

Science Foundation Arizona

Reporting Requirements

Quarterly/Final Expense Reports

Expenditure reports are due from the institution's sponsored projects office at most 30 days after the end of each quarter (quarterly report) and at most 90 days after the end of the grant term (final report). The most up to date template available can be found on the SFAz website (<http://www.sfaz.org/live/collection/grantees>). The report *must* be on this template, be consistent with the approved Budget of Record, and be signed by the institution's sponsored project office prior to being emailed to Phillip Ramirez (pramirez@sfaz.org). Unused funds *must* be refunded by the PI's institution within 30 days of submitting the final report.

Quarterly/Final Progress Reports

These reports must be emailed by the end of each quarter (quarterly report) and at most 90 days after the end of the grant (final report) to the cognizant SFAz program coordinator (see contacts below)

1. **Milestone report:** Deliverables and milestones as approved at the time of award must be reported on the most up to date template available, which can be found on the SFAz website (<http://www.sfaz.org/live/collection/grantees>). The report *must* be on this template.
2. **Narrative report:** Program progress should also include the following information in format indicated
 - a. Summary of program goals, objectives, evidence of progress pertaining to those goals and objectives; presentation of impacts; and discussion of any anticipated difficulties, scope changes, or schedule status (narrative)
 - b. Participants (faculty, staff, students, collaborators) (table)
 - c. New publications, presentations, patents and licenses, funding leveraged, non-SFAz funding proposed (table)
 - d. A paragraph briefly describing potential stories for media and news (past or present) related to the program (narrative) or links to existing press releases
 - e. Industry partner(s) activity update if appropriate (narrative)

Annual Review

Prior to end of each grant year, the PI will be contacted to participate in an in-depth review of his/her project. Typically, this review will involve submission of an annual report according to SFAz instructions (Annual Review Checklist available at <http://www.sfaz.org/live/collection/grantees>) and a reverse virtual site visit with participation of external reviewers. This process is to inform SFAz of the project's progress, leverage, value to Arizona, and quality of industry partnerships (when applicable). It is also meant to provide due diligence on financials and meet match requirements for upcoming year (when applicable).

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