Research Challenge Grant Reporting Requirements and Guidelines **March 2023**
Note: Although Annual Reports are required, Quarterly Reports are strongly encouraged. Quarterly report format may be chosen by the PI.

Annual Project Report Requirement (due Oct. 31)

Please provide an update on the following items:

1. Overview of the project written for those with a science/engineering background.

2. Assessment of overall progress on the scientific goals of the project including research activities and accomplishments. Milestones and metrics should be included in the assessment.

3. Assessment of overall progress on the education and workforce development goals of the project, including diversity and equity activities. Milestones and metrics should be included in the assessment.

   (Note that sections 1 and 2 can be reported on according to Tasks that were defined in the proposal if preferred.)

4. Progress toward Sustainability including Follow-on Funding (both submitted proposal amounts, and funded proposal amounts for the year and a cumulative total), and any partnerships that will provide resources to the project. An analysis of economic development may be included if appropriate.

5. Financial Update including Explanation of Carryover Funds for next year (budgeted funds not spent). See Financial Report instructions below.

6. Assessments and Recommendations by the Project Advisory Board.

7. An update and overview of the work plan for the coming year.

8. A list of all student and faculty participants including demographic data for all participants, i.e., sex, race/ethnicity, immigration status if not an American citizen.

9. A list of degrees completed through participation in the project, and a list of publications and presentations, and intellectual property applied for.

10. A project highlight that can be used for dissemination about the project. Please provide a 200 word write up, and one or more email high resolution jpeg photo files (>1 MB) to HEPC. Photos of students are of particular value. The highlight may be submitted to HEPC separately via email.

Both the Annual Report and Financial Report (see next page) should be uploaded to the GO system.

Annual Financial Report (due Oct. 31)

Please provide an expenditure report for the year ending Dec. 31 using the template available here https://wvresearch.org/wp-content/uploads/2022/10/FinancialReportTemplate10.22-1.xlsx.

Instructions for the form:
- In the first annual report, the cumulative budget should be for Year 1 only. In subsequent years, the cumulative budget should reflect the total amount released from HEPC.
- The second column should represent your actual cumulative expenses through the date of submission (Oct. 31), and the third column should list anticipated expenses for Oct.31 to Dec. 31. The fourth column should show the anticipated amount of unspent funds on Dec. 31 and should be addressed in the Annual Report Narrative under Carryover Funds (#5 above).
- Actual expenses should align closely with the invoices received by HEPC.
- Do not change the budget column cost categories unless you have been approved for a Budget Modification by HEPC.

Release of the next year's funds will be assessed using the Financial Report. If spending is significantly behind budget, the increment for the coming year may be reduced.

Please alert HEPC to significant changes in scope or spending as soon as possible.