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| **GUIDANCE NOTES** | |
| **If this is the FINAL CLAIM/PROGRESS REPORT please complete a ‘Final Progress Report’ that can be accessed from the adjacent link.** |  |
| Please complete the progress report and email it along with any additional information to [claims@investni.com](mailto:claims@investni.com) and to your Technology Executive, a hard copy is not required. Please note that the text boxes will expand so please provide content proportionate to the amount of support offered. | |
| **Section 1 – Project Details and Status** | |
| If this is the final progress, please click the icon for the Final Progress Report and complete that template instead. Provide details about your organisation and the project including the progress report number, the original objectives of the project and the status of the project. | |
| **Section 2 – Project Progress** | |
| Describe the work carried out during this claim period and, where possible, provide evidence via the use of photos, screenshots and diagrams. Indicate, as a percentage, how you would rate your technical progress to date.  Enter the project milestones submitted in your application form or agreed with the Technology Executive and describe technical project outputs (tasks/deliverables/features/modules) carried out so far. Enter Yes/No to indicate if the current milestones are on schedule or not. For any milestones not on schedule, please provide a revised delivery date and indicate proposals to address any issues. | |
| **Section 3 – Project Challenges and Risks** | |
| Have any risks materialised that may prevent the successful completion of the project? Explain how risks have been mitigated against and detail any remedial actions required. | |
| **Section 4 – Proposed Project Amendments** | |
| Outline any proposed changes that are required to the original plan of work such as a project time extension or request to transfer costs from one category/subhead to another. Provide the rationale for these changes that will be considered by Invest NI. If requesting a transfer of funds please provide details of any changes to your current Letter of Offer approved expenditure profile. | |
| **Section 5 – Grant Claim Forecast** | |
| Using the table, please provide an estimated forecast of the grant to be claimed in the next four claims and the month in which you expect to submit these claims. | |
| **Section 6 – Commercialisation** | |
| Outline any factors that will impact on the commercialisation of the project which may have been unknown at project outset. Comment on any commercial benefits, potential interest or product sales realised to date. | |
| **Section 7 - Declaration** | |
| Please read the declaration and ensure an authorised person signs off on the report (the signature can be typed; an electronic or handwritten signature is not required). | |

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| 1. **PROJECT DETAILS AND STATUS** | | | | |
| Organisation Name |  | | | |
| Project Title |  | | | |
| Report Number (1, 2, 3...) |  | | | |
| Project Manager |  | | | |
| RD Number |  | | | |
| Project Start Date | Click to enter date | Project Completion Date | | Click to enter date |
|  |  | | | |
| Date period covered by this progress report | Start date : Click to enter date | | End date : Click to enter date | |

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| Current Status of Project | Please choose an option |

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| Objective(s) of the project as defined in the original application form: |

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| 1. **PROJECT PROGRESS** | | | |
| Describe the work carried out during this claim period. Include your progress against the completion of project outputs (task/deliverables/features/modules). Where possible, provide evidence via the use of photos, screenshots and diagrams. Have there been any significant key achievements? Indicate as a percentage, how you would rate your technical progress to date. | | | |
|  |  |  |  |
| Update table below with progress to date | | | |
| Milestone/Work Package/Module Title | Date due for completion | On schedule? | Comment on progress to date and provide new completion date if required |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |
|  |  | Yes  No |  |

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| 1. **PROJECT CHALLENGES AND RISKS** |
| Have any new risks/challenges materialised that have caused a delay to the project or may prevent the successful completion of the project. How have you mitigated against these or how do you propose to mitigate these risks? |

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| 1. **PROPOSED PROJECT AMENDMENTS** | | | | |
| Outline any proposed changes that are required to the original plan of work including timescales or expenditure profile | | | | |
|  | | | | |
| Amendments required | Yes  No | | | |
|  |  | | | |
| Types of Amendment  (Select all that apply) | Time extension - | | Proposed new end date - Click to enter date | |
| Change to grant cost category expenditure - | | | |
| Other - | | | |
|  | | | | |
| Please provide rationale for why a time extension and/or change of amount in a cost category is required. If cost category changes are required, provide the new figure against each cost category in the following table. | | | | |
|  | | | | |
| Cost Category | | Approved LoO Expenditure | | Proposed new Expenditure |
| Labour | | £0 | | £0 |
| Consultancy | | £0 | | £0 |
| Sub-contracting | | £0 | | £0 |
| Materials | | £0 | | £0 |
| Instruments and Equipment | | £0 | | £0 |
| Trials and Testing | | £0 | | £0 |
| Travel | | £0 | | £0 |
| IP | | £0 | | £0 |
| Other | | £0 | | £0 |
| **TOTAL** | | **£0** | | **£0** |

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| 1. **GRANT CLAIM FORECAST** | | | |
| Using the following table, please provide an estimated forecast of the grant to be claimed in your next four quarterly claims and the month in which you expect to submit these claims. | | | |
| Month claim expected to be submitted | Time period that the claim will cover | Estimated Project Expenditure Amount | Estimated Grant Amount |
|  |  | £ | £ |
|  |  | £ | £ |
|  |  | £ | £ |
|  |  | £ | £ |

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| 1. **COMMERCIALISATION** |
| Outline any new factors that may impact on the commercial aspects of the project which may have been unknown at project outset. Comment on any commercial benefits, potential interest or product sales realised to date. |

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| 1. **DECLARATION** | |
| **I declare the information in this report to be true and complete to the best of my knowledge and authorise Invest NI to assess this report on the basis of the information provided.** | |
| Name |  |
| Position in Organisation |  |
| Date | Click to enter date |