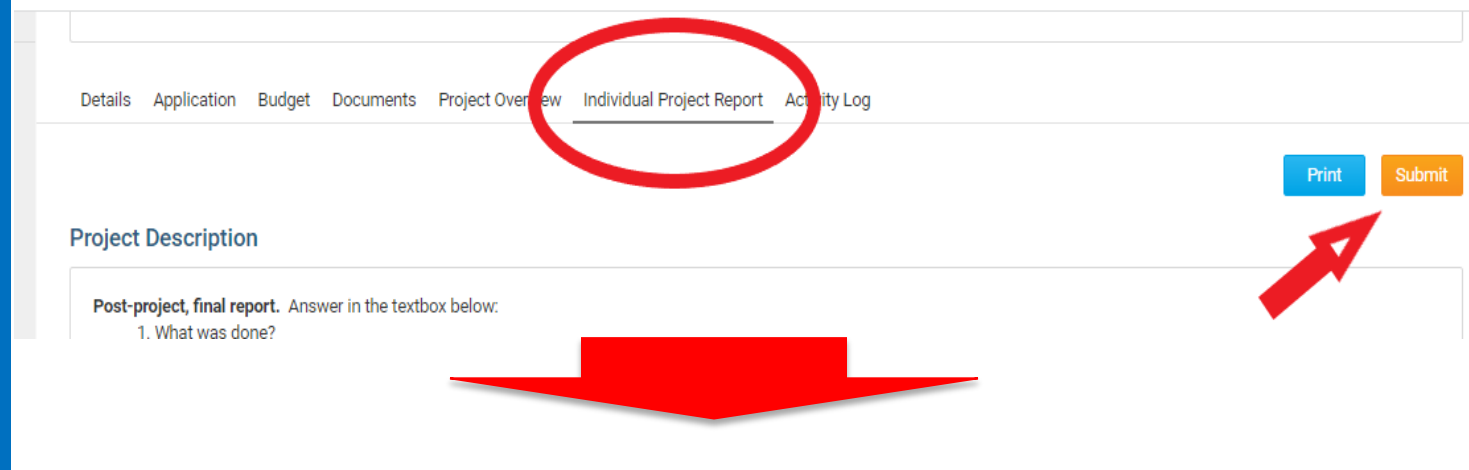
*Documents and folders are sequenced alphabetically. Drag and drop documents and folders to move them from one folder to another or to change the parent folder.*

Collapse All Expand All

Name	Updated On	Updated By	Actions
Expenses	Feb 18, 2022	Jeff Reed	Add   Add Multiple   <span>more...▼</span>
Photos	Feb 18, 2022	Jeff Reed	Add   Add Multiple   <span>more...▼</span>
Public Image	Feb 18, 2022	Jeff Reed	Add   Add Multiple   <span>more...▼</span>
Club Fundraising Analysis - FdL AM	Feb 16, 2022	Jeff Reed	Edit   Get Link   Delete
Club Goals	Feb 16, 2022	Jeff Reed	Edit   Get Link   Delete
Club MOU - FDL AM	Feb 16, 2022	Jeff Reed	Edit   Get Link   Delete

# Submit Summary Narrative Report

- When finished, Select “Submit” button (upper right corner of window).
- At bottom, edit window opens and allows for message to recipient. (at bottom)
- Opens window to select message recipient.





# Submit Summary Narrative Report

- Select: “+” in front of “Grant Administrators” to expand.
- Select: **Fond du Lac Morning Rotary Club** – this will send a message to **Jeff Reed, District Grant Chair**.
- When done, select “Send” button in lower right corner of window.

270 Welcome, Jeff Reed [Logout] Home English ▾

Grants For Members Membership Contacts Organization Communication Website Documents Reports Attendance Events Bulletin Donations Help

quest My Club Grants District Grants

← Go back

## Submit Individual Project Report

Remember to include brief overview in the email body.

Subject \* Project Report TEST - Jeff Reed

Attachment test-jeff-reed.pdf

Recipients

- Grant Administrators (0/3)
- Fond du Lac Morning Rotary Club Expand (0/1)
- Rotary Club of Neenah Expand (0/1)
- West Bend Sunrise Rotary Club Expand (0/1)
- Grant Users (0/13)
- Club Contacts (0/2)
- Area Governor (0/1)

Email Body \*

Cancel Send to Myself Send

← Go back

**Jeff Reed, Grant Chair, FdL Morning Rotary**

# SUPPORT

# Roadmap 24-25 District Grants

## SUPPORTING RESOURCES

Roadmap (Step-by-  
Step)

---

Guide in “District Grant  
Documents”

# Resources -- where to find or get help

## People to contact

For information about District Grants

- District Grant Chair **Jeffrey Reed**  
[jreed6270@gmail.com](mailto:jreed6270@gmail.com)

For information about The Rotary Foundation

- District Foundation Chair **Steen Sanderhoff**  
[steen.sanderhoff@rotary6270.org](mailto:steen.sanderhoff@rotary6270.org)

For Forms and other information

- District Admin. Assistant **Dana Kohlmeier**  
[dana.kohlmeier@rotary6270.org](mailto:dana.kohlmeier@rotary6270.org)

For information about stewardship

- District Stewardship Chair **Tom Curl**  
[tom.curl.1948@gmail.com](mailto:tom.curl.1948@gmail.com)

