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Detailed Progress Report Requirements Training for Partnerships for Climate-Smart Commodities Grantees  
October 4<sup>th</sup>, 2023

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# Agenda

- Reporting Requirements Review
- Introduction to Project Reporting Workbook
- Completing the Project Reporting Workbook
- Additional Resources
- Questions





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# Reporting Requirements Review



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# Report Submission Methods

## ezFedGrants

- Requires eAuthentication login
- Limits attachment types to PDFs (cannot exceed 20 MB)

<https://www.usda.gov/ocfo/ezfedgrants>

## Box

- Operates through USDA's enterprise Box account
- Requires grantee to create a free account
- NPO will invite single reporting POC per grant to shared folder

[www.box.com](http://www.box.com)



# General Reporting Requirements – Quarterly Report Types

## ezFedGrants Submission

- SF 425 – Federal Financial Report
- Written Progress Report
  - ✓ Comparison of accomplishments to benchmarks
  - ✓ Reasons why milestones & deliverables targets were not met
  - ✓ Additional information, including where appropriate, analysis & explanation of unexpected costs

## Box Submission

- Detailed Progress Report
  - ✓ Project Reporting Workbook
  - ✓ Supplemental Progress Report Workbook (if applicable)

# Additional Reports

## ezFedGrants

- Copies of grant deliverables (e.g., fact sheets)

## Box

- MMRV Report (one-time)
- Field-Modeled GHG Benefits Reports
- Field Direct Measurement Results

# General Reporting Requirements - Timing

All quarterly reports must be submitted within 30 calendar days of the end of each federal fiscal quarter

Federal Fiscal Quarter	Report Deadline
January 1 <sup>st</sup> – March 31 <sup>st</sup>	April 30 <sup>th</sup>
April 1 <sup>st</sup> – June 30 <sup>th</sup>	July 30 <sup>th</sup>
July 1 <sup>st</sup> – September 30 <sup>th</sup>	October 30 <sup>th</sup>
October 1 <sup>st</sup> – December 31 <sup>st</sup>	January 30 <sup>th</sup>

# Initial Report Submission Dates

- Detailed progress reports must be submitted via Box every quarter
- Follow the due date for the reporting period that covers the date your project was executed
- At a minimum, the *Coversheet* worksheet must be complete
- Financial reports & written progress reports must be submitted via ezFedGrants for every quarter that your grant has been executed for 30+ days
  - ✓ If your grant is executed within the last month of a quarter, your initial financial and written progress reports will cover all activity from the execution date – end of the following quarter



# Initial Report Submission Dates – Example 1

(Federal Fiscal Quarter July 1<sup>st</sup> – September 30<sup>th</sup>)

For agreements executed on or before August 30, 2023:

## ezFedGrants

- Initial Quarter Report due on October 30<sup>th</sup>, 2023
  - ✓ Financial Report
  - ✓ Written Progress Report

## Box

- Initial Quarter Report due on October 30<sup>th</sup>, 2023
  - ✓ Detailed Progress Report (DPR)
  - ✓ MMRV Report

# Initial Report Submission Dates – Example 2

(Federal Fiscal Quarters July 1<sup>st</sup> – September 30<sup>th</sup> & October 1<sup>st</sup> – December 31<sup>st</sup>)

For agreements executed between September 1<sup>st</sup> – September 30<sup>th</sup>, 2023:

## ezFedGrants

- Initial Quarter Report due on January 30<sup>th</sup>, 2024
  - ✓ Financial Report
  - ✓ Written Progress Report

## Box

- Initial Quarter Report due on October 30<sup>th</sup>, 2023
  - ✓ Detailed Progress Report (DPR)
  - ✓ MMRV Report

# General Review Notes

- **Financial Report**

- Do your expenses generally match the projected quarterly plan?
- Did you include the correct indirect rate?
- Do the totals match?

- **Written Progress Report**

- Are your accomplishments clearly related to your established benchmarks?
- Did you identify any missed benchmarks?
  - Include explanation & future plan to catch-up

- **Detailed Progress Report**

- Check that data elements are complete, valid, and use correct format
- Do the entries align with your established benchmarks, narrative accomplishments, and general level of effort (budget totals)?

*Note: All reports must be complete and correct for reimbursements to be processed*



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# Introduction to Project Reporting Workbook



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# Organization of the Workbook

- Topical worksheets that report data at different levels
  - Project – summaries of commodities, GHG benefits, market impacts and costs
  - Partner – summaries of activities and funds
  - Farm – summaries of operations, contracts & project involvement
  - Field – detailed information on climate-smart practices & associated benefits
- Format allows USDA to easily track & analyze performance
- Updates to the workbook or submission method that streamline data collection or reduce burden may occur



# Frequency of Data Updates

- *Quarterly updates about the project/partners*
  - Project Summary
  - Partner Activities
  - Marketing Activities (if applicable)
- *Quarterly updates about the farms/fields enrolled*
  - Farm Summary
  - Field Summary (if applicable)
- *Annual updates about the farms/fields enrolled*
  - Producer Enrollment
  - Field Enrollment & CSAF Practice Sub-questions (if applicable)
  - GHG Benefits – Alternate Models & Measured
  - Environmental Benefits

# Reminder: Workbook Submission

- Several data elements contain sensitive information
- Always use Box to share the workbook with USDA
  - ✓ Never email the workbook to your NPO
  - ✓ Never submit the workbook to ezFedGrants
- Ensure your project follows security requirements for this information during data collection and storage





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# Completing the Project Reporting Workbook



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# Universal Notes

- Follow the instructions in the workbook & refer to the *Data Dictionary* for additional guidance
- If a cell isn't applicable, ***leave it blank***
  - Only use "I don't know" when appropriate
- Only enter a single value in each cell (e.g., no lists separated by commas)
  - ***Exception:*** Free-text cells that specify an "Other" response to a drop-down list
- ***Don't*** change the formatting, add new columns, or otherwise alter the structure of the workbook
  - Notify your NPO if there is an issue that needs to be addressed
- Copy and paste information for the same Farm-Tract-Field ID between rows/worksheets
- Ensure the file name is correct before uploading to Box

ALWAYS USE BOX – NEVER EMAIL THESE FILES



# Universal Notes

- Reporting data is limited to the part of an operation participating in the grant
  - *Exception:* Producer Enrollment
- Participating producers need Farm Service Agency (FSA) IDs & must meet eligibility requirements
- Reporting is required at the field-level & should be consistent with existing FSA farm records (e.g., acreage, GHG benefits)
- Report on commodities produced and sold as part of the project
- Total GHG benefits = carbon sequestered + CO<sub>2</sub> reduced + CH<sub>4</sub> reduced + N<sub>2</sub>O reduced
- If a worksheet isn't applicable, leave it blank

# Updates to the Project Reporting Workbook

- ❖ Date ranges replaced quarter numbers
- ❖ Updated practice & commodity lists
- ❖ Coversheet for *Supplemental Reporting Workbook*
- ❖ Formatting fixes

# Coversheet Tab

- Provides administrative information about the grant
  - Minimum expected submission for any executed project
- Common errors:
    - ✓ Project ID format
    - ✓ Total award budget (should include match)
  - Check:
    - ✓ Reporting dates
    - ✓ POC information
    - ✓ COMET-Planner version

Coversheet		
Instructions: Fill in Column B, Rows 6-17		
Grantee Data	Answer	Example / Instructions
Project Title		A Partnership for Climate-Smart Commodities to Reduce Greenhouse Gas Emissions
Project ID		123456; use the "Award Identifying Number" shown on the award documentation
Grantee Organization Name		Climate-Smart, Inc.; use the "Recipient Organization" matching the award documentation
Grantee Primary Point of Contact		Jane Doe
Grantee Primary Point of Contact Email		jane.doe@climateinc.com
Calendar Year of Report Submission		Choose the year for which activities are being reported
Reporting Period		Choose the date range for which activities are being reported
Overall Project Start Date		3/1/2023; use the date from the project period shown on the award documentation
Overall Project End Date		3/1/2028; use the date from the project period shown on the award documentation
Total Approved Budget		\$10,000,000; use "Total Approved Budget" shown on the award documentation (includes federal and non-federal funds)
Description of Project		Short 1-2 sentence overview
COMET-Planner Version		3.0; indicate the version of COMET-Planner used to estimate GHG benefits this quarter

# Project Summary Tab

- Shows overall project performance *by commodity*
  - Cumulative (except for sales & enrollment indicators)
  - Commodities – include commodities produced with climate-smart practices and commodities sold as part of the project
- Common errors:
    - ✓ “Commodity sales” & “Farms enrolled” indicators are blank
    - ✓ GHG benefits: GHG total ≠ carbon stock + CO<sub>2</sub> + CH<sub>4</sub> + N<sub>2</sub>O
  - Check:
    - ✓ On-site TA & MMRV expenses
    - ✓ MMRV approaches

Project Summary

Instructions: These data will be collected about each project. Cumulative results are reported each quarter. Report last quarter's entry if there has been no change in this quarter.

List	List	List	List	List	Decimal	Decimal	Decimal	Decimal	Decimal
Commodity type	Commodity sales	Farms enrolled	GHG calculation methods	GHG cumulative calculation	Cumulative GHG benefits	Cumulative carbon stock	Cumulative CO2 benefit	Cumulative CH4 benefit	Cumulative N2O benefit

# Partner Activities Tab

- Shows partner engagement & cost-share contributors
- Shows relative investments in project activities (e.g., outreach, technical assistance, marketing, MMRV)
- Common errors:
  - ✓ Lead grantee information missing (check *Data Dictionary* for applicable columns)
  - ✓ Missing info: EINs, Partnership start dates, New Partnership, Partner Type
  - ✓ Partnership end date (should be blank unless partnership has already ended)
- Check:
  - ✓ Level of detail for “other” should mimic drop-down responses (e.g., grant administration)

Partner Activities

**Instructions:** These data will be collected at the project level. Each row in this worksheet will represent one organization involved in the project, including the recipient and all contributing partners. A partner is any organization that is receiving project funds or providing matching contributions (funds or in-kind contributions) to the project. While the recipient must complete one row for their own organization, not all data elements apply to the recipient. These exceptions are noted in the detailed descriptions of the specific elements in the Data Definitions section of the Data Dictionary. Data are reported cumulatively each quarter. Report last quarter’s entry if there has been no change in this quarter.

Unique number	Text	List	Text	Text	Date - MM/DD/YYYY	Date - MM/DD/YYYY	List	Decimal - dollars	Decimal - dollars
Partner ID (EIN)	Partner name	Partner type	Partner POC	Partner POC email	Partnership start date	Partnership end date	New partnership	Partner total requested	Total match contribution



# Marketing Activities Tab

- Shows information about commodity marketing approaches and outcomes
- Common Errors:
  - ✓ If no commodities sold that quarter, indicate in Project Summary tab and leave worksheet blank
- Check:
  - ✓ Refers to the sale of the commodity off the farm (e.g., raw milk to a processor)
  - ✓ Include additional information if project involves tracking sales at additional levels (e.g., retail) as additional marketing channels

Marketing Activities

**Instructions:** These data will be collected at the project level. Each row in this worksheet will correspond to one commodity for which the project enrolls fields and one marketing channel used to sell that commodity by the project or producers enrolled in the project. Data are reported for the current quarter and are not cumulative. If no sales of the commodity were reported during a quarter, do not complete this worksheet for that quarter.

List	List	Text	Integer	Text	List	Decimal - dollars
Commodity type	Marketing channel type	Other marketing channel type	Number of buyers	Names of buyers	Marketing channel geography	Value sold



# Field Enrollment Tab

- Provides information about the CSAF practices for each field x commodity combination
  - Only one Field ID & commodity can be entered per row
  - Common errors:
    - ✓ If no fields are enrolled that quarter, indicate in Project Summary tab and leave worksheet blank
- ✓ CSAF practices must be recorded for all fields/commodities involved in the project
  - Check:
    - ✓ Enrollment information is entered once per enrolled field ID (regardless of length of participation)
      - ☐ Review and update if there are relevant changes within or between contracts
      - ☐ Recons: List prior id using “Farm ID-Tract ID-Field ID” format

Field Enrollment								
<b>Instructions:</b> These data will be collected about each field enrolled in the project. In this worksheet, each row corresponds to one field x commodity combination enrolled in the project. If a field produces more than one commodity, use additional rows to enter additional commodities. Copy and paste the data elements that remain the same regardless of commodity, such as total field area, so that each row is complete. Generally, data are reported once for each field, at its initial enrollment. The quarterly submission should contain information about each field initially enrolled in the project during that quarter. If no fields are enrolled during that quarter, do not complete this worksheet for that quarter. If a field is enrolled for multiple years, any relevant changes, such as a new ID number or changes to the commodity or practice combinations should be entered in this worksheet during the quarter it is re-enrolled, or as applicable.								
Number	Number	Number	List	List	Number	List	Date - MM/DD/YYYY	Decimal - acres
Farm ID	Tract ID	Field ID	State or Territory	County	Prior Field ID (if applicable)	Field data change	Contract start date	Total field area

# Farm Summary Tab

- Characterizes the technical and financial assistance provided within each contract
  - Common errors:
    - ✓ Missing data elements (complete info applicable to that quarter (non-cumulative))
    - ✓ Incorrect “Producer incentive amounts” (*only* include USDA funds)
- Check:
    - ✓ If there are no changes from the previous quarter, do not complete the worksheet for that quarter

**NOTE:** *Data Dictionary* descriptions for “Producer TA received” and “Producer incentive amount” should be “for the *quarter*” not “for the *year*”

Farm Summary

**Instructions:** These data will be collected about each farm enrolled in the project. In this worksheet, each row will correspond to one farm that has at least one field enrolled in the project. The quarterly submission should contain updates to any data elements that have changed for each farm enrolled in the project during that quarter. If there are no changes from the previous quarter, do not complete this worksheet for that quarter. Data are not cumulative.

Number	List	List	List	List	List	Text	Decimal - dollars
Farm ID	State or territory	County	Producer TA received 1	Producer TA received 2	Producer TA received 3	Other producer TA received	Producer incentive amount

# Field Summary Tab

- Shows outcomes at the field level – certification of practice implementation, types of assistance provided, volume of climate-smart commodities, GHG benefits
- Common errors:
  - ✓ Missing data elements (complete info applicable to that quarter (non-cumulative))
  - ✓ GHG benefits:  $\text{GHG total} \neq \text{carbon stock} + \text{CO}_2 + \text{CH}_4 + \text{N}_2\text{O}$
- Check:
  - ✓ If there are no changes from the previous quarter, do not complete the worksheet for that quarter

## Field Summary

**Instructions:** These data will be collected about each field enrolled in the project for a commodity x practice(s) combination. In this worksheet, each row will correspond to one field x commodity x practice(s) combination enrolled in the project. Data for each field will be reported quarterly and are not cumulative. Report data for any elements that have an update in that quarter. Greenhouse gas benefit estimates must be entered upon practice completion or annually, as appropriate. If there are no changes from the previous quarter, do not complete this worksheet for that quarter. This worksheet includes a section to report the official estimate of GHG benefits amounts of greenhouse gas emissions reduced and carbon sequestered for the field. These quantities refer to the estimates that are used to calculate the projects aggregate impact (reported in Table 1). Tables 8 and 9 are used to report alternate estimates of the field level GHG benefits when additional methods are used to model (Table 8) or measure (Table 9) these impacts. Any field that is able to use COMET Planner must submit those results, either as the official or alternate model.

Number	Number	Number	List	List	List	List
Farm ID	Tract ID	Field ID	State or territory	County	Commodity type	Practice type 1



# GHG Benefits – Alternate Models Tab

- If GHG benefits are modeled using more than one method, shows the results for the alternate method (that was *not* used in official project accounting) at the field level
- If the project only uses one method to model GHG benefits, *this worksheet will always be blank*
- Common errors:
  - ✓ GHG benefits: GHG total  $\neq$  carbon stock + CO<sub>2</sub> + CH<sub>4</sub> + N<sub>2</sub>O
  - ✓ Model start and end dates (reflect period for which benefits were estimated)
- Check:
  - ✓ Include reports in quarterly submission

Alternate Modeled GHG Benefits

Instructions: If greenhouse gas benefits are modeled for the same field using multiple methods, the results for the alternate models are reported in this worksheet. The “alternate” models refer to those model results that were not used in the calculation of the project’s aggregate impact (as reported in the Project Summary worksheet). Any field that is able to use COMET-Planner must submit those results, either as the official or alternate model. These data will be collected about the modeled GHG benefits for each field x commodity x practice(s) combination. In this worksheet, each row will correspond to one field enrolled in the project. Data are not cumulative. Each quarterly submission should include information for all fields that have new modeled data. Greenhouse gas benefit estimates must be entered upon practice completion or

Number	Number	Number	List	List	List	List
Farm ID	Tract ID	Field ID	State or territory	County	Commodity type 1	Commodity type 2
			NV			

# GHG Benefits – Measured Tab

- Shows results for any direct measurements taken at the field level
- If the project does not include any direct measurements (e.g., soil samples, gas flux measurements), this worksheet will always be blank
- Common errors:
  - ✓ Start and end dates (reflect when measurements were taken)
- Check:
  - ✓ Include reports in quarterly submission

Measured GHG Benefits

**Instructions:** Projects must report the results of any carbon stock or greenhouse gas emission measurements in this worksheet. These data will be collected at the field level. Each row will represent a separate measurement method used to calculate GHG benefits for a given field. Data are reported once per year of measurement and are not cumulative. Each quarterly submission should include information for any field for which there are new soil samples or new calculations of annual GHG benefits based on actual measurements.

Number	Number	Number	List	List	List	Text
Farm ID	Tract ID	Field ID	State or territory	County	GHG measurement method	Other GHG measurement method

# Additional Environmental Benefits Tab

- Tracks co-benefits of climate-smart practice implementation at the field level
- If the project does not track other benefits (e.g., water quality, avoided land conversion), this worksheet will always be blank
- Common errors:
  - ✓ Missing elements (Complete “Amount” and “Purpose” of relevant co-benefits)
- Check:
  - ✓ Include reports in quarterly submission

Additional Environmental Benefits

**Instructions:** Projects that track additional environmental benefits (e.g., water quality improvements) from enrolled fields report results in this worksheet. These data will be collected about each field. Data are not cumulative. Estimates of environmental benefits must be entered upon practice completion or annually, as appropriate.

Number	Number	Number	List	List	List	List
Farm ID	Tract ID	Field ID	State or territory	County	Environmental benefits	Reduction in nitrogen loss

# Supplemental Reporting Workbook

- Contains additional questions for certain CSAF practices that provide insight into GHG benefits at the field-level
- If a project is implementing one or more of these practices (as captured in *Field Enrollment tab*), the relevant practice worksheets must be submitted upon practice enrollment or verification

Coversheet		
Instructions: Fill in Column B, Rows 6-8		
Grantee Data	Answer	Example / Instructions
Project ID		123456; use the "Award Identifying Number" shown on the award documentation
Grantee Organization Name		Climate-Smart, Inc.; use the "Recipient Organization" matching the award documentation
Calendar year of Report Submission		2023
Reporting Period		Reporting Period is October 1 - September 30

Cover Crop (CPS 340)

Instructions: These data will be collected about each field enrolled in the project requiring additional practice-specific sub-questions.

These columns may be copied from the Field Enrollment Report					List	List	List
Farm ID	Tract ID	Field ID	State or territor	County	Species category (select most common/extensive type if using more than one)	Cover crop planned management	Cover crop termination method

Supplemental Reporting Workbook – CSAF Practice Sub-questions

Instructions: For any fields enrolled in the project that will be implementing the practices below or enhancements to these practices, complete the relevant worksheets and submit as part of the quarterly performance report.

CSAF practices with additional sub-questions include:	
Practice code	Name
311	Alley Cropping
372	Combustion System Improvement
327	Conservation Cover
328	Conservation Crop Rotation
332	Contour Buffer Strips
340	Cover Crop
342	Critical Area Planting
592	Feed Management
386	Field Border
393	Filter Strip
379	Forest Farming
666	Forest Stand Improvement
412	Grassed Waterway
422	Hedgerow Planting
603	Herbaceous Wind Barriers
484	Mulching
590	Nutrient Management
512	Pasture and Hay Planting
528	Prescribed Grazing
550	Range Planting
329	Residue and Tillage Management – No-till
345	Residue and Tillage Management – Reduced Till
391	Riparian Forest Buffer
390	Riparian Herbaceous Cover
367	Roofs and Covers
381	Silvopasture
585	Stripcropping
612	Tree/Shrub Establishment
601	Vegetative Barrier
632	Waste Separation Facility
313	Waste Storage Facility
629	Waste Treatment
359	Waste Treatment Lagoon
380	Windbreak/Shelterbelt Establishment and Renovation



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# Additional Resources



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# Resources

- Partnerships for Climate-Smart Commodities Partner Resources: <https://www.usda.gov/climate-solutions/climate-smart-commodities>
  - Previous trainings on administration and reporting
  - Data Dictionary, Project Reporting Workbook, Supplemental Reporting Workbook
- FPAC Grants and Agreements: <https://www.fpacbc.usda.gov/about/grants-and-agreements/>
  - Terms and conditions
  - Award report (and payment) aids
- ezFedGrants: <https://www.usda.gov/ocfo/ezfedgrants>
  - Launch the system
  - Access job aids
  - Participate in ongoing training
- Box: [www.box.com](http://www.box.com)
  - Log-in to account
- NPOs





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# Questions



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1400 Independence Avenue, SW  
Washington, D.C. 20250-9410;

(2) fax: (202) 690-7442; or

(3) email: [program.intake@usda.gov](mailto:program.intake@usda.gov).

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