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## Lilly Endowment Clergy Renewal Programs at Christian Theological Seminary

### INSTRUCTIONS FOR COMPLETING FINAL REPORTS ONLINE

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The Lilly Endowment Clergy Renewal Programs at Christian Theological Seminary (CTS) look forward to learning more about Clergy Renewal Grant Program experiences through the final reports. A grant's final reporting deadline may be found on the congregation's grant agreement unless your reporting deadline has been extended by later notification.

Completion of these reports by both the pastor and a congregational representative are required for successful closure of your grant. **Failure to complete all reporting steps will result in both the pastor and congregation becoming ineligible for future Clergy Renewal grants.**

#### Final Reporting Steps

1. Prepare final report materials.
2. Send email request for access to the online final reporting portal.
3. Pastor and congregational representative enter final reporting materials.
  - a. Financial reports
  - b. Return of any unspent grant funds
  - c. Narrative reports
4. Pastor and congregational representative provide electronic signatures on financial report.
5. Pastor and congregational representative receive formal notification of grant closure.

Please see detailed instructions below for each step.

#### 1. Preparing your final report materials

The final report process includes three steps that the leave-taking pastor and congregational representative participate in.

- Financial reports > Narrative reports > Electronic signatures

#### Financial reports

The first portion of the final report involves entering actual spending according to the categories listed on the financial worksheet. It will be important to have the grant agreement with the originally proposed budget, as well as any budget revision correspondence, as you complete the final financial report. The pastor's online form will ask for actual spending for clergy expenses. The congregational representative's form will ask for actual spending for congregational expenses. *Please only report actual spending of grant funds.* **Spending from other sources should not be included in the financial report. In addition, if the full amount of the grant has been spent, the budget worksheet should reflect a zero balance while still reflecting actual spending (as compared with the original budget).**

The Final Financial Report Worksheet, which is a template for preparing these numbers, can be downloaded from the [Current Grantees](#) section of our website. If this financial information must

be obtained from a treasurer or other parties in the congregation, this template will make it easier to collect the needed information.

Please note that though the Final Financial Report Worksheet includes a column for the original budget, it is only a means to help you determine whether there are unspent grant funds which need to be returned. [In the online portal, you will only enter actual spending.](#) The originally proposed budget will appear to the left of the column where the pastor and congregational representative enter actual spending for each category.

When both the pastor and congregational representative have submitted their actual spending, an onscreen message will confirm your submission has gone to the staff for review. When actual spending is approved by our staff, the pastor and congregational representative will receive links to the narrative section of the portal.

- **Return unspent grant funds:** After our staff approves your actual spending, you may return any remaining unspent grant funds of **\$250 or more**. Please make the check **payable to “Christian Theological Seminary”** and mail it to:

Karen Bozzone  
The Lilly Endowment Clergy Renewal Programs  
Christian Theological Seminary  
1000 W. 42nd Street  
Indianapolis, IN 46208

- For **grants awarded in 2022 or later:** If your actual spending reflects reallocations greater than \$3,000 for the combined budgets and we don't have an approved Budget Revision Request on file, we will email you a link where you will upload a signed explanatory letter. The letter should detail the reason(s) for the significant changes to the originally proposed budget and be ink signed by the leave-taking pastor and congregational representative. Once we receive and approve the explanatory letter, you'll receive links to the narrative section of the portal.
- For **grants awarded between 2019 – 2021**, as previously communicated, the need for budget revision requests is waived.

### Narrative reports

The second portion is a series of questions about your experience that require written responses. The similarity between the pastor and congregation questions is intentional and designed to reveal different perspectives about the experience. Therefore, the pastor and the congregational representative should answer these questions based on [their viewpoint and genuine opinion](#) about the renewal experience.

The questions for pastor and congregational representative can be downloaded from the [Current Grantees](#) section of our website. The portal will allow you to paste responses copied from a document created with Word, Google Docs, or other similar software. The congregational representative is welcome to collaborate with multiple people from the congregation to complete the congregation's narrative report.

## Electronic Signatures

We require electronic signatures from the leave-taking pastor and congregational representative via DocuSign on the Final Financial Report generated from the original budget and actual spending as reported in the first part of the process.

### 2. Send email request for access to online final reporting portal.

Once your financial and narrative final reporting materials are ready, email us to request access to the online final reporting portal. Send an email to [clergyreports@cts.edu](mailto:clergyreports@cts.edu) to confirm the correct contact information for the pastor and congregational representative and include the following information:

- a) Congregation's name and/or your grant number
- b) Pastor's current email address
- c) Name and email address of the one congregational representative who will be completing the reports online and providing their electronic signature on the Final Financial Report.

Ideally the congregational representative would be the same person who signed and helped prepare the grant proposal. However, we realize that the people who serve in these roles sometimes change. If you are selecting a new congregational representative for the final reports, please remember that this person should NOT be a paid staff person, other pastor or family member of the leave-taking pastor. ***The link can only be sent to ONE congregational representative.***

### 3. Entering your final reports online

Once you receive your report links, use the materials you prepared in Step 1 to enter information into the online portal.

The first step in the process is entering your actual spending. After you enter the actual spending amounts for each category, click the "Submit Budget" button at the bottom right. A confirmation message will appear on the screen letting you know your information was successfully submitted and has been sent to our staff for review.

Travel and lodging: \$3,000	Actual Travel and lodging \$0.00
Congregational events relating to pastor's leave-taking and return: \$3,175	Actual Congregational events relating to pastor's leave-taking and return \$0.00
Congregational renewal activities: \$7,200	Actual Congregational renewal activities \$0.00
Other: \$1,600	Actual Other \$0.00

**Clergy Renewal Team is currently reviewing  
your actual spending budget.**

**We will send an email with next steps.**

When our staff approves your reported actual spending, you'll receive an email with a link to the Narrative Report. The link allows you to return to the narrative report as often as you need until the "Submit" button on the fourth page is clicked.

The narrative report has four pages. The first three each have a "Save & Next" button at the bottom right. The "Submit" button is on the last page. If you have entered some of your narrative answers but need to finish at another time, simply click anywhere outside the text boxes, and then close your browser window. Your responses will be saved.

There will be a "Previous" button at the bottom of each screen (except the first) that allows you to navigate to previous pages:

New Congregation Final Report

### Suggestions for the Clergy Renewal Program

Would you recommend to other congregations that they encourage and support a renewal program of this kind? Why or why not? Character Limit 6,000

Is there any wisdom you would share with other congregations whose pastors are about to take renewal leaves? Character Limit 6,000

What areas of the Clergy Renewal Program should be improved or strengthened? Character Limit 6,000

Previous Save & Next

When all your responses have been entered, click the "Submit" button on the last page (Overall Evaluation page). You'll see a confirmation message on the screen:

Previous Submit

**Thank you for completing the final program report.**

#### 4. Complete electronic signatures

Once we review and approve your submitted reports, the leave-taking pastor and congregational representative will receive emailed requests from DocuSign for their electronic signatures on the Final Financial Report. DocuSign will email a copy of the completed document to both signers.

**Please be sure to download and save a copy with the congregation's other grant records.**

#### 5. Notification of Grant Closure

After the Final Financial Report has been electronically signed and any unspent funds have been received, we will close the grant in our database. The leave-taking pastor and congregational representative will receive an email giving formal notice that the congregation's grant has been closed.

#### Further Information

Please contact us at [clergyreports@cts.edu](mailto:clergyreports@cts.edu) with any questions about the final reporting process.