

Guidance: Annual return forms

All live and recently finished awards are required to complete an annual return by noon on 30 September, reporting on activity in the previous academic year. You may submit your return at any point in advance of this date.

This form is designed to collect structured, standardised information across all strategic projects, irrespective of scale, policy area or sector. The form consists of two sections:

- [Section 1] Annual return, which includes a financial statement.
- [Section 2] End of award return.

All awards should complete the relevant parts of section 1 for the latest academic year (August – July). Award projects that have finished in the last academic year should also complete section 2, reviewing the outcomes for the entire award duration.

When completed, please send your return rosi@sfc.ac.uk

Why should you submit your return?

Telling us about the progress of your project helps to improve the monitoring of the progress of our investments to understand whether they are on track to achieve their agreed outcomes and demonstrate to key stakeholders the value of our investments.

By reviewing your project at the end of an award, you are also helping us to gather experiences and views from our investments to understand better what works well in such projects and the nature of any challenges faced. Reporting on strategic investments is also a condition of award.

Return guidance

Any sections of the return that are not relevant to your award should be left **blank**.

In Section 1 – Annual return

We are primarily looking for a narrative return which will give a clear sense of:

- How your project is progressing.
- What you are achieving with our support.
- Any issues you are facing.

In Section 2 – End of Award return

We are primarily looking for a narrative return which will give you the opportunity to:

- Record what you have achieved with your project and our support.
- Reflect on how well you think it has gone and the challenges you faced.
- Identify outcomes from your award which you would be happy for us to highlight more widely.

Evidence that supports your narrative should be available to us if we require it. Some additional guidance is included in the return, however if you require more assistance, you should contact the SFC liaison officer named in your award letter.

Definitions

These are our definitions of the key terms used in the return.

Award letter	Our letter offering funding which set out agreed outcomes, the scale of funding offered and the conditions of grant.
Communicating knowledge	One way transfer of knowledge from academia to wider audiences.
Consultant	Any person or business contracted but not directly employed by an institution (HEI or college) to provide advice and services to your project such as legal advice on commercialisation.
Contractual relationship	Formal agreement to provide / exchange services which may or may not involve financial payment.
Enhanced people capacity	New posts created, at both HEIs and colleges, by the project in the reporting period, not just those funded directly from the SFC funding contribution - such as academic teaching and research posts, non-academic posts, consultants, secondments or studentships. Current staff contributing to projects as part of their existing role or staff replacements for existing posts should not be included.
Geographical reach of outcomes and impacts	The extent of the geographical reach for each outcome / impact reported on should be recorded using the following categories: <ul style="list-style-type: none">• Regional - within the Scottish region where your project is located (e.g. Strathclyde or the Lothians).• National (Scotland).• UK-wide.• International.
Impact	Any longer term effect of an activity or outcome which adds value or benefit to others, which may concern,

	<p>for example:</p> <ul style="list-style-type: none"> • Improved educational and skill levels of the workforce. • Solutions to societal problems. • Economic impacts. • Improvements in survival morbidity or quality of life. • Changes in public attitudes on social issues. • Improvements in the regulatory environment. • Improvements in public service delivery.
Improved facilities / infrastructure	New or enhanced training facilities, laboratories, IT infrastructure or newly created people networks including scientific or teaching collaborations (national and international) and knowledge exchange partnerships with business.
Non-academic communication posts	Communications posts such as media, public relations and marketing posts.
Non-academic professional/ managerial	Professional / managerial posts such as knowledge exchange, business engagement or relationship management, student support and quality assurance professionals.
Non-academic technical posts	Technical posts such as laboratory, engineering, building, IT and medical technicians (including nurses).
Outcome	The changes or differences you plan to achieve through the activity funded by our award. Outcomes are the result of the activity, not the activity itself. Outcomes can be changes in behaviour, attitudes, knowledge, infrastructure, capacities or skills.
Progress indicators	Measures which help determine your progress towards achieving the agreed outcomes during the period of your award.
Proposal	The original statement which you provided to SFC of what outcomes you want to achieve, how you will deliver them and the costs of undertaking the activities.
Secondment	Any person who continues in employment with an external body, including the private sector, public sector and voluntary or charitable bodies, while providing input to the award.
Sustainability	Continuing the benefits created by the strategic investment after SFC funding has ended. This may be in a different format from the original project.
Sharing / exchanging knowledge	Two or multi-way communication and dialogue between academia and external communities