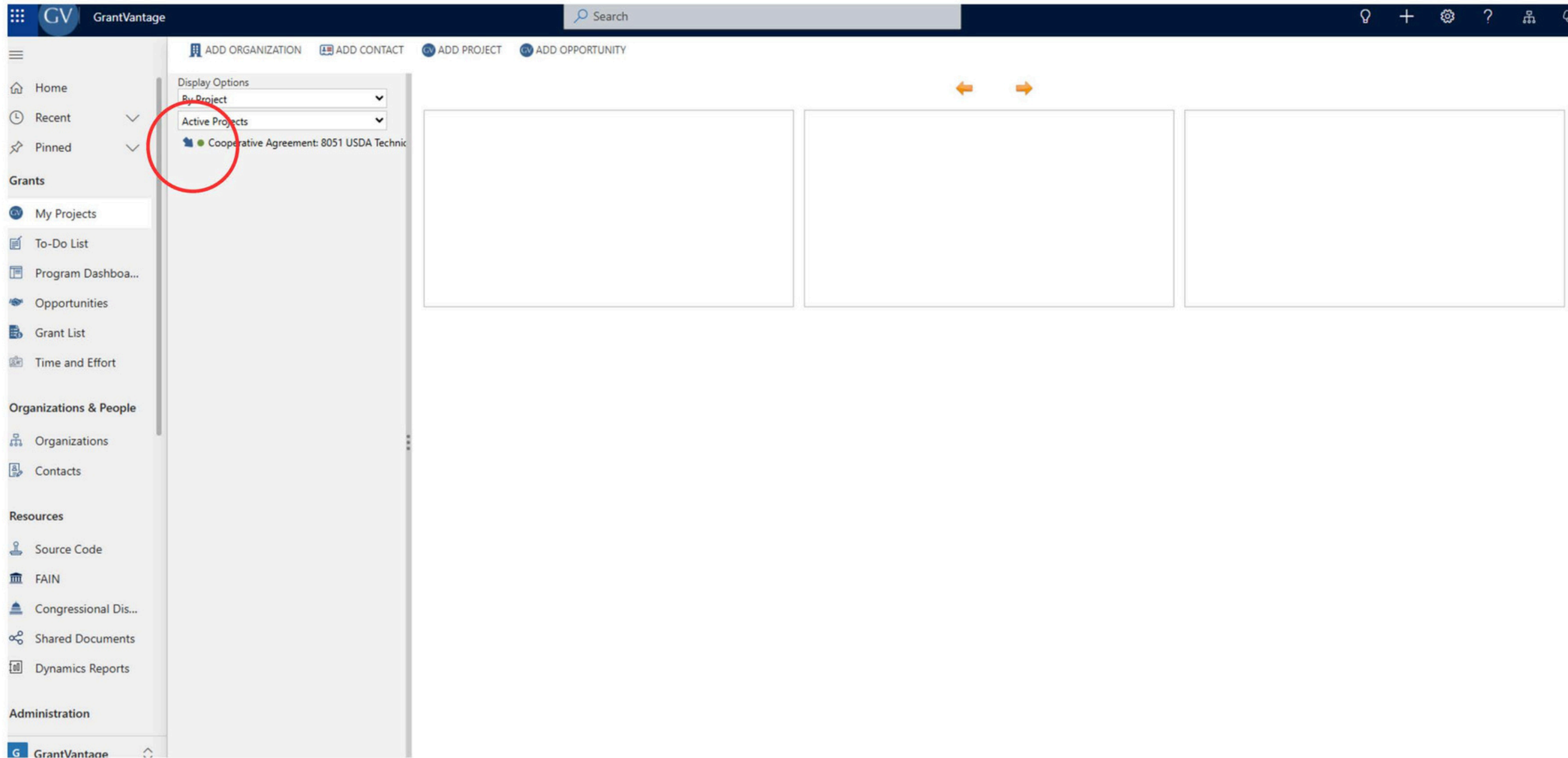


TA Reporting Project Performance Guide

Contact NACD Programs Manager Chessa Ossefoort at chessa-ossefoort@nacdnet.org with any questions.



National Association of
Conservation Districts



1

Single click arrow to expand project table.



The screenshot shows the GrantVantage application interface. On the left is a navigation sidebar with categories like Grants, My Projects, To-Do List, Program Dashboards, Opportunities, Grant List, Time and Effort, Organizations & People, Resources, and Administration. The main area displays a list of sub-awards, with one name circled in red. To the right, there are three dashboard panels: Budget Overview (loading), Objective Performance Measures (a bar chart comparing Planned vs Actual values), and Grant Activities (loading). Below these is a Project Details table.

Project Details	
Grant Action	Sub Project
Project Status	Active
Project Start	1/1/2025
Project End	6/30/2026
Grant Award No	8051 USDA Technical Assist VII 09.30....
Project Total	85,612.00
Sub Projects	--
Match Source	--
Project Manager	--
Compliance Officer	--
Authorized Certifying Official	--

2

Double click project name to open project details.



GrantVantage

Search

TA2024 - Conservation District - Saved

\$85,612.00 Project Total Active Grant Status 1/1/2025 Project Start 6/30/2026 Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort Related

Form assist

Project Name *

Grantee Applicant * Grant Award No. 8051 USDA Technical Assist VII

Project Start Date * 1/1/2025 Project End Date * 6/30/2026

Fiscal/Budget Start Date * 1/1/2025 Award Issue Date 12/30/2024

Authorized Certifying Official Grants Compliance Officer

Project Manager/Coordinator Department Director/Manager

Current Project Period [Project Period 1](#)

Project Goal & Summary

Project Goal

Related - Project Management

- Project Plan
- Budgeting
- Drawdowns & Disbursements
- Assessment
- Agreements
- Reports
- Report Schedule
- Grant Close-Out
- Communication
- Currencies
- Audit History

3

Navigate to Project Plan under related.



GrantVantage Search

TA2024 - Grant - Saved \$85,612.00 Project Total Active Grant Status 1/1/2025 Project Start 6/30/2026 Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort **Project Plan** Related

+ NEW REFRESH Goal

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	EQJP	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
2	CSP	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
3	COTA	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
4	Outcomes	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved

4

Single click any Ref. ID to expand the table.



5

Single click the arrow next to Performance Measure to further expand the table. Double-click each performance measure to input actual values.

The screenshot displays the GrantVantage software interface. At the top, there is a search bar and navigation icons. Below this, the main content area shows details for a grant labeled 'TA2024 - Grant'. Key information includes a project total of \$85,612.00, an active grant status, and project dates from 1/1/2025 to 6/30/2026. The 'Project Plan' tab is selected, showing a table of objectives and performance measures.

Num	Ref. ID	Objective Name	Objective Description	Manager	Start	End	Status
1	EQIP	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
Performance Measure (8)							
Ref. ID	Performance Measure	Manager	Type	Planned	Actual	Status	
1	Grant Funded Staff Hours	Kenesha Reynolds	Number (Actual)	1,193		Not Started	✖
5	Number of Acres with Improved Management	Kenesha Reynolds	Number (Actual)	12,000		Not Started	
6	Number of clients reached	Kenesha Reynolds	Number (Actual)	15		Not Started	
2	Number of Contracts Obligated	Kenesha Reynolds	Number (Actual)	51		Not Started	
8	Number of Historically Unserved Producers reached	Kenesha Reynolds	Number (Actual)	4		Not Started	
7	Number of new producers reached	Kenesha Reynolds	Number (Actual)	15		Not Started	
4	Number of Plans Assisted	Kenesha Reynolds	Number (Actual)	51		Not Started	
3	Number of Practices Implemented	Kenesha Reynolds	Number (Actual)	40		Not Started	
Grant Activities (0)							
2	CSP	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
3	COTA	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved
4	Outcomes	Accomplishments	Predicted Accomplishments	Kenesha Reynolds	1/1/2025	6/30/2026	Approved



6

Enter values in the Actual box. Values are cumulative over the quarters. Add your previous quarter values for your actuals total.

The screenshot displays a software interface for managing a grant project. At the top, a navigation bar includes options like 'Save', 'Refresh', and 'Run Report'. Below this, a header section identifies the project as 'TA2024 - Grant' with a status of 'Active' and a project total of '\$85,612.00'. The 'Project Plan' tab is selected, showing a table of performance measures. One measure is highlighted, opening a 'Performance Measure' form. This form contains several fields: 'Measure Description' (Grant Funded Staff Hours), 'Type of Measure' (Number), 'Manager' (Kenesha Reynolds), 'Start Date' (1/1/2025), 'End Date' (6/30/2026), 'Reference ID' (1), 'Planned' (1193), and 'Actual' (empty). A dropdown menu is open for the 'Actual' field, listing values: 653, 5, 800, 74, 8, and 7. The background shows a table with columns for 'Num', 'Ref. ID', 'Objective Name', 'Objective Description', 'Manager', 'Start', 'End', and 'Status'.



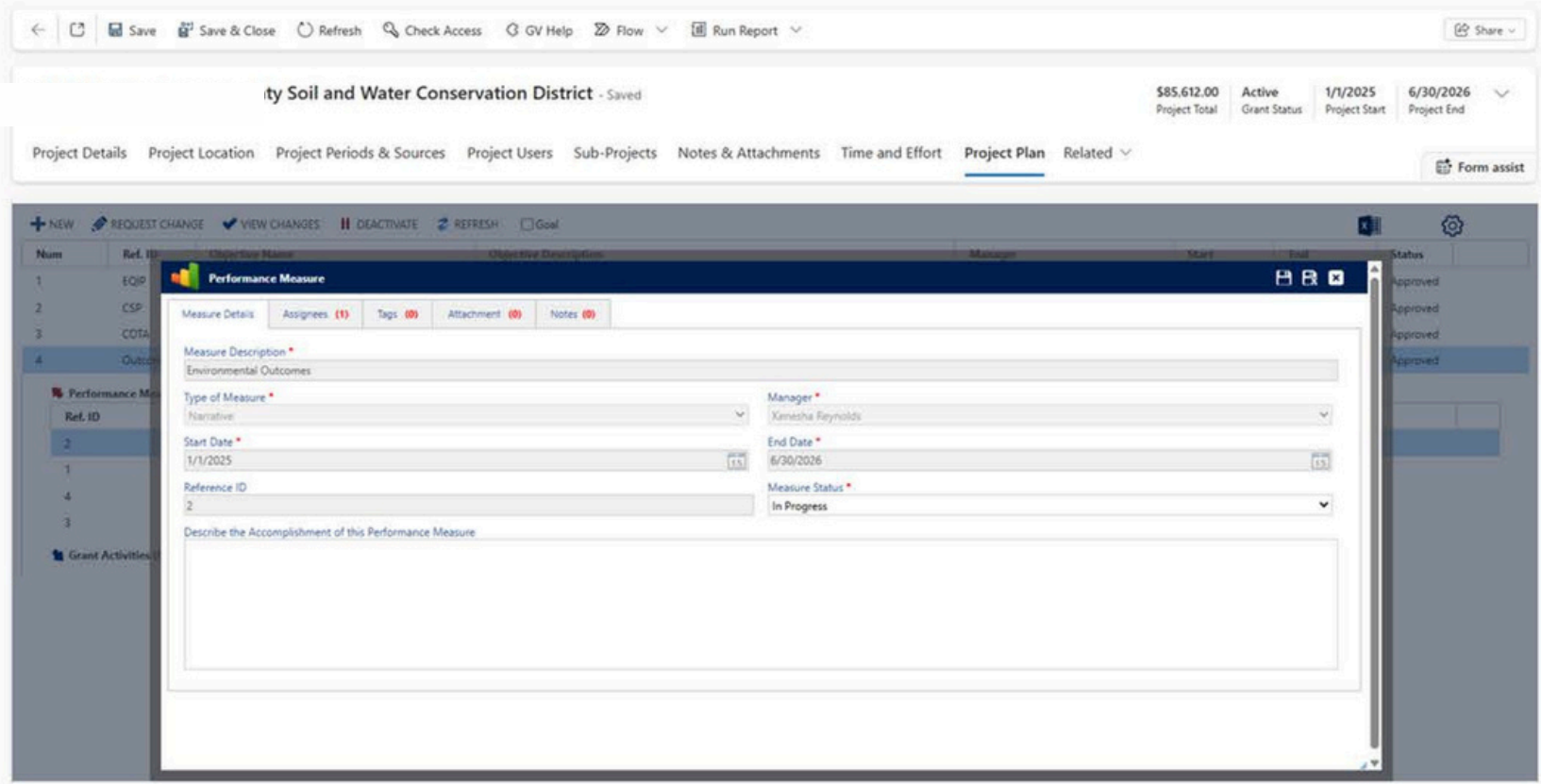
7

The narratives are located under the Outcomes objective. You can date the entry then continue to add to the narratives each quarter. The narratives are:

Environmental Outcomes - What measurable environmental changes have resulted from the project activities? (e.g., improvements in water quality, soil health, wildlife habitat, or air quality), What changes, if any, were observed in land use or management practices that support environmental sustainability? How have conservation practices implemented through this grant contributed to long-term environmental benefits? Which specific resource concerns were addressed (e.g., erosion, nutrient runoff, invasive species), and how were they mitigated?

Staffing - How did this grant support the recruitment, hiring, or retention of staff? Describe positions filled and timelines. What qualifications or skills did the hired staff bring to the organization? How have they contributed to program goals? How has staff capacity increased as a result of this funding (e.g., increased caseload, number of producers served, geographic reach)? How has grantsupported staffing enhanced partnerships, collaboration, or engagement with stakeholders and communities?

Project Successes - How did this project benefit the target audience, community, or landscape? Include any measurable or observable impacts. What lessons did you learn during the project that could inform future work or be shared with others? What do you consider to be the most significant accomplishments of this project? Why?



8

Once all metrics have been updated, navigate to Reporting and run the Project Performance Report.

The screenshot displays the GrantVantage web application interface. At the top, the header includes the 'GV GrantVantage' logo, a search bar, and utility icons. Below the header is a navigation bar with options like 'Save', 'Save & Close', 'Refresh', 'Check Access', 'GV Help', 'Flow', and 'Run Report'. The main content area shows details for a grant titled 'TA2024 - Conservation District - Saved'. Key metrics include a Project Total of \$85,612.00, an Active Grant Status, a Project Start date of 1/1/2025, and a Project End date of 6/30/2026. A navigation menu below the grant details includes 'Project Details', 'Project Location', 'Project Periods & Sources', 'Project Users', 'Sub-Projects', 'Notes & Attachments', 'Time and Effort', 'Reports', and 'Related'. The 'Reports' tab is currently selected, showing a 'Select Report' dropdown menu with 'Project Performance Report' chosen, and a 'Project Year(s)' dropdown menu with 'Project Period 1 (1/1/2025 - 6/30/2026)' selected. A 'Form assist' button is visible in the top right corner of the reports section. The left sidebar contains a navigation menu with categories like 'Grants', 'Organizations & People', 'Resources', and 'Administration', with 'Grant List' currently selected.



GrantVantage Search

Save Save & Close Refresh Check Access GV Help Flow Run Report Share

TA2024 Conservation District - Saved \$85,612.00 **Active** 1/1/2025 6/30/2026

Project Total Grant Status Project Start Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort **Reports** Related Form assist

Reports

Select Report: Project Performance Report Project Year(s): Project Period 1 (1/1/2025 - 6/30/2026)

Project Performance Detail Report

Project: TA2024 - OR - Harney County Soil and Water Conservation District

Project Manager: Chessa Ossefoort
Award No: 8051 USDA Technical Assist VII 09.30.28
Reporting Period: 1/1/2025 - 6/30/2026
Project Period: 1/1/2025 - 6/30/2026
Current Period Amount: 85,612.00
Total Funded Amount: 85,612.00

Project Goal

Project Summary
 Harney SWCD will create Candidate Conservation Agreement with Assurances (CCAA) by developing Site Specific Plans (SSP) and supporting NRCS Environmental Quality Incentive Program (Equip) contracts by project layout certification and inspections.

Objective Name: Accomplishments
Objective Number: 1
Objective Description:

10

Export the report as a PDF and save it to your files.



GV GrantVantage

Search

TA2024 - OR - Harney County Soil and Water Conservation District - Saved

Grant

\$85,612.00 Project Total Active Grant Status 1/1/2025 Project Start 6/30/2026 Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort **Reports** Related

Form assist

Reports

Select Report: Project Performance Report Project Year(s): Project Period 1 (1/1/2025 - 6/30/2026)

Related - Project Management

- Project Plan
- Budgeting
- Drawdowns & Disbursements
- Assessment
- Agreements
- Reports
- Report Schedule**
- Grant Close-Out
- Communication
- Currencies
- Audit History

Project Performance

Project: TA2024 - OR - Harney County Soil and Water Conservation District

Project Manager: Chessa Ossefoort
Award No: 8051 USDA Technical Assist VII 09.30.28
Reporting Period: 1/1/2025 - 6/30/2026
Project Period: 1/1/2025 - 6/30/2026
Current Period Amount: 85,612.00
Total Funded Amount: 85,612.00

Project Goal

Project Summary
 Harney SWCD will create Candidate Conservation Agreement with Assurances (CCAA) by developing Site Specific Plans (SSP) and supporting NRCS Environmental Quality Incentive Program (Equip) contracts by project layout certification and inspections.

Objective Name: Accomplishments
Objective Number: 1
Objective Description:

10

Navigate to Report Schedule.



11

Upload it to the Reports Schedule under the Quarterly Accomplishments Report for the current reporting period.

← Save Save & Close Refresh Check Access GV Help Flow Run Report Share

TA2024 - Conservation District - Saved \$85,612.00 Project Total Active Grant Status 1/1/2025 Project Start 6/30/2026 Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort **Report Schedule** Related Form assist

Report Management

Reporter Organization: All Report Status: All Report Type: All Project: Count + ADD REPORTING REFRESH

Report Title	Report Type	Report Frequency	Reporting Lag(in days)
Quarterly Financial Report	Financial	Custom	15
Quarterly Accomplishments Report	Performance	Custom	15

Reporting Period Start	Reporting Period End	Reporting Due Date	Report Filed By	Report Filed On	Report Approved By	Report Approved On	Report Status	Report Risk	Audit
1/1/2025	6/30/2025	7/15/2025					Overdue	No	
7/1/2025	9/30/2025	10/15/2025					Overdue	No	
10/1/2025	12/31/2025	1/15/2026					Pending	No	
1/1/2026	3/31/2026	4/15/2026					Pending	No	
4/1/2026	6/30/2026	7/15/2026					Pending	No	

Staffing Report - Assessment Internal Custom 15



Navigation: Save, Save & Close, Refresh, Check Access, GV Help, Flow, Run Report, Share

TA2024 - Conservation District - Saved | \$85,612.00 Project Total | Active Grant Status | 1/1/2025 Project Start | 6/30/2026 Project End

Project Details | Project Location | Project Periods & Sources | Project Users | Sub-Projects | Notes & Attachments | Time and Effort | **Report Schedule** | Related | Form assist

Report Management

Reporting Period

Detail | Add Notes/Attachments

Reporting Period Start	Reporting Period End	Reporting Due Date
7/1/2025	9/30/2025	10/15/2025
Report Filed By	Report Filed On	Reporting Lag (in days)
Type to search contacts		15
Report Type	Reporting Frequency	Grant
Performance	Custom	
Report Approved By	Report Approved On	Report Risk
Type to search contacts		--Select--
Report Status	Report Title	
Overdue	Quarterly Accomplishments Report	

Reporter Organization: All | Report Status: All

Report Title: Quarterly Financial Report, Quarterly Accomplishments Report

Reporting Period Start	Reporting Period End	Report Risk	Audit
1/1/2025	6/30/2025	No	
7/1/2025	9/30/2025	No	
10/1/2025	12/31/2025	No	
1/1/2026	3/31/2026	No	
4/1/2026	6/30/2026	No	

Staffing Report - Assessment

12

Attach the exported PDF under Add Notes/Attachments



13

Complete the details page being sure to click on a name for the report filed by box rather than just typing. You will get an error if you do not click on the name in the drop down.

The screenshot displays a web application interface for project management. At the top, a navigation bar includes options like 'Save', 'Refresh', and 'Run Report'. Below this, a header section identifies the project as 'TA2024 - Conservation District' with a total value of '\$85,612.00' and an active status. A series of tabs allows navigation between different project aspects, with 'Report Schedule' currently selected. A 'Form assist' button is also visible.

The main content area is titled 'Report Management' and features a table of reporting periods. A modal window titled 'Reporting Period' is overlaid on this table, providing a detailed form for editing a specific report. The form is divided into two sections: 'Detail' and 'Add Notes/Attachments'. The 'Detail' section contains the following fields:

- Reporting Period Start: 7/1/2025
- Reporting Period End: 9/30/2025
- Reporting Due Date: 10/15/2025
- Report Filed By: A dropdown menu with 'Your name here' selected.
- Report Filed On: A date field with a calendar icon and the value '15'.
- Reporting Lag (in days): 15
- Reporting Frequency: Custom
- Report Approved By: A search field with the placeholder 'Type to search contacts'.
- Report Approved On: A date field with a calendar icon and the value '15'.
- Report Status: Overdue
- Grant: TA2024 -
- Report Risk: --Select--
- Report Title: Quarterly Accomplishments Report

The background table shows a list of reporting periods with columns for 'Reporting Period Start' and 'Reporting Period End'. The first row shows '1/1/2025' and '6/30/2025', the second '7/1/2025' and '9/30/2025', and the third '10/1/2025' and '12/31/2025'. Below the table, there is a 'Staffing Report - Assessment' section.



14

The Report Status will update to “Submitted” when the report is attached and saved.

TA2024 - Conservation District - Saved \$85,612.00 Project Total Active Grant Status 1/1/2025 Project Start 6/30/2026 Project End

Project Details Project Location Project Periods & Sources Project Users Sub-Projects Notes & Attachments Time and Effort **Report Schedule** Related

Report Management Form assist

Reporter Organization: All Report Status: All Report Type: All Project: Sub-Award: TA2024 - OR - Harney Count + ADD REPORTING REFRESH

Report Title	Report Type	Report Frequency	Reporting Lag(in days)
Quarterly Financial Report	Financial	Custom	15
Quarterly Accomplishments Report	Performance	Custom	15

Reporting Period Start	Reporting Period End	Reporting Due Date	Report Filed By	Report Filed On	Report Approved By	Report Approved On	Report Status	Report Risk	Audit
1/1/2025	6/30/2025	7/15/2025					Overdue		No
7/1/2025	9/30/2025	10/15/2025					Overdue		No
10/1/2025	12/31/2025	1/15/2026					Pending		No
1/1/2026	3/31/2026	4/15/2026					Pending		No
4/1/2026	6/30/2026	7/15/2026					Pending		No

Staffing Report - Assessment	Internal	Custom	15
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