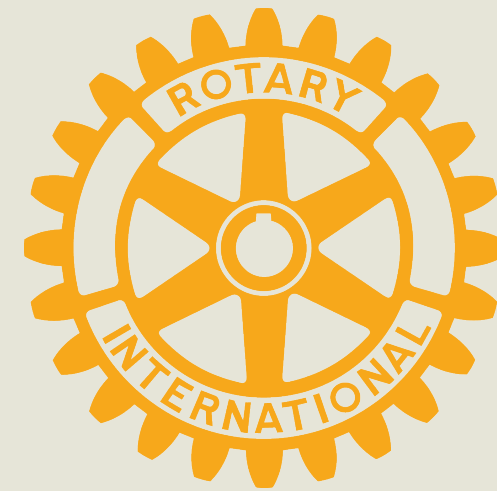


Reporting & Closing your project



District Grant Training Seminar

2023 – 2024

District 6270

OVERVIEW

Revised: Dec. 8, 2023

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

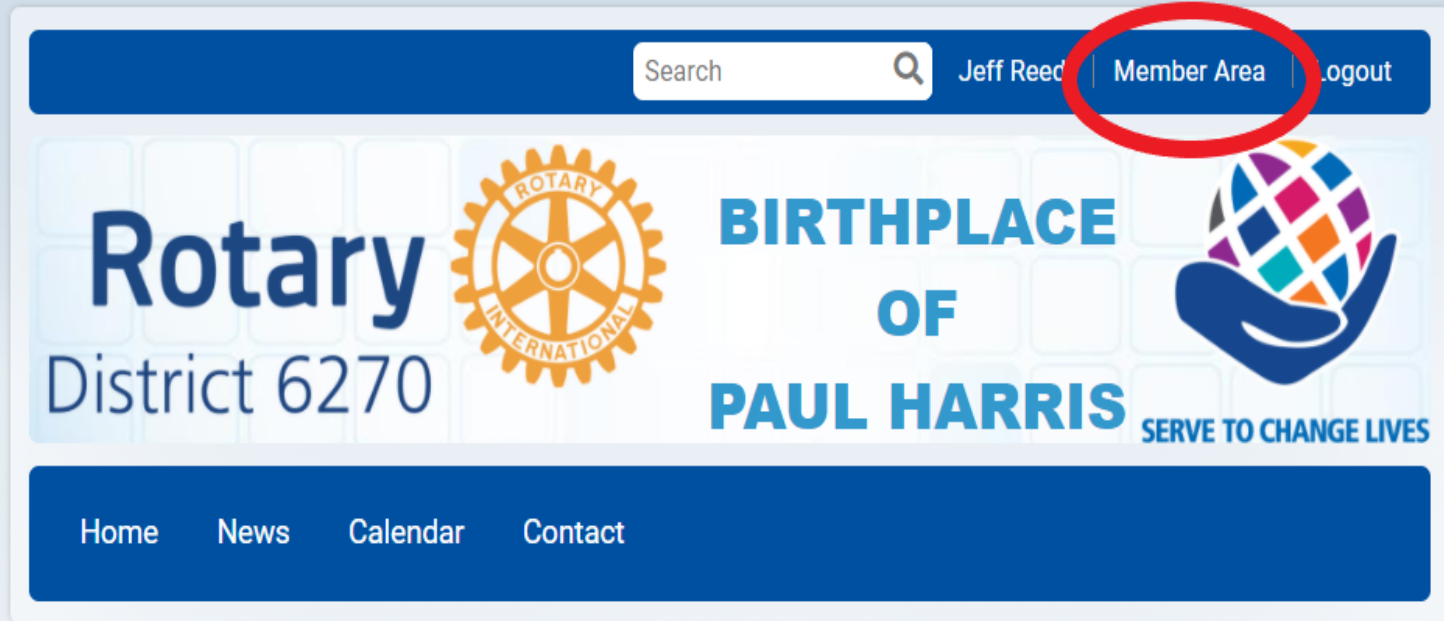
- Access on D6270 website (**Member Area**)
www.rotary6270.org
- Use for Entry of:
 - ✓ Application information
 - ✓ Supporting documents
 - ✓ Final Report

Entry to Grants Module

www.rotary6270.org

Enter “Member Area”
in D6270 website.

You may need to login



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 “2023-24”
- 5) Select and Open your club’s grant

The screenshot shows the District 6270 website interface. The top navigation bar includes links for Admin, For Clubs, Grants, For Members, Membership, Contacts, Organization, Communication, Website, Documents, Reports, and Attendance. The Grants section is expanded, showing options like Submit a Grant Request, My Club Grants, District Grants, and Grant Documents. The My Club Grants section is further expanded, showing View Club Grants, Submit a Grant Request, Documents, District Grant Documents, Help, and Grants Module. The View Club Grants option is selected, leading to the Grant Request Applications page. This page features a navigation bar with a Go back button, a Back to Landing Page button, and a year selector (Previous Year | 2023 - 24 | Next Year). A filter by status dropdown is set to Any Status, and a filter records search bar is present. A table of grant applications is displayed, with columns for Submitted, Project Name, Sponsoring Club, Estimated Budget, and Grant Amount. The first row shows a grant submitted on May 10, 2023, for the project 'Mirrors, Windows, and Sliding Glass Doors' by the 'Fond du Lac Morning' club, with an estimated budget of \$3,150.00 and a grant amount of \$3,000.00. The grant is currently 'Open'.

District 6270

Welcome, Jeff Reed [Logout] Home English ▾

Admin For Clubs **Grants** For Members Membership Contacts Organization Communication Website Documents Reports Attendance

Events Bulletin Documents Help

Submit a Grant Request **My Club Grants** District Grants Grant Documents

Grants

View Club Grants

Submit a Grant Request

Documents

District Grant Documents

Help

Grants Module

← Go back

Grant Request Applications

Back to Landing Page

« Previous Year | **2023 - 24** | Next Year »

Any Status

Filter by Status: Any Status

Filter records:

Submitted	Project Name	Sponsoring Club	Estimated Budget	Grant Amount	
Funded					
May 10, 2023	Mirrors, Windows, and Sliding Glass Doors	Fond du Lac Morning	\$3,150.00	\$3,000.00	Open

Documents

Documents filed:


- MOU
- Goals
- Fundraising Analysis

Added with Final Report:


- Expense report
- Photos
- Public Image


[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)




Project Documents


Attach all related documents and files. 


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
 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

 Collapse All

 Expand All



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:

B Financial – Expense docs


Upload to “Documents” tab

- Receipts
- Paid Invoices
- Other expense documentation





Note: Recommend – use “Add Folder” to create folder to store expense documents

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

Project Documents

Attach all related documents and files. 

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.

Name	Updated On ▼	Updated By ▼	Actions
 Expenses	Feb 18, 2022	Jeff Reed	Add Add Multiple <input type="button" value="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

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.

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.

Name	Updated On ▼	Updated By ▼	Actions
Expenses	Feb 18, 2022	Jeff Reed	Add Add Multiple <input type="button" value="more...▼"/>
Photos	Feb 18, 2022	Jeff Reed	Add Add Multiple <input type="button" value="more...▼"/>
Public Image	Feb 18, 2022	Jeff Reed	Add Add Multiple <input type="button" value="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?

- Select “**Individual Project Report**” tab
- Provide Responses in Project Description section of “**Individual Project Report**” section at bottom 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:

- What was done?
- Describe recipients.
- Describe impact of project.
- How many Rotarians participated in this project?
- How were Rotarians involved - what did they do?
- How many hours of service were contributed to the project?
- When was the project completed?
- How was the project publicized (Public Image)

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
 >>> Photos

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

[Update](#)

Reporting:

B Financial - Summary

Provide Summary of actual Income and Expenses for the project.

One line for each major item.

DetailsApplicationBudgetDocumentsProject OverviewIndividual Project ReportActivity Log

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.


[Details](#) [Application](#) [Budget](#) [Documents](#) [Project Overview](#) [Individual Project Report](#) [Activity Log](#)

[Go back](#)

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](#)

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 *

Format Font Size B I U S X X I Link Image Embed Media Templates Source

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 *

Format Font Size B I U S x₂ x₃ I_x Link Image Embed Media Templates Source

Cancel Send to Myself Send

← Go back

Jeff Reed, Grant Chair, FdL Morning Rotary

SUPPORT

Checklist 22-23 District Grants

SUPPORTING RESOURCES

Checklist (Step-by-Step)

Guide in “District Grant Documents”

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>

USING WORD TO CREATE TEXT

Copy-Paste “Tip”

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 Kohlmeier**
dana.kohlmeier@rotary6270.org

For information about stewardship

- District Stewardship Chair **Tom Curl**
tom.curl.1948@gmail.com

