



Managing Non-Research-Intensive Knowledge Exchange (KE) projects

This procedure summary sets out the key financial management stages for non-research-intensive KE projects. Initiating this process with Unisearch at the start of each new non-research-intensive project ensures consistent and commercially viable financial practice¹.

Stage 1. Identify activity and prepare project budget

The Finance Business Partner (FBP) reviews the area of accountability. The FBP notifies the Division of Enterprise (DVCE) FBP of the amount of non-research-intensive KE budgeted revenue and indirect cost recovery (ICR) expected in the next three financial years.

Stage 2. Manage opportunity and create contract

The KE project owner within the faculty or division negotiates the scope of work and deliverables with the external sponsor. The project owner may involve Unisearch in this negotiation¹.

Stage 3. Set up the project

Unisearch or the project owner completes the non-research-intensive KE project confirmation template (contained in Appendix E of the procedure). MR&A sets up the project and allocates people cost (PC expenses) and journals the budgeted indirect cost recovery. Once the project has been set up, MR&A emails details to the KE project owner, any other academic staff involved, (Unisearch,) the relevant FBP and the Head of School.

Stage 4 and 5. Execute and monitor the KE project including scope changes

The KE project owner oversees the KE project (consulting with Unisearch if applicable) regarding project progress, scope changes or project extensions. A report for non-research-intensive KE projects is available on the Calumo home page. If applicable, Unisearch acquits milestones against the original budget

Stage 6. Close the project

Unisearch or the KE project owner advises MR&A that the project may be closed as the services have concluded. MR&A performs a true-up and journals indirect cost recovery, surplus or deficit. Half of the indirect cost recovery will be available to the faculty/division in next year's budget as a strategic priority fund. The surpluses will be transferred to the respective school's RF111 in a non-research-intensive KE project. If there is a deficit, MR&A transfers the overspend to agreed upon chart fields at project outset.

Need more information? Contact the FBP for DVCE.

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¹ Unisearch involvement is not mandatory, except for in certain specific scenarios. These have been listed in stage 2 in the procedure.