TerraFund Project Progress Reporting

Frequently Asked Questions

This FAQ outlines important information about project reporting for nonprofit and enterprise organizations. This includes information on project, site, nursery, and disturbance reporting. Below you will find the most frequently asked questions and the associated answers from all the experts on the TerraFund team. Please review the information below and do not hesitate to reach out to a member of the team if you have additional questions.

Reporting Process & Timelines

Q: What counts as the official project start date for reporting purposes?

The project start date is the initiation of project activities — generally when your contract is signed. This includes all preparatory activities, even those that happen before tree planting begins, such as nursery and seedling preparation.

Q: How much detail should I include when answering report questions?

Provide enough detail that your project manager doesn't need to follow up with clarifying questions — this speeds up the quality assurance process for everyone. Aim for clear, complete answers rather than very brief ones.

Q: I haven't started planting yet. What do I select for my site report?

If you're still in the nursery/site-establishment stage and haven't carried out any field activities, select "Nothing to report." Once you've planted, you'll answer additional questions covering the number of trees planted, species, and (if applicable) your 30-day survival assessment.

Q: For enterprises: should reporting cover the whole business, or only the activities tied to the TerraFund-funded project?

Both. You'll see two types of questions: (1) project-specific questions tied directly to your TerraFund funding — e.g., trees planted, people employed through the project — and (2) whole-business questions covering your company's overall performance. WRI includes certain questions about the whole business because part of the program's goal is helping your organization build a track record that can attract additional investment.

Please keep in mind that a large majority of progress report questions will focus on the project level insights, and you should be careful not to attribute organization-wide work as project progress because this will lead to double counting. For these questions, you should only include activities that were funded by your TerraFund funding for *this* project. Play close attention to the question guidance to make sure you are answering the question the right way.

Q: What if we need to change something in our project scope, such as tree species or planting density?

Scope and species changes aren't self-service in TerraMatch — this is intentional, so that project scope stays aligned with your contract. Talk to your project manager first to discuss and agree on any changes; they can point you to the Zendesk article that explains the formal process for updating your project scope.

Employee & Livelihood Reporting

Q: If a project creates jobs or livelihood opportunities that weren't in the original proposal or budget, should we still report them?

Yes, please report them. Exceeding your original job or livelihood targets is treated as a positive outcome, not a discrepancy — these figures are shared with TerraFund's donors and funders. Document new positions the same way you would planned ones, using the employee registry.

Q: How do we handle employee turnover between reporting periods (some workers leave, others are added)?

Only report new engagements within the current reporting period. Use the employee registry to track who was engaged and when, recording a "0" for anyone no longer active. Each individual is counted only once across the full project cycle, even if they are later re-engaged.

Q: If we contract one individual and they independently bring in additional people to help, do we report one person hired, or all of them?

This depends on who you formally contracted:

- If you contracted an individual, and that person (not your organization) brings in their own additional helpers, only the person you directly contracted counts as "employed." The additional helpers are recorded as directly supported individuals / direct livelihood beneficiaries, not as employees.
- If you contracted a company rather than an individual, everyone working under that company's engagement is recorded at the "direct people supported" level.

Q: Does transportation to and from the project site (e.g., a motorcycle taxi) count as a job?

No.

Site, Ecological & Beneficiary Reporting

Q: How do we quantify trees under Assisted Natural Regeneration (ANR)?

At a high level: establish a baseline count before starting interventions, then track growth using randomly placed, stratified monitoring plots (standard size 30m × 30m, with a nested 9m × 9m subplot for counting, or an equivalent circular plot). At baseline, count trees above 130cm; once interventions begin, count trees between 50cm and 130cm as attributable regeneration. Extrapolate site-wide totals using your sampling ratio (monitored area ÷ total site area).

Full step-by-step guidance is available in the ANR protocol on Zendesk, and this topic will be covered in more depth in an upcoming peer-to-peer session..

Q: How should we calculate the monetary evaluation for disturbance reporting?

Estimate the monetary loss based on costs already incurred for the affected activities — for example, seed procurement, staff salaries, transportation, and any other related expenses already invested.

Q: Should community meeting attendees be recorded as beneficiaries?

It depends on the purpose of the meeting. Some meetings are for project awareness or mobilization, while others are specifically for beneficiary identification. Refer to the beneficiary categories guidance (Community Engagement Goals article on Zendesk) to determine correct categorization — many community meetings will include beneficiaries.

Q: What if our tree-planting timeline shifts due to something beyond our control, like delayed rainfall?

Reach out to your project manager directly. They can walk you through documentation and next steps for your specific situation.

About Monitoring, Reporting, and Verification

Q: What is Monitoring, Reporting, and Verification (MRV)?

Monitoring

Monitoring refers to the process of collecting and analyzing data and information to measure progress toward specific goals that the restoration effort aims to achieve. For a portfolio — a cohort of many restoration projects — such as TerraFund, an Indicator Framework is created as an organized way to view data about progress from different sources.

- The Indicator Framework for TerraFund is called the Monitoring, Reporting, and Verification Framework, and it consists of a collection of indicators and sub-indicators that serve as proxies for various dimensions of restoration impact, encompassing ecological, socioeconomic, and biophysical. An Indicator is a measurable variable used to represent change or the attainment of a goal (e.g., increased tree cover) for TerraFund. An indicator may be a composite of multiple sub-indicators.
- For example, the indicator "Trees Restored" is a composite indicator compiling 4 sub-indicators: number of trees under restoration reported by projects, number of seedlings or saplings grown in nurseries as reported by projects, number of trees counted through photointerpretation, and percent of tree cover assessed through remote sensing. The reason for composite indicators for trees restored is because the proof of trees restored is represented in a different format at different stages of time.

Within this framework, the TerraFund portfolio is monitored through data collected and analyzed from different sources at a predetermined frequency described in the Monitoring, Reporting, and Verification Framework. The consistent collection and analysis of data using the same method over time enables stakeholders to track changes—whether positive or negative—for each indicator, thereby monitoring its progress.

You can read about all of TerraFund's indicators within the TerraFund Monitoring, Reporting, and Verification Framework here: The TerraFund Monitoring, Reporting, and Verification Framework

Reporting

Reporting refers to data collected from champions through project, nursery, and site reports, which are submitted on the TerraMatch platform in a standardized format every six months. TerraFund's project managers and portfolio specialists assess the quality of the reported data, and WRI aggerates and analyzes the data. During the quality assurance (QA) process, TerraFund staff check for errors and follow-up with Champions to ensure that every organization provides answers based on a consistent understanding of the question.

Verification

Verification refers to periodically subjecting reported information to some form of review, analysis or independent assessment to establish completeness and reliability. Verification improves accuracy and conformance with established procedures. Verification can take the form of first party (self-review/internal audit), second party (conducted by an interested/affiliated party), or third party (conducted by a completely independent and unaffiliated third party).

For TerraFund, some form of verification is undertaken for all indicators because our funders expect credibility and trust. We also want to provide our Champions with an extra seal of approval for the quality of their work.

Q: What is my role in MRV?

In TerraFund's Monitoring, Reporting, and Verification system, your role is to submit accurate site, nursery, and project profiles on TerraMatch, followed by reports for each profile every six months.

Also, you must collect and submit polygons indicating the locations of all areas where restoration work is conducted after planting. Alongside polygons, you will provide information about each restoration area, including the name of each polygon, restoration practice, target land use system, how trees are distributed, and planting date.

Your responsibility under Monitoring and Verification is to comply with requests for supplemental documents and be available for verification through additional data collection and site visits.

Your TerraFund project manager and portfolio specialist will closely assist you in gathering this data.

Q: What if I don't have staff in my organization tasked with regular reporting or someone familiar with using apps to collect data?

In such cases, we recommend budgeting for hiring a GIS technician, either on a long-term basis or as a consultant, and someone dedicated to reporting. The GIS technician should have experience using a handheld GPS or mobile app for collecting GPS data that showcases the locations of your restoration areas. The staff devoted to reporting should have experience collecting and compiling data to write and submit reports. Regular reporting and polygon submissions are crucial responsibilities for all restoration champions, and noncompliance may impact your ability to continue with TerraFund. For sample scope of work or job descriptions for these roles, please contact your TerraFund portfolio specialist for more information.

Collecting GPS Points & Polygons

Q: What is a Geographic Information System (GIS)?

A GIS consists of integrated computer hardware and software that store, manage, analyze, edit, output, and visualize geographic data. It combines spatial information, such as maps and coordinates, with attribute data, like population statistics or land use, to solve various spatial problems in various industries like restoration to environmental management.

Q: How should I collect geospatial location data for my restoration areas?

There are two approaches to collecting geospatial data of your restoration areas. Which approach you will use depends on the size and number of areas you will be restoring through this project.

Q: What equipment do I need to collect GPS points or polygons?

Your organization should already have the approvals necessary through community and/or government engagement to restore your sites. Once restoration work has begun, preferably on the same day of planting, you will collect polygons or GPS points representing the locations where trees have been planted.
To do this, you will need an Android cell phone with Wi-Fi or cellular data. Before heading to the site, you will need to download the Flority app. If you happen to lose cellular service, the Flority app will continue to function offline, and you should continue using it, even without connectivity.
Once you have finished your field activities and regain a connection, the data will be automatically uploaded to the Greenhouse cloud-based platform where you can visualize, edit and download collected data. Then, the polygons are

taken off Greenhouse, quality assured, and then uploaded by the TerraFund team to your TerraMatch profile. Training on how to use this application and system will be shared during the April in-person training workshops.

Q: Do I need to know how to use GIS software to collect geospatial location data for my restoration areas

No, the Flority app is designed for people without GIS experience to use. As long as you are comfortable using a phone app and reading a map, you can collect polygons showing the locations of your planting areas. We will provide additional training during the next set of in-person onboarding workshops.

Q: When should I collect polygons and GPS points of my restoration areas?

Polygons and GPS points should be collected during or right after planting.

Q: How do I submit polygons and GPS points?

If you use the Flority app to collect polygons and GPS points, the collected data is then shared directly with the team and then housed on TerraMatch. If you want to use another application or system, you must receive approval from the TerraFund monitoring, reporting, and verification team.

Project Risk, Delays & Termination

Q: At what point is a TerraFund project considered "at risk"?

Common factors that can put a project at risk:

- Not meeting contracted planting/implementation targets and timelines
- Not submitting reports on time
- Not communicating with your project manager about challenges
- Enterprise organizations only: falling behind on loan repayment

Q: What happens if circumstances beyond our control — extreme weather, delays, etc. — affect our project?

TerraFund doesn't expect perfection, but does expect proactive communication. Depending on the situation, options include submitting a disturbance report (documenting losses and a plan going forward), restructuring a loan repayment timeline (enterprise), or receiving additional support to get back on track. The key requirement is timely communication — problems typically only become "at risk" issues when they go unreported.

Q: Under what circumstances could a project be terminated, and what happens if it is?

- **Nonprofit organizations:** Termination can occur "for cause" (e.g., non-compliance, land conversion, corruption, displacement of people) or "for convenience," and is preceded by a warning letter and a 30-day suspension period. If terminated, any unused funds must be returned; funds already spent on approved activities do not need to be returned.
- **Enterprise organizations:** TerraFund enterprise contracts run six years, and projects are not typically terminated outright — WRI works with champions through loan restructuring, additional support, or other partners. Non-compliance instead results in consequences such as formal warning letters and being flagged with WRI for future financing.

Still Have Questions?

- Project-specific questions: reach out to your project manager directly.
- General questions: info@terramatch.org, or your cohort's WhatsApp group.

- Self-serve guidance: terramatchsupport.zendesk.com