Reporting & Closing your project
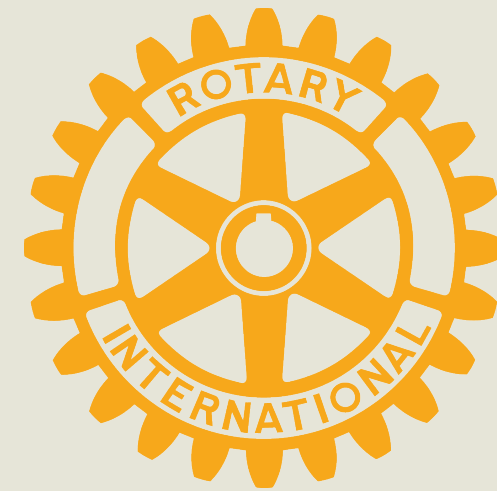
District Grant Training Seminar

2023 – 2024

District 6270

OVERVIEW

Revised: Dec. 8, 2023

The Rotary Foundation

Rotary District 6270

Requirements for Reporting

Once a project has been completed…

- Final Project Report should be submitted
  - Due: May 15, 2024
  - Include report of number of hours of service contributed to the project by Rotarians
  - Include relevant receipts, invoices, documentation of all expenditures with report.
  - Include at least one photo and Public Image example
- Submit information in ClubRunner Grant Module.
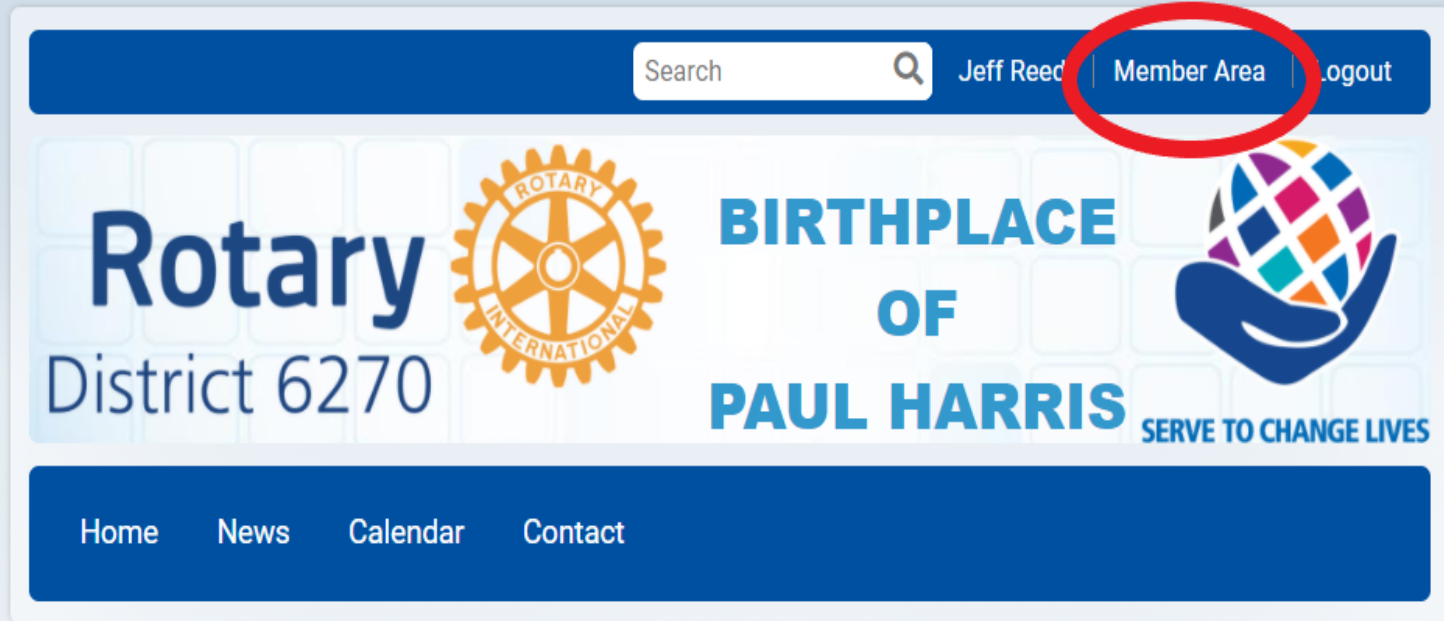
ClubRunner Grant Module

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

Entry to Grants Module

www.rotary6270.org

Enter "**Member Area**" in D6270 website.

You may need to login

Documents

Documents filed:
- MOU
- Goals
- Fundraising Analysis

Added with Final Report:
- Expense report
- Photos
- Public Image

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
   - Upload to "Documents" tab

C. Supporting Materials

4. Public Image examples
   - Upload to "Documents" tab

5. Photos
   - Upload to "Documents" tab

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 | more...▼
📁 Photos	Feb 18, 2022	Jeff Reed	Add | Add Multiple | more...▼
📁 Public Image	Feb 18, 2022	Jeff Reed	Add | Add Multiple | more...▼
📄 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

Final Report Content

The Final Project Report addresses:
- What was done?
- Who were recipients?
- How did the project impact the community?
- How many Rotarians were involved? What did they do?
- How many hours of Service were contributed?
- When was the project completed?
- Who were the partners?
- How was the project publicized?

Reporting:

B Financial - Summary

Provide **Summary** of actual Income and Expenses for the project.

One line for each major item.

Financial Report

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

✏️

⊕ Add Income Item

Date	Description	Funding Source	Amount	%	Actions
Mar 14, 2022	District Grant. $1,500 received. $1,500 approved/expected	District Grant	-$3,000.00	100.00 %	▾
		Total:	$3,000.00	100.00 %	

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

✏️

⊕ Add Expense Item

Description	Supplier	Local Amount	Currency	Tax	Total	Amount	Actions
Books purchased for children		$3,000.00	USD	$0.00	$3,000.00	$3,000.00	▾

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.

Submit Summary Narrative Report

- When done, 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.

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. What was done?

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

My Club Grants   District Grants

← Go back

Submit Individual Project Report

Remember to include brief overview in the email body. ✏

Subject *   Project Report System Test - JGR

Attachment   system-test-jgr.pdf

Recipients   ☐ Grant Administrators (0/3)
☐ Grant Users (0/13)
☐ Club Contacts (0/2)
☐ Area Governor (0/1)

Email Body *

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.

SUPPORT

SUPPORTING RESOURCES

Checklist (Step-by-Step)

Guide in "District Grant Documents"

[Checklist 22-23 District Grants](#)

The Rotary Foundation

USING WORD TO CREATE TEXT

Copy-Paste "Tip"

Using a text editor to create text for online submission

https://portal.clubrunner.ca/50114/Documents/en-ca/10a3b2c7-fa4d-479f-9b71-6cfd60563af2/3/?TypeEntityId=00000000-0000-0000-0000-000000000000

The Rotary Foundation

Resources -- where to find or get help

People to contact

For information about District Grants
- District Grant Chair **Jeffrey Reed**

  jreed6270@gmail.com

For information about The Rotary Foundation
  – District Foundation Chair **Steen Sanderhoff**

  steen.sanderhoff@rotary6270.org

For Forms and other information
- District Admin. Assistant **Dana Kohlmeyer**

  dana.kohlmeyer@rotary6270.org

For information about stewardship
- District Stewardship Chair **Tom Curl**

  tom.curl.1948@gmail.com