

NSF Annual & Project Outcomes Reports: Demystifying Preparations



Live Webinar
Wednesday, May 25, 2022 - 2:00 pm





Getting Started

- Using the chat box, tell us how many viewers are in the room with you
- Ask questions in the chat
- Questions will be answered during the webinar
- Change the view in the upper right-hand corner





Housekeeping

- Registered participants will receive a link to the webinar recording
- Registered participants will receive an e-mail with any attachments shared in Chat
- Typically happens within one week of the broadcast
- Tutorial based on the webinar will be published in the *Resource Library* on Mentor-Connect.org
- Tutorial includes the PowerPoint slides with annotated text



Welcome and Introductions



Elaine Craft, Principal Investigator

**Mentor-Connect: Leadership Development and Outreach for ATE
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Emery DeWitt, Project Manager, Co-Principal Investigator

**Mentor-Connect: Leadership Development and Outreach for ATE
Florence-Darlington Technical College, SCATE Center of Excellence**

Email: emery.dewitt@fdtc.edu



Mentor-Connect Webinar Objectives

Demystify requirements and help grantees prepare

- annual reports
- final outcomes report





- Overview
- NSF Annual Report
- Evaluation(how does it relate)
- NSF Outcomes Report



Poll Question

What NSF reports have you previously created? (check all the apply)

1. Annual Report
2. Outcomes Report
3. I am an evaluator and have created evaluation reports
4. None



Poll



Why and Who (excerpt from NSF Website)

- NSF **requires** that NSF-funded researchers regularly report on the progress of supported projects and the way funds are used
- Only Principal Investigators (PIs) and co-PIs can create, edit and submit project reports
- Sponsored Projects Office (SPO) staff and administrative users with read-only access can view project reports

NOTE: SPO is likely the same person as the Authorized Organizational Representation (AOR) who submitted your grant.



Types of Reports

- Annual Reports
 - PI (with team) creates Annual Report
 - External Evaluator contributes Annual Evaluation Report
 - Internal to NSF
- Outcomes Report
 - PI submits after college administrative review
 - At conclusion of grant
 - For broad, general audiences
 - External to NSF



Who Should be Involved - Internal

- Administration
- Faculty
- Internal Advisory
- Grant Professionals



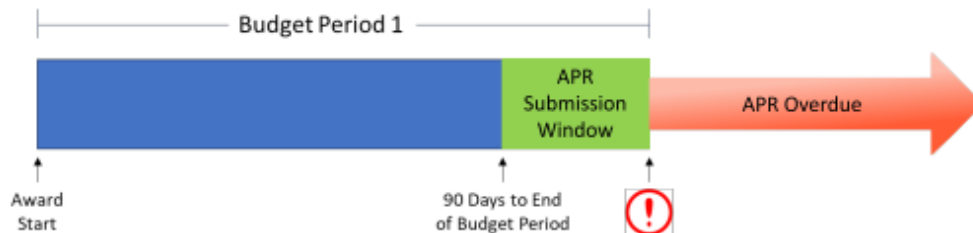
Who Should be Involved - External

- Industry Partners
- Academic Partners
- External Advisory Committee
- External Evaluator



NSF Project Reporting Reminders

Updated June 28, 2021



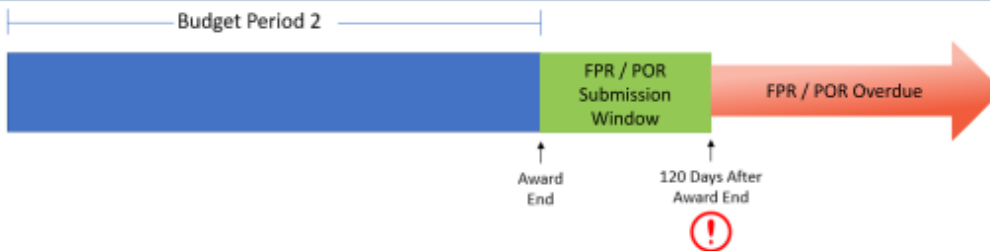
The Annual Project Report (APR) is due during the 90 days prior to the end of the current budget period. This allows adequate time for the cognizant NSF Program Officer to review and approve the report prior to the start of the next budget period.

The Principal Investigator (PI), Co-PIs, and Sponsored Program Officials associated with the award receive E-mail notifications every 30 Days during the 90 days preceding the end of the current budget period.

APRs become overdue *at the end* of the budget period (e.g., Year 1 of a Standard NSF Grant)

Timely submission of the APR is required by NSF Research Terms and Conditions, NSF Grant General Conditions, and NSF Cooperative Agreement Financial & Administrative Terms and Conditions (CA-FATC).

Reports are considered due until the cognizant NSF Program Officer approves the report.



The Final Project Report (FPR), which is the final APR of the project, and Project Outcomes Report for the General Public (POR) must be submitted **NO LATER THAN** 120 Days following the End Date. These reports become overdue on day 121 following the end date of the grant.

Reminder E-mails are sent to the PI, Co-PIs and all SPOs beginning the day after the end date of the grant and on the 30th, 60th and 90th days thereafter (pending the report submission).

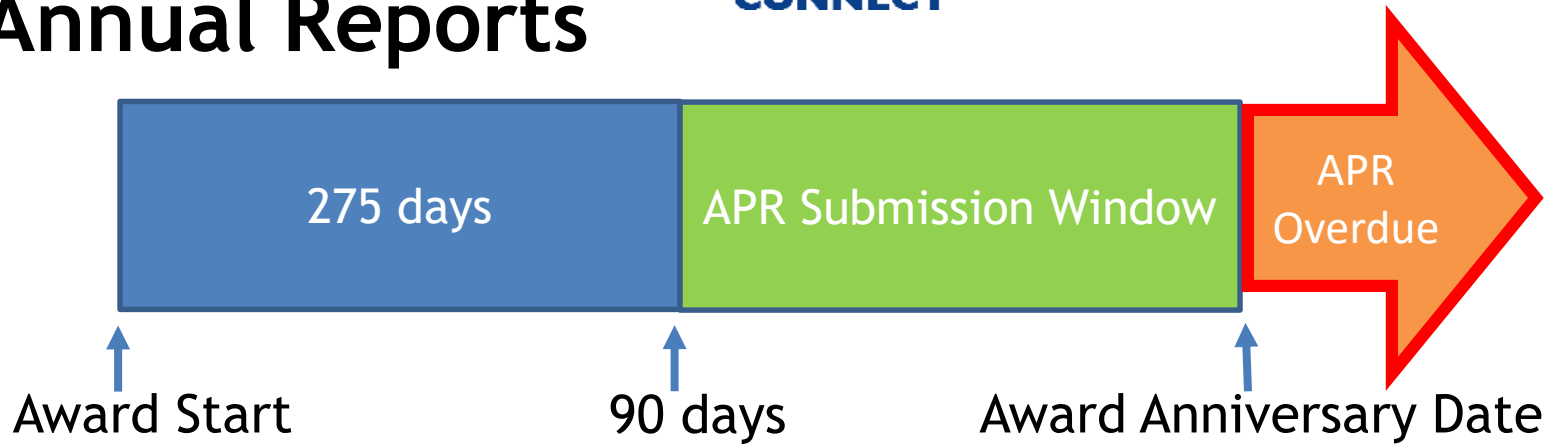
Overdue Project Reports will delay additional funding (e.g., Increments, Supplements) and administrative actions (e.g., No Cost Extensions) for current awards or any associated awards.

Timely submission of the FPR and POR is required by NSF Research Terms and Conditions, NSF Grant General Conditions, and NSF Cooperative Agreement Financial & Administrative Terms and Conditions (CA-FATC).

NSF Program Officials do not approve the Project Outcomes Report. NOTE: Submission of this Report marks the completion of the Project and begins the Closeout procedures. **Be absolutely sure the project is over before submission!**



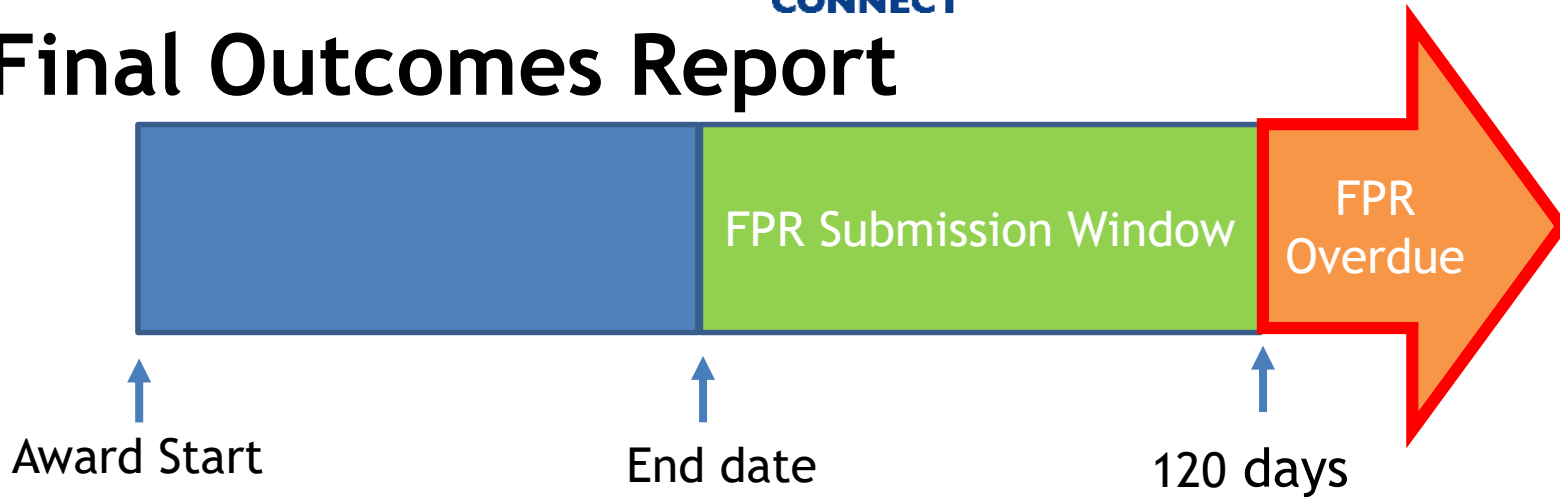
Annual Reports



- Required annually each project year
- Due in 90-day time frame prior to award anniversary date
- Due until Program Officer approves (allow >2 weeks)
- NSF send alerts at 90, 60, and 30 days prior to anniversary date



Final Outcomes Report



- One (1) Final Outcome Report required with 120 days of grant end date
- 30, 60, and 90 day alerts sent after grant end date (pending report submission)
- Focus on purpose and outcomes for a broad, general audience
- Be absolutely sure the project is over before submission



When you submit the Final Outcomes Report,
you are signaling NSF to close your award.

No reprieve!



Overdue Project Reports

- For current awards or any associated awards*
 - Delays additional funding
 - Increments
 - Supplements
- Delays administrative actions
 - No Cost Extensions



*Any other grant for which PI or Co-PI is Senior Personnel, no matter who is grantee!



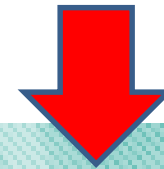
Accessing Annual Report & Outcomes Report





HELP Instructions

- Access Research.gov HELP instructions (upper right corner of homepage)
- Screen-by-screen instructions for completing annual report template

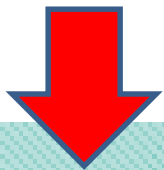


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Sign In

- Access Research.gov
- Click Sign In
(upper right corner of homepage)



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Accessing and Login

- Use same login as used for other items in Research.gov (& Fastlane.gov)

NSF Account

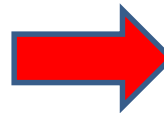
Primary Email Address or NSF ID

[Forgot ID](#)

Password

[Forgot Password](#)

Sign In



Awards & Reporting

- [Notifications & Requests](#)
- [Project Reports](#)
-  [Award Functions](#)
- NSF Public Access Repository (NSF-PAR):
 - [Add Research Products](#)
 - [Manage Research Products](#)



Reports Dashboard in Research.gov

Project Reports

What is the difference between an Annual, Final, Interim and Project Outcomes Report?

Download a project report template

Example Project Reports (Demo site)

Reports Due

Reports Due < 12 Months

All Awards

Show 25 per page

PAGE: 1 of 1

Award Number	Award Title	Report Type	Status	Days Until Overdue	Report Overdue Date	Action
2055362	Collaborative Research: HSI ATE Hub 2: Professional Development for Culturally R...	Annual	Due	46 days	07/01/2022	Create/Edit

PAGE: 1 of 1

Show 25 per page

Export options CSV Excel XML

Award Number

Award Title

Report Status Type

Days Until Overdue

Report Overdue Date

Action (Create/Edit)



Report Status Indicators

- Not Yet Due
- Due
- Overdue
- Submitted
 - Under Review
 - Approved



Getting Started

- Download template (if you want)
- You will copy and paste answers into actual report at Research.gov

Research.gov
ONLINE GRANTS MANAGEMENT
FOR THE NSF COMMUNITY

NSF

NSF Project Reporting Format

This document has been developed to provide Principal Investigators (PIs), co-PIs, and research organizations with:

- A listing of the questions that will be asked in the new NSF project reporting format;
- Assistance in planning for the submission of the report; and
- A tool to help PIs collaborate with other contributors in answering these questions, if needed.

The project reporting service on Research.gov and the associated [help documentation](#) provides more detailed instructions and contextual assistance.

Note: NSF project reports are not cumulative and should always be prepared for the specific project reporting period only.

Please should NOT complete and upload this document to Research.gov in order to meet your reporting requirement. You are required to enter text in the text boxes available online.

Accomplishments

You have the option of selecting "not applicable" for any question that does not apply to your project.

What are the major goals of the project?

What was accomplished and information for at least one reporting period?

Major Activities:

Specific Objectives:

Significant Results:

Key outcomes or other achievements:

What opportunities for training and professional development has the project provided?

Have the results been disseminated to communities of interest? If so, please provide details.

What do you plan to do during the next reporting period to accomplish the goals?

NOTE: You may upload PDF files with images, tables, charts, or other graphics in support of the Accomplishments section. You may upload up to 4 PDF files with a maximum file size of 5 MB each.

Please should NOT complete and upload this document to Research.gov in order to meet your reporting requirement. You are required to enter text in the text boxes available online.



Annual Report - Major Goals

- What are the major goals of the project?
 - From proposal
 - Don't change without permission



Annual Report - Accomplishments

- What was accomplished under these goals?

Providing information for at least 1 of the 4 categories is required.

- Major activities
- Specific objectives
- Significant results
- Key outcomes or other achievements



Annual Report - Information Needed

- What opportunities for training and professional development has the project provided?
- How have the results been disseminated to communities of interest?
- What do you plan to do during the next reporting period to accomplish the goals?

NOTE: You may upload PDF files with images, tables, charts, or other graphics in support of the Accomplishments section. You may upload up to 4 PDF files with a maximum file size of 5 MB each.



Annual Report - Products

- Within the *Products* section, you can list any products resulting from your project during the specified reporting period.
- Most likely items
 - Conference Presentations/Papers
 - Websites
 - Curricula/modules
 - Recorded webinars



Annual Report - Products

Select Product (dropdown)

Book, Book Chapters, Invention, Journal or Juried Conference Paper, License, **Other Conference Presentation/Paper**, **Other Product (activates another dropdown, see below)**, Other Publications, Patent Applications, Technologies and Techniques, Thesis/dissertation, **Websites or other Internet Sites**, Evaluation Instruments, Survey Instruments, Protocols, Other [If select, then describe in text box provided].

Activate with "GO" button

Required to describe product and how it is being shared.

Other Products (dropdown)

Databases, Physical collections, **Audio or Video Products**, Software or Models, **Educational Aids or Curricula**, Instruments or Equipment, Data Research, Materials (e.g., cell lines, DNA probes, Animal models)

***selections most likely for ATE Projects**

Can upload up to 4 pdf files in Products section, < 5MB each.

Products i i NSF Specific

Submit New Product(s)

Select the type of product you want to add to your report or upload multiple products using BibTex file.

Select Product:

--OR--

Nothing to report

Supporting Files

You may also upload PDF files with images, tables, charts, or other graphics in support of this section. You may also upload up to 4 PDF files with a maximum size of 5MB each.

Please select a file.

Description (required if uploading a file). Please provide a description of the content contained in the attached file.



Annual Report - Participants

- What individuals have worked on the project?
- What organizations have been involved as partners?

NOTE:

- This is where you report PI and co-PI time
- Partners from proposal - high schools, other colleges



Annual Report - Impacts



➤ You might have nothing to report...yet



Impact on What?

(May not have anything to report for some categories)

- The development of the principal discipline(s) of the project?
- Other disciplines?
- The development of human resources?
- Teaching and educational experiences?
- Physical resources that form infrastructure?
- Institutional resources that form infrastructure?
- Information resources that form infrastructure?
- Technology transfer?
- Society beyond science and technology?

Also,

- What % of the award's budget was spent in a foreign country?



Annual Report - Changes/Problems

(May be none)

- Changes in approach and reason for change
- Actual or Anticipated problems or delays and actions or plans to resolve them
- Changes that have a significant impact on expenditures
- Has there been a change in your primary performance site location from the originally proposed? If so, please provide the location of your primary performance site and reason for the change in location.



Changes/Problems (Continued)

(May be none)

Less Likely with ATE Grants

- Significant changes in use or care of human subjects
- Significant changes in use or care of vertebrate subjects
- Significant changes in use or care of biohazards



Report Expectations

- When should you submit - what does 90 days mean?
- Length
- Attachments
- Time needed for completion

- Annual Report and Evaluation Report are consistent but content must differ



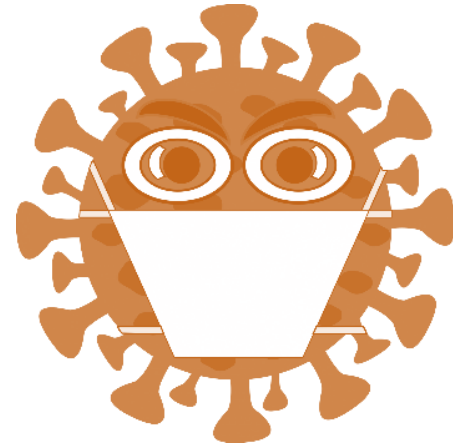
Five Common Mistakes

- Recycling last year's report without changes
- Including students' names
- Not attaching your evaluator's report
- Not using/responding to your evaluator's report
- Only reporting the positive things and not the challenges/unforeseen obstacles



Challenges/Unforeseen Changes

- Training & Travel
- Working with your business office
- Faculty Training with current workload
- Unexpected financial costs (certification exam)
- Equipment (vendor timeline, cost more than original estimate)
- Evaluator's Site visit - Plan ahead
- PI or Co-PI leaves the institution (training, salary adjustments and increases)





Tips Beyond Instructions

- Beware of browser selection
- Print and review BEFORE submitting
- Understand Report Due Date and NSF Notifications
- Notify Program Officer prior to reporting significant changes





QUESTIONS



Final Outcomes Report

- Must be submitted NO LATER THAN 120 Days following the Project End Date
- Reminder e-mails are sent to the PI, Co-PIs and AOR beginning the day after the end date of the grant
- Be absolutely sure the project is over before submission



Final Outcomes Report - Details

- Develop document, then cut & paste into text box provided in Research.gov
- 200-800 Words
- Content
 - Project outcomes or findings that address intellectual merit and broader impacts of your work
 - Briefly describe important outcomes of your award
- Save, Save & Submit, or Cancel commands at bottom of screen



Final Outcomes Report - Attachments

- Can add up to 6 images
- < 8MB
- Landscape orientation (width > height)
- Acceptable file formats: JPG, JPEG, GIF, BMP, PNG, TIFF
- Must provide copyright release



Final Outcomes Report

- Project Outcome Reports are not reviewed or approved by NSF
- You may preview your report prior to submission
- Will receive notification “Project Outcomes Report Submitted Successfully”



Final Tips for Outcomes Report

- Edit as if being distributed as PR for your college
- Minimize process & activities - focus on what happened or resulted
- Emphasize features that indicate your project was a good use of public funds
- Take advantage of Guide for preparing Final Outcomes Report provided in [Research.gov](https://www.research.gov)



Sample Final Outcomes Report

- 382 words
- Written by PI
- Reviewed by co-PIs, Grants Professional, Evaluator and PI from an ATE Center before submission
- Focused on what happened or resulted

This project focused on (1) improving the awareness and perception of technology and engineering careers and educational opportunities, and (2) increasing the number and diversity of technicians available for employment in the workforce. Asheville-Buncombe Technical Community College (A-B Tech) partnered with the 14 high schools in its service area (Buncombe County, Asheville City and Madison County) to offer outreach to personnel, students, and parents.

The project's three-pronged approach resulted in outreach to over 3,500 people during the project. There is a saying that you "can't do what you don't know about." The project was successful in letting targeted groups know about the technology programs and the paths students can follow at A-B Tech. Below is an overview of some of the events held for targeted groups:

1. High School Personnel - The project team hosted meetings for high school personnel including teachers, counselors, and support staff. Pre-covid, these events included Lunch and Learn sessions and two-day on-campus workshops. During covid, virtual events were held utilizing Zoom and YouTube.
2. Students - Meetings were held with high school students via classroom presentations, student club meetings, career days and leadership academies.
3. Parents - Events which focused on parent engagement were hosted. The most popular and well-attended sessions were scheduled as part of local high school sporting events. The lesson learned about engaging parents is the importance of hosting activities during events they would already be attending.

At the conclusion of the project, enrollment of high school students in the targeted programs had doubled. Enrollment was defined as students starting A-B Tech within one year of high school graduation. The targeted programs were Computer Engineering Technology, Electronics Engineering Technology, Mechanical Engineering Technology, Geomatics Technology, Environmental Engineering Technology, IT: Information Systems, IT: Systems Security, and IT: Network Management.

Both the in person and virtual events created critical relationships between community college faculty and high school personnel. One teacher who attended a workshop stated: "It is crucial that we connect students who have an interest . . . to their passion and with all that is possible for their lives. "

Due to covid restrictions, many of the planned activities were migrated to a YouTube channel and virtual meetings. Long term these resources will continue to be available, and usage will continue after the conclusion of the project.



NSF Disclaimer will be Added

“This Project Outcomes Report for the General Public is displayed verbatim as submitted by the Principal Investigator (PI) for this award. Any opinions, findings, and conclusions or recommendations expressed in this Report are those of the PI and do not necessarily reflect the views of the National Science Foundation. NSF has not approved or endorsed its content.”



QUESTIONS



Upcoming Webinar

Including a Recruitment/
Retention Plan in your Proposal
June 22 – 2:00-3:00 pm ET

Connect with Mentor-Connect

+01011010110



•www.Mentor-Connect.org



•843.676.8541



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[LinkedIn.com/MentorConnect](https://www.linkedin.com/company/MentorConnect)



Webinar Evaluation

- Please complete the evaluation/poll
- Scroll down to make sure you answer all questions





Leadership Development and Outreach for ATE

NSF DUE #1840856

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SC ATE Center of Excellence

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