

NCR-SARE has offices in :

Indiana

Minnesota (University of Minnesota)

Missouri (University of Missouri)



Welcome to this PowerPoint presentation about how to manage your NCR-SARE Farmer Rancher grant.

My name is Joan Benjamin. I have coordinated the Farmer Rancher Grant program and have been your contact. My office is located at Lincoln University in Jefferson City, Missouri. You can contact me at: benjaminj@lincolnu.edu or 573-681-5545. However, I will be retiring this year. Liz Brownlee started work this week and she will be the new Farmer Rancher Grant Coordinator. Welcome, Liz! I will be here for a couple of months to help with the transition.

My name is Liz Brownlee. I am a farmer in southeast Indiana, and I've received a SARE Farmer Rancher grant in the past. I'm excited to be stepping into this role. I have a lot to learn, and I'm grateful to be learning from Joan and alongside all of you!

Today, we will walk you through the things you'll do behind the scenes to manage your grant. This includes grant finances (including receiving grant payments and how to request a budget change), how to request an extension, and the steps for reporting on your grant project. We will share these slides and this recording with you, so don't worry about capturing every little thing in your notes.

But first: Congratulations!

We're excited for you, and we're here to help:

Liz Brownlee brow7263@umn.edu (812) 405-5681



Reporting Instructions

NCR-SARE uses an online reporting system. It feeds into our project database that's used by farmers nationwide. This is one key way you help advance sustainable agriculture. Your reports let you document and share what you're learning.



Your project is part of a long tradition of sustainable farmers innovating here in the North Central region. The first Farmer Rancher grants date back three decades, and as you likely know, we have an online database of thousands of projects from our region and nationwide. This database is a treasure trove of applied research and education on sustainable farms. Your project is now a part of this database.

For now, your listing just includes some basics from your project proposal. You'll get to add to your project page, so that other farmers can learn from what worked and what didn't.

Reporting Instructions

You might want to find (and share!) your project. To find it, you'll want your project number. They're formatted like this:

FNC _year_ - _project

Example: FNC22-1339



You might want to share your project's listing in our database with others. To find your grant project in the database, you can use your title or your project number:

NCR-SARE projects are named using this structure: FNCXX-XXXX:

- FNC stands for Farmer North Central,
- the first two digits are the year you were funded, so yours are all "24"
- the last four digits are the number of your grant ever awarded in the North Central region.

For example, FNC22-1339. Is a Farmer Rancher Grant here in the North Central Region, funded in 2022. It was the 1,339th grant SARE funded. You are part of a large and proud tradition – and one that farmers look to for knowledge that they can build on.

You'll also see your project number on all of your grant paperwork. Now you know what it means!

Reporting Instructions

Farmer Rancher Grant recipients must provide a progress report each year their project is active, and a final report when the project is completed. Reports are approved by an administrator.



You have 23 months to complete your grant project. After the first year of your project, you are required to submit a progress report and budget update. Then at the end of your project, you submit a final report and final budget.

If you have a one-year project, you can fill out both at the same time. You would fill out the one year progress re

complete a final report and final budget after the first year if all grant work is done and all grant funds are spent.

Use the SARE online reporting system to submit your report.

Grant Finances

NCR-SARE Farmer Rancher Grant recipients receive grant funds in 3 payments:

- > 50% at the start of the project,
- 35% after a first-year progress report is approved,
- And a final payment of 15% when the final report is approved. The final payment is a reimbursement.



Many grant programs provide funding by reimbursing you once you've spent funds.

NCR-SARE Farmer Rancher Grants are different.

At the start of your project, you will receive a contract to sign as well as a form stating that you have started your project. When these are signed, returned, and approved, you will receive the first payment of your grant (50%), so you have funds to start your project. Because these grants are issued as a contract, you will receive a 1099 form for the grant payments. Please contact a tax professional if you have guestions about how this might affect your taxes.

Save your receipts and invoices for your own tax purposes. NCR-SARE does not need to see them. We rely on the budget information you provide in your reports. We trust you!

At the end of the first year of your project, you are required to submit a progress report and budget update showing how you have spent grant funds up to that point. Once the report and budget are approved, you will receive the second payment of your grant (35%).

When your project is finished, you are required to submit a final report and final

budget. At this point, all grant funds should be spent. **The final payment of 15%** is a reimbursement. The final budget should show how all grant funds were spent.

If you have a one-year project, you can submit the final report instead of a progress report at the end of the first year of your project.

Budget Changes

Grant recipients can request budget changes as needed.

- For changes of \$1,500 or more, you will need <u>prior</u> approval.
- Smaller changes are usually OK if they involve a price change of an item or another simple change.
- Be sure to contact NCR-SARE with questions.



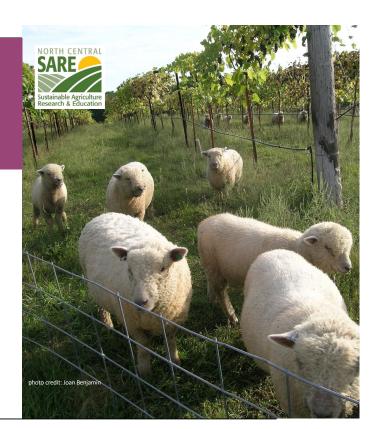
If the price of items in your budget changes as you carry out your project, you can usually move funds from one line item to another to reduce funds in one area and increase them in another. You can enter small changes in your online budget in the reporting system. There is a Notes column where you can explain the changes. See more on this in the Reporting section of this PowerPoint presentation.

For larger budget changes of \$1,500 or more, be sure to contact me first to make sure the change is allowed. You can email me at: brow7263@umn.edu or call me at (812) 405-5681.

We want you to be successful and will work with you on budget changes.

"No-Cost" Extensions

Grant recipients can request
6- to 11-month extensions if
they are unable to complete
their project within 23
months. This is in case
weather or other issues
prevent you from completing
the project by the original
deadline.



A "no-cost" extension means that you need additional time for your project but are not requesting additional funds.

All Farmer Rancher Grant recipients are issued a contract for 23 months. Even if you plan on a 12-month project, you will receive a contract for 23 months. This is because there are often weather problems or other issues that prevent people from completing their projects in 12 months. If your project will end up taking more than 23 months, you can request a no-cost extension.

*** In order to receive a no-cost extension, you must be up to date on reporting. If you need a no-cost extension, please submit your request by September of the second year of your project. Be sure your progress report is completed and submitted before requesting an extension.

To request a no-cost extension, send an e-mail to me at: brown7263@umn.edu or send me a hard copy letter with signature that states the following.

1. I am requesting a no-cost extension for NCR-SARE project FNCXX-XXXX. (The FNC number is your Project number. It stands for Farmer North Central, followed by the last two digits of the year your project was funded, and the number of your grant.

- For example, FNC22-1339.)
- 2. In order to complete my project, I am requesting a new end date of Month, date, year. (Typically, we grant 6-month extensions. If you need longer, be sure to provide reasons why you need a longer extension in your explanation.)
- 3. Include a brief explanation of why you need the extension.

I will let you know by email if your extension is approved or if there are further questions. This typically takes a week or two. Once approved, you will also receive an email from the NCR-SARE main office at the University of Minnesota in St. Paul, Minnesota confirming the extension for your records.

Deadlines

- > Start Date: March 15, 2024
- Progress Report Due Date:Feb 15, 2025
- End Date: Depends on your grant, but latest possible is Feb 15, 2026
- > Final Report Due: On your end date



Please note these deadlines:

Start Date: March 15, 2024

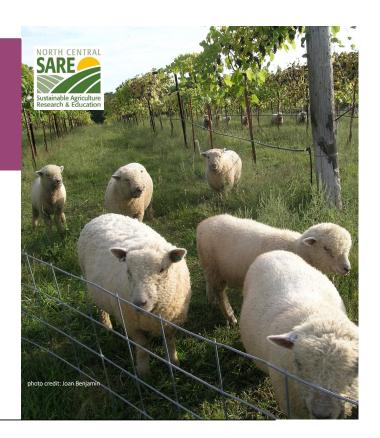
Progress Report Due Date: Feb 15, 2025

End Date: Depends on your grant, but latest possible is Feb 15, 2026

Final Report Due: On your end date

Last Big Picture Thoughts on Reporting

- Save these slides for future reference.
 - Know that we're here to help.
 - Think of your report as a tool for sharing what you learn!



Last big picture notes:

- Don't be afraid of the reporting. You're going to see in a minute that it is a kind of complex process. This webinar gives you step by step directions on how to submit your report. You don't need to memorize everything now you can come back and refer to these slides. We just want to give you a sense of how the system works and what sorts of information you need to be noting now, as you start of your project, so that it's easy to make your reports later.
- When you submit your report, it doesn't go straight to the public. It comes to our staff, and we review to make sure it's complete and ready. We'll be in touch if we see any areas that need more explanation.
- The budget doesn't go to the public ever. That's just for our record keeping and payments system.

projects.sare.org/sare-reporting-system-instructions/

Reporting System Instructions

As a SARE grant recipient, you will be required to submit periodic progress reports. Progress reports are due annually until a final report is approved by an administrator.

The SARE program uses an electronic reporting system to review report submissions and post approved project reports at projects.sare.org.

Login

If you have any problems logging in, please read: <u>Creating or resetting your password instructions</u>. If you still have trouble logging in, contact <u>projects@sare.org</u> for support.

Your Profile

Once logged in, edit your user profile by clicking "View/Edit your profile" at <u>projects.sare.org</u>. Click "Edit" on the user profile page then enter your personal information. Click "Edit" at the bottom of the page to save your entries.

Project Overview

Use the links on the Project Overview page to access and update the following:

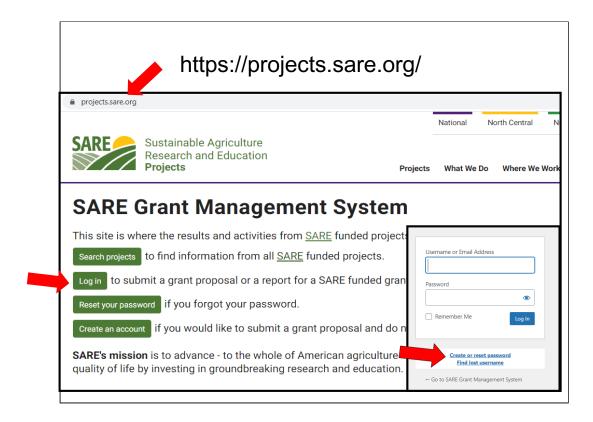
- Project Report: Access the working and previously approved versions of your project report.
- Information Products: Add information products produced as part of your project.
- Benefits and Impacts: Select the benefits and impacts you expect your project will lead to or influence over the long term.
- Commodities and Practices: Select the commodities and practices that are relevant to your project. This information is used to help users search for relevant projects.

Reports are an important part of SARE grants. They are one way to share the results of your project with other interested farmers and ranchers so they can benefit from your research and education efforts.

To access the reporting website, go to: https://projects.sare.org/

For reporting instructions, go to: https://projects.sare.org/sare-reporting-system-instructions/

In this webinar, I'll walk you through the reporting process.



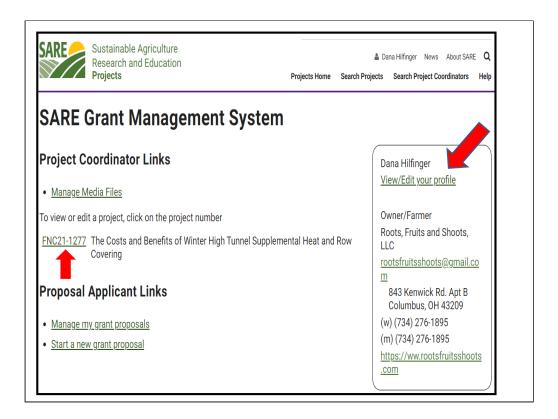
To begin the report for your NCR-SARE Farmer Rancher grant, go to https://projects.sare.org/ and click on "Log in."

Enter the same username and password you used when you created your grant proposal (and for your SARE correspondence). Your "Username" is typically your email (the one you use for SARE correspondence).

Enter your "password."

If you have forgotten either of these, click on "Create or reset password" or "Find lost username."

If you have trouble logging in, contact projects@sare.org for help.



When you log into the system, you'll see a screen like this.

Project Coordinator Links

You'll see a list of all SARE grant projects you've been associated with on the left. Click on the project you want to report on. If this is your first grant, you will only see one project listed.

The reporting system uses progressive reporting rather than separate annual and final reports. Start by completing a Progress Report. You will add to it over time to create the final report. When a Progress Report is approved by an administrator, that version is saved, and a new version of the report is created called the "Working Version."

If you have a one-year project and your project is finished at the end of the first year, you can complete the final report instead of a progress report, by answering all questions in all report sections.

Your Profile

If you have **address**, **phone**, **or email changes**, click on "View/Edit your profile" on the right side of the page. On the page that opens, click on the "Edit" button in the upper right corner and make any changes needed. When done, scroll to the bottom of the page and click on "Update" to save your changes.

Supplemental Heat and Row Covering			
Project Overview (Reporting Instructions)			
Proposal			
Report Versions	FNC21-1277 Project Type: Farmer/Rancher		
Working version Last updated: 02/11/2021 3:02pm EST by Joan Benjamin	Funds awarded in 2021: \$8,931.00 Projected End Date: 01/31/2023		
Information Products	Grant Recipient: Roots, Fruits and Shoots, LLC Region: North Central State: Ohio Project Coordinator:		
If you produced standalone books, bulletins, or other educational products, add them here. Products should contain acknowledgement of SARE's support. Graphs, illustrations and tables should be uploaded to the related section of the report.			
Add a product	<u>Dana Hilfinger</u> Email		
Benefits and Impacts Edit	Roots, Fruits and Shoots, LLC		
Economic Sustainability: Improved income or profitability			
• Production and Production Efficiency: Improved crop production and/or production efficiency	су		
Social Sustainability: Improved quality of life			
Commodities Edit			

After you click on your report link, you will see the Project Overview page. Before you start on the official report, you can do a few things:

In the "Project Overview" you can click on "Reporting Instructions" or "Proposal" to view your original proposal.

If you want to add an "Information Product," you can also do that from the Project Overview page. Click on "Add a product" to add items such as standalone books, bulletins, and fact sheets produced as part of your project. (Items such as photos, graphs, and charts are not considered Information Products and should be added to your narrative report.)

If your Benefits and Impacts, Commodities, or Practices information is not filled in, complete these checklists by clicking on "Edit" beside each of the headings. The information you provide is used to help people search for projects on topics they are interested in. (Your information may already have been entered using the answers from your proposal.)

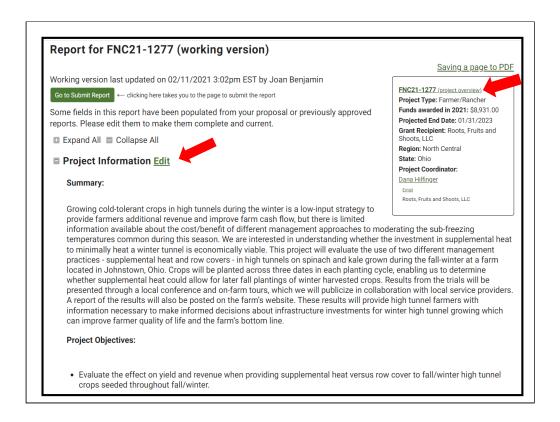
- "Benefits and Impacts." Select the benefits and impacts you expect your project will lead to or influence over the long term.
- "Commodities." Select the agricultural products that are a primary focus of your

project. Select "None" if your project doesn't involve commodities.

• "Practices." Select the practices that are a primary focus of your project.

Before leaving a checklist, scroll all the way to the bottom and click on the "Update" button to save your choices.

When you are ready to start your report, Click on the "Working Version."



When you click on "Working Version" you will see the headings and entries that make up your report. Scroll down to see all of the headings on the left side of the screen.

Click "Edit" next to each section heading to enter report data. A text box will open where you can enter text and add photos, tables, and other items. You will see that some information from your proposal was automatically filled in.

As you can see in this example, the Project Information, including the Summary and Project Objectives has already been filled in from information in the proposal. Your Approved Budget (from your contract), and the Materials and methods information listed under the Research heading are also automatically entered as part of your report.

If you have changes to make in any of these areas, click on "Edit," make your changes, then click on "SAVE."

To get to the next section, you can click the project number in the box at the top right of the main report page to exit the report and return to the "Project Overview" page.

No cooperators Budget Edit										
Contract Budget has been approved										
Category	Description	Approved Budget	Amount Spent Year 1	Amount Spent Year 2	Amount Spent Years 3 and 4	Total Grant Funds Spent	Remaining Balance (+/-)	Notes - explain changes *Contact Joan Benjamin at: benjaminJ@lincolnu.edu for pre-approval of new items and changes of \$1,500 or more.		
Personnel	Labor planting experimental plots, 15 hours at \$20/hour	300	250	0	0	250	50			
Travel	Coordinator travels to conferences to present findings	3,000	1,230	0	0	1,230	2999			
Materials and supplies	Netting to cover 6 rows of berries	700	800	0	0	800	-100	Cost of netting increased \$100.		
Equipment, permanent fencing, perennial seeds and plants, or	240 Raspberry plants at \$4.50 each = \$1080 + \$55 shipping = \$1135 x 50% = \$567.50, rounded to \$568	568	568	0	0	568	0			

Scroll down to the sections labeled Cooperators and Budget.

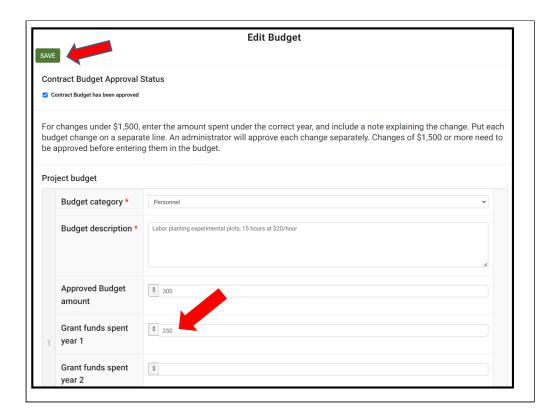
Open "Cooperators" by clicking on the "Edit" link if there are people helping you with your project who play a major role in conducting project research or educational activities. Do NOT include your own info here. As project coordinators or leaders, your info should be at the top of the report. Add Cooperators, if there are any, and click on "SAVE." If you have no cooperators, go on to the "Budget."

Review the "Budget" section. The initial information is already filled in and is a copy of the budget that was approved for your contract. It shows the budget categories, descriptions of items, and the budget amount approved for each item.

Click on "Edit" to open the budget so you can add information. The system will do the math for you.

^{*}The budget is only visible to administrators. The public cannot view your budget.

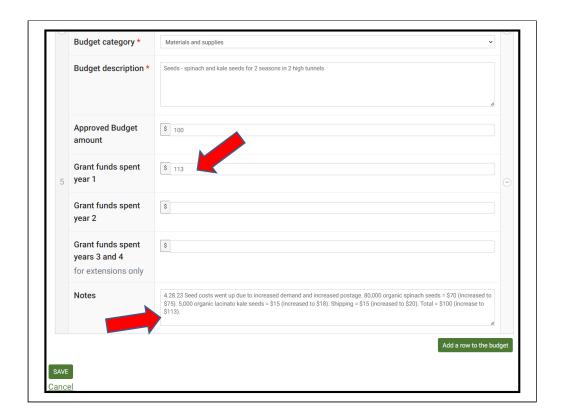
^{**}If there is budget information that you want to share with other farmers and ranchers, be sure to add the information in the narrative of the report.



When you click on "Edit," the budget will open in this vertical view, with boxes so you can fill in amounts spent, notes, etc.

Show what grant funds you spent in the first year of your project by filling in the "Grant funds spent year 1" box for each item you spent grant funds on. Use whole numbers. Click on "SAVE" when you are done.

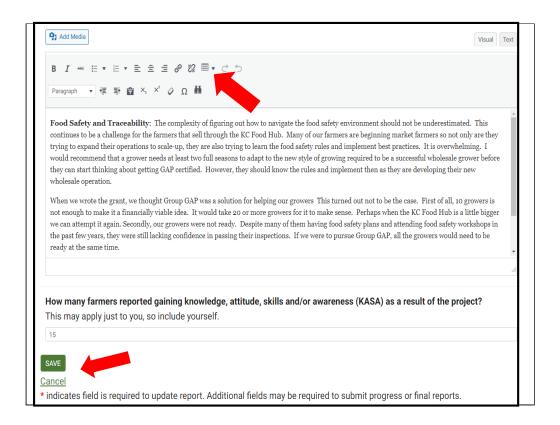
Note: If you spent your own money, that's great, and you can feel free to talk about total costs in the narrative if it's important to folks' understanding of the project. But do NOT show it here. We need you to ONLY report grant funds spent.



If you want to make minor changes to your budget, fill in the amount spent in the correct year. Explain the change in the "Notes" area at the bottom of each budget item. Click on "SAVE" when you are done. Show changes on separate budget lines, so an administrator can approve each change. Do not combine changes.

If you increase funds for one item, you will need to decrease funds for another item(s). NCR-SARE cannot add additional funds to your budget, but you can move funds from one line item to another.

For major changes of \$1,500 or more, contact Liz first to make sure the change is OK. She will let you know if we have questions about your budget changes.



When you are done with the budget, click on "SAVE." You will be returned to the main report page where you can choose which section to work on next.

There are two options for entering report data:

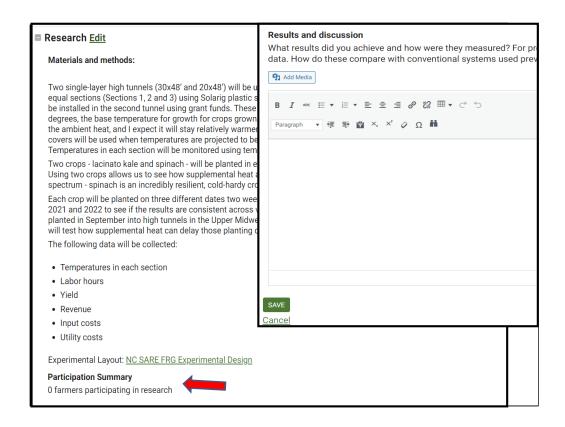
- Recommended: Enter and format report data directly in the report. *This approach is least likely to result in formatting errors.* You can type in text and can also add tables and images.
- Alternately, create your report using a word processor and then copy and paste the information into the report sections. If this is only text, that's usually fine. But this approach is likely to result in formatting errors if you are copy and pasting in formatted content, tables or images.

To create a table within the grant reporting system, you click on the table icon. It's in the menu at the top, by the arrow.

Some questions will just ask for numbers, so tally those up and type in your answer.

When you are finished with a section, click one of two buttons at the bottom of the screen:

- "SAVE" saves the current edits and returns you to the main report page.
- "Cancel" does not save the current edits and returns you to the main report page. If you do not click the SAVE button, your work will not be saved.



After the budget, you will see the **Research** section. The **Materials and methods** information from your proposal is already entered in the report, but you can add to the answer if there were changes.

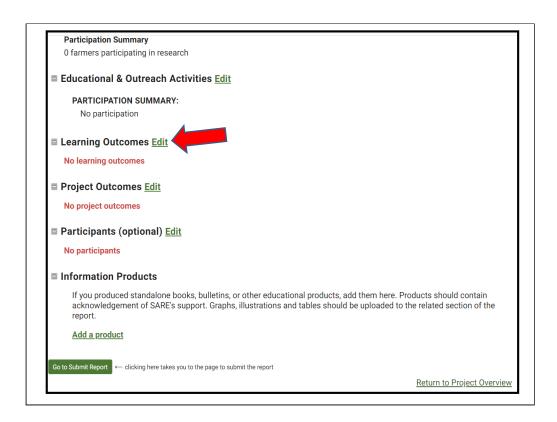
Click on **Edit** to open the Research section. A box will open where you can type in text to answer the questions.

Be sure to fill in the **Participation Summary.** This often gets missed. If you are the only farmer or rancher participating in the project, enter "1." If there are more farmers or ranchers participating, enter the total number of farmers or ranchers who are working on the project.

Next add any information you have for the **Results and discussion** section.

If there are any sections where you aren't doing this part of the project – or you don't have results yet, b/c it's a two year trial, for instance – you can share what you have so far and note that you'll have more later, or say "This will happen in year two of the project."

Click on **SAVE** when you are done. You will be returned to the main report page where you can choose which section you want to work on next.



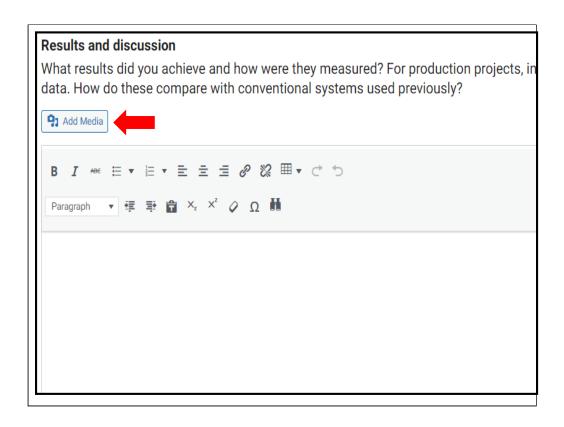
As you scroll down the page, you will see the rest of the sections that need to be filled in. Continue to click on **Edit** next to each section to open it. Complete information in each section by typing in your information (or cut and paste from a Word document).

For the Progress Report, add the information you have available at the Progress Report stage (typically at the end of the first year). If you don't have information for a section yet, you can fill it in later as part of the Final Report.

For a final report, fill out all sections.

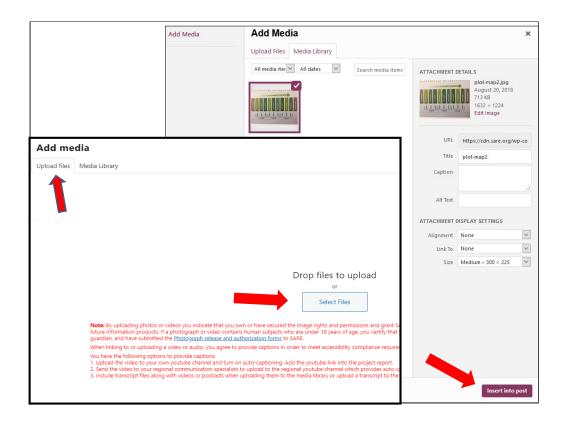
And no matter which report you're on (progress or final), remember that until you submit, you can always save and edit it later. In fact, even when you submit, it doesn't go straight to the public. It comes to me or one of the SARE staff to review and approve it. So if you press submit and then later that night realize something you want to change, you can press "unsubmit" and make that edit. Or if we've already approved your report, you can get in touch with me to make the updates happen.

Be sure to click on **SAVE** when you are done with each section to save your information. You can click on **Edit** again if you want to make changes or add more information later.



In sections that have an **Add media** button, you can embed images or tables.

To add an attachment or embed images, FIRST place your cursor in the text box where you want the attachment or image to appear and click on the **Add Media** button. Wherever your cursor is, that's where the image will go.



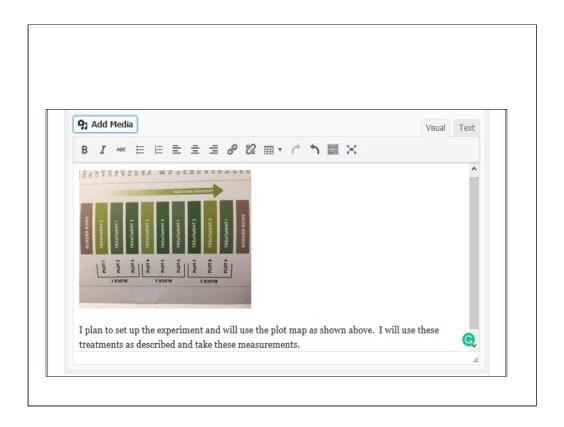
You will be taken to your **Media page.** Click on **Upload files,** then **Select Files.** Open the file from your computer and click on **Insert into post.**

You'll see the uploaded file listed in your media library. At this point, you can add a caption. This is not a caption that will appear in your report. It's only visible in the Media Library – so it's a way for you to quickly find your photo. Consider using your project number as your caption. Once you have a caption, click on **Insert into post** in the lower right-hand corner to add the item to your report.

This often trips people up, because it's a two-step process. In general, to add images and graphs to your report from the media click on "Add Media" and select the item from the Media Library, then click on "Insert into Post." Please remember this additional step (clicking on insert into post) to make them visible in the report.

Please note that the maximum size of a photo, image, video, or other item that you add is 150 MB. If you have larger items, you may want to provide a link to the item, perhaps on Youtube or your social media page or website.

For more information on adding figures, graphs, images, and videos, see: https://projects.sare.org/inserting-figures-graphs-and-other-images/



After you insert an item, the image will be embedded as you see here. Be sure to type out in the narrative what the image is illustrating, so people understand.

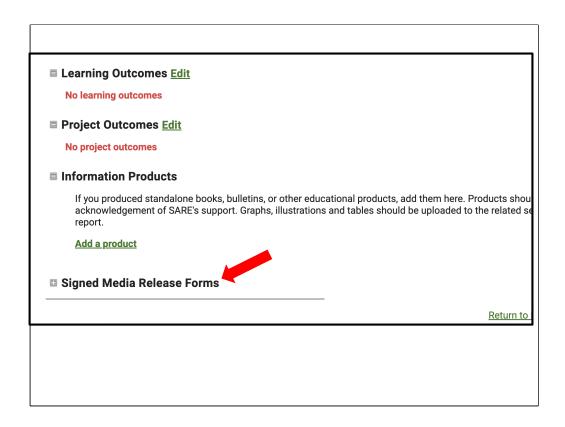
SUBMITTING PHOTOS WITH YOUR GRANT PROJECT

By uploading photos or videos to your report, you are indicating that you own or have secured the image rights to their use and grant SARE and USDA non-exclusive authority to use them in all current and future information products.

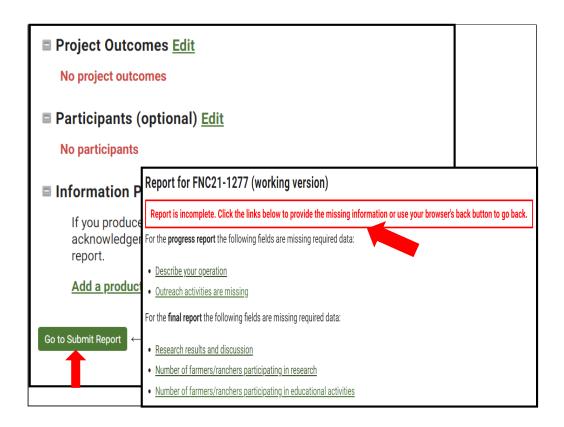
ATTENTION: Photos of MINORS need additional photo release forms uploaded.

If you want to share a photo or video that includes minors (under 18), you must confirm that you've secured parental or guardian consent and **upload** the required SARE <u>Photograph release and authorization forms</u> in the "Signed Media Release Forms" section of your SARE project.

You will find the "Signed Media Release Forms" section of your SARE project below the spot where you upload "Information Products" to your report.

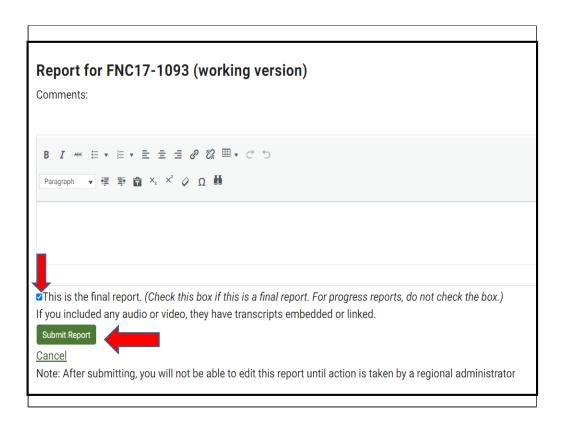


You can upload your signed Media Forms via your report.



When you have completed the report, click on the **Go to Submit Report** button.

If the report is Incomplete, the report system will show you which areas need to be filled in to complete a Progress Report or Final Report. If you are working on the Progress Report, you can ignore the Final Report fields. Complete the Progress Report by clicking on the fields that still need entries and press save after each one. Then click on **Go to Submit Report** and click on **Submit Report**. There is a box where you can add comments for NCR-SARE if you want to.



When you click on **Submit Report,** the system sends an email message to NCR-SARE administrators, so we know your report is ready for review. If you are not ready to submit the report, click on **Cancel.**

If you are working on a final report, if any items are missing, the system will list items that you still need to complete. Click on each missing item, answer the questions, and click on **SAVE**. When all items are completed, click on **Go to Submit Report**, then click on **Submit Report**. When you submit a final report, check the box noting that this is the final report.

You are welcome to add information after your project ends

This is not required, but if you would like to add information after your project ends and the final report is approved, please do! It often takes more time than the 23 months of the grant project to get all of the results on your project. Farmers and ranchers who are interested in your work appreciate updates and so do SARE staff.

When you submit your final report, no Working Version is created. Once your report is approved, you can create a new Working Version by going to the **Approved** version and clicking on "Start a new draft report." Edit, save, and submit as before.

Feel free to ask questions anytime!

Good luck with your SARE project!

If you have questions, contact Liz Brownlee:

by phone: 812-405-5681

by email: brow7263@umn.edu

https://northcentral.sare.org/



The report will be reviewed by North Central region SARE staff. You will receive an email via the reporting system when your report is approved or if there are questions. The public cannot see your report until it is approved by an administrator.

If you have any questions, contact NCR-SARE.