

Attachment A2

Milestone report guide

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Purpose of milestone reports

Milestone reports provide a platform for delivery partners to formally demonstrate the progress of a project to Hort Innovation – that it is performing well and being managed professionally – and that it is expected to achieve intended outcomes.

Milestone reports assist Hort Innovation with the obligations of ensuring accountability to growers and levy payers, the Australian Government and other stakeholders. They demonstrate project performance against agreed milestone achievement criteria, outputs and outcomes as per the relevant “Agreement”. Information collected as part of project Monitoring and Evaluation (M&E) plans should also be reported in milestone reports. They also indicate potential project improvements, highlight any issues or risks, and indicate intellectual property, commercialisation and confidentiality issues and developments.

Although milestone reports are internal documents and are not formally published, Hort Innovation uses the information supplied in milestone reports (particularly the public summary) to communicate project progress, updates and outputs with stakeholders – growers, industry participants, government and other stakeholders, usually through the Hort Innovation website.

Templates, guides and forms

Templates, guides and forms can be found on the Delivery Partner Portal or alternatively, on the delivery partner section of our website at <http://www.horticulture.com.au/delivery-partners>. This includes the final report template and guide, milestone report template and guide, M&E template and guide and many more.

Due dates and variations

Milestone reports form part of the contractual requirements under the terms of the Agreement and are due in accordance with the schedule in that Agreement.

The first milestone report is designed Milestone 102 (the signing of the Agreement between Hort Innovation and the delivery partner marks the first project milestone – Milestone 101 – but does not require a milestone report to be submitted) and the last is the project’s final report. For more information on final reports, please refer to Hort Innovation’s final report guide available on the delivery partner section of the Hort Innovation website at www.horticulture.com.au/delivery-partners.

Hort Innovation regularly checks for overdue milestone reports. A milestone report that is submitted after its due date, or not submitted at all, could result in, amongst other things, the suspension of funding or the termination of the project due to non-performance.

A valid reason for extending the due date of a single Milestone Report may be considered by Hort Innovation, and if an extension is required, a request for extension must be submitted to the appropriate Project Manager at Hort Innovation well in advance of the due date. Requests to change the due date after the actual due date will not be accepted and may constitute non-performance.

Requests for changes to milestone achievement criteria, progress payments, project personnel or other changes to a project must be made prior to submitting a milestone report via a formal contract variation. Requests to do so must be submitted via the Delivery Partner Portal and discussed with the appropriate Project Manager at Hort Innovation. These requests will be assessed by Hort Innovation and if the request is approved, the project details will be updated in Hort Innovation’s project management system and through a written variation to the Agreement.

Approval process

Milestone reports are submitted through Hort Innovations Delivery Partner Portal. After submission, milestone reports are reviewed by Hort Innovation to ensure they meet standards. If a milestone report does not meet standards, it will be returned through the Delivery Partner Portal to the delivery partner for review, editing and resubmission.

Milestone report standards include, but are not limited to:

- The summary provides an effective overview of the project
- The project has delivered against the terms of the Agreement
- The report has been produced using Hort Innovation's milestone report template
- Each of the template sections provide the required information as stipulated below in the 'Format and structure' section
- The report has undergone proper editing.

Confidential projects

Milestone reports for confidential projects must be clearly marked as confidential – the option to do so, is located on the first page of the milestone report template. If individual sections of the milestone report are confidential, this should be indicated on the first page of the template and clearly highlighted in yellow where they appear in the milestone report.

To assist Hort Innovation with obligations of accurately communicating project results on a confidential project, a public project summary must be provided.

Visual content

Hort Innovation uses visual content to assist with communication to stakeholders – growers, industry participants, government and other stakeholders.

Visual content, such as images; designs, graphics and illustrations; footage and advertorials; and quotes and written content that are submitted to Hort Innovation may be used to illustrate project progress or activities in Hort Innovation communication channels, annual reports, web pages and the like.

Any visual content relating to final report activities must be included in final reports. The visual content should appear in the body of the report and should also be supplied to Hort Innovation in an appropriate format through the Delivery Partner Portal. For photographic imagery, the appropriate format includes .jpg, .tiff or .png formats at the best possible resolution.

Depending on file sizes, the visual content should be compressed into a .zip folder for transfer to Hort Innovation along with the 'Talent release form' as explained below.

Intellectual property, usage rights, attributions and credits for images:

Visual content supplied to Hort Innovation must contain necessary attributions, credits and permissions. Ownership and usage rights in and relating to this work must align with the contractual terms of the Agreement. For each image, it is important that you provide this information using the 'Talent release form'.

For each image and video, the supplied materials should include the following:

- .zip image folder
- Talent release form (if applicable) (available at <http://www.horticulture.com.au/delivery-partners>).

Hort Innovation's name protocol

To strengthen the recognition of the organisation's name it is important that reference to our name in final reports align with the following standards.

In general communication, the organisation must be referred to as **Hort Innovation**. It must not be shortened or abbreviated.

The organisation must not be referred to as HIA, HI, HIAL or any other acronym.

The organisation must be referred to as Horticulture Innovation Australia Limited in relation to legal notices and other formal disclaimers and copyright notices. In these instances, the only acceptable way to refer to the organisation in the first instance is Horticulture Innovation Australia Limited. It may then be shortened to Hort Innovation.

Submitting the report

Milestone reports must be submitted via the Delivery Partner Portal.

It is expected that all appendices be included in the final report document itself. Additional files (such as zipped image folders) can be separately uploaded via the Delivery Partner Portal.

Format and structure

Milestone reports must be produced using Hort Innovation's milestone report template. We have provided an overview of the content requirements for the milestone report template sections below.

It is important that milestone reports use information collected as per the project's M&E Plan to provide evidence of project performance. Hort Innovation's 'Project M&E guide and template' can be found on the Delivery Partner Portal or alternatively on the delivery partner section of our website at <http://www.horticulture.com.au/delivery-partners>.

Please note that the template and guide have not been adapted for any particular project. The documents and their contents should act as a guide and will need to be considered against any particular project that it is used for and adapted accordingly in consultation with the relevant Hort Innovation Project Manager.

PUBLIC SUMMARY

The milestone report summary provides an at-a-glance overview of the project's progress during the last reporting period. It is the information that Hort Innovation will use to communicate about how the project is progressing and what outcomes are being achieved for industry. Therefore, the summary must be easy to understand, concise and factual. It should be written in plain English, with all technical terms and concepts clearly explained with a lay audience in mind.

Usually, a length of one to three paragraphs (about 500 words) is appropriate. The summary should provide information on:

- Key activities during the reporting period
- Key outputs during the reporting period
- Key outcomes during the reporting period.

Please do not include any commercially or institutionally sensitive material or any personally identifiable information. All information included in the milestone report must be correct, up to date and not be misleading. Projects that are confidential must be summarised in a way that is suitable for public release. As the summary may be presented separately from the entire milestone report, it must be able to stand alone.

Quick tips

- Keep it simple and easy to read
- Communicate project outputs and outcomes (particularly tangible outputs that stakeholders can access and use)
- Think about what levy-payers and other industry stakeholders want and need to know about the project
- Describe progress with a big-picture-view

ACHIEVEMENTS

This section should form the bulk of the milestone report.

The content must provide a systematic and evidence-based account of how specific agreed milestone achievement criteria have been successfully achieved. Each milestone achievement criteria should be addressed separately via the table provided. Where relevant, provide supporting evidence of project delivery and performance using monitoring data collected as per the project's M&E Plan.

Milestone reports will only be approved if all the achievement criteria have been completed. Any change requests to milestone achievement criteria must be made to Hort Innovation as previously outlined.

Information that is not relevant to project progress and key achievements, such as background information and detailed methodology, should not be included.

Quick tips

- Make this the bulk of the report
- Address each criteria separately via the table provided
- Use monitoring data to provide evidence of performance
- Keep it relative to project progress and key achievements

OUTPUTS

In this section, list all outputs (tangible deliverables such as products and services) that have been delivered during the reporting period in the table provided. The table in the milestone report template includes prompts for what should be described in each column.

Examples of the outputs must be supplied as an appendix where appropriate, or if the output is digital, a link to the output would be appropriate. Please note that during the term of the project, all outputs, where appropriate, should have been provided to Hort Innovation as part of the approval process for branding and funding acknowledgement (refer to the Hort Innovation publication guide).

As Hort Innovation invests in such a diverse range of projects, the outputs are wide-ranging. These include reports; field trial and experimental data; new technology; new protocols or standards; minor use permits; new cultivar or rootstock varieties; industry data; publications/websites and their reach; articles in industry magazines; industry development services; training/extension events and number of growers trained/attendance; training material; project evaluation reports; annual operating plans; and project reference group minutes.

For industry extension/training activities, include details such as dates, locations, target audience, number of attendees and subject matter. For example:

- For workshops and webinars provide the date, location, topics presented, guest presenters, target audience and number of attendees
- For articles in industry publications provide the name of the article, where it appeared and reach of the publication
- For industry websites include access analytics
- For newsletters include the name of the newsletter, number of editions, focus of the content and the reach of the newsletter.

Quick tips

- List tangible deliverables
- Supply tangible deliverables where appropriate as an appendix or digital link
- For industry extension/training events, supply all the relevant details
- Refer to monitoring data collected to provide evidence of outputs as per the project's M&E plan

OUTCOMES

In this section, detail the project outcomes (intermediate and/or end-of-project outcomes) in the table provided. The table in the milestone report template includes prompts for what should be described in each column.

Refer to monitoring data collected to provide evidence of outcomes as per the project's M&E Plan.

Intermediate outcomes are short- to medium-term outcomes brought about through project activities. They include changes in grower knowledge, attitudes, skills and aspirations. End-of-project outcomes are the desired final result of the project and represent the project's unique contribution.

Project outcomes should be linked to the relevant fund outcomes (as per industry Strategic Investment Plan or Hort Frontiers strategy). Outcomes are the desired result of the project and represent the project's unique contribution to the relevant fund outcome(s), strategy(ies) and key performance indicator(s). For grant projects (or projects with external funding sources) the linkage to grant outcomes should also be included where appropriate.

This information is essential to support understanding how the specific project has contributed to the overall fund.

REFEREED SCIENTIFIC PUBLICATIONS

In this section, provide a list of all refereed scientific publications published during the project that can be attributed or partly attributed to the project. Also, provide a list of all scientific publications in preparation or submitted for publication.

Use the reference style provided in Hort Innovation's milestone report template. If there are no refereed scientific publications to report, enter 'None to report'.

INTELLECTUAL PROPERTY

Where there was background Intellectual Property (IP) used in the project and/or the generation of project IP, provide a summary using the format of the Hort Innovation IP Register. If an IP Register was provided in contracting of this investment, it should be updated to reflect any changes because of this investment. Please also provide narrative regarding commercialisation where appropriate. The IP Register is available on the delivery partner section of our website at <http://www.horticulture.com.au/delivery-partners>.

If the report is confidential, provide narrative regarding the rationale behind the confidentiality. Enter 'No IP, commercialisation or confidentiality issues to report' if there are none to report.

ISSUES AND RISKS

Provide details on new issues or risks associated with the project that Hort Innovation should be aware of, and how they are being managed. This should link to a risk register where appropriate.

Examples include: budget issues, forthcoming change requests, inability to deliver agreed outputs, inability to achieve the intended project outcomes, management issues, changes to project personnel and any restrictions or limitations on use of intellectual property.

Enter 'none to report' if there are no issues or risks to report.

OTHER INFORMATION

Provide any additional information you would like Hort Innovation to be aware of that has not been detailed elsewhere.

Enter 'No additional information to report' if there is no additional information to be detailed.

APPENDICES

Insert a list of all documents to be appended and attach them to the milestone report. Please note that all appendices are published with the final report.

If an appendix includes information that should not be published, such as commercially or institutionally sensitive material such as sensitive meeting minutes, provide that information to Hort Innovation separately.

Share your thoughts

We strive to provide the best experience possible for our delivery partners. Please share your feedback on how we can improve this document for you and other delivery partners in the future by emailing us at communications@horticulture.com.au

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