CLIENT MEETING QUESTIONNAIRE

This list of questions will help you further define the methodology for the statement of work and will help you better understand the needs of the client.
If there are a lot of "I don't knows" after completing the discovery process, then your client is either not ready or they may require the "total package".

WHAT CATEGORY IS THE PRODUCT IN?
New product line, core product revision, line extensions,
changes to augmented product, repositioning.

WHAT IS THE PRODUCT AND HOW IS IT MANUFACTURED?
Understand the company's capabilities and capacity for manufacturing a new product. Are your suppliers, co-packers or private labelers all lined up or are you still exploring production options?

WHO WILL USE THE PRODUCT?
Who is the target customer/end user: retailers vs. foodservice?

HOW WILL IT BE USED? WHAT PREPARATION IS NECESSARY BY THE CUSTOMER?

HOW WILL THE CUSTOMER BENEFIT FROM IT? DOES IT HAVE ANY OTHER USES?

WHO IS THE COMPETITION AND WHAT IS THE PRICE AND SIZE AVAILABLE?

HOW IS THE PRODUCT DIFFERENT FROM THE COMPETITION?

WHERE WILL THE PRODUCT BE AVAILABLE? WHAT ARE YOUR DISTRIBUTIONS CHANNELS?
Direct to retailers? Selling to distributors? Private label? Box stores or mom and pop? Online only?

HOW WILL THE PRODUCT BE PACKAGED?
For example: bottle, jar, box, can, tube, or bag, etc.

ARE YOUR NUTRITIONAL FACTS DONE? HOW ABOUT INGREDIENTS?

ARE THERE ANY REGULATORY REQUIREMENTS FOR YOUR PRODUCT/PACKAGING?

WHEN WOULD YOU LIKE TO HAVE THIS PRODUCT FINISHED (OR EXPECTED LAUNCH DATE)?

Plant Visit - Version 2.0 - 160526
Adapted from a document generously provided to Tech-Access Canada by Holland College

INSERT COMPANY NAME Plant visit - insert vistor's name

1) GENERAL INFORMATION- COMPANY STRUCTURE AND ORGANIZATION	
Plant Address:	
Date if visit:	
People met:	
Owner	
Sales	
R&D	
QA	
Ownership/History	
Number of facilities:	
Facility Locations:	
Number of production employees:	
Number of QA Employees;	
Hours of operations/shifts:	
Square footage of site:	
Square footage of Production Area:	
Approximate cases produced per shift	
Number of lines	
Kosher:	
Nut free	
Organic	
2) R&D Department - lab? Kitchen? Structure?	
3) PLANT SECURITY: Describe how company provides the security of products and ingredients.	
4) WAREHOUSING AND TRANSPORTATION	
Dry warehouse available on site:	
Refrigerated warehouse available on site:	
Freezer warehouse available on site:	
5) MANUFACTURING	
Continuous or batch operation?	
Any thermal treatment involved? Describe:	
Describe the manufacturing process or attach process flow diagram:	
Who records the numbers of raw materials used in manufacturing? What is the document on which this info is recorded?	

Are all raw materials weighed or metered prior to production?	
Describe calibration for scales	
Review batch sheets, tracking, weight checks	
Number and types of ovens	
Spiral cooling	
Spiral freezing	
Describe tracking of WIP	
How are temperatures in coolers/freezers maintained and logged	
6) QUALITY SYSTEMS	
Number in Quality Control team	
Is this facility HACCP recognized/certified:	
Which organization has recognized/certified your HACCP Plan (AIB, FDA, etc):	
What are CCP's for product being considered?	
Is this facility GFSI certified? SQF? BRC? Other	
Does any Government regulatory authority or any independent auditing body audit your facility:	
When was the last audit conducted?	
Do you have a supplier approval and audit procedure in place:	
Do you audit all of your suppliers?	
Describe the program:	
Do you have Pest Control Program?	
In-house or 3rd party?	
Are any products on a positive release program?	
How do you trace your lots?	
Do you trace packaging material?	
Product coding, individual and case/how to read	
Do you have internal testing laboratory?	
Do you perform any pathogenic/micro testing in house?	
State of hand washing stations (fully stocked etc)	
Do you have a sensory panel? Frequency?	
7) SANITATION SCHEDULE and comments re overall cleanliness of facility	
8) FOREIGN MATERIAL CONTROL	
Do you have a written GLASS policy?	
Glass breakage procedure?	
Frequency of verification of metal detectors? (NOTE IF NO METAL DETECTION)	
How do you make sure product is free of extraneous material?	
9) RECALL PROGRAM	
Do you have documented Recall Program?	
Do you conduct Mock Recall?	
How often?	
Did you ever had to recall or withdraw product from the market? How long did it take?	
10) RETAIN PROGRAM	
Do you have retain program in place?	
Please describe:	
11) ALLERGENS AND FOOD SENSITIVITY	
Provide the list of all the allergens handled in the manufacturing facility?	
Do you have written allergen control program?	
Describe the main components of your program (colour coding, time, segregation of lines, etc)	

Who trains employees for allergen handling and how often?	
Do all products have a may contain statement?	
12)RE-CAP/NEXT STEPS	
Products reviewed:	
Opportunities:	
Additional Comments:	

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STATUS REPORT FOR [INSERT COMPANY NAME]

Period Accomplishments for DD MMM YYYY to DD MMM YYYY
-
-

Plan for DD MMM YYYY to DD MMM YYYY
-
-

Issues/ Decisions/ Outstanding Items
-
-

Project Lead:
Date:

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Project Title – Scope Change Request Form

Contract Reference:	Requested By:	Date Reported:
	Scope Change Assigned To:	Date Resolved:

INDIVIDUAL(S) TO BE NOTIFIED OF CHANGE REQUEST :

BACKGROUND OF CHANGE REQUEST/WHY IS THIS REQUEST NECESSARY
Describe in detail what the change is, why it is being done, and how it will be done, etc. Provide attachments as appropriate.

TIME
How long will it take, when will it start, and when will it be completed? Attach detailed information as appropriate.

.

BUDGET
Identify the cost to make the change. Attach detailed information as appropriate to support your estimate.

RESOURCES
Identify who will make the change and any other resources needed – equipment, special skills, etc.

APPROVAL SIGNATURES

CSK Project Manager:	Date:
Client:	Date:

This form is used to capture and track changes in the scope of a project. Also, this form will document the impact of the change on the project cost, work effort, and duration. The degree of detail should allow all appropriate parties to easily gain an understanding of the change to determine the impact on the project.

CLIENT NAME

SCHEDULE PLANNER 2016

PROJECT	PROJECT NAME
PROJECT LEAD	NAME
PROJECT SUPPORT	NAMES, INCLUDE SUBCONTRACTORS

PROJECT PHASE	STARTING	ENDING	TEAM REQUIRED
MARKET RESEARCH	01-01-2016	01-30-2016	NAMES
CONCEPT IDEATION			
RESEARCH & DEVELOPMENT			
REPORT PREPARATION			
PROJECT MANAGEMENT			

DECEMBER 2015								JANUARY 2016								FEBRUARY 2016								MARCH 2016						
S	M	T	W	T	F	S		S	M	T	W	T	F	S		S	M	T	W	T	F	S		S	M	T	W	T	F	S
		1	2	3	4	5							1	2			1	2	3	4	5	6				1	2	3	4	5
6	7	8	9	10	11	12		3	4	5	6	7	8	9		7	8	9	10	11	12	13		6	7	8	9	10	11	12
13	14	15	16	17	18	19		10	11	12	13	14	15	16		14	15	16	17	18	19	20		13	14	15	16	17	18	19
20	21	22	23	24	25	26		17	18	19	20	21	22	23		21	22	23	24	25	26	27		20	21	22	23	24	25	26
27	28	29	30	31				24	25	26	27	28	29	30		28	29							27	28	29	30	31		
								31																					

TEAM PROJECT DEBRIEF

Overview

Purpose:

To find better ways of doing things in projects the next time by identifying mistakes and/or clarifying efficiencies.

Outcomes:

(1) To determine what worked well within the project scope
(2) To share and teach best practices and lessons learned

Meeting with Project Team:

☐ Make sure all team members attend

☐ Hold meeting within 1 week of project end

☐ Send agenda to team members 1 day prior to meeting

☐ Purpose of meeting is to learn and grow from the project wins and losses

☐ Appoint someone to take minutes (needs to be detailed)

☐ Forward meeting minutes to project team after meeting

☐ Save copy of meeting minutes on H:drive, under 'Project Closeout' folder

Tips for a Productive Meeting[1]:

1. Adopting a learners mindset
   a. Doing better next time doesn't mean that we didn't do our best this time
      "When you're winning, and things are going well, is the best time to question yourself"/

2. Make a post-project checklist
   a. Build a multipoint action list for future projects. What should be done differently? What worked well for this project?
      Wikipedia has a great definition: "…type of informational job aid used to reduce failure by compensating for potential limits of human memory and attention. It helps to ensure consistency and completeness in carrying out a task."

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[1] Womack, Jason W. (5 January 2012). Entrepreneur.com. Three tips for boosting productivity with project debriefing.

TEAM PROJECT DEBRIEF

3. Build on common communication strengths of others: visual, auditory and kinesthetic. Use active listening, write down key points, share project debrief with group via email and hard copy.

Meeting Agenda

Principles for Review:

1. What were the main objectives of the project?
2. What actually happened?
3. Why were there differences?
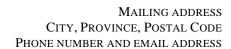4. What did we learn?

Revisit Objectives & Deliverables:

The project lead is to prepare this information prior to entering the meeting. Prior to this meeting, the project lead will share the information with the project team.

1. **Were the project objectives completed?**
   a. Provide list objectives by phase from the SOW
2. **What did we set out to do?**
   a. Provide list of deliverables due for each phase from the SOW or work plan
3. **What did we actually achieve?**
   a. Provide list of <u>actual</u> deliverables and reasons for change from projected deliverables
4. **What happened?**
   a. Review project objectives
   b. Review project deliverables
   c. Review project budget
      i. Total hours used with $ amount
      ii. Total expenses by item with $ amount
      iii. Estimated project cost vs. actual project cost (How did you account for discrepancies?)
   d. How much time was spent on this project?
      i. Estimated time (from budget) vs. actual time (from time management software)

TEAM PROJECT DEBRIEF

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        ii.   Determine where time was either overestimated or underestimated. Why are there these discrepancies?

e.   What did work well and why?

f.   What did not work well and why?

g.   What can we do differently in future projects?

h.   Are there any immediate steps we should take?

PROJECT DEBRIEF – Meeting Minutes

MEETING DETAILS   [CLICK TO SELECT DATE]   [MEETING TIME]   CSK BOARDROOM

MEETING CALLED BY	
PROJECT & CLIENT NAME	
FACILITATOR	
NOTE TAKER	
ATTENDEES	

Agenda topics

5 MINUTES   **PROJECT OBJECTIVES & DELIVERABLES**   PROJECT LEAD

DISCUSSION	

CONCLUSIONS	

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

5 MINUTES   **PROJECT BUDGET**   PROJECT LEAD

DISCUSSION	

CONCLUSIONS	

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

10 MINUTES   **WHAT WORKED WELL?**   ALL TEAM MEMBERS

DISCUSSION	

CONCLUSIONS	

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

10 MINUTES   **WHAT DID NOT WORK WELL?**   ALL TEAM MEMBERS

DISCUSSION	

CONCLUSIONS	

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

5 MINUTES   **WHAT CAN WE DO DIFFERENTLY FOR FUTURE PROJECTS?**   ALL TEAM MEMBERS

DISCUSSION	

CONCLUSIONS	

ACTION ITEMS	PERSON RESPONSIBLE	DEADLINE

OBSERVERS	
RESOURCE PERSONS	
SPECIAL NOTES	

NOTES:	

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PROJECT LEAD DEBRIEF FORM

INFORMATION FOR PROJECT DEBRIEF   **MARCH 16, 2016**   **[PROJECT LEAD NAME]**

TOPICS

PROJECT OBJECTIVES

PROJECT PHASE	PROJECT OBJECTIVE	COMPLETED Y/N

DISCUSSION PIONTS	

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PROJECT LEAD DEBRIEF FORM

PROJECT DELIVERABLES

PROJECT PHASE	PROJECT DELIVERABLE	COMPLETED Y/N

DISCUSSION PIONTS	

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PROJECT LEAD DEBRIEF FORM

PROJECT BUDGET

BY TASK OR EMPLOYEE	HOURS	COST ($)	EXPENSES ($)	TOTAL COST ($)	UNDER OR OVER BUDGET?

DISCUSSION PIONTS	

PROJECT LEAD DEBRIEF FORM

FROM THE PROJECT LEAD'S PERSPECTIVE, WHAT <u>DID</u> WORK WELL AND WHY?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

FROM THE PROJECT LEAD'S PERSPECTIVE, WHAT <u>DID NOT</u> WORK WELL AND WHY?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

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PROJECT LEAD DEBRIEF FORM

PROJECT LEAD DEBRIEF FORM

FROM THE PROJECT LEAD'S PERSPECTIVE, WHAT CAN WE DO DIFFERENTLY FOR FUTURE PROJECTS?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

FROM THE PROJECT LEAD'S PERSPECTIVE, ARE THERE ANY IMMEDIATE STEPS WE NEED TO TAKE?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

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PROJECT TEAM DEBRIEF FORM

INFORMATION FOR PROJECT DEBRIEF **MARCH 16, 2016** **[TEAM MEMBER NAME]**

TOPICS

FROM YOUR PERSPECTIVE, WHAT <u>DID</u> WORK WELL AND WHY?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

FROM YOUR PERSPECTIVE, WHAT <u>DID NOT</u> WORK WELL AND WHY?

DISCUSSION POINTS	

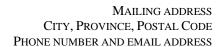| POTENTIAL REMEDIES TO ISSUES	

PROJECT TEAM DEBRIEF FORM

PROJECT TEAM DEBRIEF FORM

INFORMATION FOR PROJECT DEBRIEF   MARCH 16, 2016   [TEAM MEMBER NAME]

FROM YOUR PERSPECTIVE, WHAT CAN WE DO DIFFERENTLY FOR FUTURE PROJECTS?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

FROM YOUR PERSPECTIVE, ARE THERE ANY IMMEDIATE STEPS WE NEED TO TAKE?

DISCUSSION POINTS	

POTENTIAL REMEDIES TO ISSUES	

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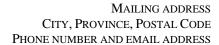
PROJECT TEAM DEBRIEF FORM

DEVELOPING YOUR PLAN

- Collect requirements (defining and documents stakeholders needs to meet project objectives)

- Define the scope (detailed description of project and product)

- Create a work breakdown structure (process of subdividing project deliverables and project work into smaller, more management components)

- Define activities (identifying the specific action to be performed to produce the project deliverables)

- Sequence activities (identifying and documenting relationships among the project activities)

- Estimate activity resources (process of estimating the type and quantities of material, people, equipment or supplies required to perform each activity)

- Estimate activity durations (process of approximating the number of work periods needs to complete individual activities with estimated resources)

- Develop schedule (process of analyzing activity sequences, durations, resource requirements, and schedule constraints to create the project schedule)

- Estimate costs (process of developing an approximation of the monetary resources needed to complete project activities)
- Determine budget (process of aggregating the estimated costs of individual activities or work packages to established an authorized cost base)

- Plan Quality (process of identifying quality requirements and/or standards for the project and product, and documenting how the project will demonstrate compliance)
- Develop human resource plan (process of identifying and documenting project roles, responsibilities, and required skills, reporting relationships, and creating a staffing management plan)
- Plan communications (process of determining project stakeholder information needs and defining a communication approach)

- Plan risk management (process of defining how to conduct risk management activities for a project)
- Identify risks (process of determining which risks may affect the project and documenting their characteristics)
- Perform qualitative risk analysis (process of prioritizing risks for further analysis or action and combining their probability of occurrence and impact)

- Perform quantitative risk analysis (process of numerically analyzing the effect of identified risks on overall project objectives)
- Plan risk responses (process of developing options and actions to enhance opportunities and to reduce threats to project objectives)

- Plan procurements (process of documenting project purchasing decisions, specifying the approach, and identifying potential sellers)

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BOARD MEETING #	
DATE & TIME	
LOCATION	
TELECONFERENCE #	

Voting Members:	☐ <<Name>>	☐ <<Name>	☐ <<Name>>	☐ <<Name>>
	☐ <<Name>>	☐ <<Name>>	☐ <<Name>>	☐ <<Name>>
Non-Voting Members:	☐ <<Name>>	☐ <<Name>>	☐ <<Name>>	☐ <<Name>>
NSERC Representative:	☐ <<Name>>	☐ <<Name>>	☐ <<Name>>	
		Quorum Met?	☐Yes ☐No	

Agenda Items

12:00 pm to 12:30 pm
-
-
-
-

Monthly Update

Project Status

Project	Description	Project Manager	Status

Student Engagement

Student Name	Work Period	School	Project Name	ARIS Theme

Hosting

Individual or Organization	Date	# of people	Purpose	Who to invite next time

Conference/Workshop

Description	Date	Location	ARIS Staff

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TERMS OF REFERENCE

INTENT

<<Intent of Centre>>

MANDATE

1. The Advisory Board is expected to provide strategic advice on the implementation, management and future of the Centre.
2. The Advisory Board is expected to provide input into the Centre's service direction including service mix, revenue streams, applied research and development services, technical service offerings and testing needs.
3. The Advisory Board is expected to provide strategic advice on the major research themes and program objectives to meet particular industry sector represented.
4. The Advisory Board will be made aware and asked to comment on marketing and fundraising strategies with respect to the industry sector represented.
5. The Advisory Board must review annual statements of income and expenses, and review strategic or major funding changes.
6. Recommend and initiate ways of expanding and strengthening partnership or cooperative arrangements in the delivery of research and training services within the particular industry sector represented.

MEMBERSHIP

1. Membership on the Advisory Board is voluntary
2. The Advisory Board must have no more than ten and no fewer than six members, with no fewer than two members from the private sector. Members will be selected because of their expertise, breadth of experience, network and ability to represent that related industry sector.
3. Any changes in Advisory Board membership must be approved by the Centre and NSERC.
4. The School's Director and TAC Manager shall jointly establish Advisory Board and shall invite members to serve on the Board.
5. Once the Advisory Board has been established the board may invite additional members in consultation with the School's Director and TAC Manager.
6. Board members will be appointed for the full five year funding term.
7. The Director and TAC Manager may reappoint members for additional terms.
8. Advisory Board ex. officio members including the Director, TAC Manager, and business development coordinator, in addition to the service administrator.
9. Academic Chairs and other appropriate employees may participate as Advisory Board members.

MEETINGS

1. Advisory Board will meet quarterly, including two face-to-face meetings semi-annually and two conference call or webinar meetings
2. Costs associated with meetings including travel, accommodation and meals will be borne by the Centre
3. Annually the Advisory Board will review and provide recommendations for approval* to NSERC on annual statements of income and expenses, in addition to strategic or major funding and/or service offering changes.
4. SubCommittee's may be formed and meet on a more informal basis throughout the year. Reports should be made at these meetings for discussion at official quarterly meetings.
5. The Centre will provide an administrative assistant to record proceedings and will provide the support services required to prepare and distribute agendas and minutes.
6. Board members will receive relevant information prior to the meeting.
7. Minutes and action items established during the meeting will be distributed in a timely fashion.

RECOMMENDATIONS

1. A recommendation will be in the form of a formal motion.
2. The Centre will consider all recommendations.
3. The TAC Manager and/or Director or designate will provide the Advisory Board with a yearly report on the status of the recommendations.

ADVISORY BOARD/ CENTRE ROLES AND RESPONSABILITIES

Institution should lead in:
- Advocacy
- Legal accountability for financial management and program accountability to all funders
- Institutional strategic planning including department strategic planning

Advisory Board should *lead* in:
- Organizational oversight related to NSERC Technology Access Centre fund (overall financial and program performance)
- Centre specific strategic planning linking into School/Institution and Department directions including multi-year priorities, industry outreach (issues, barriers and opportunities and service expectations)
- Championing Centre within the industry as a go-to organization for applied R&D, commercialization and training support

Advisory Board should *support others* in:
- Advocacy – specifically related to the Centre's scope of activities with external organizations and championing the Centre and its principles within the school/institution.
- Fund development planning
- Program and research scope guidance

Advisory Board Members should:

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Adapted from a document generously provided to Tech-Access Canada by SAIT

- Regularly attend and participate at meetings.
- Annually review statements of income, expense and strategic business development

Centre Staff should *lead* in:

- Fund development (Grants and/or other contributed sources)
- Annual business planning
- Organizational management and business administration
- Program and service implementation
- Industry outreach, communications (internal and external) and marketing
- Business development (Fee for Service – earned income)
- Institutional liaison – e.g.TACCAT Network
- Administrative support to board functions

Centre staff should *support* others in:

- Advocacy
- Strategic planning
- Organizational oversight and accountability

Final Approval and Liability rests with NSERC.

Faculty Course Load Reduction Funding Request

For Tri-Council (*NSERC, SSHRC, CIHR*) related applied research funded projects

Faculty Information

Name	
School / Department	
Equivalent Course load	
Inclusive dates	
Project Grant / Program	

Description/Explanation: *(Provide brief information of the activities described in the approved research grant or program. Include course name information requiring the back-fill)*

Financial Information

(Should request be approved, AR&C Requires this information in order to transfer the funds)

Department Cost	
Department Budget Code	
Department Object Centre	

For AR&C use:

Project Code	
Grant Account Number	

Signatures:
By signing the funding request form, you are agreeing to the terms and conditions of a Course Release (course load reduction) for the named Faculty member.

_____
Department Chair/Manager

_____
Director, TAC

Please note: Tri-Council may request to see supporting evidence on the teaching workload, such as:

- *Original workload of Faculty member*
- *Workload of backfill instructor hired,*
- *Faculty member's modified workload*

*AR&C strongly recommends these records be kept on hand for a minimum period of **7years. Lack of supporting evidence could result in reimbursement to the Grant Funder.***