| **Project Summary Sheet for [Insert Project Title]**  *It is only necessary to fill out fields deemed relevant to your project.* | |
| --- | --- |
| **Date Prepared** |  |
| **Research Project Manager** |  |
| **ISA Project Number** |  |
| **General** | |
| **Funding Source** |  |
| **Grant/Contract Term** |  |
| **Lead PI** |  |
| **Department** |  |
| **Legal Sponsor** |  |
| **Sponsor’s Project Number** |  |
| **SFU Account Numbers** |  |
| **GrantTracker ID** |  |
| **Contacts** | |
| **Funding Agency Contact** |  |
| **Department/Lab Administrative Contact** |  |
| **ORS Grants/Contracts Officer** |  |
| **Research Accounting Contact** |  |
| **Facilities Contact** |  |
| **Other Contacts** |  |
| **Financial** | |
| **Total Research Funding ($)**  ***specify if in USD*** |  |
| **Eligible/Ineligible Use of Funds** | Identify restrictions, if any. Review for GST/PST/HST restrictions on purchased goods. |
| **Billing Schedule/ Deadlines** |  |
| **Matching Contribution** |  |
| **Sponsor Carry-forward Approval?** | If project is multi-year, please determine if carry-forward budget needs prior approval by sponsor (as it might delay the billing/installments in the next year). |
| **Reporting** | |
| **Financial Report Schedule and Deadlines** |  |
| **Technical Report/Presentations Schedule and Deadlines** |  |
| **Subrecipient Reporting (Sub to SFU)?** |  |
| **Other Misc.** | |
| **Grant or Contract?** |  |
| **Co-PI’s/Primary Collaborators** |  |
| **Associated SFU Projects** |  |
| **Equipment Ownership** |  |
|  |  |
| **Ethics Approval Required?** |  |
| **Audit Requirements** | Consider elements such as record retention. |
| **Special Conditions for PI** |  |
| **Governance Structure** |  |
| **Committee Meetings Requirements/Schedule** |  |
| **IP Considerations** |  |
| **Where are Project Files Saved?** |  |
| **General Remarks** |  |