

The quarterly progress report template, which will be an automated form, is currently under construction and should be available mid-December. Below is what information will be required to be included in your quarterly report.

REPORT SUBMITTAL GUIDANCE: QUARTERLY PROGRESS REPORT

1. When is the Quarterly Progress Report due?

Quarterly (Q) reports are due on a fiscal year basis. The following table gives the quarterly performance period and the report due date.

<u>Quarter</u>	<u>Period Covered by the Quarterly Report</u>	<u>Report Due Date</u>
1 st (1Q)	October 1 through December 31	January 30
2 nd (2Q)	January 1 through March 31	April 30
3 rd (3Q)	April 1 through June 30	July 30
4 th (4Q)	July 1 through September 30	October 30

2. Required Information.

QUARTERLY PROGRESS REPORT

- Project Title:** Title
- Covering Period:** Time period covered by the report (e.g., October 1, XXXX through January 31, XXXX)
- Date of Report:** Date (e.g., February 25, XXXX)
- Recipient:** Company/University Name
Address
- Contract Number:** XXXXXXXXXX
- Project Number:** 0x-xxx (last 2 digits of the Year awarded – 3 digit assigned number)
- Principal Investigator:** Principal Investigator name, telephone number, and email address
- Collaborators:** Names and email addresses

Project Objective: (Paragraph. This paragraph should be the same from quarter to quarter.)

Background: This section changes slowly, outlining a brief summary of previous work completed to date and key accomplishments.

Status: This section should include a concise narrative assessment of the work done in the past quarter according to the tasks for the project, as well as any problems or programmatic issues related to milestones and schedule, and how they are being resolved. Identify the organizational participant responsible for each task area noted.

Task A:

1. Task Status
2. Issues/Concerns

Task B:

1. Task Status
2. Issues/Concerns

Plans for Next Quarter:

A few sentences about the plans for the next quarter and other plans according to the schedule for the project.

Patents: A cumulative list of patents applied for or resulting from the award.

Publications/

Presentations: Identify and attach all publications resulting from the award during this quarter. Identify and attach all presentations resulting from the award made to industry or government groups during this quarter.

Milestone Status Table: This should be a complete list of project milestones, anticipated completion dates and actual completion dates. The milestone identification number should correspond to the task numbers in your agreement to aid in tracking.

Status Summary of NERI Tasks – Phase 1-3:

Phase1:

Milestone/Task Description	Planned Completion Date	Actual Completion Date	Percent complete

Phase2:

Milestone/Task Description	Planned Completion Date	Actual Completion Date	Percent complete

Phase 3:

Milestone/Task Description	Planned Completion Date	Actual Completion Date	Percent complete

Budget Data (as of date): A quarterly spending plan will be developed by the recipient and approved by CAES. The approved spending plan shall not change without documented spend plan change approval from CAES which will only affect the future spending plan. The actual costs should reflect all money actually spent by the project in the corresponding period plus and estimated accrual amount for work performed if subcontract invoices have not yet been received/paid.

			Approved Spending Plan		Actual Spending	
			Quarter	Cumulative	Quarter	Total to Date
	From	To				
Year 1:						
Q1						
Year 1:						
Q2						
Year 1:						
Q3						
Year 1:						
Q4						
Year 2:						
Q1						
Year 2:						
Q2						
Year 2:						
Q3						
Year 2:						
Q4						
Year 3:						
Q1						
Year 3:						
Q2						
Year 3:						
Q3						

Year 3: Q4						
Totals						

Cost Performance:

