

# Northeast SARE Partnership Grant reporting instructions

## Contents

[Introduction](#)

[Reporting timeline](#)

[Step one: Register as a user in the SARE electronic reporting system](#)

[Step two: Verify and expand on project information](#)

[Submission tips for annual and final reports](#)

[Write your report offline](#)

[Graphic elements](#)

[Step three: Prepare an annual report](#)

[Step four: Prepare a final report](#)

[Step five: Submit an annual or final report on line](#)

[Project information products](#)

[And, finally](#)

---

## Introduction

These instructions will help you navigate the SARE online reporting site, open your grant so funds can be released, submit annual and final reports, and then close your grant when it's complete. If you've had a previous grant from Northeast SARE, a lot of what you will read here will sound familiar. Note that if you already have a user name and password for the online report system, they will also work for a new award. Whether you are familiar with the online reporting protocol or new to it, you should keep these instructions for your reference.

All grantees should always feel free to ask questions about reporting. Your grant administrator is Carol Delaney, [carol.delaney@uvm.edu](mailto:carol.delaney@uvm.edu); phone is 802-656-0697.

## Reporting timeline

**Early spring:** New awards announced

**Spring and summer:** New award proposals posted and funds released.

**December 31:** All awards, annual progress report deadline.

**Sixty days after grant contract ends:** All awards, final report deadline.

## Step one: register as a user in the SARE electronic reporting system

First, you will receive an e-mail telling you that your project has been added to the SARE reporting web site. The message will contain a **project number** and a **code**. Save these two pieces of information; you'll need them to access your project as described in the next paragraph.

Next, go to [http://mysare.sare.org/mySARE/sare\\_main.aspx](http://mysare.sare.org/mySARE/sare_main.aspx) and click on the "register" button. Fill out the form that comes up and submit a username and password. **Do not use your e-mail address as a username**—the system won't accept it—and use a password you can remember, since you will need these each time you log in. When you get to the "confirmation screen," click on "go to MySARE." If you are already registered in the system from a previous grant, enter your username and password to go to your MySARE page.

Under "My SARE-funded projects," click on "retrieve new project." This is where you will enter the **project number** and **code** (cutting and pasting works well because the code is long) mentioned in the paragraph above. Once you've done this, click on "add project."

You should now be on a page that has your name, followed by "MySARE."

## Step two: Verify and expand on project information

Under the **project overview** heading, **general information** section, make sure the title of your project, the award amount, and the year your project will end are correct—this information is filled in by staff when they create your account. If anything looks amiss, contact Carol Delaney so we can correct our records. Click the "save general information" button when all the information is correct.

Under **participants**, enter the names and contact information for members of the grant project team by clicking "add a participant." Grant team members are the people who are helping you manage the grant—a good rule of thumb is that if someone besides you is performing some specific task (data collection, administrative support, workshop leadership, outreach, etc.), they are participants. These people will be listed with their contact information for possible communication from the public.

Under **project profile**, select the "add/modify" button and fill out both pages of this form, saving the pages as you go. This project profile is an important indexing tool—it makes it possible for people to search the database efficiently—so it's important that the form reflect the content of your project accurately. At the end, select "save and back to my project."

Under **proposal narrative**, click the "create new proposal narrative" button. Under "summary/abstract," copy and paste verbatim the "summary" section from the cover page of your original proposal. Then, under the "objectives/performance targets" section, copy and

paste verbatim the section of your proposal called “What will your methods be?” followed by the section, “How will you package and disseminate your results?” Save each section.

Finally, when you are satisfied with the all the information in the **project overview**, click “submit for approval.” This will send an e-mail message to the administrator, who will read and, if all the required elements are there, publish your proposal to the online database. Once this is submitted and approved and Northeast SARE has a signed grant contract, your project is open and Northeast SARE can begin accepting invoices for reimbursement. (There is a useful invoice template on the Northeast SARE website; go to <http://www.nesare.org/Grants/Manage-a-Grant/Partnership-Grant> and use the “for grantees” download option on the right-hand side of the page.)

## **Submission tips for annual and final reports**

### **Write your report offline**

The best way to prepare an annual or final report is to read over the descriptions below and then create the report in a word-processing program. This text can then be pasted under the appropriate headings in the online report system.

It’s important to submit only clean, unformatted text on line. Special characters—ampersands, greater than or lesser than, fractions, smart quotation marks, underlining, bold, italics, indenting, or other text effects—will not translate well and leave unintelligible character strings in the online document. Some special characters are simply not supported, but any character that that can be accessed from a standard keyboard (brackets, ampersand, percent sign, etc.) can be inserted by hand after pasting the text into the report template window.

Once your text is submitted, you can format it within the report template itself. Supported format options are:

Indented and unindented paragraphs

Bulleted lists

Numbered lists

Quote block

### **Graphic elements**

Your annual or final report may include tables, figures, graphs, photos, audio, and video files. The online reporting system lets you upload these elements within each section using dialogue boxes in the template. If you plan to include photos, tables, charts or other graphic elements, make each item a separate file. Supported upload formats are:

**Images:** gif, jpeg, jpg, png

**Figures:** ppsx, ppt, pptx

**Tables:** xls, xlsx

**Documents:** doc, docx, pdf, rtf

**Video:** asf, asx, avi, mov, mp4, mpeg

**Audio:** au, mp3

## Step three: Prepare an annual report

An **annual report** is a progress report due at the **end of each calendar year for every year your project is active but not yet complete**. This report describes all progress since your last report or, if your project is new, since your project began. Most annual report narratives run 800 to perhaps 2000 words, and the goal is to describe project activities as they relate to the objectives and the plan of work in your original proposal. Annual reports are due on or before **December 31** of the reporting year. You may want to do your annual report in early December to accommodate the holidays. Annual reports are submitted on line only. If your administrator feels there are content gaps or other concerns with an annual report, she will ask you to correct them by going back to the report template to add to or clarify your initial submission.

There are four generic section headings to the online annual report —**summary, objective/performance targets, accomplishments/milestones, and impacts and contributions/outcomes**.

**1. Summary**—this gives the reader a brief overview of the project and its key components, and is typically 100 to perhaps 300 words long. As much as possible, quantify participant involvement and your project progress.

*Example: Twelve farmers and six outreach professionals met in person and via conference call with the project leaders to plan research into the viability of six CSAs. This call identified commodities, economic models, member characteristics, and overall business designs. The first year's data has been collected and is now being analyzed. Three presentations on the project's progress to date are planned for the coming winter at meetings in New York, New Jersey, and Delaware.*

**2. Objectives/Performance Targets**— describe what you accomplished in terms of the methods section of your original proposal and include any outreach that may have occurred. These elements can often be summarized concisely in brief paragraphs or as a bulleted list, and should be consistent with the work plan in your proposal. If they are not, explain why.

**3. Accomplishments/Milestones**—copy your timetable from your proposal and describe the events and activities of your project over that past year in sequence. For each activity, say whether you did do what you set out to do—did you engage the types and numbers of audiences you proposed? Did your project progress as expected? What did you learn as events unfolded? Were there any surprises or changes in the plan of work?

**4. Impacts and Contributions/Outcomes**—an annual report often does not have impacts yet, but this is a place to note any preliminary results.

## Step four: Prepare a final report

A **final report** is due within **60 days after your project completion date**—check your SARE contract to find out when your completion date is. Final reports are the full summary of your entire project; they should be comprehensive, incorporating all the material provided in past annual reports. The goal is to write a complete narrative of all key project events and results, including outreach, from beginning to end.

**Final reports should be timely and complete.** A percentage of grant funds will be held back until the final report is approved. Late reports are also noted by staff, and project managers who fail to meet reporting requirements will be ineligible for future SARE funds.

**Final reports are submitted on line.** It is no longer necessary to mail a hard copy the final report itself—we once required this but our guidelines have changed.

There are ten section headings on the online final report—**summary, introduction, objectives/performance targets, materials and methods, results and discussion/milestones, impact of results/outcomes, economic analysis, publications/outreach, farmer adoption and areas needing additional study.** These headings are generic, and you may find that you don't have anything to report under all of them. For example, if you are working on an education or demonstration project, you do not need to repeat material in the results and discussion section that was described in the methods section. In the same vein, not all reports have anything under areas needing additional study. If you find that you are repeating content under different headings, re-read the prompts below to see what each section is asking for. Use your best judgment when organizing your material, tailoring the report to your specific project.

**1. Summary**—an overview of the project. Describe what you did do (with detail of any treatments) and what happened with an emphasis on numeric, measurable results. It is similar to an abstract for a reviewed paper so these results pique the reader's interest to read further.

**2. Introduction**—an introductory description of the project and its context. This is your chance to explain to a reader what issues prompted your proposal and why the project is important. This often comes from your proposal text response to “What is your proposed solution?” If you have article references in your text (e.g. Samson and Thomas, 2002), put the full bibliographic reference at the end of the section. If your report has a lot of citations throughout, scattered over several sections, you also have the option of uploading a full bibliography as a separate document.

**3. Objectives/Performance Targets**—briefly state whether or not you accomplished the goals for your plan of work. If some goals were not reached, or if there were changes what you measured or how you measured something, describe these changes and any barriers to completion you encountered.

**4. Materials and Methods**—describe your approach and the overall design of the project taken from the methods section of your proposal. Include the activities, materials, and strategies you used to reach your target audience, including what worked and what didn't. When discussing events, give the year, month, and day at the start of each event so readers can follow the timeline.

**5. Results and Discussion/Milestones**—this is where you summarize the results and interpret the data for readers. Describe your key discoveries and accomplishments and those of your partnering farmers. What do you want the reader to remember about your project?

**6. Impact of Results/Outcomes**—if your project included verification in the form of surveys, feedback, farmer debriefings, etc., discuss how well your verification plan worked in terms of response and certification of the goals of your project. Assess the immediate and possible future impacts of your work on farmers and the farm community, and describe, if applicable, the effect of the project on any secondary audiences like extension, private groups, or the general public. Express survey results numerically as well as qualitatively—for example, “We sent out 100 surveys to farmers who attended the field day. Twenty-nine surveys were returned, with 55 percent saying they adopted the new planting technique. Some comments on the new technique were... .”

**7. Economic Analysis**—if applicable, describe any changes in farm income, the economic status of farms, or the repercussions of your project on farm viability. Focus on clear, numeric results such as costs per acre, increased yield, increased revenue, decreased cost, improved erosion control, soil quality, herd health, lowered labor, or other indicators of sustainability as they bear on the project.

**8. Publications/Outreach**—describe your outreach and education efforts, including any publications, web content, or other media products that grew out of the project, and assess their effectiveness. If your project included a video, upload it either here or as a **project information product** as described below. Make sure the format is compatible (use asf, asx, avi, mov, mp4, or mpeg) and under 240 Mb. If your project included website content, put the URL in the body of the report as well listing it as a **project information product**.

**9. Farmer Adoption**—this section is not always part of a final report, but if you have this information describe how and whether farmers adopted the new techniques offered or advocated, gave feedback, or brought interesting or useful ideas or criticism to bear on the project. Much of this content will likely come from direct farmer contact and through a verification process. Include any farmer quotes that summarize or clarify farmer reaction to your efforts.

**10. Areas Needing Additional Study**— if applicable, note the need for additional work on the topic beyond the scope of this project.

## Step five: submit an annual or final report on line

Once your report is ready, log in to the system with your username and password and go to your “MySARE” page. Under “MySARE funded projects,” click on “submit/edit My projects and reports,” then click the “year” button. For annual reports, choose the year actually covered by the report—normally the year just ending. If you are submitting a final report, choose the year the project ended. Click the “create new” button.

Copy and paste the text from the word processing file to the corresponding text boxes in the template. Do not change the main headings in the template. If you want to add subheadings, you can create them beneath the main headings. Copy and paste the text into the sections, saving each section as you go. Insert two line spaces after each paragraph to create a clear paragraph separation—this extra space makes the report much easier to read.

**Adding graphic elements:** Once you enter text for a section and click the “save text” button, you will see an “upload file” button just below the text window. If you have supporting files, place them logically under the sections they belong to. For example, an Excel file showing the results of a field experiment would likely be added under **methods** or **results and discussion**, depending on the content, while a .pdf file of a bulletin or flyer or perhaps .jpgs of photographs of an event or demonstration would likely belong under **outreach**. Photos are always welcome and add emphasis and interest.

If you have more than one document to upload, like a series of tables, you can create subsections and upload that document right after you refer to it in your text. In the screen shot below, the author uploaded a data sheet and then created a new subsection to continue writing in the **methods** section.

Click this

To get new section where you can follow with an uploaded file

It's important to create a descriptive caption for each element you upload. The file name of the attachment does not display in the report (all the reader can see is a very generic "Document 1," "Document 2," etc.), so these captions are important to the reader. This upload feature is limited to 240 Mb; if you have a large file, it may take some time to transfer. Also, if you have a standalone final product that others might use—often a manual, fact sheet, video, or handbook—upload it separately as a **project information product** as described in the next section.

Once your report is in the template and any graphic elements are uploaded and captioned, go to the bottom of the report editing screen. There, you will see buttons that allow you submit, save, preview, or cancel your work session. "Submit" will send an e-mail to a regional administrator, who will read the report and either publish it or e-mail you with questions. "Save without submitting" lets you come back to the report later. "Save and preview" lets you see the report as it will appear onscreen, while "cancel" will delete the entire report. Use "cancel" with care.

## **Project information products**

If you go back to the main "MySARE" page, you will see, at the bottom of this page, a **project information project** option. This allows you to upload books, bulletins, websites, videos, or other materials developed as part of the project, and these materials will be indexed in the SARE online learning center so visitors can access them using a simple search. Fill out the form that comes up about the product, save, and then upload.

## **And, finally**

If the report is approved you will get an e-mail from the reporting system, and the final step is to send us a print copy or copy on disk of any **project information products**. You may, as an option, also send along any project flyers, news coverage, outreach materials, or other peripheral content generated by the project but not included as an information product. SARE staff like to review these materials, and exceptionally good ones are sometimes offered as models to other grantees. Send these to:

**Carol Delaney**  
**Northeast SARE**  
**University of Vermont**  
**655 Spear Street**  
**Burlington, Vermont 05405**

Once the final report is approved, Northeast SARE will release any remaining funds; submit a final invoice to [Lee.Hendrickson@uvm.edu](mailto:Lee.Hendrickson@uvm.edu). Questions about report content should be sent to Carol Delaney ([carol.delaney@uvm.edu](mailto:carol.delaney@uvm.edu)) at Northeast SARE; questions or problems associated with using or navigating through the report template should be sent to Kim Kroll ([assoc\\_dir@sare.org](mailto:assoc_dir@sare.org)) in the national SARE office.