

CFI Annual Institutional and Project Report Form Instructions June 2003

This information is to assist institutions and Project Leaders completing annual reports due in **June 2003**. For general information on annual progress and impact reports, please see Section 7.8 of the Policy and Program Guide, at:

<http://www.innovation.ca/programs/guide.html>

Reports Required

Project Reports

An annual project report is required for all projects funded under any CFI program, as long as the award was finalized (i.e. the CFI issued an Award Agreement):

- After March 31, 1998
- Before March 31, 2003

A Project Leader can determine whether a June 2003 report is due by viewing the list of annual reports required for the project on the “Projects Funded” screen within their Portfolio page.

Institutional Reports

Each institution which has received funds under any CFI program between March 31, 1998 and March 31, 2003, must submit an annual institutional report.

Deadlines

The usual deadline for the submission of annual reports is June 15 each year. Given the May 30 competition deadline for the Innovation Fund, this year, reports will be accepted until **June 30, 2003**.

The “CFI deadline” of June 30, 2003, will be displayed on the on-line system, and reports cannot be completed or changed after that date, although they can be read and printed.

Institutions will be able to set an “internal deadline” earlier than June 30, 2003. Both deadlines will be displayed to Project Leaders. Project Leaders cannot complete or change information in the Project Reports after the internal deadline date. (However, an institution may choose to allow a Project Leader to access a report after the internal deadline, for revisions).

Institutional Management of the Reports

Using their institutional username and password, institutions may access the “Project and Institution Reports” screen. From this screen, the institution can complete the Institutional Report Form, set an internal deadline to allow time for verification of Project Reports, and submit Project Reports to the CFI.

For the current reporting year, a list of all projects for which a report is due is provided, and the completion/submitted status of each is shown. A total of the reports submitted versus the number due is given.

The institution may access a Project Report that has been completed by the Project Leader, and, once approved, can submit it to the CFI. Project Reports which are not yet submitted can be accessed and edited by the institution. Reports that have already been submitted to the CFI can be viewed and printed.

Report Forms

Institutional and Project report forms are available on the CFI web-site. Institutions and Project Leaders must use the web-based electronic forms for completing and submitting reports.

The web-based electronic form controls the font size and the number of lines/pages allowed. Use only the space provided in the form.

Both report forms contain one or more lengthy text blocks. We recommend that this text be written and saved offline, using a word processor, to ensure your work is not lost due to any technical difficulties. It can then be cut and pasted into the on-line report form. The form indicates the maximum number of characters for each text block, but this should be used only as a guide on the space available. It is possible that the web-based form will appear to accept all your text, but in fact, it exceeds the PDF line/page limit. Any extra text will be truncated at the line/page limit.

The apparent "mismatch" between number of characters and actual space is necessary as it provides flexibility for people who wish to include lots of spaces in their text. Carriage returns do not add to your character count but do take up space on the PDF display. So you may be under the character limit but because of line/paragraph breaks you are going over the PDF page limit.

Please note: Users of Internet Explorer for Mac. We have identified problems with Internet Explorer for Mac. This combination can cause extra carriage returns to appear in text blocks. Until such a time that a solution has been found by Microsoft or Apple, we recommend that users of this combination try a different Web browser.

Completing the Project Form – Project Leader

You can access the report form from "Projects Funded" on your Portfolio page, using your PIN and password. If you have forgotten your PIN and password, please contact the CFI with your name, research institution and department and we will respond to your query by the next business day.
(pin.nip@innovation.ca)

Please ensure that all information you provide in the report is for the period **April 2002 to March 2003**.

For a **multi-institutional project**, the report should include information from all the participating institutions and their researchers.

Part A

This section of the report form has been structured to allow you to:

- Provide a summary of the Project, which will be published on the CFI web site**
- Describe progress in implementing the project
- Indicate how many researchers and trainees have been recruited/retained

** The summary of the Project will be taken from the Notice of Intent form submitted for projects in the second and third Innovation Fund competitions, and need only be verified or updated. For all other projects, the information must be entered this time, but will only need updating in future reports. **Please note:** we specified 30 lines as the limit for this section in the “Sample” forms distributed in March, 2003; ***there is a limit of 10 lines for this section.***

Part B

For projects which are already operational, either fully or partly, this section of the report form captures:

- The comparability of the infrastructure to other research organizations
- Operations and utilization
- Researchers, research activities, training and collaborations supported by the infrastructure
- Attraction of funding
- Benefits to Canada of the research

Part C – Text Attachment

In the final section you may provide narrative information to expand upon points captured in the report. This Text Explanation should be written and saved off-line, and then attached to the report. Please ensure, when saving your text off-line, that the complete directory path (including the file name) does not exceed 64 characters. Also, there should be only one dot (.) in the file name, namely that which precedes the 3-letter file extension (e.g. “.doc”). Please indicate the Project Number and the Question Number at the top of each page and the page number at the bottom of each page.

Submitting the Project Report On-line

Once all the information is entered and saved in the electronic form, the Project Leader returns to the Portfolio page to indicate that the report is completed by switching the Report completed? – Yes/No toggle to Yes. **The Project Leader can reverse this by clicking on the “No” toggle.**

Using the Institutional username and password, the authorized official for the institution may review the report, and if it is deemed ready, may electronically submit the report by clicking on the “submit to the CFI” toggle (all within the 2003 report year). **At this point, no further changes can be made by either the Project Leader or the Institution.**

After the Project Leader has “Completed” the report, the institution may decide that revisions are needed. The institution may allow the Project Leader to access the report again by selecting “Yes” on the “Revisions” button.

Institutional Report

The report can be accessed under “Project and Institution Reports” using the institutional username and password. **Please note** that last year, this report was a text attachment. The Institutional Report must now be completed on-line.

The institution is asked to describe the impact, over the year **April 2002 to March 2003**, of all CFI investments, in accomplishing the objectives of the institution’s strategic research plans. This report will be published on the CFI web site.

In addition, the institution may provide information on any challenges faced in implementing or sustaining projects.

On an optional basis this year, institutions are asked to provide information on the number of new faculty taking up their first full time academic appointment in a Canadian university over the past year. Again on an optional basis, institutions are asked to provide information on their communication activities over the past year as they relate to the institutional communication plan. This information will be required in future reports.

When completed, the report can be submitted to the CFI by selecting “Yes” in the “Submit Report” column, on the “Project and Institution Reports” screen.