**Quarterly Report Template**

Summarize activities and use quantifiable metrics to report on technical assistance efforts and outcomes. Submit reports along with quarterly invoices to: CDFA.OEFI\_CSA\_TA@cdfa.ca.gov, cc: Carolyn.cook@cdfa.ca.gov. Reports are due within 60 days of the end of the quarter.

For auditing purposes, technical assistance providers are also required to maintain detailed technical assistance records in the office. These records should include name, contact information, location of project, dates assisted, description of assistance provided, application pin numbers and/or grant agreement numbers, and status of belonging to a priority group (Socially Disadvantaged Farmer or Rancher (SDFR), Priority Population, and/or total farm size of 500 acres or less).

# I. PROJECT BACKGROUND

|  |
| --- |
| Grant Recipient Organization: |
| Grant Agreement #: | Reporting Period: |
| Reporting Date: | Grant Duration: |
| Contact Name: |
| Phone: | E-mail: |
| County(s) Served: |
| CSA Program(s) Served (HSP/AMMP): |

# II. PROJECT ACTIVITIES PERFORMED

*For each task and program served (HSP and/or AMMP) included in the approved Work Plan, describe in detail the work ongoing/accomplished during the reporting period.**Descriptions should correlate to the activities (tasks, subtasks, objectives, etc.) identified in the Work Plan.*

1. **Climate Smart Agriculture Pre-Award Activities**

*These are activities conducted by the technical assistance provider prior to a CSA applicant receiving a grant (or award) from CDFA.*

1. Provide a short narrative describing activities completed to assist HSP and/or AMMP applicants.

1. Quantify individuals assisted with pre-award activities

*In the table below quantify individuals assisted with pre-award activities. See Appendix A for definitions.*

|  | **Number of individuals assisted for the first time in this reporting period** | **Number of individuals assisted during this reporting period that have also been assisted during previous reporting periods** |
| --- | --- | --- |
| **HSP** | **AMMP** | **HSP** | **AMMP** |
| 1. Total number of individuals assisted
 |  |  |  |  |
| 1. Number of Individuals that identify as SDFR
 |  |  |  |  |
| 1. Number of individuals located within a priority population
 |  |  |  |  |
| 1. Number of individuals who farm 500 acres or less
 |  |  |  |  |
| 1. Number of-non-English speakers (indicate languages)
 |  |  |  |  |
| 1. Number individuals provided computer access
 |  |  |  |  |

1. Applications Submitted

*Provide basic information on individuals who submitted a Climate Smart Agriculture (AMMP or HSP) application with assistance. Add rows as necessary.*

| **Program (HSP or AMMP)** | **Name of Applicant** | **Application Pin Number** |
| --- | --- | --- |
|  |  |  |
|  |  |  |
|  |  |  |

1. Workshop Details

*If workshops were hosted, provide details. Add rows as needed.*

| **Program (HSP or AMMP** | **Location** | **Date/Time** | **Language(s)** | **Number of Attendees** |
| --- | --- | --- | --- | --- |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

1. **Climate Smart Agriculture Post-Award Activities**

*These are activities conducted by a technical assistance provider after CDFA has awarded a Climate Smart Agriculture grant to an individual.*

1. Provide a short narrative describing activities to assist awardees of HSP and/or AMMP.
2. Quantify individuals assisted with post-award activities

*In the table below quantify individuals assisted with post-award activities. See Appendix A for definitions.*

|  | **Number of individuals first assisted in this reporting period** | **Number of individuals assisted during this reporting period that have also been assisted during previous reporting periods** |
| --- | --- | --- |
| **HSP** | **AMMP** | **HSP** | **AMMP** |
| 1. Number of individuals assisted
 |  |  |  |  |
| 1. Number of Individuals that identify as SDFR
 |  |  |  |  |
| 1. Number of individuals located within a priority population
 |  |  |  |  |
| 1. Number of individuals who farm 500 acres or less
 |  |  |  |  |
| 1. Number of-non-English speakers (indicate languages)
 |  |  |  |  |

1. Please briefly describe and quantify project implementation assistance provided including project coordination, project installation, and/or soil organic matter testing support.
2. Please briefly describe and quantify assistance provided in scope of work or budget revisions, matching funds and annual report preparation.
3. Please briefly describe and quantify other activities such as trainings provided, case-study preparation and/or consulting/assisting those applicants who may not have received funding.

# III. PROJECT MANAGEMENT

**C. WORKPLAN AND SCHEDULE MODIFICATIONS**

*Describe of any modifications to the Work Plan that were approved during the reporting period. Also mention any modifications to the Work Plan that will be proposed in next reporting period. If none, please state so.*

**D. PROBLEMS AND DELAYS**

*Explain any problems or delays, impediments and challenges encountered on the project and explain why they took place. Describe corrective measures that are planned to address delays, impediments, challenges. Include anticipated resolution date(s).*

**E. ATTACHMENTS**

*Provide any training documents, translations, videos etc. Please do not provide draft documents.*

# APPENDIX A: DEFINITIONS

**California Climate Investments (CCI)** - California Climate Investments is a statewide initiative that puts billions of Cap-and-Trade dollars to work reducing greenhouse gas emissions, strengthening the economy and improving public health and the environment—particularly in disadvantaged communities.

**Greenhouse Gas Reduction Fund (GGRF)** - The State’s portion of the Cap-and-Trade auction proceeds which used to further the objectives of the California Global Warming Solutions Act of 2006 (Assembly Bill 32; Núñez, Chapter 488, Statutes of 2006).

**Priority Populations** - Priority populations include residents of: (1) census tracts identified as disadvantaged by California Environmental Protection Agency per SB 535; (2) census tracts identified as low-income per AB 1550; or (3) a low-income household per AB 1550. Priority Populations are identified in the California Communities Environmental Health Screening Tool ([Cal Enviroscreen 3.0](https://oehha.ca.gov/calenviroscreen/report/calenviroscreen-30)) and are specifically targeted for investment of proceeds from the State’s Cap-and-Trade program.

**Socially Disadvantaged Farmer or Rancher (SDFR)** – The Farmer Equity Act of 2017 defines “Socially disadvantaged farmer or rancher” as a farmer or rancher who is a member of a socially disadvantaged group.

(c) “Socially disadvantaged group” means a group whose members have been subjected to racial, ethnic, or gender prejudice because of their identity as members of a group without regard to their individual qualities. These groups include all of the following:

(1) African Americans.

(2) Native Indians.

(3) Alaskan Natives.

(4) Hispanics.

(5) Asian Americans.

(6) Native Hawaiians and Pacific Islanders