

The R&D Tax Incentive is jointly administered by:



Australian Government
Department of Industry,
Science and Resources

AusIndustry



Australian Government
Australian Taxation Office

www.business.gov.au/RDTI
www.ato.gov.au/RDTI

Stakeholder Reference Group Terms of Reference

R&D Tax Incentive Stakeholder Reference Group provides a forum for registered tax agents and R&D consultants to engage with program administrators from the Department of Industry, Science and Resources (DISR) and the Australian Taxation Office (ATO).

<p>Purpose</p>	<p>The R&D Tax Incentive (R&DTI) Stakeholder Reference Group (SRG) provides an information and feedback forum for technical and administrative issues relevant to the R&DTI program. It aims to facilitate program access and integrity by engaging with stakeholders who advise program users and prepare applications on their behalf.</p> <p>A key purpose of the SRG is to provide program updates, discuss technical matters and exchange insights to improve the effectiveness of the program. The SRG is not a policy or decision making forum.</p> <p>Administrative and technical matters open to discussion include:</p> <ul style="list-style-type: none"> • program promotion and guidance • interpretation of legislative requirements • registration and compliance processes and insights • R&D expenditure issues and claiming processes
<p>Chair</p>	<p>The SRG is hosted by DISR and co-chaired with the ATO. The co-chairs will:</p> <ul style="list-style-type: none"> • set the agenda and lead meetings • determine invitees based on program participation and topics for discussion
<p>Agenda</p>	<p>The agenda will be set by DISR in consultation with the ATO.</p> <p>Meeting invitees are encouraged to suggest topics for discussion at the time of invitation. Invitees may also request to lead a proposed item for discussion by contacting the SRG secretariat in advance of the meeting.</p> <p>The final agenda will be shared at least one week prior to the meeting.</p>
<p>Meetings</p>	<p>Meetings will be held at least twice a year and may be held online or in person at DISR state offices. When online, multiple sessions will be offered to accommodate different Australian time zones and to enable nation-wide participation.</p> <p>A summary of the meetings will be published on <i>business.gov.au</i>.</p>

<p>Invitations</p>	<p>Invitations to SRG meetings will reflect program engagement by tax agents and R&D consultants and the geographic distribution of program users.</p> <p>Consideration for selection to attend a SRG meeting will be based on:</p> <ul style="list-style-type: none"> • level of engagement with the program by individuals or organisations • geographic distribution of program users and their advisors so that issues relevant to all state and territories can be represented • sector-specific factors if relevant to a proposed discussion item. <p>Group composition is likely to change for every SRG.</p>
<p>Meeting participation</p>	<p>To ensure the SRG promotes mutual understanding and fulfils its purpose to improve program effectiveness, meeting participants are expected to:</p> <ul style="list-style-type: none"> • provide topics for discussion in advance of a meeting to allow DISR and the ATO to effectively prepare the agenda, respond to questions and facilitate meeting discussions • actively and respectfully engage in discussion, share their insights and make constructive suggestions to any issues raised • acknowledge that government decisions may not align with their views or recommendations • advocate for the best interests of program users in line with the program’s legislative boundaries • declare any conflicts of interest • ensure their meeting attendance is not used for any purpose contrary to the SRG’s purpose • protect participant sensitivities when sharing information raised during the meeting with their clients, colleagues and affiliates by not disclosing an individual’s comments or affiliations • ensure confidential information or individual cases are not disclosed. <p>Participants who do not meet all expectations for attendance and respectful and constructive discussion will be excluded from future meetings.</p>