

Mentor-Connect

Effective Strategies to Prepare Annual Reports: Demystifying the Process

2019 ATE PI Conference

Thursday, October 24

10:10 am-11:00 am



Introductions

- Elaine Craft
- Thomas Higgins
- Erika Louviere
- Tanya St Julien
- Pamela Silvers

Annual vs. Evaluator's Report

- PI (or team) creates Annual Report
- External Evaluator creates their report

Information Needed

- What are the major goals of the project?
- What was accomplished under these goals (you must provide information for at least one of the 4 categories)?
 - Major activities
 - Specific objectives
 - Significant results
 - Key outcomes or other achievements

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?
- Last Item: ATTACH EXTERNAL EVALUATOR REPORT

Accessing and Login

www.Research.gov

Use same login for both Research.gov and Fastlane



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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Engaging Key Partners - Internal

- Administration - Communicate with Deans and Upper Management how the institution can meet the needs of the industry and how your project fits.
- Faculty - Meet and advise them of the projects purpose and goals even if they are not part of the grant.
- Grant Coordinators - Explain to the Grants department what your goals are pertaining to the project so they can effectively assist with the requirements of HR, Purchasing & Accounts, and NSF.

Engaging Key Partners - External

- Industry Partners - Survey the needs of your industry and obtain in writing if possible. (Advisory Committee Meetings)
- External Evaluator - Update and communicate with your evaluator regularly

Report Expectations

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

Five Common Mistakes

- 1) Recycling last year's report without changes.
- 2) Including students' names.
- 3) Not attaching your evaluator's report.
- 4) Not using/responding to your evaluator's report.
- 5) 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 – avoid Explorer
- Understand Report Due Date and NSF Notifications
- Notify Program Officer prior to reporting significant changes

When YOU Want Help

Mentor-Connect NSF Annual Report Help Guide *Session Handout*

- Available at www.Mentor-Connect.org,
- Get a Resource, Key Words “annual report”

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