

# GrantVantage Reporting Instructions

## National Association of Conservation Districts



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Conservation Districts

All grantees are required to complete and submit the following three report types in the Reporting Portal: **Quarterly Accomplishments Report, Quarterly Financial Report, and Semi-Annual Staffing Assessment.**

## Project Performance Report (Quarterly)

Find instructions with accompanying visuals in this [powerpoint](#).

- Navigate to the Project Plan tab, located underneath Related in the menu, to enter actual accomplishments.
- Click on any reference ID to expand the table, and then click the arrow next to performance measure to further expand the table and enter accomplishments.
- Double-click each performance measure to input actuals. Values are cumulative over the quarters. Add your previous quarter's values to the current values for your actuals total.
- 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 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 grant-supported 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?
- Once all metrics have been updated, navigate to Reports in the menu, then select Project Performance Report for the corresponding year, and run the Project Performance Report.
- Export the report as a PDF, save it to your files, and upload it to the Reports Schedule, located underneath Related in the menu, under the Quarterly Accomplishments Report for the current reporting period.

### Contact Us

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## Financial Report (Quarterly)

Find instructions with accompanying visuals in this [powerpoint](#).

- Navigate to the Budgeting page, located under Related in the menu.
- Expand the Budget Table.
- Right-click on the budget amount for the appropriate line item and select “Add Transaction” to enter your actual expenses.
- Enter all applicable transactions.
- Navigate to the Reporting tab, also located under Related in the menu, and run the Transactions Report.
- You can run the report as many times as needed until it accurately reflects your expenses.
- Export the final report as a pdf and save a copy to your files.
- Upload the pdf of the report to the Reports Schedule, also located under Related in the menu, for the current reporting period. You will find the corresponding reporting period when you expand the table for the Quarterly Financial Report and can upload the document when you click on the pencil.

### Video References

- [Completing Your Grant Reports](#)
- [Request a Drawdown](#)
- [Requesting Reimbursement](#)

## Staffing Assessment (Semi-Annual)

- Go to the Assessments section under the Related tab.
- Complete the Staffing Assessment survey until it shows 100% complete. (The score or point total is not relevant.)
- Once completed, return to the Reports Schedule and certify the Staffing Assessment for this reporting period by entering:
  - ◊ Name of the person who completed the survey
  - ◊ Date of completion
- No attachment is required for this report.

**Important Notes: NACD will not process payments without a payment request and reports completed. Payment requests are due no later than 30 days prior to the end of the quarter for payment in the next quarter if you are operating on an advance basis. Reimbursement requests can be submitted with quarterly financial reports.**

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