



Guidelines for preparing 2019-20 FY CRB July Progress Report Form

General Information

In an ongoing effort to improve research transparency for CRB Board members and to assist the CRB Research Department in assessing project progress, some modifications were made to the format of last year's CRB Progress Report Forms and these revised forms, which include two parts, will continue to be used for the 2019-20 FY:

- (1) an **Executive Summary Form** and
- (2) a **Description of Activities** Document

Note: Information contained in Progress Reports is used to review CRB-funded research project progress and is made available to CRB Staff, Board Members and Committee Members for review. Due to Bagley-Keene requirements, this information may be discussed in public meetings for review of project progress and project funding decisions in subsequent years.

If your project involves confidential or proprietary information that should not be distributed for patent or other reasons but is part of your CRB-funded research efforts, please contact the CRB Research Department at research@citrusresearch.org for a watermarked 'CONFIDENTIAL' template.

CRB Progress Reports are due for the 2019-20 FY on March 2, 2020, and July 1, 2020.

If you have any questions regarding Progress Report Submissions, please contact the CRB Research Department at research@citrusresearch.org or by phone during normal business hours at 559-738-0246.

Executive Summary Form

Project Information

Provide the necessary project identification information including: Date Submitted, CRB Research Project Number, CRB Research Project Title, Principal Investigator(s) Name and Affiliations, Project Collaborator(s) [Last Name only], Overall Project Completion (in %) and [Current] Year of [Total Proposed] Years.

Executive Summary of Project Progress (limited to space provided)

Provide in layman's terms the overall project goal and accomplishments made to date. This summary must include the following:

1. Overall project goal(s).
2. Accomplishments made to date for each objective to achieve overall project goal(s). For all projects, include all progress since March 1.
3. Remaining steps needed within each objective to achieve overall project goal(s).

PIs should note at the bottom of the Executive Summary Form whether this research will result in a product that will require commercialization or further development by some other entity prior to grower use. The CRB Research Department may reach out to you in the coming months with additional questions based on your response and the *Commercialization Potential* questions should be answered within the Description of Activities document (below).

Description of Activities Document

The purpose of the Description of Activities document is to provide detailed information on project accomplishments for each objective leading to project completion.

For **each** objective currently in progress or scheduled to be underway, according to the CRB-funded Research Proposal, a description of the project objective and activities towards milestone accomplishment must be provided to include:

1. *CRB Project Number* and *Objective Number* (if provided in the proposal).
2. *Objective Description* – restate the objective as described in the CRB-funded Research Proposal.
3. *Objective Completion Date* – restate completion dates for each objective (month, year) as provided in the Gantt Chart from the CRB-funded Research Proposal.
4. *% Complete* – Estimation of % work completed to date for that objective.
5. *Summary of Accomplishments* – address progress made for each objective listed. Any data tables or graphs included must be referenced in text and provided within that specific objectives section if applicable. Also note any obstacles, delays or research changes experienced that may impact project progress.
6. *Alternative plan* – detail the alternative plan or approach developed in the event of unexpected results.

Additional Information

Publications/Presentations – provide any papers and presentations that include aspects of this project that have been prepared or presented since the previous progress report

Status of Funds – provide a summary on the amount of funds spent to date and note any issues with funding.

*Commercialization Potential** - provide information, as appropriate, on intellectual property, patents and development efforts pertaining to this research project.

Submission

Progress Report files should be submitted to the CRB Research Department at research@citrusresearch.org no later than **March 2, 2020** (for March Progress Report submissions) or **July 1, 2020** (for July Progress Report submissions).

Project Number must be included in title of documents submitted. Late submissions may result in the withholding of funds.