Lilly Endowment Clergy Renewal Programs at Christian Theological Seminary

INSTRUCTIONS FOR COMPLETING FINAL REPORTS ONLINE

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. Confirm contacts and request reporting links
3. Pastor enters pastoral reporting materials and congregational representative enters congregational reporting materials
4. Both pastor and congregational representative complete electronic signature of reports
5. Congregation returns any unspent grant funds to Christian Theological Seminary

Please see detailed instructions below for each step. Once all steps have been completed, the pastor and congregational representative will receive a formal closeout email acknowledging that the grant file is successfully closed.

1. Preparing your final report materials

Final reports include two components for the pastor and the congregation.

Narrative reports

> The first portion is a series of questions about your experience that require written responses. Although the questions are similar, we want to hear answers to these from different perspectives, so both the pastor and the congregational representative should answer all these questions from their own perspective.

> These questions can be found in the "Pastor – Final Report Narrative Questions" and "Congregational Representative – Final Report Narrative Questions" documents in the "Resources For Current Grantees" section of our website. You may it easier to draft your responses in a Word document and then cut and paste them into the online fields. Congregational representatives that will work with other congregation members in completing are welcome to work collaboratively on this process.

Financial reports

The second portion of the final reports involves entering your actual spending according to the categories from your original budget proposal. 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" expenditures on the "Clergy Expenses" side of the grant budget. The congregational representative's form will ask for "Actual" expenditures on the "Congregational Expenses" side of the grant budget. *Please enter only expenditures made using grant funds*. Additional spending from other sources should not be included.

A template titled "Final Financial Report Worksheet," which is a template for preparing these budget numbers, can be found in the "Resources For 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 all necessary numbers prior to entry.

Please note that although the final financial report worksheet has a column for entering your original budget (or approved budget revision) to help you determine whether there are unspent grant funds to be returned, you will only be entering your actual spending of grant funds into the online forms. The online final financial report will automatically populate with budget numbers we have on file for the grant. *Pastor and congregational representative will be replacing those automatically populated figures with the "Actual" figures they have to report.*

2. Confirm contacts and request reporting links

Once you have prepared your final reporting materials and are ready to enter them, send an email to clergyreports@cts.edu to confirm the correct contact information for the pastor and congregational representative and include the following information:

1. Congregation's name and/or your grant number
2. Pastor's current email address
3. Name and email address of the one congregational representative who will be completing these reports online and providing their electronic signature on the Final Financial Report we will send once narrative responses and actual spending are completed in the online forms.
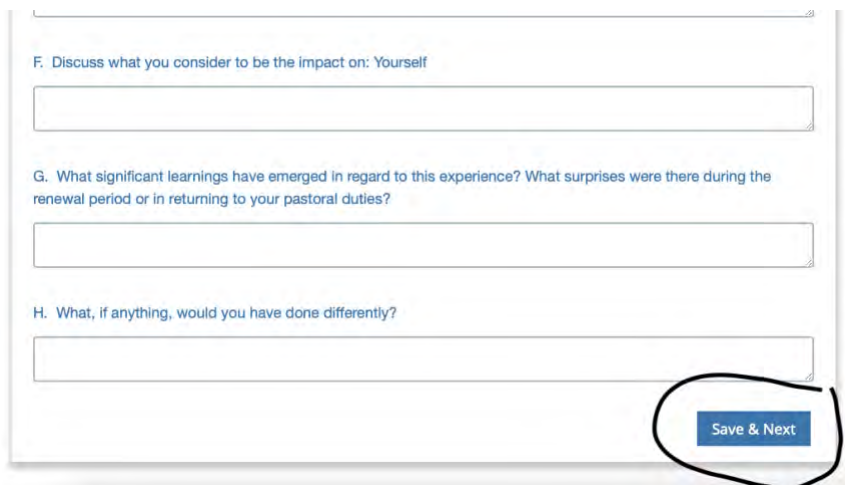
Ideally the congregational representative would be the same person who signed and helped prepare the grant application, but we know that these roles sometimes change. If you are selecting a new congregational representative for the final reports, please remember that this person should NOT be a paid staff member of the congregation. *The link can only be sent to ONE congregational representative.* See the "Preparing your final report materials" section for suggestions on how multiple people can collaborate on these reports, if needed.

Beginning in 2022, if we have not heard from you by the summer before your September 1 reporting deadline, we will automatically send these links to the email addresses for the pastor and congregational representative that we have on file. Please make sure you are keeping this information up to date throughout the life of your grant period.

3. Entering your final reports online

Once you receive your links, you can use the final report materials to enter the information you prepared in step 1 into the online portal. Please carefully follow the instructions below to ensure that your data is saved correctly and that you do not lock yourself out of the system.

There will be a "Save & Next" button at the bottom of each screen of the online forms before the final screen:
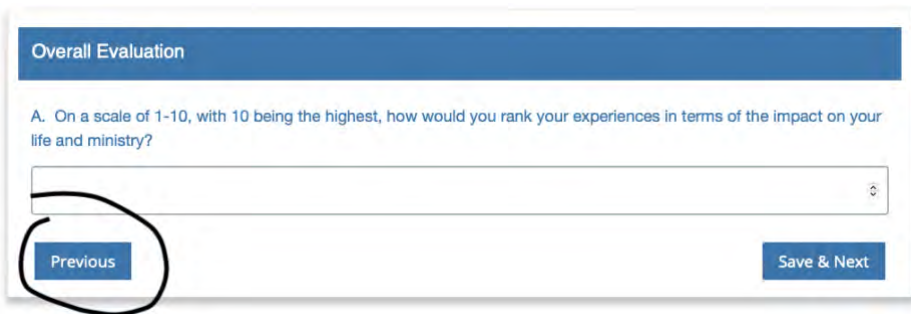

There will be a "Previous" button at the bottom of each screen (except the first) that allows you to navigate back to earlier screens:

Clicking "Save & Next" saves your work so you may leave the form (navigate away from it, shut down the browser, etc.) and return to it as often as desired before clicking "Submit" on the final screen. The emailed link will allow you to return to the form as many times as you like.

However, the final screen of the form, with the financial reporting, does NOT have a "Save" button. It only has the "Submit" button:

Since the final screen cannot save the information entered on that screen before submission, please plan to enter the financial information on the final screen only at the very end when you're ready to submit the entire form.

4. Complete electronic signatures

Once we have reviewed your submitted reports, the pastor will receive an email with a link to an e-signature portal. If there are reallocations in your budget of more than $3000 between budget lines, the pastor will also be asked to provide an explanation of these reallocations before completing the electronic signature.

Please note that there is a navigation band at the bottom of the agreement with a green or blue button that guides through the signature process. Be sure to click on the final button registers your e-signature as complete!

Once the pastor has completed their e-signature, an email will be sent to the congregational representative to collect their e-signature also.

5. Return unspent grant funds

If you did not spend all your grant funds, your e-signature form will indicate the amount of unspent grant funds to be returned.

Please send a check for this amount to "Christian Theological Seminary" and mail it via USPS only (please no Fed Ex or UPS) to:

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

Further Information
Please contact us at clergyreports@cts.edu with any questions about the final reporting process.