

Tutorial for Quarterly Reports & Expense Report Forms

Please use the website below to access the forms needed for your Quarterly Reports & Expense Reports

<https://toknc.com/finance/services/community-grants/>

This is the page that should appear when you click on the above link.

The screenshot shows the 'Community Grants' page with the sub-header 'Funding for Local Nonprofits'. It features a table of 'Important Dates' and 'Details', a paragraph explaining the town's funding criteria, and a section for 'The Annual Operating Budget Support Application' available via Jotform. Contact information for Kelly Hargett is provided, along with links to 'Grantee Forms', 'Quarterly Performance Reports', and 'Expense Report Form'.

Important Dates	Details
Grant Period	July 1, 2023 to June 30, 2024
Applications Available	January 2, 2024
Applications Deadline	February 16, 2024
Presentation to Board of Alderman for previous year recipients	March & April 2024
Notification of Funding	On or before August 1, 2024 (*grant contract must be signed before funds will be released to grantees) PLEASE NOTE - Grantees will be notified #/when funding is awarded. Awarding does not take place until the annual budget is approved.
1st quarterly report due (reporting for July, August, September)	October 15, 2023
2nd quarterly report due (reporting for October, November, December)	January 15, 2024
3rd quarterly report due (reporting for January, February, March)	April 15, 2024
4th quarterly report due (reporting for April, May, June)	July 15, 2024

The Town of Kernersville considers funding nonprofits based on the services they provide to the citizens of Kernersville. Funds may also be provided to nonprofits based on the amount of travel and tourism they bring to Town. Please note, not every nonprofit that applies for funds will be funded.

The Annual Operating Budget Support Application is available online via Jotform.

Please click the link below to fill out the online application. The application will not be available until **January 2, 2024**:

[Annual Support Request for Nonprofits](#)

If you have any questions, please contact: Kelly Hargett @ khargett@toknc.com

[Grantee Forms](#)
[Quarterly Performance Reports](#)
[Expense Report Form](#)

Quarterly Reports

Once a quarter (dates are listed on the webpage for reference) Quarterly Reports are due. The hyperlink to the Quarterly Reports Form is highlighted in the next picture.

Community Grants

Funding for Local Nonprofits

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[Quarterly Performance Reports](#)

[Expense Report Form](#)



Once you click on the link, the form below will appear.

Performance Report

Grantee ID

Date

Semi Annual Report

January 15
 April 15
 July 15
 October 15

Expenses
 Do you certify that all the expenses to date that have been submitted for this grant and are reflected in the associated Smartsheet?
 Yes
 No

Purpose
 Do you certify that all funds to date were used for the purposes for which they were awarded and in compliance with your contract?
 Yes
 No

Activities
 Please provide a report of activities and accomplishments related to your grant funding during this reporting period.

Setbacks
 Have there been any setbacks to using your funds at this time?

Additional Info
 Is there any other information that the Town of Kernersville needs to be aware of at this time?



You will receive your Grantee ID in an email from me. Please use this number for all reports.



Choose the correct reporting cycle



Certify expenses



Certify funds were used the way they were intended to be used.

Scroll down for the rest of the form

(second half on next page)

Activities

Please provide a report of activities and accomplishments related to your grant funding during this reporting period.

Setbacks

Have there been any setbacks to using your funds at this time?

Additional Info

Is there any other information that the Town of Kernersville needs to be aware of at this time as it relates to your funding?

Name

Please provide your name

File Upload

You may upload a document below if more space is needed for the questions above.

Drag and drop files here or [browse files](#)

Authority

I certify that I am authorized by organization to submit this performance report on behalf of my organization.

- Yes
- No

Send me a copy of my responses

Submit



Please tell us what activities and accomplishments have taken place during this past quarter with regards to grant funding.



Setbacks = this can be anything that is happening that is causing delays in your ability to expend funds



Anything else you would like for us to know.



You may upload a file here if you feel like we need more information.



Certify that you have the authority to submit this form on your organization's behalf



Click "send me a copy" if you want a copy for your records. And then hit "submit"

Expense Report

Community Grants

Funding for Local Nonprofits

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Grantee Forms

[Quarterly Performance Reports](#)

[Expense Report Form](#)



For expense reporting, please submit copies of receipts, or invoices with cleared checks, with each report. Once you have reported all Town funds expended, you do not have to continue to do quarterly reports for the remainder of the funding period. Expense Form example below.

Expense Report

Date

Expense Report

Grantee ID

Description

Expense Category
Select or enter value

Merchant/ Vendor Name

Amount

Attached Receipt?

File Upload
Drag and drop files here or [browse files](#)

Email Address

Notes

Send me a copy of my responses

Submit

← Please choose the date

← Please use Grantee ID number here

← Short description of expense: new sheets for resident's beds

← Please choose the expense category that matches as closely as possible.

← Merchant name

← Amount on spent

← Upload individual receipts here. You may fill out as many of these forms as you need. One form per receipt.

← Your email address

← Any notes you would like for us know

← You may check "send a copy of my response" to keep a copy for your records and then hit the "submit" button.

Please note, the Expense Forms can be filled out and submitted at any time during the quarter, but must done by the end of each quarter.

If you have any questions, please feel free to contact me at any time.