CFI Award Finalization and Management Workshop
Award Finalization

Projects approved by both CFI and the Province (MRIF).

- Updated budget must be submitted to confirm use of funds.
- Changes after this point may require a project amendment.
Confirmation of In-kind Contributions

- Need copies of all quotations which include in-kind contributions.
- Can be original or updated quotes (unless item over $100,000).
- Changes in price are O.K. as long as budget balances in the end or additional matching funds available. Indicate the reason for significant change, if any.
- Make sure sufficient in-kind contributions are still available – ask suppliers for 22% in-kind discount
Budget Changes

• Award finalization is time to make minor changes to budget such as model/quantity of item
• If you no longer plan to purchase an item – must explain
• If funds “left over” – consider purchase of accessories, additional extended warranty.
Extended warranties

- If warranties decrease in cost/eliminated, *dollar value will be taken back from award*
- Only warranties purchased at time of equipment purchase eligible
- Cost must be factored out into a separate line item
Items over $100,000

- Items with total eligible cost of over $100,000 must be competitively bid before finalizing.
- Contact Jurgens Bekker, Senior Purchasing Consultant (Research): jurgens_bekker@umanitoba.ca or 789-3348
Item Details

- Tax rate of 8.65%
- Include shipping/installation charges
- Exchange rate
Projects with Renovations

• Need Req7, budget summary, drawings, and summary of any changes

• May tender construction project before finalizing
After finalization

• Likely 4-6 weeks for CFI to review before purchasing can begin

• All purchases should be requested through a Requisition to Purchase form

• Identify CFI Line Items on your purchase requisitions
Purchasing your items

• Competitive bidding is standard procedure
• Please include quotes already previously solicited from various suppliers (may expedite the process)
• Research Accounting will check Purchase Requisitions against Itemized List
• More information and links can be found at Purchasing Services home page: http://umanitoba.ca/admin/financial_services/purch/
Changing and Completing your Project

• End date 1 year after finalization.
• After finalization, changes require project Amendment.
• Variance in item cost of 5% of total project costs must also be approved.
• **Track purchases** to make sure you have sufficient funds. Cost savings after all purchases may be put towards additional items.
• Reconciliation – the end of the project
Infrastructure Operating Funds

- IOF Call issued in March of each year
- Project must be finalized before application for IOF can be made
- Responsibility for IOF funds delegated to the Faculties.