

## **FVI Project Leader Reporting Guidance**

### **Quarterly Reporting Advice for Project Directors/Leaders:**

As you begin your NYFVI project for 2019, it will be useful to review the reporting and reimbursement requirements. If you have questions or problems please contact us.

Project leaders are required to submit quarterly progress reports beginning 3 months after the project start date. The NYFVI online database is used to manage the quarterly reports and expenditure reimbursement requests.

The login system to begin the reporting process is the same as the initial application login procedure.

### **QUARTERLY PROGRESS REPORTING:**

- ❖ Quarterly reports should show progress in the reported quarter toward milestones as they are described in your proposal. You will receive reminders of quarterly report due dates and also overdue notification e-mails.
  
- ❖ All quarterly reports are read and reviewed by FVI staff and are either put into approved or denied status. Staff will contact you if any report is inadequate to qualify for approval and reimbursement.
  
- ❖ Reports should be specific and concise in terms of work done in that quarter, numbers of participants reached, if applicable, and preliminary results. It is not necessary to completely describe research procedures. If no work has been done on a milestone, or if a section of the progress report is not related in a given quarter, it is acceptable to write “No work on Milestone this quarter” or “Not applicable”. Note: you need to enter at least some text for every unattained Milestone.
  
- ❖ A summary of each project’s progress narrative is submitted to Ag & Mkts. on a quarterly basis for review. It is important that the narrative succinctly describes ongoing work and results for the quarter that ultimately will lead to achieving major project goals and a successful conclusion of the project.

- ❖ If you mark a project milestone as “attained” in a given quarter, be sure to include language that indicates that this is so. For example, if the milestone says that you will “Sign up 30 farmers to participate in the program”, be sure that the text under that milestone for the quarter in which it was achieved has “30 farmers signed up” somewhere in it. Believe it or not, this is a common problem; a milestone will be marked as “attained” but no reference is made to how or what was attained.
- ❖ To simplify reporting, once a milestone is marked as “attained” the system closes it out and you will not be able to report activity on the milestone in the future. So if you will want to report activity against a milestone in the future, even though it is essentially attained, do not mark it as such until you know you will not want to provide additional information.
- ❖ There should be a complete explanation if a milestone will not be accomplished during the life of the grant or if attaining it will be significantly delayed.
- ❖ Please think about impact numbers as you proceed with the project. If preliminary figures are reported on a quarterly basis-it is far easier to account for progress in the final report. Below is a link to impact requirements necessary to complete the final report. As you read through them it becomes clear that complete reporting on a quarterly basis is critical for verifiable numbers and results. <http://www.nyfvi.org/documents/156.pdf>

## **FINAL REPORT:**

A final report is due within 60 days of project completion. The lesser of 10% of the total project budget or the entire final reimbursement request, will be held until the final report is completed and approved.

Keep in mind that the final report template is different from the quarterly reports. In your final report documentation verifying that project outcomes have been achieved is essential. If you have not done so throughout the project, it would be useful to review the project outreach and evaluation sections to be certain you are following through on what was promised in the application. Measurable impact on the agriculture community is a vital part of NYFVI’s reporting requirement and one that is often neglected in the reporting process. We expect that you will provide specific, detailed, and organized information on all project impacts and outreach efforts. Final Reports that fail to do so will not be approved.

## **REIMBURSEMENT:**

- ❖ Reimbursements for actual expenses are paid on a quarterly basis. Payments are made only after both quarterly reports and reimbursement claims, along with **required back up documentation (receipts, mileage, and salary etc.)**, are submitted and approved by NYFVI staff. All reimbursement requests are submitted to the Department of Ag and Mkts once per month. It may take 30-90 days for the state to process payment after initial submission. If this creates cash flow problems for your organization please contact NYFVI staff.
- ❖ Without exceeding the total grant amount project leaders may overspend a budget line by 15% or \$1,000, whichever is greater. Expenditure differences beyond these limits require formal re-budget amendments and are not encouraged.
- ❖ At no time will any amount greater than the total original grant amount be reimbursed.
- ❖ Remember to print, sign and mail the pdf printout of your Expenditure Request to the NYFVI financial manager. Or make certain your financial manager takes care of that requirement. NYFVI must receive this signed copy with the additional required back up documentation before any reimbursement can be processed.
- ❖ After both the Quarterly Progress Report and the associated Expenditure Request have been approved your payment will be processed.

**Finally**—when publishing results or reporting in news releases, bulletins, trade publications, academic journals, or in oral presentations, please incorporate the Farm Viability Institute logo/signage into all aspects of your project. All projects must acknowledge NYFVI as the funder, or partial funder for their work, in all materials and presentations. Templates for signage and the NYFVI logo are available on the Resource tab found on the project leaders' Manage Applications page. All weather plot signs are also available through the NYFVI office.

If you have any questions or problems with the reporting process, please don't hesitate to contact NYFVI staff.