Periodic Report Format and Content

Periodic reporting is a requirement for all research projects for The Water Research Foundation. Most projects will require submittal of Periodic Reports, the format for which is shown below. Some projects have specialized periodic reporting requirements, and Exhibit B of the Project Funding Agreement will include the reporting schedule and requirements for a particular project.

PERIODIC REPORT

I. **Title Page** – 1 page (every 3 months)
   a. Project title and number
   b. Periodic report number and period covered
   c. Principal Investigator and organization
   d. Project start date and end date
   e. Subrecipients, participating utilities and organizations, and other participants
   f. Project funding
   g. Project objective

II. **Status Summary** (basic Periodic Report) – 2 to 5 pages (every 3 months)
   a. Statement of goals for the reporting period
   b. Summary of work tasks completed and accomplishments during reporting period, including significant findings, major observations, statement of how goals were met, and applicability of findings to the water community.
   c. Assessment of actual versus planned progress for each work task (recommend using a table to show actual versus percent completed for each task)
   d. Tasks proposed to be completed in the upcoming period
   e. Problems encountered
   f. Rationale for proposed changes (if any) to the scope of work
   g. Brief explanation of abstracts, presentations, papers, and reports submitted for publication or presentation during reporting period
      i. List of submitted/published reports (title, author, journal/conference, date)
      ii. Copy of submitted/published reports and presentations
   h. Response to questions and comments on previous report

III. **Technical Summary** – 5 to 20 pages (every 6 months, include with Status Summary)
   a. Methods and materials
   b. Data and analysis
   c. Significant findings
   d. Applicability of findings to water utilities
   e. Response to questions and comments on previous report

IV. **Website Update** - 1 to 2 pages (every 6 months, include as separate section after Technical Summary)
  a. Project title and number
  b. Principal Investigator and organization
  c. Reporting period (i.e., period covered by update)
  d. Activities and progress since previous Website Update; work to be performed next period
  e. Findings of significance to WRF subscribers and other stakeholders; how/why are they significant?
  f. Statement of how overall project results will ultimately benefit water utilities and the water community
  g. Brief statement on communications and outreach (presentations, papers, etc.)