Reporting on SFC Strategic Investments: changes in approach

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Summary: Guidance on changes in approach to reporting on strategic investments and where to find additional information.

FAO: Principals and directors of Scotland's colleges and universities

Further
information:
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Scottish Funding Council
Promoting further and higher education

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1. I am writing to advise you of changes to the way in which institutions are asked to report progress on awards they hold from SFC Strategic Investment funds. I am drawing this advice to the attention of award leads and institutions' central administrative contacts for outcomes reporting, as they will have more immediate responsibility for action. I would be grateful if you could ensure that anyone else in your institution who has relevant responsibility is also notified.

2. The key changes of which you should be aware are:

   - **There will be a standard reporting deadline of 30 September annually**. Historically, reports have usually been requested on the anniversary of award.

     We are phasing this in. Awards which are due to report in 2016 should submit these by the date specified in their grant letter. Awards which are due to report in 2017 (Jan-Dec) should report on or by 30 September 2017. We will notify awards of changes to their reporting requirements.

   - **There will be a standard return** which covers (a) annual reporting on the previous academic year (August to July) and (b) end of award reporting on both the final period of activity and the full period of funding. This return will focus on the outcomes of the funded activity. A financial statement will be incorporated into this return.

     This return template is available immediately. It should be used by awards due to report on or after 30 September 2016. It may also be used by awards due to report before then.

3. Our intention is that these changes will provide a more efficient and predictable means for you to fulfil your conditions of grant and demonstrate your award achievements to the SFC.

4. In developing this approach, we have had the benefit of the advice of a User Group, drawn from institutions' staff with responsibilities for outcomes reporting systems (see Annex A for current membership). However, we welcome ongoing feedback from those who are to use the system.

5. We will provide information on the awards to which this new approach applies to the institutional contacts listed in Annex B. We will be holding briefing sessions on the new approach later in the summer and will contact award leads and administrative staff directly about this.

6.   The return template can be downloaded in Word format and further guidance can be found on our website: http://www.sfc.ac.uk/funding/Strategicinvestments/StrategicInvestments.aspx

7.   Returns may be submitted to rosi@sfc.ac.uk at any convenient point, but – from 1 January 2017 – should be received by 30 September each year.

Further information

8.   Any queries, requests for further information, or feedback should be directed to Morag Campbell, Assistant Director, Skills, Research and Knowledge Exchange (Tel: 0131 313 6530, email: mcampbell@sfc.ac.uk).

Martin Fairbairn
Chief Operating Officer / Secretary to the Board

User Group: Current membership

- Richard Malham, Research Policy Officer, University of St Andrews (previously Anna Clements, Head of Research Data and Information Services, University of St Andrews)
- Valerie McCutcheon, Research Information Manager, University of Glasgow
- Richard Simson, Performance and Planning Manager, Ayrshire College (previously Gerry Dougan, e-College Lead Specialist, College Development Network)
- Wendy Steven, Research Support and Innovation Officer, Edinburgh Napier University (previously David Breckenridge, Head of Systems and Assurance, Edinburgh Napier University)
- James Toon, Research Information System Manager, University of Edinburgh

Institutional contacts

Jackie	Galbraith	Vice Principal - Strategy, Planning and Performance.	Ayrshire College
David	Killean	Vice Principal	Borders College
Jannette	Brown	Vice Principal	Dumfries and Galloway College
Ray	Mudie	Vice Principal - Planning & Learner Services	Dundee and Angus College
Craig	Wilson	Deputy Principal/VP People Performance & Planning	Edinburgh College
Joanna	McGillivray	Assistant Principal	Fife College
David	Neilson	Vice Principal, Finance & Planning	Fife College
David	Allison	Head of Information Systems	Forth Valley College
Robin	Ashton	Executive Director	Glasgow Colleges Regional Board
Derek	Smeall	Assistant Principal	New College Lanarkshire
Ann	Southwood	Principal	Newbattle Abbey College
Pauline	May	Planning Manager & Secretary to the Board	North East Scotland College
Shona	MacLennan	Director of Business and Org. Development	Sabhal Mòr Ostaig UHI
Angus	Allan	Depute Principal	South Lanarkshire College
Mike	Devenney	Vice-Principal (Further Education)	University of the Highlands and Islands
Stephanie	Graham	Vice Principal	West College Scotland
Lindsay	Seywright	Assistant Principal, Curriculum and Planning	West Lothian College

Caroline	Summers	Director of Strategic Planning	Abertay University
David	Reeves	Director of Finance & Research Funding	Abertay University
Wendy	Steven	Research and Innovation Manager	Edinburgh Napier University
John	Marshall	Director Research, Innovation and Enterprise	Glasgow Caledonian University
Nicola	Siminison	Institutional Repository and Records Manager	Glasgow School of Art
Linda	Kerr	Research Support Librarian	Heriot-Watt University
Kate	Signorini	Depute Director (Planning)	Open University in

			Scotland
Helen	Muir	Research Support Librarian	Queen Margaret University
Emma	Gillibrand	Research Strategy Manager	Robert Gordon University
Ewan	Hainey	Secretary	Royal Conservatoire of Scotland
Linda	Whillans	Education Business Support Manager	SRUC (Scotland's Rural College)
Nykolhla	Strong	Research Information Officer	University of Aberdeen
Clive	Randall	Research Policy Manager	University of Dundee
M	Houston		University of Dundee
James	Toon	Research Information System Manager	University of Edinburgh
Valerie	McCutcheon	Research Information Manager	University of Glasgow
Anna	Clements	Assistant Director of Library Services	University of St Andrews
Lauren	Wilson	Research Systems Manager	University of Stirling
Emer	Mcdougall	Research and KE Operations Manager	University of Strathclyde
Karen	Furness	Grant and Contracts Manager	University of the Highlands and Islands
Ian	Bishop	Head of Research Services	University of the West of Scotland