

# Funding Management System (FMS) – User Guide



**Forestry Innovation  
Investment<sup>®</sup>**



**Natural Resources  
Canada**

**Ressources naturelles  
Canada**

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## SYSTEM & DOCUMENT OVERVIEW

### About the Funding Management System

The Funding Management System (FMS) enables eligible organizations to apply for funding from Forestry Innovation Investment's (FII) Market Initiatives and Wood First programs and Natural Resources Canada's (NRCan) Expanding Market Opportunities program.

This document guides users on how to use the FMS to request and manage user accounts, develop and submit proposals, amend contribution agreements and prepare and submit interim and annual reports and year-end reconciliation statements.

All users are **strongly** encouraged to review this guide to ensure understanding of the system prior to entering content into the system.

### Who Uses the System?

All eligible organizations that have been given a username and password are expected to use the FMS to manage their contribution agreement(s) with FII and NRCan. The FMS ensures the programs are delivered with consistency and is part of the auditable record of the funding relationship.

Note that for the purposes of this document, any organization submitting a proposal is referred to as an "applicant", however once a proposal has been approved and an agreement is in place, the organization will be referred to as a "recipient".

### System Requirements

#### WEB BROWSERS

The FMS has been designed for Microsoft Edge, Google Chrome and Apple Safari. Microsoft Internet Explorer is compatible with the system but will result in formatting issues when combined with low resolution monitors (see Screen Resolution below).

#### SCREEN RESOLUTION

The FMS was designed to run optimally using at least 1400 X 1050 screen resolution.

## General System Functionality

### HOME SCREEN

#### 1. USER ID BUTTON

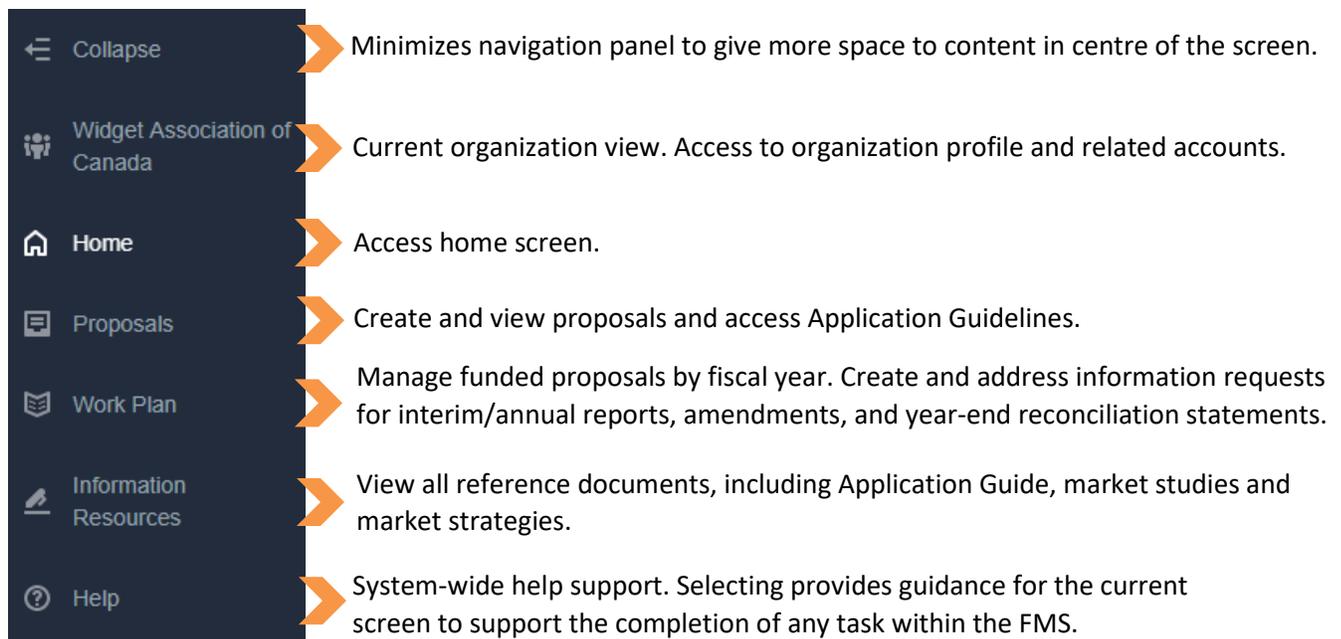
The **User ID** (user's name) button at the top right-hand corner of the screen allows users to switch organization views, view or edit profile, change password and logout.

#### 2. ACTION REQUIRED NOTIFICATIONS

The four panels on the home screen alert users if action is required on proposals, amendments, interim and annual reporting, and year-end reconciliation. The panels also provide quick links to these sections of the FMS.

#### 3. LEFT SIDE NAVIGATION PANEL

The panel links to key navigation elements which are always available to users from the left-hand side of the screen:



### 4. NEWS

The panel contains general messages from the funders to all users.

### 5. HIGHLIGHTED INFORMATION RESOURCES

The panel contains quick links to key reference documents to help account holders develop funding proposals and manage work plans.

## Editing and Sorting Content

### ENTERING INFORMATION IN THE FMS - EDIT BUTTON

Most pages with editable fields will load in a read-only view with an **Edit** button at the top right-hand corner of the window.



To enter text select **Edit**. An editable pane will open from the right-hand side of the screen. All editable fields offer users tools to format their text.

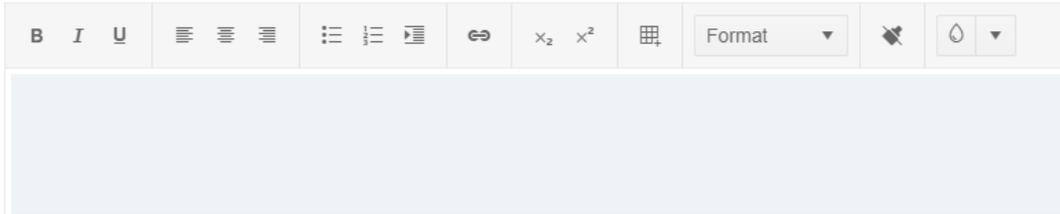
Select **Save** to capture information in the system or **Cancel** to erase input.

Screens with two or more editable sections can be opened by different account holders from the same organization. This means information can be added to different parts of a screen in tandem.

However, two account holders cannot work in the same edit box at the same time. The first user to open the section locks out other account holders. Only once the editable section is closed can the section be re-opened for additional revisions.

CAPTURING, DISPLAYING, AND PRINTING TEXT

\* Project Description



To ensure the uniformity of text on the screen and when printed, the FMS will remove the original formatting of any data copied and pasted into text fields. To format or edit data, use the editing tool bar at the top of each text box.

Small graphics such as simple charts or pictures may be entered into text boxes by copy and pasting. Please upload large or complex graphics, such as architectural drawings, complex spreadsheets, or a series of high-resolution photographs, as support files.

REQUIRED INFORMATION FIELDS

Required information fields are generally identified by an asterisk \* in the FMS and must be filled in and saved to proceed. Partial input cannot be saved and will be lost if the user navigates out of an edit screen.

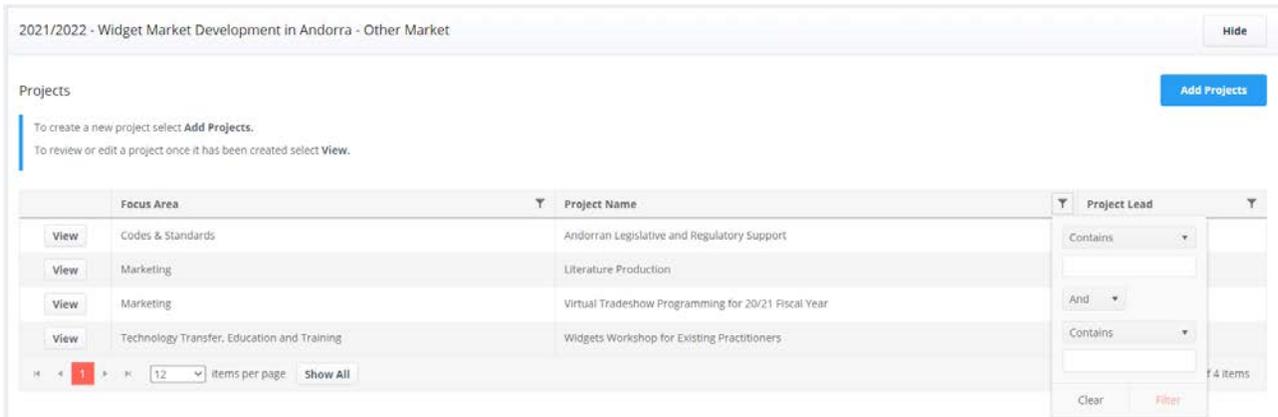
The proposal template is an exception. All proposal fields are required but are not identified by an asterisk. Applicants can navigate away from a screen without filling in all of the required fields. This allows information to be entered and saved in stages. However, the FMS prevents the submission of a proposal, amendment, interim or annual report or year-end reconciliation statement if any required information field is blank.

As a best practice, main account holders should review all information before submitting work.

SORTING AND FILTERING INFORMATION

The columns on tabular screens have a default sort order. This may be reversed by clicking on the column heading. An arrow will indicate the sort order once when it has been modified.

Data may be filtered by clicking on the funnel symbol. When a filter is applied, a red box will appear around the filter icon to indicate the feature is in use.



## FMS ACCOUNT FUNCTIONALITY (ALL ACCOUNT TYPES)

### Logging In

Log into the FMS with the email used to establish your FMS account and personalized password.

Refer to [Reset a Password](#) if the personalized password needs to be reset.

At any time, a user with an active FMS account can change their password. See [Changing Password](#) for details.

Login Français

Email  
natalie.chan@bcfii.ca

Password  
.....

Login Forgot your password? | Request an Account

### Resetting a Password

To reset a password, select **Forgot your password?** on the login screen.

Forgot your password? Français

Email

Request a New Password Login | Request an Account

Privacy | Contact

Enter the account email address and select **Request a New Password**. The FMS will send an email with a link to the Password Reset screen to create a new password. Follow the on-screen instructions.

## Account Types

The FMS distinguishes between users (individuals) and the organization(s) they represent. This allows an individual to hold roles in more than one organization without requiring multiple FMS accounts. Account holders must be official representatives of the applicant organization. See Sub-Accounts and Main Accounts for details.

An organization can establish two types of user accounts: main account and sub-account. The key difference between a main and sub-account is a main account holder can **submit** proposals, interim and annual reports, amendments and year-end reconciliation statements on behalf of their organization. They are also able to manage all the accounts assigned to their organization as well as edit organization information.

**All accounts (main and sub)** can do the following activities:

- Create and edit proposals.
- Create and edit interim and annual reports.
- Create and edit year-end reconciliation statements.
- Edit amendments.
- Manage their user profile, including the account password.
- Be a main or sub-account holder for one or more different eligible organizations. See Sub-Accounts and Main Accounts.
- Access Information Resources.

In addition to the activities above, a **main account** holder can:

- **Submit** proposals on behalf of their organization.
- **Submit** interim and annual reports.
- **Submit** year-end reconciliation statements.
- **Submit** amendments.
- Edit organization information that appears in proposals.
- Create main accounts and sub-accounts.
- Change the status of main accounts and sub-accounts to active or inactive.
- Promote an existing sub-account to a main account and demote a main account (other than themselves) to a sub-account.

A main account holder **cannot**:

- Edit the name, title, contact information or preferred language of an account other than their own.

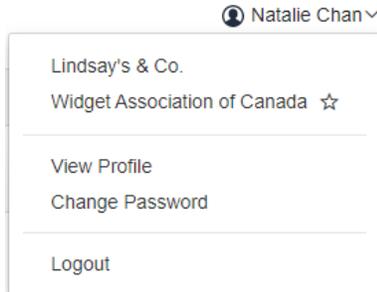
Once an account is established, access to the FMS is ongoing; no annual renewal is required.

System administrators will periodically review **all** accounts:

- Organization accounts which have not submitted a proposal for two consecutive years will be made inactive. To regain access, follow the steps to establish a new organization account.
- Individual user accounts where the user is not associated with any active organization or which have not logged on for two consecutive years will be made inactive. To regain access, follow the steps to establish a new user account.

## User Profile & Password Management

FMS users can manage organization views, their account profile and password by selecting **User ID** at the top right of the screen. Choose either **View Profile** or **Change Password** and follow the on-screen instructions.



### SWITCHING ORGANIZATION VIEWS

FMS users with access to multiple organizations can switch their view any time while working in the system.

To switch organization views, select **User ID** at the top right corner of the screen. Organizations linked to the user account will appear. The current organization view will have a star beside it. Upon changing the selection, the view will refresh.

To verify you are in the right view, look to the organization name listed at the top of the left side navigation menu.

The selected organization view remains active until logging out or switch organization views again.

Account holders linked to more than one organization can set their default organization view.

First, select **User ID**, then **View Profile**, and scroll down to **Associated Organizations**. Select the organization that will become the default view from the choices listed. Upon saving the selection, a star will appear beside the default organization under **User ID**.

### EDITING (OWN) USER PROFILE

To edit a user profile, select **View Profile**.

**Associated Organizations** section at the bottom of the screen lists all the organizations linked to the account holder. This is also where the account holder can establish their default organization view.

## CHANGING PASSWORD

To change the password for your account, select **Change Password** and fill in the fields.

Change Password

Password must meet the following criteria:

- be between 8 and 16 characters
- have at least:
  - 1 upper case letter
  - 1 lower case letter
  - 1 number
  - not have 3 or more consecutive characters from your username

Old Password

New Password

Confirm Password

Change Password

Cancel

## ORGANIZATION ADMINISTRATION (MAIN ACCOUNT ONLY)

### Editing Organization Details

Only a main account holder can edit information about their organization contained in Organization Details (e.g. address, description, and preferred language of correspondence).

To edit the profile of an organization, select the **Organization Name**, then **Organization Details** from the left side navigation panel. Select **Edit** to open the editing screen. Select **Save** to save the changes.

Entered information for Organization Details will appear in corresponding fields in the organization's proposal(s).

### Creating and Managing Sub-Accounts and Main Accounts

Before starting a proposal, a main account holder should establish and review accounts for all staff that will be associated with proposals for their organization. Only existing main and sub-account holders can be a proposal lead (main point of contact for the proposal) and/or a project lead (main point of contact for the project).

#### CREATING SUB-ACCOUNTS

Main account holders can create sub-accounts without further approval from FII and/or NRCan.

To create a new sub-account, select **Organization**, then **Sub-Accounts** from the navigation panel. Select **Add Sub-Account** from the top right corner of the screen.

If the individual already has an FMS account linked to another organization, select **Existing Account?**

After selecting **Save**, the new sub-account will appear on the list of sub-accounts and will receive an email with a link to the Password Set screen to establish a password.

The screenshot displays the 'Sub-Accounts' management interface. At the top, there are logos for Natural Resources Canada and Forestry Innovation Investment. The user 'Natalie Chan' is logged in. The main content area shows a table with the following data:

	Last Name	First Name	Email Address	Status for this Organization
<a href="#">Edit</a>	Chan1	Natalie	natalie.chan.recipient@bctc.ca	Active

Below the table, there is a pagination control showing '1' item per page and 'Show All' options. At the bottom of the page, there are links for 'Privacy | Contact'.

#### MANAGING SUB-ACCOUNTS

To see a list of active and inactive sub-accounts, select **Organization Name**, then **Sub-Accounts** from the left side navigation.

## MODIFYING SUB-ACCOUNTS

To modify a sub-account, select **Organization Name**, then **Sub-Accounts** from the navigation panel. Select **Edit** next to the user whose account needs to be modified.

The main account holder(s) of an organization can change the user role of any account; meaning the main account **can promote** an associated sub-account to a main account **or demote** a main account (other than themselves) to be a sub-account.

A main account holder can also make accounts inactive or active by changing their status.

A main account holder **cannot edit** the name, title, contact information or preferred language for a sub-account. Only the account holder can make these changes as the individual may be linked to other organizations.

## CREATING MAIN ACCOUNTS

There are two ways to create a main account:

1. Request an account for a new eligible organization. When FII and/or NRCan have approved an FMS account request for a new organization, the individual who initiated the request is assigned a main account by default.
2. An existing main account holder can create additional main accounts. No further approval is required from FII or NRCan.

To create additional main accounts, select **Organization Name** and then **Main Accounts** from the navigation panel. Then select **Add Main Account** at the top right corner.

If the individual already has an account that is linked to another organization, select **Existing Account?**

After selecting **Save**, the individual will appear on the list of main accounts and will receive an email advising them of their new role.

## MANAGING MAIN ACCOUNTS

To access the list of main accounts, select **Organization Name**, then **Main Accounts** from the navigation panel.

	Last Name	First Name	Email Address	Status for this Organization
Edit	Chan	Natalie	natalie.chan.uat@bcfci.ca	Active
Edit	Chan	Natalie	natalie.chan14@gmail.com	Active

## MODIFYING MAIN ACCOUNTS

To modify a main account, select **Organization Name** and then **Main Accounts** from the navigation panel. Select **Edit** next to the user whose account needs to be modified.

## APPLYING FOR FUNDING

### REMINDER: System-wide Help Support

Support for completing any task within the FMS is available by selecting Help on the left side navigation panel.

Selecting Help provides context specific guidance based on the screen being viewed. Please review the help guidance for each screen in the FMS to ensure information submitted responds adequately to FII and NRCAN information needs.

### CALL FOR PROPOSAL PROCESS - SUBMITTING APPLICATIONS FOR FUNDING

NRCAN and FII will issue an email to all FMS main accounts when launching a Call for Proposals. In addition:

- FII announces the Call for Proposals on the corporate website at [www.bcfii.ca](http://www.bcfii.ca) and on BC Bid.
- NRCAN announces the Call for Proposals on the corporate website at <https://www.nrcan.gc.ca/forests/federal-programs/13133>.

To inform proposals for funding, NRCAN and FII publish guiding documents each year to support the Call for Proposals: the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCAN *Expanding Market Opportunities Handbook for Applicants*.

Both first-time applicants and past recipients are encouraged to become familiar with the content of these guiding documents prior to submitting proposals as they contain key information about the conditions of funding.

These documents, along with various market studies and market strategies, are also available in the FMS under **Information Resources** via the left side navigation.

### LATE SUBMISSIONS

The FMS will prevent the submission of a proposal after the closing date/time of the Call for Proposals.

## The Structure of a Proposal

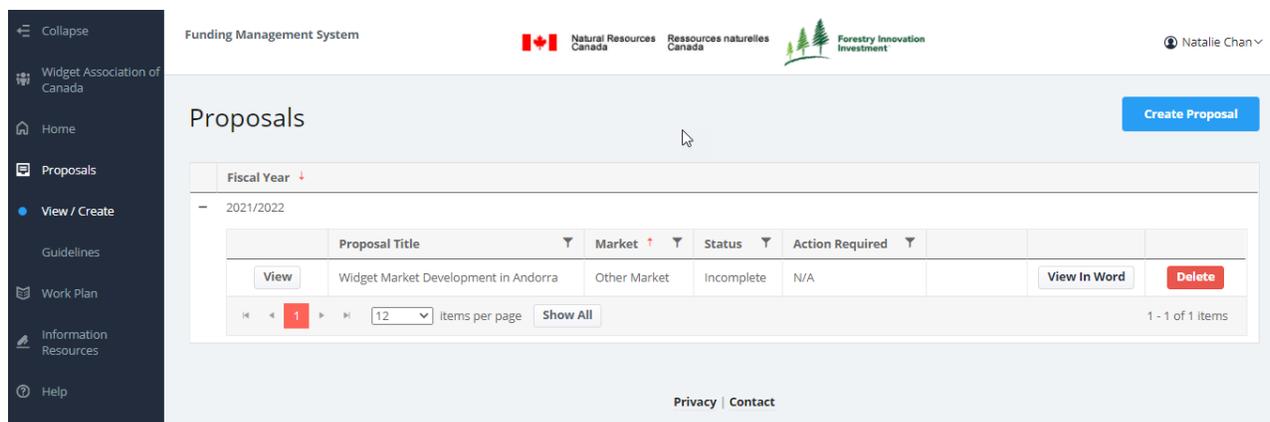
Title	Organization	Market	Focus Area	Projects	Support Files	Review	Submit
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The sections of a proposal are:

- A) Title:
  - a. Proposal Title and Lead
  - b. Program(s), Fiscal Year and Market
- B) Organization:
  - a. Organization Details
- C) Market:
  - a. Market Overview: Description and Trends, Opportunities, Challenges, Risks & Mitigation
  - b. Market Objectives: Links to Strategy, and Outcomes Achieved to Date
  - c. Partnerships and Collaborations and In-Kind Contributions

- D) Focus Area
- E) Projects:
  - a. Project Details: Project Name, Project Lead, Focus Area
  - b. Project Description, Personnel and Staff
  - c. Activities: Deliverables, Indicators, Activity Funding by Interim Period, Activity Funding by Funder
- F) Support Files
- G) Review
- H) Submit

## Starting and Viewing Proposals



To start a proposal, select **Proposals** on the left side navigation, then select **View/Create** or select **View/Create Proposals** from the Action Required on Proposals box on the home screen. Both options bring a user to the Proposals screen.

Proposals are organized in tables by fiscal year. The table flags the status of the proposal and whether an action is required. This allows account holders to see work in-progress, and know if a proposal has been submitted, approved or rejected.

Status Column	Description
Incomplete	Proposal has been started and is in progress
Submitted	Proposal has been submitted
Approved	Proposal has been approved by funder(s)
Rejected	Proposal has been rejected by funder(s)

If a proposal has been approved with one or more projects rejected for funding, a red exclamation icon will be beside the Approved status. Hover over the icon to see which project(s) have been rejected.

Approved 

Select **View** to access the current version of the proposal to edit an incomplete proposal or to view a submitted, approved or rejected proposal.

Select **View Submitted Proposal** to view the submitted version of the proposal in the system.

Select **View in Word** to download a Word output of the current version of the proposal. The Word output for an approved proposal will include only approved project(s) and activities.

Proposals that have not been submitted will remain listed for reference as incomplete on the Proposals screen when a Call for Proposals closes.

Select **Delete** to remove incomplete proposals from the system.

The FMS will validate that all required information fields contain data before allowing the submission of a proposal. However, the applicant is ultimately responsible to submit a complete and accurate proposal.

### STARTING A PROPOSAL

To start a new proposal, select **Create Proposal** at the top right corner of the Proposals screen.

### FILLING IN PROPOSAL DETAILS – TITLE, LEAD, SUBMISSION ROUND, FOCUS AREA, MARKET

#### Proposal Title

The title should be descriptive, have a unique identifier (e.g. market) and should not be too long. Consider how it will read as part of a list of proposals. If the proposal is for ongoing work and changing the title every year does not make sense, consider adding the year to the title to distinguish it from past and future proposals.

For example, 20/21 Market Development Programing for China or In-Ground Wood Finishing Testing: Year Two of Four.

#### Proposal Lead

The proposal lead is a sub- or main account holder for your organization who will be the principal contact for the proposal. If the individual does not appear on the list, exit the screen, and follow the steps for creating a sub- or main account. Then restart the process to create a proposal.

TIP: To avoid stopping mid-process if the intended proposal lead does not yet have an account, select an existing account as a placeholder.

#### Submission Round

Select the submission round that matches the point in time you are applying for funding. For a fiscal year with more than one Call for Proposals, the drop-down list will include all rounds available that year.

**After data has been entered into Proposal Title, Proposal Lead and Submission Round, the screen will expand to show Program(s) and Market selection options.**

New Proposal for Widget Association of Canada



Complete the **Title and Lead** for the proposal and select the appropriate Submission Round. This selection will display the available funding programs. To request joint funding select two programs, if the options appear.

The program selection will display the available Markets.

You must create a separate proposal for each market for which you will be requesting funding.

**\* Proposal Title**

**\* Proposal Lead**

**\* Submission Round**

**Fiscal Year**

2021/2022

**\* Program(s)**

Expanding Market Opportunities (NRCan)

Market Initiatives (FII)

Wood First (FII)

**\* Market**

Note: The following fields can not be changed once the proposal is created Submission Round, Program and Market.

Program(s)

Only the program(s) for which the organization is eligible to apply for funding will appear. Depending on the options, applicants can seek funding for a proposal from one or more programs administered by FII or NRCan.

Market

Markets available for selection are dependent on the chosen program(s). NRCan and FII programs do not fund the same types of activities (or focus areas) in every market. For more information, please refer to the guiding documents—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

**A proposal can only include planned activities for a single geographic market.** For example, an applicant with an interest in proposing projects in the US and in India will have to submit two separate proposals.

The exception to this rule is the “All Markets” selection, which should be applied to projects with a global reach, such as ISO standards work.

For markets not specifically listed in the FMS, you may select “Other Market”. Applicants are to keep the focus of the proposal to a single “other” market and indicate in the proposal title the target market. For example, “Widget Market Development in Andorra”.

Note, the market selection controls the market objective, focus area and activity type options available in subsequent sections.

*REMINDER:* Make sure to select the correct market. Once the market has been selected, it **cannot** be modified. Please contact NRCan or FII if there are any questions.

## Filling in Proposal Template – Section by Section

Completion of the Title section is required in order to navigate to other sections. Upon completion, the Organization section will be displayed and the applicant can navigate between sections of the proposal via the menu at the top of the screen.



### ORGANIZATION

This section displays the organization details entered during the account request process. Only a main account holder of the organization can update the information by selecting **Organization Name**, then **Organization Details** and then **Edit** in the left side navigation.

Upon saving, the changes will appear in **all** proposals for the organization—past, present, and future—from that point onwards.

### MARKET - OVERVIEW, OBJECTIVES, PARTNERSHIPS, AND IN-KIND CONTRIBUTIONS

The Market section includes the Market Overview, Market Objectives, and Partnerships and In-Kind Contributions for the proposal. This section is a critical part of the proposal and is weighed heavily during the evaluation scoring process.

## EDITING MARKET OVERVIEW

### Edit Market Overview

The **Market Overview** provides the business case for the proposal.

Please explain clearly why your organization is seeking to develop the selected market and how the proposed work will benefit the Canadian forest sector.

#### \* Description and Trends

As of 2019, the global market consumes about 1 billion units of widgets annually. Of this, the Andorra market accounts for 300 million units. In 2019, Canada is presently shipping about 100 million units annually to Andorra, accounting for approximately 33% of the market.

The widget market in Andorra was in its infancy in 2000, with widget consumption being negligible. Since 2000, the market has grown significantly. According to Widget Economists, such as Riley Johnson, the consumption rate of widgets is expected to double between 2018 and 2025.

Further developing and providing technical support and training will help to accelerate and increase the consumption rate of widgets.

#### \* Opportunities

The construction market segment consists of small and medium builders, architects, engineers and other specifiers - each consuming approximately 50 million units of widgets annually. Through previous market research conducted, it was concluded that there is an opportunity to market Canadian widgets to increase its current 33% market share in Andorra to 45% or approximately 120 m units over the span of three years.

#### \* Challenges, Risks and Mitigation

Through previously completed projects, it has been determined that one of the factors impeding the growth of the Canadian market share of widgets in Andorra is the unfamiliarity with the products amongst practitioners. The nature of unfamiliarity ranges from general unfamiliarity with the different widget products and their specific properties to more technical questions regarding usage.

Additionally, there are other global competitors. The U.S., Vietnam and Australia are Canada's biggest competitors in the Andorra market. Exports from the U.S. and Vietnam overtook Canada for the first time in 2010 and their growth continues to outpace Canada by a wide margin.

Canadian Widgets have also not as yet been declared eligible for all of their potential building applications. At present Canadian Wood Widgets have been deemed eligible for only 75% of the construction market applications in Andorra - leaving a gap of 25% of the market which could be filled by Canadian Wood Widgets but which is currently being filled by other systems and products.

To increase familiarity of Canadian widgets and to displace other global competitors, Widget Association of Canada is proposing the production of educational literature. The literature will be distributed at marketing [tradeshows](#) and will also be available on our established website, as a digital copy. To improve the potential marketplace for Wood Widgets - special codes + standards briefings, meetings, and demonstrations will help with Andorran code officials and others. To assist current practitioners in advancing their technical skills in using widgets, workshops will be conducted.

The cost of inaction in assisting current practitioners with their technical skills is estimated to be 1 million dollars. If sufficient technical support is not provided, practitioners are likely to continue or revert back to using wingnuts.

The global health pandemic and the wide reaching socioeconomic impacts of the [coronavirus](#) have affected the widget market in various ways. The nature of this year's proposed activities reflect the shift towards virtual program delivery.

Cancel Save

### Description and Trends

Briefly explain your organization’s interest in developing the selected market, and how doing so will benefit the B.C./Canadian forest sector. Include information about the selected market, such as:

- General description about the wood culture, including wood products, species and applications preferences/uses, and related socio-economic factors.
- Statistics and trends directly relevant to proposed activities (e.g. housing starts, demographic changes, government policies, design trends and status of codes and standards).

### Opportunities

Describe current opportunities for the selected market that the organization aims to take advantage of through the proposed activities on behalf of the B.C./Canadian forest sector. Highlight:

- Opportunities for specific B.C./Canadian wood products, species and applications based on consumer preferences, demands and needs, and policies encouraging wood use/wood trade.
- Potential areas for growth or influence.

### Challenges, Risks and Mitigation

Describe conditions that could prevent or slow down progress in the selected market and the ways (if any) the organization will work to minimize their impact through planned activities. Description should address:

- Threats and risks (e.g. tariffs and non-tariff barriers).
- Major competitors and competing products.
- The cost (e.g. financial or market share loss and impact on reputation) of inaction.



### Market Objective

A proposal must have at least one market objective. The choices available for selection are driven by the market identified when first establishing the proposal.

### Link to Strategy

Explain how the proposed activities respond to one or more of the strategic objectives identified in a published market strategy for your organization and/or NRCan/FII. The description should include:

- Your analysis explaining how the proposed projects and activities address your organization's market development goals and those of the chosen funding program(s).

NRCan and FII have commissioned and supported the development of market strategies and studies for priority offshore and domestic wood markets. These publications are available under **Information Resources**.

If a strategy is not available for the selected market, referencing a credible third-party analysis is an acceptable alternative. The analysis should focus on how the proposal addresses the organization's market development goals. Whenever possible, provide supporting documentation in the Support Files section.

A clear analysis of the link between the proposed projects and market development goals for the chosen market will help strengthen the proposal. The analysis should be contained in this sub-section and should stand on its own.

### Outcomes Achieved to Date

Explain how the proposed activities build upon past activities and highlight the incremental changes over time for the selected market. Provide examples of accomplishments achieved in this market resulting from previous market development activities and explain the significance of the outcome(s) to the B.C./Canadian forest sector in the given market.

If the proposed suite of projects and activities are the same or similar year after year, specific examples of achievements (e.g. number of sales leads, sales data, and increased wood use due to training or code changes) are expected.

If the proposal presents new projects and activities, the focus can be on the expected outcomes and the potential positive implications for B.C./Canadian forest sector. If applicable, the analysis can also describe how the new activities relate to current or past activities; how it will advance the use of forest products or fill a gap in knowledge, etc.



Where possible, indicate the project(s) in which the partnering organization(s) or individual(s) will be involved.

The applicant is encouraged to seek out partnerships whenever appropriate and to look beyond the “usual” cohort of potential partners.

When scoring, evaluators consider the appropriateness, variety, and the degree to which the collaboration(s) will help achieve the goal(s) of the proposal. Established markets should include more than one partner.

### In-Kind Contributions

The applicant must identify if their organization is pursuing in-kind contributions.

If “No”, a reason must be provided.

If “Yes”, list any free (or discounted) goods and services and/or other contributions that will directly help the organization deliver the proposed suite of project(s). Where possible, include the value of the in-kind contribution(s).

Examples of in-kind contributions include donations of boardroom space and products/samples, volunteering time to be a member of a project steering committee or delivering a presentation. **Expenses considered the normal cost of doing business for individuals or companies are not in-kind contributions.** These include:

- Time to participate as an Executive and/or Board member for the organization.
- Investments that directly benefit association member companies, such as costs to attend tradeshows or travel for trade missions.
- Association membership fees.

Evidence of additional industry support for activities beyond the minimum cost-share requirements contributes to a higher proposal evaluation score. Therefore, it is important to disclose the details of additional financial contributions, or other direct contributions to the project(s).

Letters of support, while not an in-kind contribution, are another way for clients, partners and collaborators to express support for the organization’s market development project(s) and to help support the proposal.

Attach letters of support to a proposal in the Support Files section.

FOCUS AREAS – SELECTING AND ESTABLISHING TARGETS

← Collapse

Widget Association of Canada

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Proposals

**View / Create**

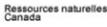
Guidelines

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Funding Management System


👤 Natalie Chan

Title	Organization	Market	Focus Area	Projects	Support Files	Review	Submit
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2021/2022 - Widget Market Development in Andorra - Other Market

Add / Edit

**Focus Areas**

Identify one or more **Focus Areas** that this proposal supports. Focus area(s) must be selected before adding project(s).  
 For each focus area, establish **Anticipated Target Results** and add any notes.  
 To guide your selection, focus area descriptions are listed in the guiding documents under **Information Resources**.  
 Need to change a focus area selection? See **Help** for instructions.

Focus Area
+ Codes & Standards
+ Marketing
+ Technology Transfer, Education and Training

⏪ < 1 > ⏩
12 items per page
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## Edit Focus Areas



Identify one or more **Focus Areas** that this proposal supports. Focus area(s) must be selected before adding project(s).  
 For each focus area, establish **Anticipated Target Results** and add any notes.  
 To guide your selection, focus area descriptions are listed in the guiding documents under **Information Resources**.  
 Need to change a focus area selection? See **Help** for instructions.

Use In Proposal	Focus Area		
<input checked="" type="checkbox"/>	Codes & Standards		
Anticipated Outcome	Indicator	Anticipated Target Results	Notes
Canadian wood products and building systems are accepted in international codes, standards and policies.	Qualitative assessment of codes and standards progress using the Market Access matrix.	Yes	The Market Access matrix
Changes to codes and standards are adopted that expand the use of wood products and building systems.	# of local, provincial and federal government organisations adopting policies and/or regulations to support wood use.	1	Focus on the Andorra market
Canadian companies have the information they need to identify market changes and pursue market opportunities.	# of Canadian companies that received information products.	10	10 Canadian companies in
Canadian organizations have the information needed to assess their readiness to enter a wood market or pursue opportunities.	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood market.	10	10 Canadian companies in
An increased number of individuals or organizations have access to tools and information needed to facilitate their acceptance of or capacity to design and build with wood.	# of individual or organizations that are using tools and information to facilitate their acceptance of or capacity to design and build with wood.	10	10 Canadian companies in
Codes and standards, regulations and policies expand recognition of wood as a viable construction material and/or wood construction systems.	# of codes and standards, policies or regulations along the change continuum as identified in the codes and standard matrix.	4	4 Andorran codes and stan
<input type="checkbox"/>	Market Research		
<input checked="" type="checkbox"/>	Marketing		
<input type="checkbox"/>	Infrastructure		
<input checked="" type="checkbox"/>	Technology Transfer, Education and Training		
<input type="checkbox"/>	Technical Research and Testing		
<input type="checkbox"/>	Environmental Reputation		

Cancel Save

Focus areas are categories of activities, such as marketing or technical research. A focus area encompasses a prescribed set of activities, like hosting an event. An applicant can create a project using one or more of the activities available for selection in that focus area.

Applicants need to select a focus area before adding project(s). Given this, it is important to understand the types of activities and cost shares aligned with each focus area to make the appropriate selection(s) for your proposal.

For example, an applicant could request support to organize a mission that includes a presence at a tradeshow. The applicant would select the Marketing focus area, create and title the project, and include two activities: one to host the mission and one to attend the tradeshow.

Focus area definitions are in the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants* under **Information Resources**.

To choose one or more focus areas and to establish performance targets select **Add/Edit** at the top right corner of the screen. Since multiple selections can be made at the same time, use the “+” and “-” buttons to expand and minimize performance measurement information.

**REMINDER:** Key features of a focus area:

- Links to one or more markets. The market that is selected for the proposal determines the focus areas that are available.
- Includes one or more activities. When creating a project, the activities available to choose from are dependant on the focus are the project supports.
- Can link to one or more projects, but a project can only have one focus area.

Codes and Standards focus area: The Market Access Matrix template is how recipients track milestones for work aligned with the Codes and Standards focus area. A Matrix is required for each market where Codes and Standards work is taking place. The template is available in the FMS under **Information Resources**.

FII and NRCan expect that Codes and Standards related activities will be coordinated in offshore markets through the Canada Wood Group and domestically through the Canadian Wood Council.

## FOCUS AREA PERFORMANCE MEASURES

Upon selecting a focus area, related anticipated outcomes and indicators will appear. NRCan and FII determine the Anticipated Outcomes and Indicators for focus areas.

Applicants need to establish anticipated target results for each indicator. Targets must be whole numbers, not a range of numbers (i.e. “20” rather than “20-30”).

If a proposal is approved, final indicator target results must be reported in April via the annual report.

## CHANGING A FOCUS AREA

Focus area selections can be changed by selecting **Add/Edit**.

However, if one or more projects have been linked with the focus area selection, all related project information must be deleted before deselecting the focus area. Navigate to the Projects section, select **View** beside the project and select **Delete** at the bottom of the screen. Repeat for every project linked to the focus area in question.

Once all related project information is deleted, the focus area can be deselected.

## Projects – Viewing and Adding Projects to the Proposal

**Funding Management System**

2021/2022 - Widget Market Development in Andorra - Other Market Hide

**Projects** Add Projects

To create a new project select **Add Projects**.  
To review or edit a project once it has been created select **View**.

	Focus Area	Project Name	Project Lead
<a href="#">View</a>	Codes & Standards	Andorran Legislative and Regulatory Support	Natalie Chan
<a href="#">View</a>	Marketing	Literature Production	Natalie Chan
<a href="#">View</a>	Marketing	Virtual Tradeshow Programming for 20/21 Fiscal Year	Natalie Chan
<a href="#">View</a>	Technology Transfer, Education and Training	Widgets Workshop for Existing Practitioners	Natalie Chan

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Show Project List

### ADDING A PROJECT

#### New Project ✕

**Project Name** should be descriptive yet succinct.  
Select the **Project Lead** from the list of main and sub-accounts for your organization. To add a new project lead contact a main account for your organization.  
Select a **Focus Area** for this project from the list. Available options reflect the focus area(s) selected at the proposal level.  
For additional guidance, refer to guiding documents under **Information Resources**.

**\* Project Name**

**\* Project Lead**

**\* Focus Area**

Note: Focus Area cannot be changed once a Project has been created.

To add a new project to a proposal, select **Add Projects** from the top right corner of the screen, fill in the required information fields and select **Create Project**.

TIP: When creating projects, consider combining similar activities together. For example: Want to participate in five tradeshow in a market? Submit **one** project that lists each tradeshow as a separate activity and provide related budget details.

### Project Name

The project name should be descriptive and not be too long. Consider how it will read as part of a list of projects. If the project is comprised of ongoing work, consider adding the year to the title to distinguish it from past and future proposals.

### Project Lead

The project lead can only be an existing sub- or main account holder. Along with the main account holder(s) of the organization, the lead will receive all email correspondence regarding the project.

TIP: To avoid stopping mid-process, select an existing account as a placeholder if the intended project lead does not yet have an account.

### Focus Area

A project must be linked to a focus area. To do this, select a focus area from the drop-down menu.

If the desired focus area is not listed, it was not selected in the Focus Area section. To add a focus area, see Focus Areas – Selecting and Establishing Targets.

The focus area determines the default budget cost share and activity selection options for affiliated projects. Focus area cost shares are in the guiding documents—the FII Market Initiatives *Investment Strategy* and *Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy* and *Application Guide*, and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

**Once a project has been created, its Project Details can be edited by selecting Edit on the Projects screen.**

Proposals can have one or more focus areas. A single focus area can be linked to one or more projects. However, a project can only be linked to one focus area.

## EDITING PROJECT DETAILS

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Natalie Chan

Title	Organization	Market	Focus Area	Projects	Support Files	Review	Submit
2021/2022 - Widget Market Development in Andorra - Other Market							

[Show Project List](#)

### Literature Production

The fields on this screen are critical to funding decisions.

Please clearly describe the various elements of the project, how a project will be implemented, and why your organization wants to invest staff time and funds in this work. Provide the name, job title and role for each staff/contractors that will deliver the project.

When establishing the project budget and spending schedule, please identify if your organization is seeking funding from other institutions or levels of governments.

Select **Edit** to add or change content.

For additional guidance, refer to guiding documents under **Information Resources**.

**Project Details** [Edit](#)

**Project Name**  
Literature Production

**Project Lead**  
Natalie Chan

**Focus Area**  
Marketing

**Project Description** [Edit](#)

**Project Description**

To address unfamiliarity with Canadian widget projects, we are proposing to produce a digital pamphlet for our website. The pamphlet will contain basic information about Canadian widget products: how they differ, how they're produced and how they can be used in construction applications. We are hiring a writer to help us produce the digital pamphlet.

The pamphlet will be shared at the virtual tradeshows we are planning on attending. The pamphlet will also be available via our website either as a downloadable digital copy or printable on demand.

Interim 1 (April-July): writing completed  
Interim 2 (August-November): uploading and formatting all copies  
Interim 3 (December-March): tracking downloads and website engagement

**Personnel and Staff**

Our staff and the hired writer, Avery, will deliver this project.

To add an activity to the project, including related budget and performance measures, select **Add Activity**.

To create a budget for an activity, select **Add Budget Item**. Please carefully review the list of available budget items before selecting. Then enter the total cost of the item and a description.

Select **Add Other Funder** to identify if your organization is seeking funding from other institutions or levels of governments. Project cost shares must equal 100%

**Activities** [Add Activity](#)

Activity Type	Activity Name
<a href="#">+</a> <a href="#">Edit</a> Literature Production	Widget Pamphlet

**Activity Funding by Interim Period**

Activity Name	Budget	Interim 1	Interim 2	Interim 3
<a href="#">+</a> <a href="#">Edit</a> Widget Pamphlet	\$2,500	\$1,500	\$1,000	\$0
<b>Project Total</b>	<b>\$2,500</b>	<b>\$1,500</b>	<b>\$1,000</b>	<b>\$0</b>

**Activity Funding by Funder** [Add Other Funder](#)

Activity Name	Budget	NRCan	FI	Recipient	Other
<a href="#">+</a> <a href="#">Edit</a> Widget Pamphlet	\$2,500	\$725	\$750	\$825	
<a href="#">+</a> <a href="#">Edit</a>					\$200
<b>PROJECT TOTAL (COST SHARE)</b>	<b>\$2,500</b>	<b>\$725</b>	<b>\$750</b>	<b>\$825</b>	<b>\$200</b>
<b>Cost Share</b>	<b>100.00000%</b>	<b>29.00000%</b>	<b>30.00000%</b>	<b>33.00000%</b>	<b>8.00000%</b>

[Delete Project](#)

## PROJECT DESCRIPTION AND PERSONNEL AND STAFF

## Edit Project Description

**\* Project Description**

To address unfamiliarity with Canadian widget projects, we are proposing to produce a digital pamphlet for our website. The pamphlet will contain basic information about Canadian widget products: how they differ, how they're produced and how they can be used in construction applications. We are hiring a writer to help us produce the digital pamphlet. The pamphlet will be shared at the virtual [tradeshows](#) we are planning on attending. The pamphlet will also be available via our website either as a downloadable digital copy or printable on demand.

Interim 1 (April-July): writing completed

Interim 2 (August-November): uploading and formatting all copies

Interim 3 (December-March): tracking downloads and website engagement

**\* Personnel and Staff**

Our staff and the hired writer, Avery, will deliver this project.

Cancel Save

For Project Description, describe the project and the implementation strategy and provide some reasoning for the listed staff time and funding levels.

The Project Description is critical to informing funding decisions. Therefore, include details such as:

- Timing—provide specific date(s) if possible, otherwise indicate the general timing (e.g. summer or August).
- Target audience.
- Description of activities (e.g. hosting five lunch-hour training sessions) and the role of your organization in the delivery of the project (e.g. planning and coordination and reserving rooms).
- Description of resources required to deliver the work (e.g. creating new training material, reprinting existing literature, and hiring professional services).
- If the proposed activities are new for your organization or ongoing. If ongoing, include key past achievements (e.g. sales leads, value of sales, and influenced policies/codes/standards), and why continuing this work is worthwhile.

## Funding Management System (FMS) – User Guide

- Explanation of anticipated outcomes and how the project supports broader market goals/opportunities/gaps, and/or supports your organization and/or FII or NRCan market strategies.
- Identification of elements of the project that will be done by a third party outside of your organization and explaining why.

For Personnel and Staff, provide the name and job title of each person (employees and consultants) directly involved in the delivery of the project and indicate the role each will play in the project delivery (e.g., researcher, mission leader, and quality assurance provider).

### ACTIVITIES – DELIVERABLES, INDICATORS, AND FUNDING

#### ADDING AN ACTIVITY

A project must have at least one activity.

To add an activity to the project (and related budget and performance measures), select **Add Activity**. At a minimum, the mandatory Activity Type and Activity Name fields must be filled to establish the activity. However, to submit the proposal, activity budget information is required. This allows applicants to edit activity details in stages.

Note that applicants can only add one activity at a time to a project. Repeat steps as needed.

To delete an established activity, select **Edit** next to the activity type or name to open the Edit Activity window and select **Delete Activity**.

## EDITING ACTIVITY DETAILS

### Edit Activity ✕

To add an activity to the project, including related budget and performance measures, select **Add Activity**.

To create a budget for an activity, select **Add Budget Item**. Please carefully review the list of available budget items before selecting. Then enter the total cost of the item and a description.

Select **Add Other Funder** to identify if your organization is seeking funding from other institutions or levels of governments. Project cost shares must equal 100%

**\* Activity Type**

Literature Production

**\* Activity Name**

Widget Pamphlet

**Activity Deliverables**

Deliverables
Copy of Product (Digital or Print)

**Activity Indicators**

Indicators	Target
# of documents downloaded	4,000
# total people reached	4,000

**Activity Funding by Interim Period** Add Budget Item

Budget Item	Budget	Description	
Professional Services (Fixed rate)	\$1,500	Avery's writer services to produce the content o	Delete Budget Item
Professional Services (Fixed rate)	\$1,000	Digital design of a pamphlet that encourages re	Delete Budget Item

Add Budget Item

	Budget	Interim 1	Interim 2	Interim 3
Widget Pamphlet Total	\$2,500	\$1,500	\$1,000	\$0

**Activity Funding by Funder**

Override default cost share

Budget	NRCAN Program	NRCAN Funding \$	FII Program	FII Funding \$	Recipient	Recipient Funding \$
	EMO	\$825	MI	\$850	Recipient	\$825
\$2,500		\$825		\$850		\$825

Delete Activity

Cancel

Save

## ACTIVITY TYPE

The activities available for selection are based on the focus area linked to the project. Once the Activity Type is selected, the required activity deliverables and indicators will populate.

### DELIVERABLES AND INDICATORS

NRCan and FII determine deliverables and indicators for activities. The applicant **must establish targets for each activity indicator**.

If a proposal is approved, applicants must report the results against these targets in April for interim 3 reporting although deliverables should be attached to interim reports throughout the year as the planning/delivery of activities unfold.

### ADDING A BUDGET ITEM

The Edit Activity screen allows the applicant to build the activity budget from a list of eligible expenses referred to as budget items. An activity can have one or more budget items.

To create a budget item for an activity, select **Add Budget Item**. A line will appear with a drop-down menu of budget items. Make a selection and enter the **total cost of the item and a description**; this information is necessary for every budget item that is added to the activity. Scrolling while a budget cell is actively selected will change the inputted numerical value.

Select **Delete Budget Item** to remove the item.

Activity Funding by Interim Period [Add Budget Item](#)

Budget Item	Budget	Description	
Printing	<input type="text" value="\$1,000"/>	<input type="text" value="Print copies of the pamphlet, 2000"/>	<a href="#">Delete Budget Item</a>

### SOME ACTIVITY BUDGET ITEMS REQUIRE MORE INFORMATION

Staff: Salary and Benefits – This budget item is only eligible for the Office Maintenance activity under the Infrastructure focus area. At this time, all offshore Infrastructure expenses must be coordinated through the Canada Wood Group, FII or the Canadian Wood Council for domestic expenses.

Eligible organizations using this budget item must provide supporting documentation that lists each employee's full name and job title (including vacant and contract positions) who will be performing work on the project and reflect the lump sum salary and benefits cost in the budget.

All other organizations are encouraged to capture contractor and consultant salary costs using the Professional Services budget item.

Professional Services – Each consultant and contractor working on a project must be a separate Professional Services budget item. Their services can be paid by one of two ways: "Daily Rate" or "Fixed Rate".

Daily rate is preferred. Applicants that select fixed rate will need to explain why this was necessary.

If the individual is not known at proposal submission, provide a job title or more general description instead. If the project receives funding, this information should be updated at interim reporting once the individual is known.

FII and NRCan must also be made aware of any changes to existing subcontractors or the addition of new subcontractors through interim reporting, and the changes must continue to respect conflict of interest and competitive process requirements.

If Professional Services – Daily Rate is chosen as a budget item, applicants will be asked to:

- Identify the consultant’s name in the Description field;
- Identify the # of Days and Cost Per Day – which will automatically generate the total cost per fiscal year. If more than one consultant is working on an activity, each should be listed in a separate line;
- Enter details on the competitive process (e.g. Request for Proposals and Request for Qualifications) or if a competitive process was not used, provide details for the selection of the subcontractor with reference to how the reasonableness of the rate has been ascertained in the Description field;
- Notify FII and NRCan of any changes or additions of new subcontractors through interim reporting. The changes must continue to respect conflict of interest and competitive process requirements.

If Professional Services – Fixed Rate is chosen as a budget item, applicants will be asked to:

- Identify the consultant’s name in the Description field;
- Enter the total budget for the consultant. If more than one consultant is working on an activity, please add a new budget item for each consultant;
- Enter details on the competitive process (e.g. Request for Proposals and Request for Qualifications) or if a competitive process is not used, provide details for the selection of the subcontractor with reference to how the reasonableness of the rate has been ascertained in the Description field;
- Notify FII and NRCan of any changes or additions of new subcontractors through interim reporting. The changes must continue to respect conflict of interest and competitive process requirements.

ACTIVITY FUNDING BY INTERIM PERIOD

	Budget	Interim 1	Interim 2	Interim 3
Widget	\$2,500	\$1,500	\$1,000	\$0
Pamphlet				
Total				

Financial planning and reporting for every project activity are organized in a four-month block of time known as an interim period.

An applicant must identify how the total activity budget will be spent throughout the year. Possible options include:

- Allotment of the whole activity budget to a single interim period (e.g. all costs incurred in interim 2).
- Splitting of the budget between any combination of interim periods based on estimated spending timelines (e.g. interim 1 and 3 or interim 2 and 3).

The Activity Funding by Interim Period table will automatically calculate the sum of budget items for an activity. To help the applicant plan their spending, the table highlights the difference between the allotted budgets across interim periods and the total activity budget. To submit a proposal, the total value of budget items must be fully allotted.

## Funding Management System (FMS) – User Guide

	Budget	Interim 1	Interim 2	Interim 3
Widget	\$2,500	\$1,500	\$500	\$0
Pamphlet				
Total				
Difference				\$500

### ACTIVITY FUNDING BY FUNDER

The FMS will calculate costs between identified sources of funding (FII, NRCan, Recipient and Other) based on the default cost shares for the focus area attributed to the project.

The applicant can override the default cost share breakdown, as long as the revised funder cost share does not exceed the maximum percentage outlined in the guiding documents and the applicant meets their minimum contribution level.

If **Override default cost share** is applied, the applicant must manually calculate the alternative cost share. The FMS can only apply the default cost share automatically.

The table will inform the applicant if there is a difference between the sum of dollar amounts across all funders and the sum of all budget items.

Activity Funding by Funder

Override default cost share

Budget	NRCan Program	NRCan Funding \$	FII Program	FII Funding \$	Recipient	Recipient Funding \$
	EMO	\$500	MI	\$4,230	Recipient	\$4,230
\$14,100		\$500		\$4,230		\$4,230
Difference						\$5,140

Cost share rules are in the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants*, under **Information Resources**.

### IDENTIFYING OTHER FUNDING

Applicants can seek project funding from multiple sources alongside funding from NRCan and FII. However, applicants must disclose the source(s) and amount(s) of other funding for relevant projects. This may affect the amount of funding NRCan or FII will provide towards eligible project costs. For details regarding funding stacking limits, refer to the guiding documents—FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

To identify one or more sources of other funding as part of the Activity Funding by Funder table, select **Add Other Funder**.

Once added, the Other column will be listed in the Activity Funding by Funder table and will display the sum of all “other” funding. To see a detailed breakdown for source(s) of “other” funding, select “+” for the table row.

The inclusion of “other” funding means recipients must calculate cost shares manually. Select **Override default cost share**, if not already selected, to adjust funding levels between all identified funding sources.

### Edit Project Other Funding ✕

**Include Other Federal Funding**

\* Other Federal Funding Tag       \* Other Federal Funding Budget

**Including Other Provincial Funding**

**Including Other Funding**

## Support Files

Under the Support Files section, attach support files and diversity and inclusion files.

Upload supporting reference material such as spreadsheets, design documents or the Market Access Codes and Standards Matrix and to upload files with your diversity and inclusion strategy.

Files by default are associated with the entire proposal but can be associated with one or more projects. To do so, select **Link to Project(s)**, then select from the list of project(s) contained within the proposal.

Please do not attach documents provided by FII or NRCAN, such as market strategies or market studies, as a support file. Instead, include the relevant text from the document in the proposal.

A Diversity and Inclusion Plan is mandatory for each proposal. Upload your diversity and inclusion strategy document(s) under the Diversity and Inclusion Attachment section. **If applicants do not include a Diversity and Inclusion plan, they will not be able to submit a project proposal for funding through the FMS.**

Once files are uploaded, select **View** to download the document or **Delete** to remove.

## Review

The screenshot shows the 'Review' section of the FMS. At the top, there is a navigation bar with tabs for Title, Organization, Market, Focus Area, Projects, Support Files, Review (selected), and Submit. Below the navigation bar, the proposal title is '2021/2022 - Widget Market Development in Andorra - Other Market' with a red warning message: 'There are one or more problems with the Proposal. Please correct before submitting.' The main content area is divided into sections: 'Summary', 'Market Objectives', and 'Performance Summary - Codes & Standards'. The 'Market Objectives' section has a 'Go to Market' button. The 'Performance Summary' section has a 'Go to Focus Area' button. A red banner above the table states 'An anticipated target result is required per anticipated outcome.' The table below has columns for 'Anticipated Outcome', 'Indicator', 'Anticipated Target Results', and 'Notes'. The table contains several rows of data, each with a red exclamation mark icon in the 'Anticipated Target Results' column, indicating missing information or errors.

The Review section summarizes and validates all the information entered for a proposal. It is also where an applicant can request to decline the administration fee by selecting **Decline Admin Fees**. For details about administrative fees refer to FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants* under **Information Resources**.

Missing information or errors are displayed in red text boxes or highlighted with a red exclamation icon . Hover over the exclamation icon to see additional information.

To fix errors or complete sections of the proposal, select **Go to** for the section or select the red exclamation icon. Either selection will bring a user to the relevant section of the proposal template to fix the error.

Organizations are responsible for ensuring the completeness and accuracy of their proposals. Given this, it is highly recommended that all sections of a proposal are thoroughly reviewed before submission.

**TIP:** Targets for Focus Area and Activity Indicators, along with the Activity Deliverables listed on the Review screen can serve as a valuable checklist during interim and annual reporting. Completeness of reporting is one criteria funders assess when releasing holdbacks on payments.

## Submitting a Proposal

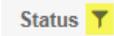
Submission of a proposal requires certification of authorization by a main account holder. Once a proposal is submitted it will become read-only. If changes are required, and the Call for Proposals is still open, contact FII or NRCan.

In the Submit section, **I agree** must be selected in order to submit the proposal.

The FMS will prevent the submission of proposals with missing required information or budget errors. In this case, the system will redirect a main account holder to the Review section to address the missing required information or error(s).

## VIEWING SUBMITTED PROPOSALS

To view submitted proposals, select **Proposals** from the left side navigation panel or **View/Create Proposals** from the Action Required on Proposals box on the home screen. Both options bring a user to the Proposals screen. Select **View in Word** to download a Word version of the proposal or **View Submitted Proposal** to view a system version of the proposal.

Refer to the Status column to confirm the submission of a proposal. For ease, you can filter the column by selecting the black filter icon .

## Responding to Information Requests

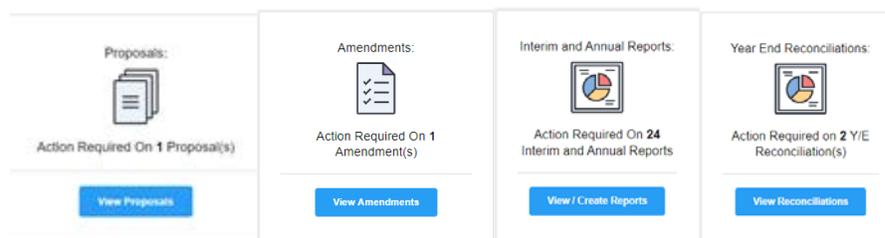
As part of the workflow in the FMS, during the proposal evaluation process, amendment process, interim/annual reporting, and year-end reconciliation, FII and/or NRCan may request additional information or changes to the submitted material.

The applicant or recipient will be informed of information or change requests by a system-generated email and through notification(s) on the home screen from the Action Required boxes.

Receiving system-generated emails when action is required throughout the business process is dependent on the role(s) of individual users for specific proposals and projects and their account type. Main account holders will receive all correspondence. Proposal and project leads will receive correspondence for proposals and projects, respectively, which require action. The email will detail the nature of the request.

Information Request Type	Who Receives System-Generated Emails
Interim Report	Main account holder(s), proposal lead, and project lead
Annual Report	Main account holder(s) and proposal lead
Year-End Reconciliation Statement	Main account holder(s)
Amendment	Main account holder(s) and proposal lead

Requests for additional information or changes must be addressed by the applicant or recipient to move forward through the business process. Responding to requests is done solely through the FMS.



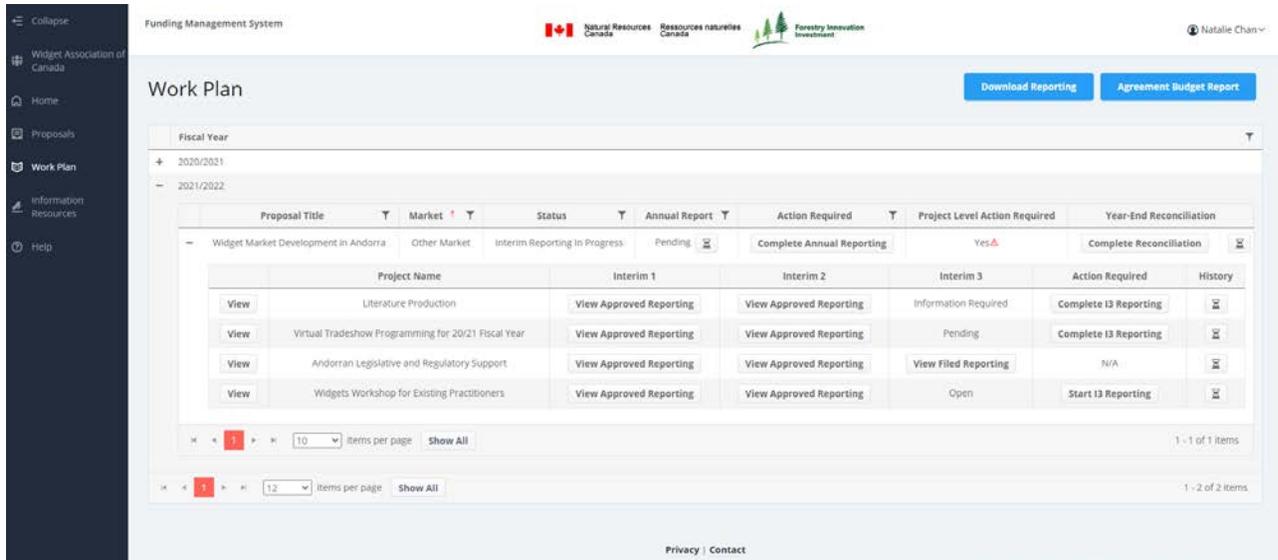
## Proposals Rejected for Dual Funding but Eligible for Single Funding

Proposals originally submitted for dual-funding consideration may be rejected for dual funding but approved for single funding. If all the proposal’s projects have been rejected by one of the funders—NRCan or FII—and at least one of the projects has been approved by the other funder, the originally submitted proposal will have rejected status.

The FMS will automatically create a copy of the proposal, with the same title as the rejected proposal, with “Rejected for Dual Funding” added. All the projects will now have the default cost shares defined for single funding. If other funding and/or overriding default cost shares were applied, they will be carried forward into the proposal copy.

The proposal copy will have pending status. You will be contacted by the single funder to let you know when to review the proposal copy. Resubmit the proposal for single-funding consideration. The consequent review and approval or rejection process follows the regular business process.

# WORK PLAN



If a proposal is approved for funding, a contribution agreement is created, and the approved projects and related activities form the basis of a work plan for the fiscal year. Once the contribution agreement has been generated, the proposal will appear on the Work Plan screen.

To see the funded proposals, select **Work Plan** from the left side navigation. The Work Plan table will list all past and presently funded proposals for the organization.

Proposals are displayed by fiscal year. Select “+” to view the list of proposals for a given fiscal year.

The information columns at the proposal level provide an overview of the reporting statuses and actions required at a given time.

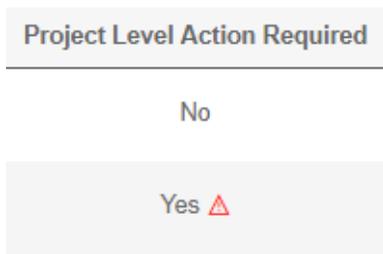
Status Column	Description
Agreement Generated	Contribution agreement has been generated by funder(s)
Advanced	An advance has been generated by funder(s)
Interim Reporting in Progress	Interim reporting has been started. Report(s) may be in draft state or are submitted and pending approval.
Interim Reporting Complete	Interim reporting is complete and approved by funder(s)
Under Amendment	Proposal is under amendment
Amendment Submitted	Proposal amendment has been submitted
Amendment Approved	Proposal amendment has been approved

Annual Report Column	Description
Open	Annual reporting is open and can be started
Pending	Annual reporting has been started and is in a draft state
Filed	Annual report has been completed and submitted
Approved	Annual report has been approved by funder(s)
Information Required	Information request issued by a funder

Action Required Column	Description
N/A	No action required
Start Annual Reporting	Select to start an annual report
Complete Annual Reporting	Select to continue editing an annual report in progress
View Annual Reporting	Select to view a read-only version of a submitted or approved annual report
Amend Proposal	Select to amend a proposal

Year-End Reconciliation Column	Description
No Action Required	No action required
Start Reconciliation	Select to start a year-end reconciliation statement
Complete Reconciliation	Select to continue editing a year-end reconciliation statement in progress
View Filed Reconciliation	Select to view a read-only version of a submitted year-end reconciliation statement
View Approved Reconciliation	Select to view a read-only version of an approved year-end reconciliation statement

The Project Level Action Required column will alert account holders if action is required for interim reporting or amendments. When action is needed, hover over the red exclamation icon next to Yes to see which projects require interim report actions.



To view the project(s) within a proposal, select “+” to the left of proposal name to display the list of projects.

To view the details of a project, select **View** next to the project name.

The information columns at the project level provide a detailed account of interim reporting actions required at a given time.

Interim (1/2/3) Column	Description
N/A	No action required
Open	Interim reporting for that period is open and can be started
Pending	Interim report has been started and is in a draft state
View Filed Reporting	Select to view a read-only version of a submitted interim report
View Approved Reporting	Select to view a read-only version of an approved interim report
Information Required	Information request issued by a funder

Action Required Column	Description
N/A	No action required
Start I(1/2/3) Reporting	Select to start an interim report
Complete I(1/2/3) Reporting	Select to continue editing an interim report in progress

FMS users can also access the administrative history of each annual report, year-end reconciliation, and project from the Work Plan screen. Select  under the Annual Report, Year-End Reconciliation or Project History column to see the history of the respective report or reconciliation e.g., select the icon under the Annual Report column to see the detailed annual reporting history including its creation, submission and information requests.

2021/2022 - Widget Market Development in Andorra - Other Market



Project Details

<b>Project Name</b>	Literature Production
<b>Project Lead</b>	Natalie Chan
<b>Other Country / Market</b>	Other Market
<b>Focus Area</b>	Marketing

Project History

- 2020-10-19 Proposal Created
- 2020-10-21 Project Submitted
- 2020-10-21 Proposal Submitted
- 2020-10-21 Proposal Unlocked (FI)
- 2020-10-21 Project Submitted
- 2020-10-21 Proposal Submitted
- 2020-10-21 Project Approved (NRCan)
- 2020-10-21 Proposal Approved (NRCan)
- 2020-10-21 Proposal Interim1 Advance Created (FI)
- 2020-10-21 IR1 Advanced (FI)
- 2020-10-21 Proposal Interim1 Advance Created (NRCan)
- 2020-10-21 IR1 Advanced (NRCan)
- 2022-05-04 Proposal Interim 1 Report Created
- 2022-05-04 Proposal Interim1 Report Filed
- 2022-05-04 Proposal Interim1 Report Approved (NRCan)
- 2022-05-04 Proposal Interim2 Advance Created (NRCan)
- 2022-05-04 Proposal Interim2 Advance Generated (NRCan)
- 2022-05-04 Proposal Interim2 Advance Created (FI)
- 2022-05-04 Proposal Interim2 Advance Generated (FI)
- 2022-05-04 Project Interim 2 Report Created
- 2022-05-04 Project Interim2 Report Filed**

Close

# AMENDING A CONTRIBUTION AGREEMENT

## Making Changes to a Work Plan

Over the course of the fiscal year, a work plan and related budgets may need adjusting. Common reasons include changes to a project or activity budget (increasing or decreasing funding), delayed completion of a project or an unforeseen urgent priority needing to be addressed.

The process of changing a work plan and updating the proposal(s) that comprise a contribution agreement is known as an amendment. FII and NRCan have different business rules for what triggers an amendment and the process by which the recipient identifies the need for an amendment. Please refer to the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide* or the NRCan *Expanding Market Opportunities Handbook for Applicants* for detailed guidance under **Information Resources**.

### INITIATING AMENDMENTS

The screenshot displays the FMS interface for the Widget Association of Canada. The top navigation bar includes the system name, logos for Natural Resources Canada and Forestry Innovation Investments, and the user name 'Natalie Chan'. The main content area is titled 'Widget Association of Canada' and features four cards:

- Proposals:** Action Required On 0 Proposal(s). Button: View / Create Proposals
- Amendments:** Action Required On 1 Amendment(s). Button: View Amendments
- Interim and Annual Reports:** Action Required On 1 Interim and Annual Reports. Button: View / Create Reports
- Year-End Reconciliations:** Action Required on 2 Y/E Reconciliation(s). Button: View Reconciliations

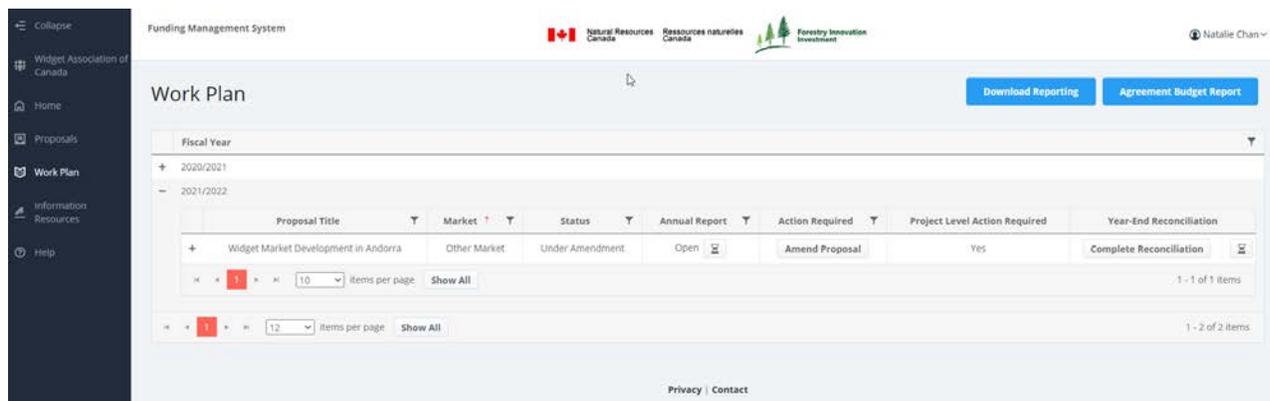
Amendments require the funder to re-open a proposal for editing. An organization will be alerted to an amendment request in two ways:

- The proposal lead and main account holder(s) for the organization will receive an email signaling which proposal has been unlocked and detailing the required changes. Recipients will need to log into the FMS to address the questions or input changes.
- The Action Required on Amendment(s) box on the home screen will track the number of amendments requiring attention.

**REMINDER:** If an amendment starts between reporting periods but is not finalized before the next interim reporting period begins, the recipient will not be able to start interim reporting. This could influence whether the recipient receives the full administrative holdback at the end of the fiscal year.

Given this, and the differing amendment processes between funders, it is important to raise the potential need for an amendment as early as possible to ensure that access to funding and reporting are not delayed.

## AMENDING AND RESUBMITTING A PROPOSAL



To begin an amendment, select **View Amendments** from the home screen or **Work Plan** from the left side navigation. Both options bring a user to the Work Plan screen, which lists all proposals –past and present– for the user’s organization.

Select **Amend Proposal**. An editable view of the proposal will open. Users can navigate between all sections of the proposal to make changes, including adding project activities, changing budgets, and adding support files.

If one or more planned projects or activities are no longer taking place, do not delete the entry. Instead, the related budget should be zeroed out and the project description(s) should be updated to reflect the change: explain why the work is cancelled or replaced. It is important for the audit history of the project that this information is captured in the FMS.

If the funder provided guidance or requested specific changes, this input will appear at the top of each screen with a blue bar to the left to highlight the text. Similar to the application process, the proposal may be edited in stages.



Once all changes are entered, a main account holder submits the amended proposal by navigating to the Submit tab via the top menu and selecting **I agree** and then **Submit Amendment**.

**REMINDER:** Only a main account holder can submit an amendment.

Title	Organization	Market	Focus Area	Projects	Support Files	Review	Submit
Amendment Notes from Funder							
Unlocking proposal to address changes as discussed.							
2021/2022 - Widget Market Development in Andorra - Other Market							
<p><b>Submit Proposal</b></p> <p>Submission of a proposal requires certification of authorization by a main account, by selecting <b>I agree</b>.                      The proposal will become read-only once submitted.                      If changes are required and the Call for Proposals is still open, contact FII or NRCan. Proposals and supporting material will not be accepted once the Call for Proposals is closed.</p> <p>I hereby certify that as the main account holder of Widget Association of Canada (Applicant) that I am authorized to submit a proposal through the password protected online Funding Management System (buildwithwood.ca) and the proposal shall be considered as signed by the Applicant.</p> <p><input checked="" type="checkbox"/> <b>I agree</b></p> <p><b>Submit Amendment</b></p>							

Upon submission, the Action Required on Amendment(s) counter will show one less item for action. When all amendments are completed, the counter will show zero.

Similar to the review and approval process for a new proposal, NRCan or FII may issue an information request for an amendment. The main account holder(s) and proposal lead will receive an email notification, which will contain details about the information request. The funder message will also appear next to a blue vertical bar at the top of the proposal screens in the FMS.

Information requests re-open the proposal so further changes can be made.

Once the amendment is approved in the FMS, the organization will receive:

- A Confirmation Letter from FII documenting the changes to work plans and budgets; and/or,
- An email from NRCan with the amended Contribution Agreement for the CA signatory to sign. Once the amendment is returned and signed by NRCan, costs related to new activities can start to be incurred.

For detailed guidance about amendments, refer to the relevant Contribution Agreement or guiding documents—the FII Market Initiatives *Investment Strategy* and *Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy* and *Application Guide*, or the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

## REPORTING

Organizations receiving funding must report on the progress of their work plan and its financial performance throughout the fiscal year. Reporting is required at the project, proposal, and agreement level. Each reporting period is called an interim period and looks back at the previous four months:

- Interim 1 – April 1 to July 31
- Interim 2 – August 1 to November 30
- Interim 3 – December 1 to March 31

Interim reports, annual reports and year-end reconciliation statements are required at the project, proposal, and agreement level, respectively. Each fiscal year requires three interim reports and one annual report. Year-end reconciliation statements are required for each agreement to attest to the financial management of the related work plan.

The Action Required boxes on the home screen indicate if any interim or annual reports or year-end reconciliation statements are outstanding. The Action Required boxes count the number of interim or annual reports or year-end reconciliation statements which require submission.



**For the third interim period, recipients must submit an annual report and a year-end reconciliation statement.** The annual report provides a year in review, highlighting key accomplishments in a market and how the work plan brought the organization closer to identified market goals. The year-end reconciliation statement is an attestation of the financial management of the agreement and is required to receive earnable administration funding held back during the fiscal year.

The deadline for reporting is generally one month after the end of the interim period. Reports are reviewed by the funder for completeness. If questions arise, an information request will be issued. See Information Requests During Interim Reporting section for more details. The specific deadlines for reporting are noted in the final Contribution Agreement.

For the open and close dates for interim and annual reporting and year-end reconciliation statements, please refer to guiding documents—FII Market Initiatives *Investment Strategy* and *Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy* and *Application Guide* and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

**REMINDER:** An organization cannot begin interim or annual reporting or year-end reconciliation if an amendment is in progress.

Accurate, complete and timely interim reporting is important because:

- Funds are not advanced for the following interim period until reporting is fully approved by the funder. In dual funding scenarios, all reports must be approved by NRCan and FII before either advance is issued.
- It is a key condition to earning the full earnable administration allowance associated with a Contribution Agreement.

In addition, as a best practice NRCan/FII conduct recipient audits every year. Audits can focus on the work plan for a market, or a specific project to ensure recipients properly claimed eligible expenses and maintained financial records. Accurate and complete interim reporting helps to facilitate the conduct of recipient audits.

## Interim Reporting

### STARTING AN INTERIM REPORT

An interim report is required for each project receiving funding. The report must be based on the last approved version of budgets and cost shares within a proposal. To start interim reporting, select **Work Plan** from the left side navigation or select **View/Create Reports** in the Action Required on Reports box on the home screen. Both options bring a user to the Work Plan screen.

Interim and Annual Reports:



Action Required On **24**  
Interim and Annual Reports

[View / Create Reports](#)

Select **Agreement Budget Report** at the top right corner of the screen to download a summary of planned and actual project spending for each proposal, as well as funds advanced to date in the current fiscal year.

For each proposal listed in the table, there is a Project Level Action Required column. If reporting is required, the action status will be Yes. Hover over the red exclamation icon to get a summary of required actions.

Yes 

Select “+” next to the proposal in order to view the associated project(s).

Each project has an Interim 1, Interim 2 and Interim 3 column that indicates its reporting status.

Interim (1/2/3) Column	Description
N/A	No action required
Open	Interim reporting is open and can be started
Pending	Interim report started and is in a draft state
View Filed Reporting	Select to view a read-only version of a submitted interim report
View Approved Reporting	Select to view a read-only version of an approved interim report
Information Required	Information request issued by funder

The Action Required column for each project will list the specific task that needs to be completed.

Action Required Column	Description
N/A	No action required
Start I(1/2/3) Reporting	Select to start an interim report
Complete I(1/2/3) Reporting	Select to continue editing an interim report in progress

To begin drafting an interim report, select **Start I(1/2/3) Reporting** under the Action Required column of the table. The interim report includes:

- Project Details
- Project Description
- Project Update
- Activities
  - Activity Funding by Interim Period
  - Reason for Variance
  - Activity Funding by Funder
- Interim Report Attachments

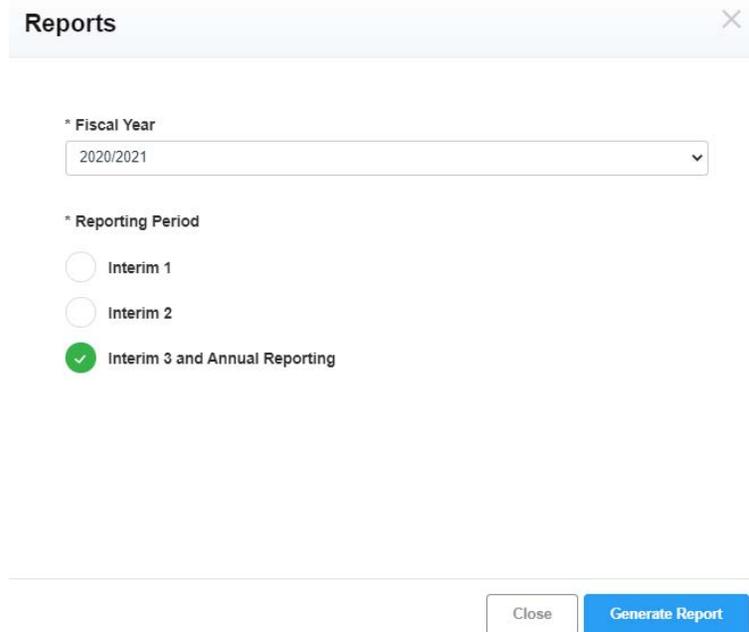
At any time during reporting periods, recipients may exit the FMS and return to edit interim reports in progress by selecting **Complete I(1/2/3) Reporting**.

When a main account holder submits the interim report by selecting **Save and Submit** at the bottom right of the screen, the project status will display a **View Filed Reporting** button and main account holder(s) and the proposal lead will receive a system-generated email confirming the submission. Select the button to see the details of the submitted interim report.

When the interim report is approved, the button for the interim period will change to **View Approved Reporting**.

At any point during the fiscal year, the organization can access the latest version of a project by selecting **View** to the left of the project name or see the administrative record of a project by selecting  under the History column.

To download a Word version of an interim or annual report, select **Download Reporting** at the top right corner of the screen.



Select the fiscal year and interim reporting period(s) of interest. Annual reporting content cannot be downloaded separately from interim 3 content.

Select **Generate Report** to download the details for started, submitted and approved interim or annual reports for the selected fiscal year and interim reporting period.

**REMINDER:** Only a main account holder can submit an interim report.

## EDITING AN INTERIM REPORT

The screenshot shows the FMS interface with a dark sidebar on the left containing navigation options like 'Collapse', 'Widget Association of Canada', 'Home', 'Proposals', 'Work Plan', 'Information Resources', and 'Help'. The main content area is titled 'Funding Management System' and features a header with logos for Natural Resources Canada and Forestry Innovation Investment. A navigation bar includes 'Title', 'Organization', 'Market', 'Focus Area', 'Projects' (highlighted), 'Support Files', 'Review', and 'Submit'. Below this, a table lists projects, with the selected one being '2021/2022 - Widget Market Development in Andorra - Other Market'. A 'Return to Project List' button is visible. The project details section shows 'Project Name: Literature Production', 'Project Lead: Natalie Chan', and 'Focus Area: Marketing'. The project description section contains text about producing a digital pamphlet and lists interim milestones: 'Interim 1 (April-July): writing completed', 'Interim 2 (August-November): uploading and formatting all copies', and 'Interim 3 (December-March): tracking downloads and website engagement'. A 'Personnel and Staff' section is partially visible at the bottom.

The Project Details section displays the Project Name, Project Lead and Focus Area as read-only information.

The Project Description section displays the Project Description and Personnel and Staff as read-only information. This text is pulled from the latest version of the project, which means if the project information is amended during the year, the new text will be displayed on the screen the following interim reporting period.

Use the “+” and “-” symbols to expand and minimize these sections.

**TIP:** To navigate back to the list of funded projects, select **Return to Project List** near the top right corner of the screen.

**Project Update** Edit

All the project work was on track and is now complete.

In the **Activities** section, select **Edit** next to the relevant Activity Type to edit activity indicators and budget items. Use the "+" and "-" symbols to see and hide Activity Type metrics. This section should be reviewed every interim period to ensure project performance is on track.

**Activities** Add Activity

	Activity Type	Activity Name
+	<b>Edit</b> Literature Production	Widget Pamphlet

**Activity Funding by Interim Period**

	Activity Name	Approved Budget	Revised Budget	Approved Interim 1	Revised Interim 1	Approved Interim 2	Revised Interim 2	Approved Interim 3	Revised Interim 3
+	<b>Edit</b> Widget Pamphlet	\$2,500	\$2,500	\$1,500	\$1,500	\$1,000	\$1,000	\$0	\$0
	<b>Project Total</b>	<b>\$2,500</b>	<b>\$2,500</b>	<b>\$1,500</b>	<b>\$1,500</b>	<b>\$1,000</b>	<b>\$1,000</b>	<b>\$0</b>	<b>\$0</b>

Review and update the **Activity Funding by Interim Period** table above by selecting **Edit** next to each activity. Organizations must ensure the planned and actual spending across interim periods for each activity is accurate. Select **Edit** in **Reasons for Variance** to explain any change between planned and actual spending, like but not limited to an increase, decrease or deferred spending. For any significant re-allocations of funds between activities and projects, recipients should contact NRCan/FII in order to determine how best to manage the change in the budget.

**Reason for Variance** Edit

No variance in the budget.

**Activity Funding by Funder** Add Other Funder

**Project Update** ×

\* Project Update

The project is moving forward as expected.

Cancel Save

An update on the planning and implementation of each project is required every interim period. This information is captured in Project Update. To enter a project update, select **Edit**.

**TIP:** Use this section to indicate: if the planning and delivery of a project is on-track, behind or will be deferred/cancelled and why; if the right resources (people, tools, partnerships) are in place; if the scope of the project has changed and why; or, to summarize key points that may be in an attached event form.

The Activities section displays every project activity type, along with its indicators. **This section should be reviewed every interim period to ensure project performance is on track.**

Activity Indicators and Anticipated Targets established in the proposal are displayed as read-only under the Indicators section. **At interim 3, organizations must disclose the actual target for each Indicator.**

Activity Indicators

Indicators	Target	Actual
# of documents downloaded	4,000.00	<input type="text" value="4,000.00"/>
# total people reached	4,000.00	<input type="text" value="4,000.00"/>

Activities, indicators and deliverables are defined in the guiding documents—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide*, and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**. Additional guidance about what to include in an event report is also available under **Information Resources**.

ADDING A NEW ACTIVITY THROUGH INTERIM REPORTING

To add a new activity to a project during interim reporting, select the **Add Activity** button to the right of the Activities section.

Selecting the activity type, establishing anticipated targets and related budget information in an interim report is the same as the proposal stage. For step-by-step instructions, refer to Activities – Deliverables, Indicators, and Funding.

At a minimum the mandatory Activity Type and Activity Name fields must be filled in order to establish the activity. However to submit the interim report, activity budget information will be required. This allows recipients to edit activity details in stages.

*REMINDER:* NRCan and FII have different rules for adding new activities through interim reporting and whether this triggers a formal amendment to a contribution agreement. **Before adding an activity to a project through interim reporting, please review guiding documents**—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide*, or the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

**The interim reporting process does not support the addition of new projects** to a proposal. Please consult the relevant funder to discuss the potential addition of new projects. Should a work plan update require the addition of a new project(s), NRCan/FII will need to open the affected proposal for amendment.

### ACTIVITY FUNDING BY INTERIM PERIOD

Activity Funding by Interim Period

	Activity Name	Approved Budget	Revised Budget	Approved Interim 1	Revised Interim 1	Approved Interim 2	Revised Interim 2	Approved Interim 3	Revised Interim 3
-	<b>Edit</b> Quality certification training workshop for Canadians	\$4,000	\$4,000	\$0	\$0	\$4,000	\$4,000	\$0	\$0
<b>Budget Item</b>		<b>Current Budget</b>	<b>Budget</b>	<b>Description</b>					
Printing		\$500	\$500	Training materials, 20 times \$25					
Professional Services (Daily Rate)		\$2,000	\$2,000	Quality Certification Consultant					
				<b>Budget Item Attribute</b>		<b>Value</b>			
				# of Days		2			
				Cost Per Day		\$1,000			
				Competitive Process		Yes			
Registration Fee		\$500	\$500	Hotel meeting room rental					
Travel/Accommodation		\$1,000	\$1,000	Air fare and hotel for consultant, travel from Vancouver to Kelowna					
+	<b>Edit</b> Attend International Widget Products Council Meetings	\$5,500	\$5,500	\$0	\$0	\$5,500	\$5,500	\$0	\$0
<b>Project Total</b>		<b>\$9,500</b>	<b>\$9,500</b>	<b>\$0</b>	<b>\$0</b>	<b>\$9,500</b>	<b>\$9,500</b>	<b>\$0</b>	<b>\$0</b>

The Activity Funding by Interim Period table displays the approved and revised budget for each project activity, as well as planned and actual spending across interim periods for each activity and the project as a whole. To ensure accurate financial reporting, it is important to review and update this table by selecting **Edit** next to each activity. Scrolling while a cell is actively selected will change the inputted numerical value.

Activity Funding by Interim Period [Add Budget Item](#)

Budget Item	Budget	Description								
Printing	\$500.00	Training materials, 20 times \$25								
Professional Services (Daily Rate)	\$2,000.00	Quality Certification Consultant								
	<table border="1"> <thead> <tr> <th>Budget Item Attribute</th> <th>Value</th> </tr> </thead> <tbody> <tr> <td># of Days</td> <td>2</td> </tr> <tr> <td>Cost Per Day</td> <td>\$1,000.00</td> </tr> <tr> <td>Competitive Process</td> <td><input checked="" type="radio"/> Yes <input type="radio"/> No</td> </tr> </tbody> </table>		Budget Item Attribute	Value	# of Days	2	Cost Per Day	\$1,000.00	Competitive Process	<input checked="" type="radio"/> Yes <input type="radio"/> No
Budget Item Attribute	Value									
# of Days	2									
Cost Per Day	\$1,000.00									
Competitive Process	<input checked="" type="radio"/> Yes <input type="radio"/> No									
Registration Fee	\$500.00	Hotel meeting room rental								
Travel/Accommodation	\$1,000.00	Air fare and hotel for consultant, travel from Vancou								

Movement of funds and amendments are subject to review and approval by NRCan and/or FII. Changes in the annual budget for one or more existing activities or projects, where the result is a change in the annual budget of the proposal, can be handled by:

## Funding Management System (FMS) – User Guide

- Decreasing the budget(s) from one or more activities within the same proposal, or another proposal within the same Contribution Agreement.
- If the increase cannot be offset by a redistribution of funds within the Contribution Agreement, an amendment would be required.

For any significant re-allocations of funds between activities and projects, recipients should contact NRCan/FII in order to determine how best to manage the change in the budget.

If revised interim budgets are approved:

- FII will send the recipient a Confirmation Letter documenting the change(s) to the work plan and/or budgets.
- For most contribution agreements, NRCan requires a revised budget document approved and signed by both the funding recipient and NRCan for any movement of funds greater than 20% between existing projects.

To see budget item details for an activity, select “-“ to expand the table.

To reflect past and future activity spending across interim periods, recipients can:

- Adjust the cost of individual budget items, or add budget items. It is important that the revised Project Total and the sum of interim periods match.
- Move funds between activities, and between projects by increasing and reducing respective activities or budget items.

	Budget	Interim 1 Actual \$	Interim 2	Interim 3
Certification Scheme stakeholder committee and board meetings Total	\$14,100	\$4,700.00	\$4,700.00	\$4,700.00

Select **Edit** in Reasons for Variance to explain any change between planned and actual spending, such as (but not limited to) a spending increase, decrease or deferral.

If budget spending is on-track, and there is no change to the financial plan (timing or \$ amounts), please write N/A in the Reasons for Variance section.

**TIP:** When a planned activity is no longer taking place, zero out the budget, and in the Project Update explain why the work was cancelled or replaced by a different activity. Under Reasons for Variance, indicate if the activity budget is being returned or allocated elsewhere—provide details. It is important for the audit history of the project that this information is captured in the FMS.

NRCan and FII have different conditions for what triggers an amendment. Please refer to guiding documents—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide*, and the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

**REMINDER:** Budget information submitted in the interim reports forms part of the audit record of the agreement. Recipients must ensure revised budget numbers reflect the real and documented expenses that have occurred to date, and are recorded in their organization’s accounting system. Accurate and complete reporting is a key condition to receiving the full earnable administration allowance for a Contribution Agreement at the end of the fiscal year.

### ACTIVITY FUNDING BY FUNDER

Activity Funding by Funder

		Activity Name	Approved Budget	Budget	NRCan	FII	Recipient
-	<a href="#">Edit</a>	Certification Scheme stakeholder committee and board meetings	\$14,100	\$14,100	\$5,640	\$4,230	\$4,230
		<b>NRCan Program</b>	<b>Budget</b>	<b>FII Program</b>	<b>Budget</b>	<b>Recipient</b>	<b>Budget</b>
		EMO	\$5,640	MI	\$4,230	Recipient	\$4,230
+	<a href="#">Edit</a>	Certification Scheme Canadian training workshop	\$1,000	\$1,000	\$400	\$300	\$300
<b>PROJECT TOTAL (COST SHARE)</b>			<b>\$15,100</b>	<b>\$15,100</b>	<b>\$6,040 (40%)</b>	<b>\$4,530 (30%)</b>	<b>\$4,530 (30%)</b>

The FMS will automatically update costs between identified sources of funding (FII, NRCan, Recipient and Other) in the Activity Funding by Funder table based on the default cost shares for the focus area attributed to the project.

If funding for the activity is not following the default cost share, and **Override default cost share** is applied, the recipient must manually recalculate the alternative cost share for interim reporting. The FMS can only apply the default cost share automatically—it cannot take the manual cost share ratios established by an applicant and apply it to interim reporting.

Budgets from all sources of funding, including “other”, must be reviewed. However, note that to update an existing “other” funder or to add a new additional source of funding, an amendment may be required. See Amending a Contribution Agreement.

The Activity Funding by Funder table will highlight if there is a difference between the sum of dollar amounts across all funders and the sum of all budget items as recipients manually adjust cost shares so they amount to 100%.

**REMINDER:** Funder cost shares cannot exceed the maximum percentage for a focus area and recipients must meet their minimum contribution level. Focus area cost shares are outlined in the guiding documents—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide*, or the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

### INTERIM REPORT ATTACHMENTS AND DELIVERABLES

Activity deliverable(s) and other documents that support the project update are attached under the Interim Report Attachments section.

Interim Report Attachments						
<b>Add / Edit</b>						
	Document Title	Interim Period	Activity Name	Deliverable Name		
<b>View</b>	Interim Report Attachment.docx	3	N/A	N/A	<b>Delete</b>	▲
<b>View</b>	Interim Report Deliverable Attachment.docx	3	Widget Pamphlet	Copy of Product (Digital or Print)	<b>Delete</b>	▼

Select **Add/Edit** to add or edit a document. In the Interim Report Attachments edit screen, select **Interim Attachments** if the attachment generally supports the reporting or select **Interim Activity Deliverable Attachments** if the attachment is an activity deliverable.

✕
**Interim Report Attachments**

**Interim Attachments**
     
  **Interim Activity Deliverable Attachments**

**\* Document Upload**

Select File

	Document Title	Interim Period	Activity Name	Deliverable Name		
<b>View</b>	Interim Report Attachment.docx	3	N/A	N/A	<b>Delete</b>	▲
<b>View</b>	Interim Report Deliverable Attachment.docx	3	Widget Pamphlet	Copy of Product (Digital or Print)	<b>Delete</b>	▼

Close

If **Interim Activity Deliverable Attachments** is selected, specify the relevant activity and deliverable type. The Activity Name and Deliverables drop-down menus are prepopulated with selection options based on the interim report’s project activities and its required deliverables.

To upload one document at a time, choose **Select File**.

✕
**Interim Report Attachments**

**Interim Attachments**
     
  **Interim Activity Deliverable Attachments**

**\* Activity Name:**

Widget Pamphlet ▼

**\* Deliverables:**

Copy of Product (Digital or Print) ▼

**\* Document Upload**

Select File

	Document Title	Interim Period	Activity Name	Deliverable Name		
<b>View</b>	Interim Report Deliverable Attachment.docx	3	Widget Pamphlet	Copy of Product (Digital or Print)	<b>Delete</b>	▲

Select **View** next to the document title to see the contents or select **Delete** to remove.

Uploaded files for a given report will automatically carry over to the following interim period(s). The Interim Period column in the Attachments table will indicate which interim period the file was originally uploaded. Past attachments can be viewed but not deleted.

**REMINDER:** Failure to supply all deliverables may delay approval of interim reports.

### INFORMATION REQUESTS DURING INTERIM REPORTING

During the interim reporting review process, FII and/or NRCan may have questions about the submitted reporting.

In this instance, an information request is issued to re-open the report for editing. The organization will be alerted to an information request in two ways:

- The project lead, proposal lead, and main account holder(s) for the organization will receive an email signaling which interim project report is unlocked and detailing the required edits or questions. Recipients will need to log into the FMS to address the questions or input changes.
- The Action Required on Reports box on the home screen will track the number of reports requiring attention.

## Annual Reporting

### STARTING AN ANNUAL REPORT

Organizations must submit an annual report for each funded proposal. Annual reporting opens at the same time as interim 3 reporting and year-end reconciliation.

Open and close dates for reporting are outlined in guiding documents—the FII Market Initiatives *Investment Strategy and Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy and Application Guide*, or the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

To start an annual report, select **Work Plan** from the left side navigation or select **View/Create Reports** in the Action Required on Reports box on the home screen. Both options bring a user to the Work Plan screen.

To begin drafting an annual report, select **Start Annual Reporting**. The annual report includes:

- Market Objectives
- Focus Area Results
- Focus Area Performance
- Market Performance
- Annual Report Attachments

The Annual Report column will indicate the reporting status.

Annual Report Column	Description
Open	Annual reporting is open and can be started
Pending	Annual reporting has been started and is in a draft state
Filed	Annual report has been completed and submitted
Approved	Annual report has been approved by funder(s)
Information Required	Information request issued by funder

The Action Required column for each proposal will list the specific task that needs to be completed.

Action Required Column	Description
N/A	No action required
Start Annual Reporting	Select to start an annual report
Complete Annual Reporting	Select to continue editing an annual report in progress
View Annual Reporting	Select to view a read-only version of a submitted or approved annual report

Recipients may exit the FMS and return to edit annual reports in progress by selecting **Complete Annual Reporting**. The status of a draft annual report will change from Open to Pending.

When a main account holder submits the annual report by selecting **Submit Annual Report** at the bottom right of the screen, the proposal status will display a **View Annual Reporting** button and main account holder(s) and the proposal lead will receive a system-generated email confirming the submission. Select the button to see the details of the submitted annual report.

When the annual report is approved, select **View Annual Reporting** to see the details of the approved report.

**REMINDER:** Only a main account holder can submit an annual report.

View the annual reporting history by selecting  under the Annual Report column.

### EDITING AN ANNUAL REPORT

The Market Objectives section displays a read-only list of the market objective(s) selected during proposal creation.

Market Objectives
<ul style="list-style-type: none"> <li>Facilitate, increase or sustain preference for B.C./Canadian value added/wood in manufacturing/secondary wood products in order to gain market share.</li> </ul>

**TIP:** To navigate back to the list of funded proposals, select **Return to Proposal List** near the top right corner of the screen.

### FOCUS AREA RESULTS

The Focus Area Results section displays a read-only list of the focus areas selected during proposal creation. To see the anticipated outcome, indicator and target results for a given focus area, select “+” next to the focus area name.

Organizations need to report the actual results for every focus area indicator. To start, select **Edit** to the far right of the section label, Focus Area Results.

This will launch an editable view of the focus area table. Use the “+” symbol to expand the performance measurements table for a specific focus area, and within the Actual Results column input the actual target results for each indicator. Recipients can enter notes for an actual result in the corresponding field in the Notes column.

Select **Save** to store input. Actual target results for focus area indicators must be inputted all at once and cannot be edited in stages.

Focus Area Results					
Focus Area					
- Codes & Standards					
Anticipated Outcome	Indicator	Target Results	Actual Results	Notes	
Canadian wood products and building systems are accepted in international codes, standards and policies.	Qualitative assessment of codes and standards progress using the Market Access matrix.	Yes	<input type="text"/>	The Market	
Changes to codes and standards are adopted that expand the use of wood products and building systems.	# of local, provincial and federal government organisations adopting policies and/or regulations to support wood use.	1.00	<input type="text"/>	Focus on th	
Canadian companies have the information they need to identify market changes and pursue market opportunities.	# of Canadian companies that received information products.	10.00	<input type="text"/>	10 Canadia	
Canadian organizations have the information needed to assess their readiness to enter a wood market or pursue opportunities.	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood a market.	10.00	<input type="text"/>	10 Canadia	
An increased number of individuals or organizations have access to tools and information needed to facilitate their acceptance of or capacity to design and build with wood.	# of individual or organizations that are using tools and information to facilitate their acceptance of or capacity to design and build with wood.	10.00	<input type="text"/>	10 Canadia	
Codes and standards, regulations and policies expand recognition of wood as a viable construction material and/or wood construction systems.	# of codes and standards, policies or regulations along the change continuum as identified in the codes and standard matrix.	4.00	<input type="text"/>	4 Andorran	
+ Marketing					
+ Technology Transfer, Education and Training					

**TIP:** To avoid losing partial input of actual target results for focus area indicators, fully expand and print a view of the focus area(s) performance measures in read-only first.

### FOCUS AREA PERFORMANCE

The Focus Area Performance section contains questions that seek to assess whether the project(s) delivered by the organization achieved the desired result/had an enduring impact, and whether the organization encountered any challenges while delivering the project(s).

To answer the questions, select **Edit** to the far right of the section label.

Recipients are encouraged to review the focus area performance measures for the market and interim reporting for key achievements that can be highlighted in this section of the annual report.

### MARKET PERFORMANCE

The Market Performance section contains questions that seek to assess if the organization achieved steps towards their market goal(s), and the incremental impact of market development efforts over time.

To answer the questions, select **Edit** to the far right of the section label.

### ANNUAL REPORT ATTACHMENTS

Documents that supplement the market-level outcomes described in the annual report can be attached within the Annual Report Attachments section.

To upload one document at a time, choose **Select File**.

Once the attachment has been added, select **View** next to the document title to download the attachment, or select **Delete** to remove.



The screenshot shows a web interface titled "Annual Report Attachments". At the top, there is a "Select File" button and a "Done" indicator with a checkmark. Below this is a table with the following structure:

	Document Title		
<a href="#">View</a>	Support File to Upload.xlsx	<a href="#">Delete</a>	

### INFORMATION REQUESTS DURING ANNUAL REPORTING

During the annual reporting review process, FII and/or NRCan may have questions about the submitted reporting.

In this instance, an information request is issued to re-open the report for editing. The organization will be alerted to an information request in two ways:

- The proposal lead and main account holder(s) for the organization will receive an email signaling which annual report is unlocked and detailing the required edits or questions. Recipients will need to log into the FMS to address the questions or input changes.
- The Action Required on Reports box on the home screen will track the number of reports requiring attention.

## Year-End Reconciliation

### STARTING A YEAR-END RECONCILIATION STATEMENT

Organizations must submit a year-end reconciliation statement for each contribution agreement. NRCan and FII have different year-end reconciliation statements. Organizations receiving dual funding must submit reconciliation statements to both funders. The year-end reconciliation opens at the same time as interim 3 and annual reporting.

Open and close dates are outlined in guiding documents—the FII Market Initiatives *Investment Strategy* and *Application Guide*, the FII Wood First *Investment Plan, 3 Year Strategy* and *Application Guide*, or the NRCan *Expanding Market Opportunities Handbook for Applicants*—under **Information Resources**.

To start a year-end reconciliation statement, select **Work Plan** from the left side navigation or select **View Reconciliations** in the Action Required on Reconciliations box on the home screen. Both options bring a user to the Work Plan screen.

The Year-End Reconciliation column at the proposal level will indicate the reporting status of the statement. View the year-end reconciliation history by selecting  under the Year-End Reconciliation column.

Year-End Reconciliation Column	Description
No Action Required	No action required
Start Reconciliation	Select to start a year-end reconciliation statement
Complete Reconciliation	Select to continue editing a year-end reconciliation statement in progress
View Filed Reconciliation	Select to view a read-only version of a submitted year-end reconciliation statement
View Approved Reconciliation	Select to view a read-only version of an approved year-end reconciliation statement

To begin drafting a year-end reconciliation statement, select **Start Reconciliation** for a proposal.

Select **Display Agreements** to see all the agreements that require a reconciliation statement. The Funder column shows the funder—NRCan or FII—associated with the contribution agreement. The Status column indicates whether the statement is pending, submitted, or approved.

Status	Description
Pending	Year-end reconciliation statement is in progress
Submitted	Year-end reconciliation statement has been submitted
Approved	Year-end reconciliation statement has been approved by the associated funder
Information Required	Information request issued by funder

Select **Review** to view the year-end reconciliation for a contribution agreement. Since a contribution agreement may contain more than one proposal, one year-end reconciliation statement may apply to multiple proposals. The Related Proposals column will show which proposals are part of the selected contribution agreement.

#### DOWNLOADING AND SUBMITTING A YEAR-END RECONCILIATION STATEMENT

The required year-end reconciliation document(s) are available in the **Mandatory Year-End Reconciliation Documents** section. Select **Download** to get a blank copy of the document. NRCan has two versions of its

required document, one in English and one in French. Recipients only need to submit one version of the document.

To upload a completed document, select **Upload**. The upload functionality is disabled if an information request is active for the contribution agreement or if a file has already been uploaded.

A **View** button will appear in the Completed column once a file has been uploaded successfully. Select **View** next to the document title to download the attachment or select **Delete** to remove.

A main account holder submits a year-end reconciliation statement by selecting **Submit** at the bottom right of the screen. FII's year-end reconciliation statement needs to be signed by a Certified Professional Accountant (CPA).

Once submitted, the proposal status will display a **View Filed Reconciliation** button and the main account holder(s) will receive a system-generated email confirming the submission. Select **View Filed Reconciliation** to see the details of the submitted year-end reconciliation statement.

Once the year-end reconciliation statement has been approved, the button will change to **View Approved Reconciliation**.

### INFORMATION REQUESTS DURING YEAR-END RECONCILIATION

During the year-end reconciliation review process, FII and/or NRCAN may have questions about the submitted reconciliation statement.

In this instance, an information request is issued to re-open access to the reconciliation statement for editing. The organization will be alerted to an information request in two ways:

- The proposal lead and main account holder(s) for the organization will receive an email signaling which year-end reconciliation is unlocked and detailing the required edits or questions. Recipients will need to log into the FMS to address the questions or input changes.
- The Action Required on Reconciliations box on the home screen will track the number of reconciliation statements requiring attention.

**REMINDER:** Only a main account holder can submit a year-end reconciliation statement.

## Completing Reporting

### COMPLETING THE CERTIFICATION OF ELIGIBLE EXPENDITURES INCURRED AND PAID (NRCAN ONLY)

As part of the annual financial reporting process NRCAN asks all funding recipients to deliver a CERTIFICATION OF ELIGIBLE EXPENDITURES INCURRED AND PAID (see Schedule D of the Contribution Agreement). The certification must be on company letterhead and be signed by a duty authorized officer of the recipient confirming that all claims for payment are true and accurate. This document is also part of the audit record for the agreement.

### STATEMENT OF CERTIFICATION OF PROJECT EXPENSES (FII ONLY)

As part of the annual financial reporting process FII asks all funding recipients to deliver a Certification of Project Expenditures. The statement must be signed on behalf of the recipient by an individual holding a professional accounting designation which certification will confirm that the annual financial report is a

true and accurate representation of the financial transactions undertaken by the recipient in respect of the work performed during the fiscal year. This document is also part of the audit record for the agreement.

Part 1 “Certification of Project Expenditures” includes a certification by such professional that all the third party project funding and the additional outside funding, if any, received by the recipient in connection with the work or the project proposal has been disclosed to FII and is accurately reflected as the applicable type of funding in the online annual financial report. All numbers reported in **Part 1** of the statement refer to the **total actual cost** of delivering the program.

Part 2 “Reconciliation of Funds received from FII against FII’s share of eligible expenditures” certifies and reconciles the funding provided to the recipient with the recipient’s claimed eligible costs and accountable advances and remaining cash on hand. Part 2 will also specify the total amount of interest earned on accountable advances and on the FII project funding during the fiscal year. All numbers reported in **Part 2** refer to **FII’s share of the total cost** of delivering the program.

The statement template explains where to find the relevant figures in the online system’s interim 3 “Detailed Summary Report”, which can be downloaded from the system.