



**CANADA'S OCEAN
SUPERCLUSTER**

OSC PROJECT KICKOFF SUMMARY GUIDE

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Welcome to the OSC Project Journey!

Congratulations and welcome aboard! We're thrilled to be partnered with you for your OSC project. This document is your key to a successful kick-off, designed to support you and your team at every step.

How to Make the Most of this Guide

Feel free to distribute this document amongst your team; it serves as your comprehensive project playbook. Whether you possess extensive experience in navigating OSC projects or are new to the endeavor, you will discover invaluable insights to optimize your path to success.

Are you prepared to delve into the details? Let us collectively work together towards a successful project experience.

Once again, welcome to the OSC.

Meet your OSC Team:

Technology Leadership Program Manager, Audrey Lapenna audrey.lapenna@oceansupercluster.ca (Eastern Time)

Technology Leadership Program Manager, Patrick LeClair patrick.leclair@oceansupercluster.ca (Atlantic Time)

Technology Leadership Program Manager, Colleen Menard colleen.menard@oceansupercluster.ca (Atlantic Time)

Program Lead, Sophie Treptau sophie.treptau@oceansupercluster.ca (Atlantic Time)

Finance Lead, Danielle Babstock danielle.babstock@oceansupercluster.ca (Newfoundland and Labrador Time)

Corporate Accountant, Danielle Gosse danielle.gosse@oceansupercluster.ca (Newfoundland and Labrador Time)

Project Accountant, Jasmin Lawas jasmin.lawas@oceansupercluster.ca (Eastern Time)

Intellectual Property & Data Management, Shafiq Manji shafiq.manji@oceansupercluster.ca (Eastern Time)

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Project Members Responsibilities

Effective project management relies on clear roles and responsibilities. As active participants in your OSC project, each team member plays a crucial role in ensuring its success. In this section, we will outline specific responsibilities and actions for project participants as well as the OSC team. By adhering to these guidelines, we foster a collaborative environment, transparent communication, and the efficient execution of tasks.

Project Participants

1. Host Steering Committee Meetings

- Schedule and organize steering committee meetings, as further described in **Schedule E (Project Governance)**
- Prepare minutes of each steering committee meeting and provide copies of such minutes to each member of the steering committee within seven days after such meeting.
- Frequency: Semi-annual steering committee meetings with quorum are required, reference Schedule. Project steering committees are encouraged to meet quarterly, to coincide with the schedule for claims and progress reports, and to promote active steering committee communication.

Resources:

- Project Agreement Schedule E (Project Governance)
- Steering committees Terms of Reference (*Upcoming Resource*)

2. Submit Reports and Supporting Documentation:

- Submit Claims and Forecasts via email to projectfinance@oceansupercluster.ca respecting the submission schedule.
- Scheduled Progress Reports are submitted via OSC Member Portal and are due in conjunction with quarterly claims. Timely submission of progress reports is a shared responsibility. These reports are valuable for tracking achievements and identifying challenges and potential risks.
- Submit forecasts within 10 days of the end of the quarter (January 10, April 10, July 10, October 10).
- Submit claims and scheduled progress reports within 20 days after each quarter (January 20, April 20, July 20, October 20).

Reports and Forms:

- ✓ Forecast Report / quarterly / via email to the Finance Lead (see email address above)
- ✓ Scheduled Progress Report / quarterly / through the Member Portal
- ✓ Claim & Reconciliation / quarterly / via email to projectfinance@oceansupercluster.ca:
 - Claim Submission & Payroll Attestation / quarterly /Project Cost Questionnaire for New Claimants
 - Only required with first claim
 - Supporting Documents for Claims:
 - Invoices greater than \$500CAD
 - Expense reports for all travel costs claimed (if applicable)
 - Timesheets/payroll records for wages and salaries claimed (applicable only for the first claim and anytime a new employee is added, or the hourly wage changes)
 - Timesheets for all affiliates/related party subcontractor invoices

Resources:

- [Cost Eligibility Guidelines](#) (English Version)
- [Cost Eligibility Guidelines](#) (French Version)
- [Frequently Asked Questions – Member Portal](#)
- [User Guide - Member Portal Progress Report Submission](#)
- [Member Portal Project Budget Insights – Navigating the Member Portal from a Project Finance Perspective](#)
- [Claim Submission Checklist](#)
- [Frequently Asked Questions – Claim Documents](#)
- [Detailed Claim Form](#) (English Version)
- [Detailed Claim Form](#) (French Version)
- [Claim Submission & Payroll Attestation \(English Version\)](#)
- [Claim Submission & Payroll Attestation \(French Version\)](#)
- [Project Cost Questionnaire for New Claimants](#)
- [Project Participant – Travel and Expense Policy](#) (English Version)
- [Project Participant – Travel and Expense Policy](#) (French Version)

3. Accurate Project Forecasting and Effective Utilization of Project Budget

Timely, accurate forecasting is critical to your project and to ensuring we can deploy funding for the maximum benefit of the Canadian ocean innovation system. The guidelines in the Project Agreement (s. 3.1.6.c) indicate that if there is spend variance greater than 15%, the OSC may remove any underspend from the total value of the project. For example, if a project forecasts to spend \$250K per quarter but only spends \$100K, the OSC may reduce the project budget by the amount of the underspend that is greater than 15% (\$112,500 in this example).

Please plan your budget forecasts carefully to avoid any potential loss of funding, as precise and realistic forecasting is essential for maintaining the integrity and success of your project.

3. Submit Advance Payment Requests:

To ensure a seamless Advance Payment process and maintain compliance with OSC guidelines, participants are responsible for:

- Submitting requests for Advance Payments within the specified timeframe outlined in the Project Agreement.
- Providing a comprehensive six-month forecast of project expenses and each Request for Payment.
- Compiling and submitting a Reconciliation of quarterly project costs promptly, accompanied by all necessary supporting documentation.
- Using Advance solely to cover eligible costs identified in the Project Forecast until Advance is exhausted.
- Adhering strictly to the terms outlined in the Project Agreement governing the use and repayment of the Advance.

Resources:

- Project Agreement (3. Financial Management / 3.2. Guidance on Project Advances)

4. Manage Change:

To ensure a smooth change management process, changes to accommodate adjustments to the Project objectives, activities, milestones, schedules and/or budget will be managed through a Change Request.

- Participants, Steering Committee members, or Project Team members may propose changes by submitting a Project Change Request or PCR.
- Review proposed Project Change Requests as defined in section 3 of Schedule F (Project Change Management) of the project agreement.

Resources:

- [Project Change Request Form](#)

5. Intellectual Property and Data Management

Safeguarding of Intellectual Property (IP) and Data assets secures the project's long-term value. For information on the OSC's IP and Data strategies, see [Intellectual Property \(IP\) and Data Guide](#).

Intellectual Property (IP) Registry:

- The IP Registry serves as a catalog of all Foreground IP assets generated through OSC projects.
- Foreground IP assets anticipated to be generated for the Project are summarized in the IP Schedule of the Project Agreement.
- Actively contribute to the OSC's Intellectual Property (IP) Registry -As Foreground IP is generated, timely submit Foreground IP details for review and approval via the Member portal.
- Submit information promptly adhering to any specified timelines in the Project Agreement.

Resources:

- [IP Registry User Guide](#)

Data Registry:

- The Data Registry serves as a catalog of all data assets required for or generated as a result of the Project.
- Project data assets comprise Existing Data Assets as well as Expected Data Assets, both of which are summarized in the Data Schedule of the Project Agreement.
- Actively contribute to the OSC's Data Registry – Timely submit data asset details for review and approval via the Member portal. Existing Data Assets should be submitted for registration at the earliest opportunity to maintain updated and accurate details in the Data Registry.
- Track project data assets as they are generated and periodically update the OSC's Data Registry with accurate and current information to ensure the visibility of critical Project data.
- Verifying the accuracy of the data entries helps to maintain a reliable and trustworthy source of information.
- Submit information promptly adhering to any specified timelines in the Project Agreement.

Resources:

[Data Registry User Guide](#)

6. Communicating project successes, risks, and challenges:

- Share notable project achievements, milestones and successes with the project team, stakeholders and the OSC Program Manager.
- Actively identify and report potential risks that may impact the project timeline, scope or deliverables.
- Communicate openly about challenges faced during the project, detailing nature and potential impact.
- Verify the accuracy of the data entries to maintain a reliable and trustworthy source of information.
- Engage in collaborative problem-solving discussion to address challenges and mitigate risks effectively.
- Adhere to the reporting schedule to maintain consistency in communication.

7. Media Requests:

Media opportunities are a great way to help promote OSC projects. From time to time, you may receive media interview requests, or you may decide to proactively distribute a news release to the media around a milestone or some other newsworthy information about your project. When engaging with media either for an interview or in the development of media materials, please notify the OSC and, in the case where a news release is being developed, provide your materials in advance for review. The OSC commits to turn review of media materials around within a 24-hour period, and more quickly if needed based on the situation. Should you wish to notify us of a media inquiry or provide media materials for review please email marketing@oceansupercluster.ca

Resources:

- [OSC Project Media Policy](#)

8. DEI Training:

Project partners are expected to complete DEI (Diversity, Equity, and Inclusion) training modules to be made available by the OSC. Project teams will report DEI training completion by all project participants via quarterly reports. The four DEI modules should be completed by project team members within three to six months of their onboarding to the project. Instructions for module registration will be made available to project teams via email.

9. Project Close-Out: For project participants, the closure process involves submitting a comprehensive Final Project Report. This submission serves as a meticulous assessment of the project's performance, ensuring the fulfillment of contractual obligations and other closure activities. Crucially, the Final Project Report necessitates the signatures of the steering committee members to confirm acceptance. Participants are required to complete the close-out requirements within 90 days after the project's conclusion.

OSC Team

- 1. Onboarding and Training the Project Team on resources and tools:** The OSC Delivery Team leads the onboarding and training of the project team on essential resources and tools. This ensures everyone possesses the necessary knowledge to contribute effectively.
- 2. Tracking project compliance:** Monitor project activities to ensure alignment with established guidelines. Tracking compliance safeguards the project's adherence to standards and expectations.
- 3. Attending Steering Committee (SC) Meetings as an Observer:** Participate as observers in Steering Committee Meetings to gain insights into project discussions and decisions. This enhances the OSC Delivery Team's understanding of the project's direction.
- 4. Processing claims and Reviewing Progress Reports:** Efficiently processing claims is a top priority for the OSC. OSC Finance reviews claims for compliance with spending guidelines, and the OSC program manager assesses alignment with reported progress on work packages, KPIs, and milestones. The OSC Finance and/or the Program Manager may contact the project team for clarifications or additional materials. The goal is to process claims swiftly, contributing to the project's seamless financial management. The submission of incomplete claims will result in delayed reimbursements.
- 5. Processing Project Change Requests (PCR):** Project Change Requests can be discussed with the OSC Project Manager at any time. The team follows a formal process outlined in the Project Agreement under Schedule F (Project Change Management) for handling PCRs (Project Change Requests) and ensuring effective change management. This supports the project's adaptability and responsiveness.
- 6. Overall project support:** The entire OSC team is dedicated to supporting the project comprehensively, spanning delivery, accounting, and ecosystem development. Our collective efforts aim not only to meet but exceed project expectations, fostering success and sustainability.
- 7. Project Close-Out:** On the OSC team's end, the closure process involves thoroughly reviewing the Final Project Report and associated submission requirements. The OSC team is responsible for confirming the report's acceptability in its sole and absolute discretion. The final acceptance ensures the project's closure within the OSC framework, signifying the completion of essential contractual and other closure activities. To assist participants, a guide with all necessary information for the completion of this process will be provided closer to the end date of your project.

Quarterly Commitment Calendar

This visual guide outlines key dates for submissions and meetings, providing a transparent view of our ongoing reporting and governance objectives for the project.

Forecasts are due 10 days following the end of the calendar quarter. Claims and quarterly scheduled progress reports are due 20 days following the end of the calendar quarter. Steering Committee meetings are contractually required semi-annually, but are expected to be held quarterly.

| Quarterly Schedule | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec |
|---|------------------------|-----|-----|------------------------|-----|-----|------------------------|-----|-----|------------------------|-----|-----|
| Steering Committee meetings | Contractually Required | | | Operationally Required | | | Contractually Required | | | Operationally Required | | |
| Forecast | 10th | | | 10th | | | 10th | | | 10th | | |
| Claims | 20th | | | 20th | | | 20th | | | 20th | | |
| Quarterly Scheduled Progress Report (SPR) | 20th | | | 20th | | | 20th | | | 20th | | |

Action List:

1. Review OSC Project Kick-Off Summary Guide: Ensure ongoing familiarity with the project's key information and contacts.
2. Confirm Specific Project Responsibilities: Verify your project responsibilities and tasks outlined in the guide.
3. Engage with the OSC Team: Stay connected with the OSC Team, understanding their roles for effective collaboration.
4. Acknowledge Ongoing Action Items: Regularly check and stay informed about tasks in the Quarterly Action List for continuous project success.
5. Optimize OSC Resources: Continue leveraging OSC-provided resources for efficient project management and execution.
6. Coordinate 1:1 Training/Onboarding Sessions: Initiate and schedule personalized training or onboarding sessions as requested by OSC.
7. Share Banking Details: Provide a copy of the PAD/Direct Deposit form to projectfinance@oceansupercluster.ca
8. Ensure Portal Member Access: Confirm access to the Member portal for reporting. For access inquiries, email membership@oceansupercluster.ca.

OSC Program Manager Follow-Up Tasks:

1. Provide Steering Committee Overview Presentation. Create an overview presentation to the Steering Committee, ensuring ongoing engagement.
2. Distribute OSC Project Kick-Off Summary Guide: Send out the comprehensive kick-off guide to all participants for continued reference and guidance.
3. Coordinate 1:1 Training/Onboarding Sessions: Initiate and schedule personalized training or onboarding sessions as needed for participants. Claims submissions, etc.

These follow-up tasks are integral to maintaining project momentum and ensuring everyone remains aligned and informed. For any questions or further support, contact your designated project manager.

Communication Protocols:

Smooth and transparent communication is the heartbeat of the project team's success. To create a collaborative and connected environment within the OSC project, we've established a set of clear communication guidelines:

Preferred Channels: The "Preferred Channels" section specifies the primary communication platforms and tools that the OSC project team should use for discussions and updates. It aims to create a unified communication experience by clarifying where and how team members should engage with project-related communication. OSC's preferred project discussions and update channels are:

- **The Member Portal:** This is the primary channel for the project. This is where reports, claims and documentation are uploaded every quarter. And where all the user guides, templates, and forms are available for download.
- Depending on the topic, email communication with the OSC Technology Leadership Program Manager or Finance Lead will serve as the other primary channel for the project.

Additional Channels: In addition to our primary communication platforms, we may use specific channels for various purposes:

- **Communications:** anything in relation to press releases, media inquiries, promotion and public awareness should be directed to marketing@oceansupercluster.ca
- **Member Portal troubleshooting** – in case any difficulty navigating the Member Portal please reach out to membership@oceansupercluster.ca

For streamlined communication, we kindly request that you always cc your OSC Project Manager on any project correspondence directed to the OSC. This ensures effective coordination and keeps everyone in the loop.

Engaging with the OSC network

How to Proceed:

Stay Informed: Keep an eye on these additional channels to stay informed about critical updates, participate in in-depth discussions, and engage in informal communication.

Use Appropriately: Understand the purpose of each additional channel and use them appropriately. Emergency channels, for instance, are reserved for urgent matters, while social platforms are for more casual interactions.

Thank you for your ongoing commitment to the success of the OSC project.