Northeast SARE Research and Education Grant reporting instructions

Contents

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 Helen Husher, hhusher@uvm.edu; phone is 802-223-7923.

Reporting timeline:

Early spring: New awards announced
Spring and summer: 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/Project-Reports/Submit-a-Report and, if you are new to the reporting system, 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 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 in the **project number** and 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 and the award amount are correct—this information is filled in by staff when they create your account. If you need to add or change any information, use the editing and adding functions. 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. 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. Here, copy and paste verbatim the abstract from your original proposal. Then, under the "objectives/performance targets" section, copy and paste verbatim the performance target from your proposal. Save each section.

Finally, when you are satisfied with the all the information in the **Project overview**, click "submit project overview 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. (Tip: There is a useful invoice template on the Northeast SARE website under "Manage a Grant.")

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.

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 can 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 the calendar year for each 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 performance targets and milestones 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, objectives/performance targets, results and discussion/milestones**, and **impact of results/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 impacts.

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 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— copy and paste verbatim the original performance target and name the milestones achieved and the date you reached them. These elements should be summarized concisely in brief paragraphs or as a bulleted list. Your performance target and your milestones should match the performance target and milestones in your proposal. If they don't, explain why.

3. Accomplishments/milestones—describe in more detail the events and activities of your project over the past year in sequence. For each milestone, say whether you did 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? Use this section as an opportunity to give an educated general reader the narrative of what happened and in what order.

4. Impacts and contributions/outcomes—describe and assess any impacts on your beneficiaries, including feedback from farmers or other audiences, quantifiable changes in farm practices, new information emerging from your work, or other narrative content that will be useful to an interested and educated general reader. Strong engagement and participation of your target audience, or unanticipated interest from other audiences, could point to enhanced impact, even if that impact has not been measured yet.

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.

Final reports should be timely and complete. A percentage of grant funds will be held back until the final report is reviewed and approved by the program manager. Note that your administrator may publish your report and you may get a message saying the report is approved, but until it is read and approved by the program manager this designation is provisional. Late reports are noted by staff, and project managers who fail to meet reporting requirements will be ineligible for future SARE funds.

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: For example, if you are working on an education or demonstration project, you may not have an economic analysis. In the same vein, not all reports include anything under areas needing additional study. **If you find that you are repeating the same content under different headings, re-read the prompts below to make sure you understand what each section is asking for**. Use your best judgment when organizing your material, tailoring the report to your specific project and assuming a general but educated readership.

1. Summary—an overview of the entire project, with a clear emphasis on numeric, measurable results. Be descriptive and specific, giving the reader the highlights of the project and an overview of results. Please read the examples below to understand better what we need.

Example 1: *This three-year project focused on researching and strengthening the viability of community supported agriculture, with a specific performance target of increasing net income by $10,000 on at least 10 CSAs in New York, New Jersey, and Delaware. The primary tools for improved sustainability were in-depth studies of six cooperating CSAs and subsequent workshops, farms visits, and one-on-one mentoring. The target was exceeded: As a result of this effort, 12 CSAs—three in New York, four in Delaware, and five in New Jersey—saw improved net* *revenue of between 7 and 14 percent as a result of the workshops and individual meetings with CSA farm managers. These managers adopted new approaches to customer recruitment and retention, product distribution, product succession, labor, and internal recordkeeping, affecting the profitability of 1,205 acres in three states, and improved total net income across all 12 farms of $304,500. A new publication, "Row by Row: Case Studies in CSA Management," is now available in print and on line, and will be used as a training handbook for future events and workshops.*

Example 2: *Over three years, 33 New England growers successfully installed Perimeter Trap Cropping (PTC) systems to manage insect pests on at least 450 acres of vegetables. Fifteen growers used the system on two or more commodities, and an additional three growers reported failure with the system. Twenty-three growers, representing 210 acres, filled out evaluation forms that indicated 96 percent reduced their pesticide use, 96 percent improved their pest control, 83 percent reduced adverse environmental impacts on land and water, 91 percent reduced personal and personnel exposure to hazards, and 70 percent saved time. Eighty-seven percent said that PTC cost them less than conventional methods (by up to $3,810 an acre,) and 91 percent indicated they would use PTC in the future. In 2004, nine cucurbit growers in Connecticut and one in New Hampshire reduced their insecticide use by 96 percent after switching to PTC. They saved an average of 1.8 pounds of active ingredient per acre on more than 152 acres. Gross revenue increased by $105,930, averaging $1,098 per acre and $11,770 per grower. Over 4,000 Northeast growers attended conference talks and twilight meetings about PTC over three years.*

2. Introduction—give a more detailed description of the project context. This is your chance to explain to the reader, who may not know what conditions or issues prompted your proposal, why the project is important.

3. Objectives/performance targets—copy and paste the performance target from the original proposal and briefly assess whether it was reached or not. If some component of the performance target was not reached, or if there were changes in your performance target through a contract revision, describe these changes.

4. Materials and methods—give a straightforward description of activities, materials, methods, and other project components. For example, if your project involved field trials, explain how you set up, monitored, and analyzed the data; if your project sought some specific marketing result, explain how you tracked sales or other key changes in farm income. Make sure you include any material or data that will be important to a peer or educated reader who is interested in replication.

5. Results and discussion/milestones—describe and assess how your project progressed through the milestones in your original proposal. This is your opportunity to describe the full narrative arc of the project in a clear sequence—events, key components, beneficiary actions and feedback, and the progression of discoveries. This is often the longest section of a final report and can be the most strenuous to write. Describe frankly any setbacks or unexpected results, and make sure this consecutive narrative is framed by the original milestones in your proposal.

6. Impact of results/outcomes—describe the results of your verification process and discuss how well your verification plan worked in terms of both beneficiary response and certification of the performance target. 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.

7. Economic analysis—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 profitability, improved erosion control, soil quality, herd health, 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 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 and through the 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 user name 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. 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 for others 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 graphic 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 **impact of results** or perhaps **materials and 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 **publications/outreach**.

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.

Step six: Mail the list of beneficiaries and a sample copy of any print publications (final report only)

To close out the project, you will need to a send complete list of your project beneficiaries and their contact information—name, mail, e-mail, and telephone. This list should only include the beneficiaries included in the performance target, not every beneficiary who participated but who dropped out or otherwise did not contribute to the numbers reported in your final outcome. **Do not post this beneficiary list on line; it is treated by SARE as confidential information.**

Also, if you developed a farmer-ready tip sheet or other publication in the course of the project, please send us a courtesy copy. You can, as an option, also send project flyers, copies of news coverage, outreach materials, or other interesting material generated by the project. SARE likes to review these items, and exceptionally good outreach materials are sometimes offered as models to other grantees.

Send the beneficiary list and publications, if any, to:
David Holm
Northeast SARE

University of Vermont
655 Spear Street
Burlington, Vermont 05405

Once the online and hard-copy materials 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 materials. If your institution handles invoicing, you should alert them that the final report is complete and a final invoice is called for.

Questions about report content should be sent to Helen Husher (hhusher@uvm.edu) or David Holm (dholm@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**.**