



SUCCESSFULLY MANAGING CFI PROJECTS

"TEAM EFFORT"



Collaborating Departments

CFI Workflow	Notice of Intent	Application	Award finalization	CFI Contract	Start Spending	On-going Activity	Reporting, Audit & Final Report	Post-end date Activity
Research Development & Services	<ul style="list-style-type: none"> Coordinate Kick-Off presentation - program details & timeline (IF) Coordinate Expert Review Committee (IF) or core planning group (JELF), internal NOI review and allocation of institutional envelope Facilitate NOI submission 	<ul style="list-style-type: none"> Coordinate with PI completion of application Final review full proposals and budgets Facilitate on-line submission 	<ul style="list-style-type: none"> Award Announcement Coordinate Award (AF) Finalization meeting Submit award finalization forms with amendment modules if required Co-ordinates variance document (application to award finalization) 	<ul style="list-style-type: none"> Facilitate the signing and award agreement by VP research Activate grant on internal grant system (i.e. ROLA) Request provincial funding 	<ul style="list-style-type: none"> Facilitate amendments with CFI 	<ul style="list-style-type: none"> Facilitate amendments with CFI Facilitate end date extension with CFI Attend team progress meetings (IF) Communication of research outcome /impacts 	<ul style="list-style-type: none"> Participate in audits Facilitates overall performance and value for money audit 	<ul style="list-style-type: none"> Internal IOF applications Facilitate annual progress for 5 years following operational status Ensure CFI guideline are followed during the lifetime of the infrastructure
Procurement Services	<ul style="list-style-type: none"> Provide budget considerations document 	<ul style="list-style-type: none"> Develop detailed costing sheet with budgetary quotes (incl. tax, shipping, exchange rates and inflation) Ensure adherence to CFI format for quotes 	<ul style="list-style-type: none"> Attend AF meeting to provide information on procurement process Create update costing sheet with current competitive quotes Variance Document input 	<ul style="list-style-type: none"> Attend "Ready to Spend" meeting to provide further information on procurement process and fair market value assessment 	<ul style="list-style-type: none"> Coordinate competitive bidding process Determine FMV and facilitate vendor interaction/negotiates contracts If required, assist PI with e-procurement 	<ul style="list-style-type: none"> Attend team progress meetings (IF) Assist PI with procurement /vendor issues 	<ul style="list-style-type: none"> Participate in audits 	<ul style="list-style-type: none"> Archive procurement data
Research Finance	<ul style="list-style-type: none"> Provide support on CFI guidelines Attend kick-off presentations 	<ul style="list-style-type: none"> On-going support for CFI questions Attend meetings as requested 	<ul style="list-style-type: none"> Participate in AF meeting to provide information on financial practices eg: fx. rate Facilitate pre-spending if required, and assess financial risk 	<ul style="list-style-type: none"> Activate grant on Finance system Coordinate "Ready to Spend" meeting to review CFI guidelines, grant reconciliation process, reporting, timelines etc. 	<ul style="list-style-type: none"> Coordinate procurement by PI through eProcurement system Cross reference PO to quote to approved budget, by item Track purchased items and vendor in-kind 	<ul style="list-style-type: none"> Coordinates regular team progress meetings (IF) Financial reconciliation cash / in-kind (on-going) PI queries and updates on remaining funds and match requirements Evaluate timelines and extension requirements Coordinates item change documentation 	<ul style="list-style-type: none"> Financial reports Coordinate reporting on multi-institution grants Ad hoc internal reports Facilitate audits Inactivate projects 	<ul style="list-style-type: none"> Grant activation IOF PI Communication on eligible IOF expenses On-going PI consultation Annual IOF reporting Grant inactivation Archive financial data
Facilities Management	<ul style="list-style-type: none"> Provide support on construction requests 	<ul style="list-style-type: none"> Construction budget proposal, description, and drawings 	<ul style="list-style-type: none"> Attend AF meeting Provide updated construction budget, description and drawings 	<ul style="list-style-type: none"> Attend "Ready to Spend" meeting to provide further information construction initiation 	<ul style="list-style-type: none"> Upon receipt of FM construction approval form, commence construction 	<ul style="list-style-type: none"> Attend team progress meetings (IF) Updates team on scope/timeline changes Manage construction 	<ul style="list-style-type: none"> Provide final costing, drawings and scope changes Participate in audits 	<ul style="list-style-type: none"> Archive construction data

