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

My name is Joan Benjamin. I coordinate the Farmer Rancher Grant program and am available to answer your questions. My office is located at Lincoln University in Jefferson City, Missouri. You can contact me at: benjaminj@lincolnlu.edu or 573-681-5545.

I will walk you through 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.
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 questions 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.

At the end of the first year of your project, you need to submit a progress report and budget. 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.
If the price of items in your budget changes as you carry out your project, we can usually move funds from one line item to another to reduce funds in one area and increase them in another. You can show small changes in your online budget in the reporting system. You will find a column where you can put budget change requests. Show the new total you want for each line item you change. There is also 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 $1,000 or more, be sure to contact me first to make sure the change is allowed. You can email me at: benjaminj@lincolnu.edu or call me at: 573-681-5545.

We want you to be successful and will work with you on budget changes.
A no-cost extension means that you need additional time for your project but are not requesting additional funds.

*** 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 November.

To request a no-cost extension, send an e-mail to me at: benjaminj@lincolnu.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, FNC20-1112.)

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 a hard copy letter from the NCR-SARE main office at the University of Minnesota in St. Paul, Minnesota confirming the extension for your records.
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. If you have a one-year project, you can complete a final report and final budget after the first year if all grant work is done.

Use the SARE online reporting system to submit your report.
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/](https://projects.sare.org/) and click on Log in.

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

Enter your password.

If you have forgotten either of these, click on Reset your password. [https://projects.sare.org/creating-or-resetting-your-password-instructions/](https://projects.sare.org/creating-or-resetting-your-password-instructions/)

If you have trouble logging in, contact projects@sare.org for support.
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.
After you click on your report link, you will see the Project Overview page.

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 stand alone books, bulletins, and fact sheets produced as part of your project.

If your Benefits and Impacts or Commodities and 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 and Practices**: Select the commodities and 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 all of the headings and entries that make up your report. Scroll down to see all of the headings.

Click **Edit** next to each section heading to enter report data. A text box will open up 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**.

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.
Scroll down to the sections labeled Cooperators and Budget.

Open Cooperators by clicking on the Edit link if there are people who are helping you with your project who play a significant role in conducting project research or educational activities. Do NOT include project coordinators or leaders in this section. 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 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 reporting area.
When you click on **Edit**, the budget will open with boxes so you can fill in amounts spent, notes, etc.

Show what 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.
If you want to make minor changes to your budget, fill in the new budget total in the **Requested Budget Changes** box. Show what you want the **new total** for that item to be and explain the change using the **Notes** area at the bottom of each budget item. Click on **SAVE** when you are done.

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 ($1,000 or more), contact me first to make sure the change is OK. I 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. *This approach is likely to result in formatting errors when saving formatted content, tables or images.*

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. 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.

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.

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, place your cursor in the text box where you want the attachment or image to appear and click on the **Add Media** button.
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. Add a caption to explain what the attachment is, then click on Insert into post in the lower right hand corner to add the item to your report.

Please note that the maximum size of a photo, image, or other item that you add is 128 MB. If you have larger items, you may want to provide a link to the item.

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.
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. 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!
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.