Northeast SARE Graduate Student Grant reporting instructions

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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 any new award, but even if you are familiar with the online reporting protocol, keep these instructions handy for reference.

All grantees should always feel free to ask questions about what is expected. Your grant administrator is Candice Huber, candice.huber@uvm.edu; phone is 802-656-2035.

Reporting timeline:

Summer: New awards announced
Late summer/early fall: New awards: Proposals posted and funds released.
December 31: All awards: Annual progress report deadline
Sixty days after grant contract ends: All projects: 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://www.sare.org/MySARE/Login.aspx and click on the "register" button. Fill out the form that comes up and submit a user name and password. **Do not use your e-mail address as a user name**—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 user name and password to go to your MySARE page.

Under "My SARE-funded projects," click on "retrieve new project." This is where you will type in the **project number** and enter the **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 any information here doesn't look right, send e-mail to Candice Huber at candice.huber@uvm.edu.

Under **Participants,** enter the names and contact information for members of the grant project team by clicking "add a participant." Enter your faculty advisor first, followed by any co-workers, consultants, cooperating farmers, and other key individuals described in your proposal. 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. In general, most farmers are probably not participants—instead, they are the beneficiaries of the work you and your project team plan to do, and their contributions and activities should be part of the report itself. This is a subtle distinction but an important one—if you need help deciding who should be listed as a participant, call or send e-mail to your administrator.

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 the “summary/abstract” section, simply copy and paste verbatim the abstract from your original proposal. Then, under the “objectives/performance targets” section, copy and paste verbatim the objectives section of your proposal. 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.

Submission tips for annual and final reports

1. Write your report offline
The best way to prepare an annual or final report is to read over the content 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. If you reference other materials in your report, please include the citations at the end of each section.

It’s important to submit only clean, unformatted text on line— special characters, tabs, underlining, bold, italics, indenting, or other text effects will not translate well and may look strange in the final online document.

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

2. 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 that is 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.

Report structure: You will need to write four sections for your annual report—**summary, objective/performance targets, accomplishments/milestones**, and **impacts and contributions/outcomes**.

1. Summary—this abstract gives the reader a brief overview of the project, its key components and results, and is typically 100 to perhaps 300 words long.

2. Objectives/Performance Targets— describe the objectives in the original plan of work and identify what you have accomplished to date. These elements can often be summarized concisely in brief paragraphs or as a bulleted list, and should be consistent with the objectives in your proposal. If they are not, explain why.

3. Accomplishments/Milestones—describe the events and activities of your project over that past year in sequence. What work was accomplished and what is left to do? 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—describe and assess any impacts your project had and/or estimate any potential impact. How have the activities over the last year contributed to agricultural sustainability? How will the knowledge gained from these activities potentially affect farm practices? Be sure to include any outreach or publications.

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.

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 represent 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 from beginning to end. Please use clear, easy to understand language as this report will be made available to the general public. Simple graphs and tables summarizing your project are appreciated.

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

You must also mail Northeast SARE a **single printed copy** of the report along with an electronic version on CD or USB storage device. For details on this requirement, go to **step 6**.

Report structure: You will need to write up to ten sections for your 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.** You may find that you don't have anything to report under all these headings. 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, with a clear emphasis on numeric, measurable results. See summary description under annual reports, above.

2. Introduction—an introductory description of the project and its context. This is your chance to explain to a reader who may not necessarily know the conditions or issues that prompted your proposal and why the project is important.

3. Objectives/Performance Targets—restate the goals for your plan of work as described under annual reports, above. Report whether each objective was reached or not. If some objectives were not reached, or if there were changes in objectives, describe these changes and any barriers to completion you encountered.

4. Materials and Methods—describe your approach and the overall design of the project. Describe what activities, materials, and strategies you used to engage your target audience, including what worked and what didn't.

5. Results and Discussion/Milestones—describe your discoveries and accomplishments and those of your partnering farmers and any other project events that are noteworthy. Did the project develop as planned or did you need to make course corrections along the way?

6. Impact of Results/Outcomes—describe and assess any impacts your project had and/or estimate any potential impact. How have the activities contributed to agricultural sustainability? How will the knowledge gained from these activities potentially affect farm practices? Is there any immediate or possible future effect of the project on any secondary audiences like extension, private groups, or the general public?

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 improved sustainability as they bear or the content of your work.

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. Include a brief description of any field days or other events, and assess their attendance, effectiveness, and follow-up, if applicable.

9. Farmer Adoption— describe any farmer response to your project, focusing specifically on how and whether they adopted the new techniques offered or advocated, offered you feedback, or brought interesting or useful ideas or criticism to bear on the project. Much of this content will likely arise from direct farmer contact. Include any farmer quotes that summarize or clarify farmer reaction to your efforts. If you did not work directly with farmers describe how your project could lead to farmer adoption of new methods or ideas. This may overlap with #6.

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, the reporting system will let you create them beneath each main heading. Cut and paste the text into these 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. When you upload graphics and 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 **Outcomes and Impacts** or perhaps **Methods**, 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**. Please be sure to support findings with data, tables or graphs.

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 very 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 long document like a handbook—upload it separately as a **Project Information Product** on the bottom of the main “MySARE” page. Fill out the basic information form that comes up about the product, save, and then upload.

If you get into trouble, click the question mark for help.

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 can use 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.

Once you press “submit,” the grant administrator will receive an e-mail notification. The grant administrator will either publish the report or get back to you with questions and revisions may be requested. DON’T SEND THE HARD COPY UNTIL THE ONLINE VERSION IS APPROVED.

Step six: Mail the report hard copy and e-copy (final report only)

To close out the project, you will need to send one printed, word-processed copy of the final report to Northeast SARE. This printed copy should incorporate into a single document any revisions requested by SARE and any tables, charts, or other graphics referenced in the report. **Do not send a simple printout or screen dump of your online submission**.

An electronic copy of the word-processed report described above (with the necessary tables, charts, and graphics embedded) should be burned to a CD or saved to a USB storage device. You may, as an option, also send electronic or printed copies of project flyers, news coverage, outreach materials, or other peripheral content generated by the project. SARE likes to review these materials, and exceptionally good outreach materials are sometimes offered as models to other grantees.

Send the printed and e-copy in a single envelope to:
Candice Huber
Northeast SARE
University of Vermont
655 Spear Street
Burlington, Vermont 05405

Once the online, printed, and e-copy final reports are received and approved, Northeast SARE will release the remaining funds spent on the project, so please include a final invoice with the mailed final report.

We will also be sending you a short questionnaire to update our information before you leave your graduate program. We want to be sure that we maintain your contact information in order to direct inquiries about your project, and we also want to learn about your experience in order to help us improve our program.

Northeast SARE has a Facebook page and we would like you to join us. This will be an easy way for you to keep informed of our grant opportunities, and maybe you will share your successes with us!

Questions about report content should be sent to Candice Huber (candice.huber@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) in the national SARE office**.**