Annual Report and Report to Wisconsin

After the November Board meeting and after RK has entered everything into Gifts, she will pull a report of all grantees from that year. (i.e. 2015)

The list is then given to CF to review and reconcile to the budget worksheet. It is then given back to RK for any changes or updates. After that is done, RK will give the list to RN for review.

RN then will verify the program areas and subsectors based off the 2014 reports. If there are new grantees, or any questions, RN will follow up with the POs responsible for that grantee.

RN will then make a copy of RK’s original spreadsheet and update it using the changes that the POs recommended. The list is then returned to RK to update the records in Gifts. After the changes have been made, a new spreadsheet is pulled and given to CF and RN. RN will double check that the changes were entered correctly.

After the list has been approved, use that list to begin the layout of the Annual Report and Report to Wisconsin in InDesign.

Be sure to keep the final spreadsheet from RK as is. Don’t change or remove anything. The only time you change or update it is if a grant has been moved to a new section per a PO. The change must also be reflected in the spreadsheet so that the report totals match up. (CF will check to make sure that everything matches up)

After finishing laying out the reports, give to CF for her first review. After she is done, circulate it to the POs. Make any changes to the reports. Continue to circulate until no more changes are needed. When almost completed, share with MGW and TF for their final okay before sending it to the printer.

Send the files to the printer to have them lay it out and return to use for proofing. Circulate to CF and the POs for their input. If any changes are needed, share them with the printer until the report is 100% approved by all individuals.

Send the mailing lists to the printer.