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## **Current reporting arrangements**

Colleges and universities which are awarded SFC strategic investment funding are asked – as a condition of grant – to report on their achievements and spend, usually on an annual basis, with a summary report at the end of funding. These requirements are set out in the letter of award. Historically, these reports have been provided in a variety of formats, reviewed by our policy staff and reported to our Council and its committees.

## **New return approach (2016)**

We want to improve the use we can make of the information you provide about your SFC-funded projects, to focus more on your achievements so that these can be shared, celebrated and learnt from. Our new reporting approach is designed to help do this.

We are standardising the way we ask colleges and universities to report on their project achievements. If you are an SFC grant-holder, a grant administrator or a senior college or university manager these changes should be of interest to you. If you have any queries about your reporting arrangements, please contact the [SFC liaison officer](#) specified in your letter.

Your day-to-day contacts with your SFC liaison officer will continue to provide opportunities for deeper discussion and the exchange of more detailed information.

The return you submit under this process provides an additional formal reporting record and is intended to be a routine check-point in the ongoing interactions between your project and SFC. We may get back to you to talk to you further about particularly interesting elements of your return.

Our new approach is intended to deliver:

- Reporting arrangements that more efficiently and effectively demonstrate the sectors' work and success in delivering the priority outcomes for SFC and the Scottish Government.
- A reporting system that allows the capture of information in a form that readily identifies outcomes from our investments to the Board and its committees.
- Improved ability, for the sectors and SFC, to demonstrate accountability and good governance in our use of public funds.
- Increased ability to learn from the success or failure of investments.
- Improved decision-making on future funding to maximise the impact achieved in and by the sectors.

The main features are:

- Standard return format for all awards.
- Outcome focus.
- Narrative emphasis.
- Financial return.
- Consistent return date for all awards (30 September).
- Annual returns as a routine check-point in the ongoing interactions between your project and SFC.
- Opportunities to alert us to your project's impact beyond the period of SFC funding.

The new approach includes all SFC strategic investments apart from:

- Outcome Agreements and core funding.
- Specific additional elements of monitoring, such as Knowledge Exchange KPIs.

### **Sector involvement**

Universities Scotland, Colleges Scotland and the College Development Network have been kept informed about work towards our new reporting arrangements. We have been assisted by a sector user group (current membership below).

### **Sector user group**

- Richard Malham, Research Policy Officer, University of St Andrews.

- Valerie McCutcheon, Research Information Manager, University of Glasgow.
- Richard Simson, Performance and Planning Manager, Ayrshire College.
- Wendy Steven, Research Support and Innovation Officer, Edinburgh Napier University.
- James Toon, Research Information System Manager, University of Edinburgh.

Valerie McCutcheon ([Valerie.McCutcheon@glasgow.ac.uk](mailto:Valerie.McCutcheon@glasgow.ac.uk)) may be contacted on the user perspective.

### **Feedback**

We know that any new system will not be perfect, so we are interested in your views on how this approach can be made better. Please let us have your comments and suggestions, by using [rosi@sfc.ac.uk](mailto:rosi@sfc.ac.uk) or contacting the SFC liaison officer for your award.

### **Further information**

If you require further information about SFC's new reporting system, you can contact us at [rosi@sfc.ac.uk](mailto:rosi@sfc.ac.uk).