

PI Name:

EDGE Project No:

EDGE Contract No:

## **Economic Development Generating Excellence (EDGE) Annual Progress Report and Final Report Template**

The EDGE program recognizes that there will be a large number and wide variety of impacts associated with each its funded projects. Therefore, EDGE gathers and analyzes information regarding the impact of its projects on the state economy. In addition, EDGE seeks to understand how its funds have impacted the recipient's program.

**Complete the following template for submission of the Annual and Final Progress Reports to the EDGE Policy Board.** Unless otherwise indicated, the *annual and reporting period will be the most recent calendar year*. Should any field in the template not apply to your project, please enter N/A. Do not include any personally-identifiable health data or other information that may compromise any individual's privacy.

The annual reporting should be returned via email to [rwaldrop@okedge.org](mailto:rwaldrop@okedge.org). **Annual Reports are due to the EDGE Policy Board office by January 30<sup>th</sup> of the following year. Final reports are required at the end of the grant or contract but are discussed separately within the contract terms.**

If you have any questions or comments please contact Rachel Waldrop Holzhauser at (405) 319-8288 or Paul G. Risser at [risserp@ou.edu](mailto:risserp@ou.edu).

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Is this an Annual or Final Progress Report?

	What time period is this report for? MM/YYYY – MM/YYYY
<b>Annual Progress Report</b>	
<b>Final Report</b>	

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**Progress Report  
Cover Sheet**

**Contracting Agency:** Oklahoma Economic Development Generating Excellence  
(EDGE) - State of Oklahoma

**Program Account:** EDGE

**Contractor:**

**Project No.:**

**Contract No.:**

**P.I.:**

EDGE  
**Funding amount:** Year 1: \$ Year 2: \$

**Funding period:**

**Reporting period:**

**Project Title:**

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## EDGE Impact Report Form

Please complete the following tables. The tabular numbers apply to your EDGE-funded activities during the calendar year, regardless of previously reported periods. Please use additional space as necessary.

### *IMPACTS OF EDGE INVESTMENTS*

1.	Number of patent applications	
2.	Number of patents awarded	
3.	Number of scientific/technical publications	
4.	Number of collaborators/business partners	
5.	Leveraged funds (\$)	
5a.	Capital Investments – private	
5b.	Grants	
5c.	Contracts	
5d.	Licenses	
5e.	Royalties	
6.	Number (FTE) jobs created	
7.	Number (FTE) jobs retained	
8.	Average salary of EDGE jobs created/retained	
9.	New businesses created in Oklahoma	

<b>Supported by EDGE funds: # of individuals</b>	<b>FTE (0.05-1.0)</b>	<b>Annual salary range</b>
< \$20K		
\$20K - \$40K		
\$40K - \$80K		
\$80K - \$120K		
\$120K - \$180 K		
> \$180K		

<b>Not - Supported by EDGE funds: # of individuals</b>	<b>FTE (0.05-1.0)</b>	<b>Annual salary range</b>
< \$20K		
\$20K - \$40K		
\$40K - \$80K		
\$80K - \$120K		
\$120K - \$180 K		
> \$180K		

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### ***D. Follow-on funding***

1. Describe any grants or gifts enabled by your EDGE Funding that were received by you or your collaborators, including the source (e.g., federal, corporate, foundation), purpose of the funding and value. Briefly explain how EDGE funding enabled the grant or gift.

## **SUMMARY OF PROGRESS**

### ***E. Progress of your EDGE funded work***

This should serve as a comprehensive narrative providing an overall picture of the progress achieved during the most recent calendar year. ***This summary will be provided in addition to the completed Impact Report Form designated above.***

- Include your progress towards the project milestones as listed in your grant agreement. If you made progress on or met a milestone applicable to a previous or future reporting period, please cite that milestone and describe the progress.
- For Annual Progress Reports, if you have not made the expected progress on a milestone, please explain why and how you intend to accelerate progress, or alternatively, if the milestone needs to be adjusted.
- Describe, separately and even if duplicative of progress against milestones, the significant events during the reporting period, key findings, changes in personnel, unanticipated obstructions, notable results, etc.
- Describe, separately and even if duplicative of progress against milestones, any issues or questions that you would like to bring to the attention to the EDGE program staff.

### ***F. Financial statements***

**Provide a SEPARATE financial statement for your project including a balance sheet, statement of cash flow, and income statement.**

1.	EDGE Capital Awarded	
2.	EDGE Capital Deployed	
3.	Gross and Net Monthly Cash Burn Rate	
4.	Quarterly Revenue	
5.	Previous Quarterly Revenue	
5a.	Quarterly EBITDA	
5b.	Outstanding Debt	
5c.	Debt incurred in Quarter	

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5d.	Licenses Equity Financing to Date	
5e.	Equity Financing to Date	
6.	Equity Financing to Date	
7.	Equity Financing Raised in Quarter	
8.	Anticipated Financing/ Counterparty/ Target Date	
9.	Grant Money Raised in Quarter	
10.	Grant Money Anticipated	
11.	Most Recent Valuation	
12.	PDF Document Submission of Financial Statements	