**Progress reporting**

Progress reports will be conducted verbally through a semi-structured and recorded discussion with the OLT. These verbal progress reports will replace written progress reports. Verbal reports will be conducted by phone or through a face-to-face meeting with the project leader and/or the project manager (where possible) or the fellow. The OLT will take notes during the discussion and seek confirmation of their accuracy through an electronic exchange. This will reduce the reporting load, and encourage greater two-way communication between the OLT and project leaders/fellows. All progress reports will be called 'progress reports', including the year 1 report, and occur at six-monthly intervals.

The reporting dates for grants and fellowships are outlined in the funding agreement. The OLT will be in touch with the project leader or fellow approximately four weeks before the due date of the progress report to arrange a time for the verbal progress discussion.

A template will be provided to prepare for the progress reports. A copy is attached for your information.

**Final reporting**

The final report for OLT grants and fellowships will have 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 project. The single page is designed to quickly and effectively communicate key points and resources from the project.  Part 1 should be able to stand-alone from Parts 2 and 3 and may be distributed to promote and further disseminate project outcomes and outputs.

- Part two: the **executive summary** (maximum three pages) is used to summarise the issue/s and context for the project, 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 project.

- Part three: the **narrative** (maximum 25 pages) is used to provide more detailed information about the project. It may include detail on how the project was undertaken, how it progressed and any challenges or lessons learnt. A formal evaluation report may be included as an attachment to the report.

   The institutional certification is included as an appendix to the final report. The certification needs to be signed by the Deputy Vice-Chancellor (DVC) or equivalent,

and confirms that the final report is approved by the DVC. It does not need an actual signature – a name will suffice for formatting purposes.

**Financial reporting**

For grants and fellowships where the full funding amount was paid up front, a final financial acquittal will need to be provided at completion. The funding agreement outlines the due date for the acquittal.

If a grant has a second payment, this payment will only be made if the majority (70 percent or more) of the first payment is spent and if progress is satisfactory against planned deliverables. Once the project is ready for the second payment, a completed and signed 'financial acquittal of first payment' needs to be emailed to the OLT.

A final financial acquittal still needs to be provided on completion of the grant or fellowship. Refer to the funding agreement for the relevant dates.

**Transition period for new reporting**

For the three months until the end of 2014, all grant projects and fellowships can choose to use the old or the new format for final reports, and can choose to have a written or verbal progress report.

The OLT website will be updated this week, and from then until 1 January 2015 both the old and new templates and guidelines will be available to use.

As of 1 January 2015, only the new templates will be on the website, and all grants and fellowships will be expected to use the new format.

We encourage all grants and fellowships to start using the new final report format as soon as possible.

**Project Management Information Document**

To reflect the new reporting, we have updated the Project Management Information Document for grants and fellowships. This document lists all the information needed to manage OLT projects and fellowships, including information about:

- Reporting process and format
- Financial reporting guidelines and budget templates
- Impact
- Acknowledgement of the OLT and use of logo

Both documents are attached for your convenience.