Award Finalization

Once a CFI project has been awarded, and matching funds from the province are confirmed, ORS must confirm the budget and contributions (which may require amendments or updates to the proposal budget) to CFI before funds will be released and construction/renovations and/or purchasing can begin.

Construction/Renovation:

CFI projects with renovations may require updated pricing, timelines and floor plans at finalization and purchases will need to be coordinated with the timing of the completion of renovations. Please discuss what will be required with the Projects Coordinator (Institutional Programs) as soon as possible.

Equipment Items:

The Projects Coordinator (Institutional Programs) will contact you to schedule a meeting to discuss the implementation of your CFI project prior to award finalization. In advance of the meeting, new quotations should be obtained for items with significant changes in functionality from the originally budgeted items. The estimated cost of items should include any charges for shipping, installation and training, exchange rate (if applicable), and taxes of 9.65% (reduced rate payable by the U of M) on the cash price of the item. Ensure requested quotations include an in-kind contribution if this was included in the original application.

New items should not normally be added to the budget at award finalization. Please discuss any changes to the proposed budget that may be needed with the Projects Coordinator (Institutional Programs) at this time.

Project Implementation:

After ORS submits the Award Finalization Form, expect up to six weeks for CFI to issue an Award Agreement to begin the project. Research Accounting will then set up a FOP and purchasing can begin.

Prepare and submit an individual purchase requisition for each budget item and list the CFI line item number in EPIC. All U of M purchasing policies apply (e.g., researchers cannot commit to purchasing from a particular supplier, and, depending on the value of the item, Purchasing Services may need to initiate a formal competitive bidding process prior to purchase.) Equipment should not be delivered until any necessary renovations are completed.

The Projects Coordinator (Institutional Programs) will follow up during the course of the project to ensure project implementation is on track and to determine if there is any need to submit a project amendment to CFI. Such reasons would include:
- Delays which may extend beyond the project end date (normally one year after finalization) to purchase and install all equipment, including completing supplier payments;
- Change to the capability or quantity of infrastructure being purchased;
- Change to the location of any infrastructure item, before or after purchase.

Changes in supplier, small changes in price and basic upgrades not significantly altering the capabilities of the equipment are expected by CFI and do not constitute a significant change. The Projects Coordinator (Institutional Programs) should be notified in advance of any more significant changes to purchases as an explanation will be required for inclusion in financial reporting.

**Infrastructure Operating Funds**

All CFI projects generate Infrastructure Operating Funds (IOF) at a rate of 30% of the value of the CFI’s contribution to the project (normally 40% of total project costs). These funds do not become available to the University until an Award Agreement is received. In January of each year, the University will issue a Call to access IOF to all Faculties/Schools with CFI projects. Therefore, Project Leaders may experience some delay between the finalization of their CFI project and the availability of IOF funds.

ORS will review all requests for eligibility and VPRI will approve; however, the specific allocation of IOF funds is at the discretion of the Unit. Units may choose to allocate IOF exclusively to the projects that generated the funds or strategically based on the operating needs of all CFI-funded infrastructure. IOF funds must be spent only on costs related to CFI-funded infrastructure, and this infrastructure must continue to be used for research. The list of eligible IOF expenses is available online at:

http://www.innovation.ca/en/OurFunds/CFIFunds/InfrastructureOperatingFund

**Annual Reporting**

CFI-funded equipment must be held by the University for a minimum of 5 years and continue to be used for research purposes. Project Leaders are required to submit annual reports detailing the progress of their research as a result of the acquired infrastructure in each of these five years. Reporting forms are available in April/May of each year and due in June.

**CFI-post award ORS contact:** Jackie Cooney-Birch, Projects Coordinator (Institutional Programs) Jackie_Cooney-Birch@umanitoba.ca; 480-1495

**Purchasing Services contact for CFI:** Abiodun Oke, Senior Purchasing Consultant; abiodun_oke@umanitoba.ca, 789-3348