



**Australian Government**



**Office for  
Learning & Teaching**

# **Office for Learning and Teaching Fellowships**

## **Information for managing your Fellowship**

## Purpose

This fellowships management information document lists important information you will need for managing your fellowship.

This document includes information about:

- Programme establishment
- Programme management
- Programme impact, dissemination and contact with the media
- Programme reporting
- Intellectual property and acknowledgement of the OLT

Fellows are advised to also refer to the *Fellowships information and nominations instructions* of the relevant year for the operational policies. These are available on the OLT webpage [Fellowships and Nominations](#). The information in this document is in addition to the operational policies.

## Stay in contact

We encourage you to contact us with questions, updates, and good and bad news. If your fellowship is not progressing as planned, we would rather know earlier than later so we can help you solve the issue. We also want to hear your good news stories, progress, achievements and information about upcoming programme activities.

## OLT contact details

### Office for Learning and Teaching

Level 10, 255 Elizabeth Street  
Sydney NSW 2001

GPO Box 9880

Sydney NSW 2001

Email: [learningandteaching@education.gov.au](mailto:learningandteaching@education.gov.au)

Phone: (02) 6240 0625

Fax: (02) 6267 4499

### Stay in contact with the Australian Learning and Teaching Fellows (ALTF) Network

The ALTF is a network for the support of quality learning and teaching in Australian Higher Education. The ALTF comprises experienced Fellows that offer support for current OLT Fellows, and that provides a mentorship programme for new Fellows.

The ALTF website offers a wealth of resources [www.altf.org/](http://www.altf.org/)

The ALTF Network convenor Professor Dawn Bennett can be contacted with enquiries [d.bennett@curtin.edu.au](mailto:d.bennett@curtin.edu.au)

## Programme establishment

### Funding agreement

The funding agreement has been signed and a copy returned to your institution's Vice-Chancellor's office. If you do not have a copy, please either obtain one from your university or contact the OLT for an electronic copy.

The funding agreement outlines important clauses that you need to be aware of. We suggest you read through the agreement carefully and check with your legal office if there are any clauses you are unsure about. We ask you to take particular note of the Intellectual Property clauses (discussed further below).

The funding agreement also outlines important programme milestones, such as due dates for progress reports and for the final report. It also lists the programme deliverables that you will work towards, as well as programme payment milestones.

### Reference group

Many fellows will appoint a reference group. The reference group should include participants who have appropriate expertise to ensure there is constructive advice on the design, development and direction of the programme, and to ensure the programme has maximum impact within the institution/s engaged in the programme and beyond those institutions. The OLT may appoint a representative to the reference group.

In some cases, the OLT will determine that a steering committee be appointed to either one or a number of fellowships designed to contribute to the same or similar outcomes. In this case, the OLT reserves the right to appoint the steering committee.

Some reference groups are involved from very early on in the programme while others come on board later on. Some Fellows use reference groups for input into the day-to-day planning of the programme while others seek more strategic input from their reference group. Some reference group members dedicate a significant amount of time to the programme while others dedicate less time. It is important to discuss and agree on these matters with the reference group at the onset of the fellowship.

## Programme management

### Managing timelines

The timeline and reporting due dates for the programme are set out in the funding agreement. However, we understand that sometimes, due to unforeseen circumstances, there might be the need for an extension to due dates. The OLT will consider short extensions for good reasons that will have a demonstrable and unexpected impact on the programme.

If something happens that may impact on your ability to deliver the fellowship on time, please be in touch with the OLT as soon as possible to discuss.

## Managing finances

Managing the budget is an important aspect of managing a fellowship. You have submitted a programme budget as part of the nomination and funding was granted based on your submitted budget. The total funding was paid on signing the funding agreement. You, as the Fellow, are responsible for delivering your fellowship programme within budget.

## Managing stakeholders

Managing your fellowship's stakeholders and 'bringing them along' throughout the life of your fellowship is important to its success. You will have many different groups of stakeholders, and it is important to understand, think through and plan for their distinct communication needs.

Communication with your own senior staff should not be forgotten. We suggest you book time with your Deputy Vice-Chancellor and other senior staff to discuss your programme's progress on several occasions throughout the fellowship's life span. The OLT also updates its Fellowships Standing Committee and Strategic Advisory Committee about programme progress.

## Programme impact and dissemination

Broad impact and influence are the corner stones of a successful OLT fellowship. It is therefore important to programme and plan for impact as part of the design and development of the fellowship proposal. The OLT expects a systematic approach to be taken to achieving impact and encourages the use of the Impact Management Planning and Evaluation Ladder (IMPEL). Information about impact and IMPEL is available on the [website](#) and in [Appendix B](#).

An important way to achieve impact is through effective dissemination and engagement with fellowship activities. Fellows are expected to plan a range of approaches to dissemination, as appropriate to their fellowship activities. Such approaches may involve strategic engagement with relevant groups within and outside the sector, and the creation of opportunities to promote their fellowship activities and to explain their goals and outcomes. In developing the dissemination strategy for inclusion in the fellowship proposal, fellows may refer to the [Dissemination resources](#).

## Media engagement

Positive promotion of OLT-funded activities in the media is encouraged and the OLT can help you with this. When considering media engagement, the following should be noted:

- fellows should make contact with their institution's media team, and the office of their Deputy Vice-Chancellor, to ensure the timing to media engagement is appropriate and to ensure optimal preparedness
- recommendations that might result from a fellowship must not be provided to the media before the final report has been released by the OLT
- a programme should have made significant progress before media coverage is sought.
- the fellow should be the key liaison point for the media

## Fellowship events

The OLT can promote forthcoming events conducted as part of fellowship programmes on the OLT website. Please contact the OLT at [learningandteaching@education.gov.au](mailto:learningandteaching@education.gov.au).

## Reporting

### Progress reporting

OLT progress reports provide an opportunity for engagement between the OLT and the fellow, and support programme progress. Generally, every six months, a progress report is due to the OLT. This is where you update us with information about progress against deliverables and let us know if there are any issues. All reporting dates are including in the funding agreement.

OLT progress reports take the form of a semi-structured discussion between fellows and OLT's programme support officers. Fellows should prepare for the discussion by referring to the guidance provided in the fellowship verbal progress report document on the website [www.olt.gov.au/fellowships-and-secondments/managing-your-fellowship](http://www.olt.gov.au/fellowships-and-secondments/managing-your-fellowship). The guidance provides a starting point for the conversation, and does not limit other relevant matters being raised.

The reporting dates for your fellowship are outlined in the funding agreement. The OLT will be in touch with you about four weeks before the due date of the progress report to arrange the time for the verbal progress discussion.

### Final report

A final report is due at the end of your fellowship programme and will be published on the OLT website, together with any other resources your fellowship has developed. Final reports should profile the outcomes and outputs of your fellowship, highlighting the impact the fellowship has had and can have in the future and describing how other institutions can make use of what has been delivered and achieved. The final report will also briefly document how outcomes have been achieved.

Keep in mind that the final report is a tool to disseminate programme findings and outputs. It needs to be written for a wide audience, enabling maximum impact.

The OLT has recently changed the format of its final report. Please refer to the [OLT website](#) for details about required content, and the format of the final report.

In brief, the final report has three parts, with page limits of 1:3:25. The three parts are:

- Part one: the **achievements statement** (one page only). This is a stand-alone key-messages document, presenting the main outcomes and outputs of the programme. The single page is designed to quickly and effectively communicate key points and resources from the programme. Part 1 should be able to stand-alone from Parts 2 and 3 and may be distributed to promote and further disseminate outcomes and outputs.
- Part two: the **executive summary** (maximum three pages) is used to summarise the issue/s and context for the programme, its outputs, key findings, and recommendations for future action (where relevant). The information in this part should also be able to stand alone as a summary document of the programme.

- Part three: the **narrative** (maximum 25 pages) is used to provide more detailed information about the programme.

Please email your final report in Microsoft Word format to:

[learningandteaching@education.gov.au](mailto:learningandteaching@education.gov.au) If appropriate, other related fellowship outputs should also be forwarded to the OLT. These may include the form of papers, websites, reports, DVDs etc.

The OLT will review the submission and may request changes to the report prior to finalisation. Once any requested changes have been made the publication approval/release will be issued in an official written notification from the OLT.

Once approved for publication, the OLT will send you a final agreed version of the final report. This is the version that will be published on the OLT web page and no further changes should be made to the final report from this time.

Please note that any websites developed as part of the fellowship programme will need to be kept live and updated for a minimum of five years after completion of the fellowship, as per the funding agreement.

## **Financial reporting**

### **1. Budget statement**

As your fellowship has received the full grant upfront, you will only need to submit a financial acquittal at the end of the programme, once the final report is submitted. The OLT will check spending against the budget during the verbal progress reports.

### **2. Final financial acquittal**

The signed financial statement of acquittal of funds, on the official OLT template, must be provided to the OLT within two months of completion of the fellowship, as per the funding agreement. The programme will not be considered complete until this is received.

The final financial acquittal should include a certified statement of income and expenditure against the budget categories specified in the approved fellowship nomination, included in the funding agreement.

Further information, templates and frequently asked questions about financial reporting are available in Appendix A.

# Intellectual property (IP)

## IP in the funding agreement

As per the funding agreement, the Department of Education owns the programme material and the intellectual property rights to all programme materials and the Department grants a licence to you to use, copy and reproduce the intellectual property rights.

## Acknowledging the OLT

Through their funding agreement with Department of Education, each fellow is required to acknowledge the Australian Government Office for Learning and Teaching in all published programme material, including journal articles, presentations, websites, and advertising and promotional materials associated with the fellowship.

### 1. Acknowledgement statement

The following statement should appear in all material developed in association with the program:

*Support for this fellowship has been provided by the Australian Government Office for Learning and Teaching. The views in this fellowship do not necessarily reflect the views of the Australian Government Office for Learning and Teaching.*

The word “fellowship” may also be replaced with terms such as “publication”, “website”, “brochure” etc. as appropriate. Where space is limited, please include the statement “supported by” next to the OLT logo.

### 2. OLT logo and branding

The OLT has a unique logo that may be used as part of your programme. As this logo contains a Commonwealth Crest, there are restrictions on its use. For details, please contact the OLT at [learningandteaching@education.gov.au](mailto:learningandteaching@education.gov.au). We will send you the logo file and instructions on how to use the logo. All use of the logo needs to be approved by the OLT before it can be used on any material.

The OLT logo may be used in conjunction with the acknowledgement statement, or a shortened version of it. Using the logo is not a requirement.

## Creative Commons

Websites, DVDs and other multimedia resources also need to have the Creative Commons information added:



*Unless otherwise noted, content on this site is licensed under the Creative Commons Attribution-ShareAlike 4.0 Unported License*

Information on the creative commons licence can be found at:  
<http://creativecommons.org/licences>

## Other useful links

Programme impact [www.olt.gov.au/impact](http://www.olt.gov.au/impact)

Programme dissemination [www.olt.gov.au/grants-and-programmes/dissemination](http://www.olt.gov.au/grants-and-programmes/dissemination)

Programme evaluation [www.olt.gov.au/evaluation](http://www.olt.gov.au/evaluation)

## **Appendix A: Financial frequently asked questions (FAQs ) and financial reporting template**

### **Q: What is the final financial statement/acquittal?**

A financial statement is a detailed statement of income and expenditure for the funding provided. All fellowships are bound by the funding agreement to provide one at the end of the programme. You can use your own preferred financial accounting system/codes to report on expenditure.

### **Q: Why do I need to complete a financial statement?**

This is a requirement of the funding agreement you entered into prior to receiving funding for your fellowship.

### **Q: What is the format of the financial statement?**

The financial statement must be in the format described above and be issued on official university letterhead.

### **Q: What is the “commitments” section?**

This section is for any funds that have been committed at the time of providing the report but have not yet been expended. For example, you may have hired the services of an IT contractor, agreed on a price, completed the work, but have not yet received an invoice for the services. The “commitments” section allows you to report this type of expenditure to assist in accounting for all funding received from the OLT.

This section can be left blank or removed if it is not relevant to your fellowship.

### **Q: Why do you require endorsement from the university’s finance manager?**

All funding provided by the Australian Government must be accounted for and audited in accordance with Australian accounting standards. A financial officer is required to ensure this takes place.

### **Q: What qualifications must the financial officer have?**

The financial officer must be a senior executive officer employed by your institution who has primary responsibility for managing the audit functions, or a certified practicing accountant, chartered accountant, or a member of the National Institute of Accountants and who has your institution's delegation.

### **Q: What happens if there is a sum of money unexpended at the end of the fellowship?**

If a fellowship has unexpended funds at the end, the fellow should contact the OLT to discuss how this money could be used or if it should be refunded.

**Final financial acquittal: template**

UNIVERSITY OF XXX LETTERHEAD

**FINAL FINANCIAL ACQUITTAL**

Fellows name: <Name>

Fellowship Title: <Title>

	\$ Excl GST
<b>Income:</b>	
<i>OLT Fellowship payment</i>	250,000
<b>Expenditure:</b>	
Fellow's stipend	150,000
Institutional overhead levy	25,000
Fellowship activities support	40,000
Dissemination activities	10,000
Travel costs	5,000
OLT event attendance costs	5,000
Evaluation costs	5,000
Final report editing costs	3,000
<i>Total expenditure</i>	<i>243,000</i>
<b>Balance</b>	<b>7,000</b>
<b>Commitments:</b> (if relevant)	
Travel costs	1,000
Web page development	4,000
xxx	2,000
<b>Final Result</b>	<b>0</b>

I, < John Smith >, have reviewed the above statement. I can confirm that this is a true and fair representation of expenditure associated with the OLT fellowship funding received, and the funds were expended on the conduct of the programme and in accordance with the funding agreement.

.....  
<John Smith, CPA>  
<Divisional Finance Manager>  
<Office of the Deputy Vice-Chancellor>  
<The University of XXX>

.....  
<Professor Steve Jones>  
<Fellow>

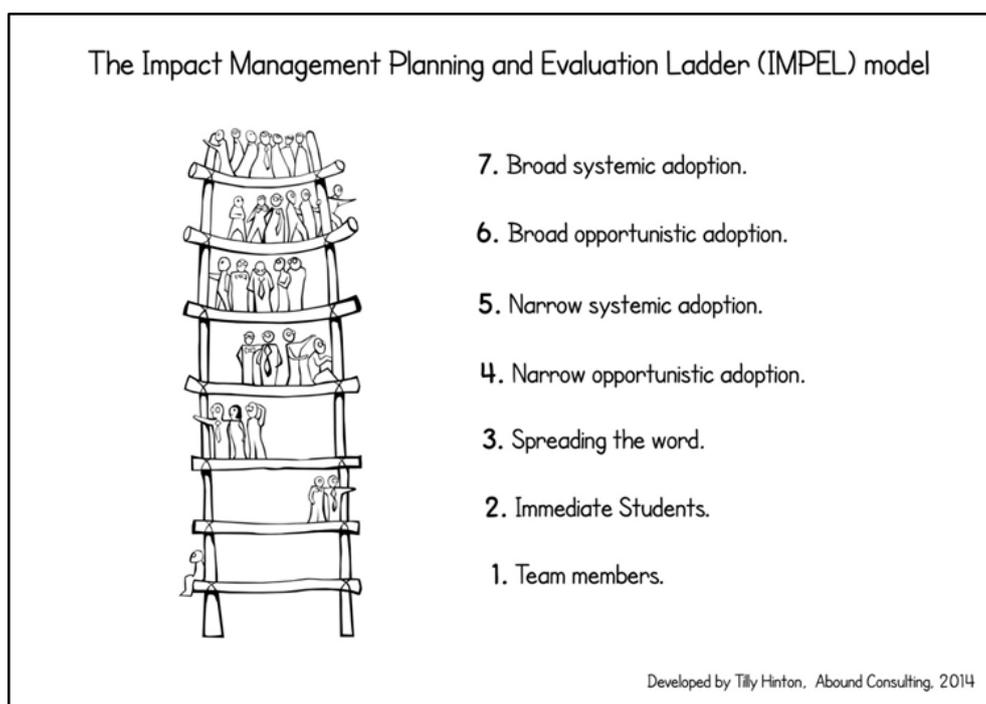
## Appendix B: Programme Impact planning template

### The Impact Management Planning and Evaluation Ladder (IMPEL)

The IMPEL model provides a framework for describing different types of change that can be achieved through educational development programmes. Each stage, or ladder rung, is incrementally broader in impact than the last. These rungs are:

1. Changes for programme team members
2. Changes by programme team members leading to changes for students who are directly influenced
3. Contributions to knowledge in the field; growth or spread of disseminated ideas; serendipitous adoption/adaptation by people beyond the programme's intended reach
4. Changes by opportunistic adopters at participating institutions leading to changes for students who are directly influenced
5. Systemic changes at participating institutions leading to changes for all relevant students
6. Changes by opportunistic adopters beyond participating institutions leading to changes for students who are directly influenced
7. Systemic changes beyond participating institutions leading to changes for all relevant students.

The model offers both a prompt for fellows in the planning, execution and reflection stages of educational development programmes, as well as a cogent frame for funding agencies to enunciate expectations, make funding decisions and evaluate the efficacy of funding schemes in facilitating strategic educational change.



## Programme Impact Plan

Impact is the difference that a fellowship makes in its sphere of influence, both during and after the funding period. Maximising impact requires forecasting and planning. The questions and matrix below provide a structure to prompt active and ongoing consideration and re-evaluation of impact and how it may be maximised given the evolution of the fellowship. Maintaining updated responses to the template is not intended to be a reporting requirement, rather a strategic steering tool for the fellow. The responses to the questions below, including input to the matrix, are expected to change over the life of fellowship as the work and results progress. The OLT will be interested in discussing evolving projections of impact at key points during the fellowship, including at progress and final reporting points.

	<b>Anticipated changes at:</b>			
	<i>NB: these are approximations &amp; text is not expected in every cell</i>			
	<b>Programme completion</b>	<b>Six months post-completion</b>	<b>Twelve months post-completion</b>	<b>Twenty-four months post-completion</b>
<b>1. Team members</b>				
<b>2. Immediate students</b>				
<b>3. Spreading the word</b>				
<b>4. Narrow opportunistic adoption</b>				
<b>5. Narrow systemic adoption</b>				
<b>6. Broad opportunistic adoption</b>				
<b>7. Broad systemic adoption</b>				

1. What indicators exist that there is a climate of readiness for change in relation to your intended fellowship?
2. In brief and indicatively, what impacts (changes and benefits) do you expect your fellowship to bring about, at the following levels and stages of the Impact Management Planning and Evaluation Ladder (IMPEL)?<sup>1</sup>

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<sup>1</sup> The full version of the IMPEL model, developed by Tilly Hinton while on secondment to the Office for Learning and Teaching, is online at <http://www.olt.gov.au/grants-and-programmes/impact>. Further information on this model and resources to assist in considering fellowship impact are available on the website.

3. What are your strategies for engaging with stakeholders throughout the fellowship?
4. How will you enable transfer<sup>2</sup> that is ensuring that your fellowship remains impactful after the funding period?
5. What barriers may exist to achieving change in your fellowship?
6. How will you keep track of the fellowship's impact? What analytics may be useful?
7. How will you maintain relevant programme materials for others to access after the fellowship is completed?

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<sup>2</sup> Transfer in this context means 'the processes undertaken to maintain momentum and impact beyond the funded life of the programme and beyond the programme team', Hinton, T., Gannaway, D., Berry, B., & Moore, K. (2011). *The D-Cubed Guide: Planning for Effective Dissemination*. Sydney: Australian Teaching and Learning Council.