

Guide for BCCAT Contractors

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BC COUNCIL ON ADMISSIONS & TRANSFER
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The research that contractors carry out on behalf of BCCAT is a key component in BCCAT's support of the BC Transfer System and BC post-secondary education. The purpose of this guide is to familiarize you with BCCAT's policies and procedures around contracted research projects. This guide is intended to supplement calls for proposals and the contract guiding your project. It is the researcher's responsibility to be familiar with, and to comply with, the terms and requirements of the calls for proposals and the contract. If information in this guide conflicts with information in the project contract, the information in the contract will take precedence.

BCCAT assigns a staff member to each contracted research project. The staff member assigned to your project is your primary contact at BCCAT. Feel free to ask them questions about any of the information in this guide, or about anything else during the project process.

Steps in the Project Process

These are the **general steps** in the BCCAT project process. The specific process for each project will be defined in the terms of the project contract.

- Project proposals are reviewed by BCCAT staff and by members of the BCCAT committee commissioning the project.
- A contractor is selected.
- The contractor and BCCAT agree on contract terms (see "**Contract**") and the contract is issued and signed.
- The contractor begins work on the project, with BCCAT support.
- The contractor provides project updates as requested (e.g. to inform BCCAT committees of the project's progress).
- BCCAT staff review draft versions of the report and provide feedback.
- An interim payment is typically issued after a draft report is approved by BCCAT staff. Staff may request revisions to the report before payment is issued.
- The contractor submits a draft final report that is reviewed by BCCAT staff and by peer reviewers. BCCAT staff may request revisions to the report before it is submitted for final approval.
- The revised final report is reviewed by the BCCAT committee that commissioned the project. The committee may choose to receive the report and pay the contractor without publishing the report (see "**Project Dissemination**"); approve the report for publication and authorize final payment to the contractor; or authorize publication and final payment to the contractor subject to satisfactory revisions to the report.
- The final payment is issued and the contract is closed.



Contract

Identifying the Parties to the Contract

BCCAT's financial transactions are conducted through the BC Institute of Technology (BCIT). BCCAT will initiate the process of creating a contract and BCIT issues the contract. The contract is signed by the contractor and by representatives of BCIT and BCCAT.

Project payments are made to the contractor named in the contract. (See "**Project Payments**") If there is more than one participant in the contracted project, only one participant can be named as the contractor, and only one participant will sign the project contract. The contractor is responsible for directing reimbursements or payments to the other participants. The amount of compensation for other participants can be outlined in the project budget, but payment will only be made to the identified contractor.

Sub-contracting of project work is not permitted. When the contractor signs the contract, they commit to carrying out the project work themselves, or in collaboration with participants identified in the project description. If the contractor wishes to sub-contract any project work after the contract is signed, BCCAT must be notified and must approve the sub-contracting before it commences. BCCAT retains the right to deny requests for sub-contracting.

Project Title and BCCAT Org Code

Each contract includes the project title and a six-digit "org code" assigned by BCCAT. Both the title and the org code are used to identify and track the project. The project title and the org code must both be included in invoices from the contractor (see "**Project Payments**").

Contract Length

The contract includes a start and end date in the "Term" section. These dates are mutually agreed upon by the contractor and BCCAT. The contractor is responsible for informing BCCAT of any unexpected circumstances that may delay the project beyond the contract end date, or that may affect the ability of the contractor to produce deliverables on or before the deadlines stated in the project timeline.

After the project is underway, BCCAT can extend the contract term by up to six months from the original end date without a formal contract extension. If the project work is likely to continue for longer than six months beyond the contract's end date, a formal contract extension is required.



Informal and formal contract extensions will usually only be granted in the case of unforeseen or extenuating circumstances. If contractors feel an informal or formal contract extension may be needed, they should inform BCCAT in writing as early as possible.

BCCAT will initiate the process of creating a formal contract extension. The extension agreement is signed by the contractor and by representatives of BCCAT and BCIT.

Project Description

The project description in the contract is drafted by BCCAT, based on the description in the project proposal, and incorporating any changes requested by BCCAT or its committees. The contractor and BCCAT will mutually agree on the final version of the project description.

The project description includes these sections of the contract:

- A list of project objectives
- A description of the tasks to be carried out
- An itemized budget for the project, shown in the “Value of Contract” section of the contract
- A timeline for completing the tasks and the overall project, in the “Outputs, Timeframe and Payment Schedule” section of the contract
- Estimated dates when drafts of the project will be submitted to BCCAT, in the “Outputs, Timeframe and Payment Schedule” section of the contract

The BCCAT staff member supporting the project is identified in the contract in the “Outputs, Reporting and Payment Schedule” section.

Project Support

The BCCAT staff member assigned to your project is available to assist you throughout your work on the project. Feel free to contact your assigned staff member at any time, but please remember that BCCAT staff members are usually supporting more than one project at a time. We will support your work on your project as thoroughly and efficiently as we can, but at times our availability may be limited because of commitments to other projects.

Report Content

Literature Review

Some projects incorporate a review of published relevant literature. If a literature review is required, this is stated in the project contract. Generally, the literature review focuses on



relevant academic (peer-reviewed) research, but may also include research findings from industry and professional groups. It is the researcher's responsibility to arrange access to appropriate sources of literature. BCCAT is not able to provide access to online academic databases.

The contractor is expected to ensure that the literature review includes credible, accurate, relevant, and up-to-date information.

Please note that while Google Scholar and Wikipedia are useful for identifying potentially relevant literature for the literature review, these sources may not supply the full text of the cited research, and may not accurately describe research results. Contractors are strongly encouraged to review the original version of material cited in either of these sources.

Data Collection

If a project involves data collection from individuals or groups, ethical approval may be necessary before work on the project can begin. Generally, ethical approval is granted by the research ethics board of each institution where data collection will take place. BCCAT will work with the contractor to identify the research ethics board(s) with jurisdiction to review the research. However, it is the contractor's responsibility to obtain the necessary approval(s), and to provide BCCAT with a copy of the notice of ethical approval from each participating institution.

BCCAT may require that standardized wording on data privacy and informed consent be included in any survey instrument or interview protocol. BCCAT will supply this wording to the contractor.

If a project involves data collection through an online survey, the contractor should consider how the survey will be hosted, and address this with BCCAT as the contract is developed. The contractor is responsible for creating the survey questions and response formats; BCCAT staff may suggest revisions to wording or formatting to make the survey instrument more effective.

BCCAT does not distribute survey links to its own mailing lists. BCCAT staff will, whenever possible, work with the contractor to assist them in identifying or compiling mailing lists for survey distribution.



Preparation of Draft and Final Reports

BCCAT expects reports and publications to be logically structured, consistently formatted, and clearly written. Contractors should follow the guidelines in the [BCCAT Style Guide](#) when preparing their draft and final reports.

Referencing

APA formatting is used for citations and references in BCCAT reports and publications. A guide to APA formatting is included in the BCCAT Style Guide. Additional detailed information is available at

https://owl.purdue.edu/owl/research_and_citation/apa_style/apa_style_introduction.html

- If there is a direct quote from a source in the body of the paper, please include the page or paragraph number for the quoted material in the in-text citation.
- Please do not auto-format references in Word. This makes it difficult for reviewers to add edits or comments.
- Please ensure that in-text citations and entries in reference lists contain all necessary information. This includes correctly spelled author names, publication dates, journal or book name, publisher and city (for books), volume and edition numbers (for journals), and the starting and ending page numbers (for journal articles).
- If a cited document is available online, please include a link to the document at the end of the reference in the reference list ("Retrieved from [link]").

Formatting

Please ensure that the format of tables and figures is consistent throughout the document (e.g. headings, font type and size, colours, capitalization in titles/captions/row or column headings). Please do not insert auto-generated tables or figures from Excel or other programs, as these cannot be edited without access to the source data. Please do not format figures as images, because these also cannot be edited and may cause formatting problems during the layout of the finalized report.

Please start each major section of the report on a new page.

A table of contents should be included, but please do not use auto-numbering. The pagination will likely change when the final version of the report is prepared, and auto-numbering makes it difficult to format and edit the table of contents.



Please do not insert internal links within the document (e.g. linking the text “Table 1” to the table itself). These links can also cause problems in preparing the report for publication.

If the report includes appendices, please give each appendix its own number and title (e.g. Appendix I: List of Participants) and start each appendix on a new page. Appendices must be referenced within the text of the report.

Revisions

BCCAT will provide feedback, including feedback on content and formatting, on draft and final versions of reports. However, the contractor is responsible for producing a final version of the report that is acceptable to BCCAT and its committees. Contractors should allocate time in their schedules for revisions and editing after draft and final reports are submitted to BCCAT. If a report contains multiple files, charts or appendices, the contractor is responsible for putting all of the elements of the report together in a single, coherent document that is acceptable to BCCAT.

BCCAT requires that a line item for professional editing be included in every project budget. If a report needs extensive revisions or rewriting, the contractor is responsible for that work, including the cost of a professional editor if necessary. BCCAT is not responsible for additional costs of report revisions based on feedback provided by BCCAT or peer reviewers.

Project Deadlines

A proposed timeline for the project is included in the contract. Contractors are expected to consult with BCCAT if unexpected circumstances will significantly delay phases of the project as identified in the timeline. If the overall project needs additional time to be completed, BCCAT may grant an informal or formal contract extension in the case of unforeseen or extenuating circumstances (see “**Contract Length**”).

Final reports are evaluated and approved by the BCCAT committee that commissioned the project. Generally, BCCAT staff will not send a final report to a committee until the report is satisfactory in content and format. Find committee meeting dates on the [Committee pages](#). Contractors should submit reports far enough in advance of the agenda deadline for BCCAT staff to provide feedback and request revisions, and for the revised report to be completed before the meeting agenda deadline. Generally, BCCAT recommends that contractors submit reports at least a month prior to the meeting date.



If a contractor submits a final report without enough time for BCCAT staff to review or to suggest revisions before a committee's agenda deadline, BCCAT retains the right to delay submission of the report to the committee for approval until the report has been adequately reviewed and, if necessary, revised.

Project Payments

Generally, BCCAT issues payments for projects at multiple points in the project process. The payment schedule will be defined in the "Fee Schedule" section of the contract.

The contractor and BCCAT will mutually agree on the percentage of total fees that will be paid at each of these points (e.g. 50% upon approval of the draft report and 50% upon approval of the final report).

Interim Payment

When a draft report is submitted to BCCAT, the report is reviewed by the BCCAT staff member assigned to the project. The staff member will give feedback to the contractor on the report, and may request edits or revisions to the report. The report will also be sent to peer reviewers.

When the BCCAT staff member is satisfied with the content and format of the draft report, including responses to peer reviewers' comments, they will ask the contractor to submit an invoice to BCCAT for the interim payment amount specified in the contract. BCCAT cannot initiate a payment until it has an invoice from the contractor.

The invoice must include:

- The date the invoice was issued
- The name and contact information of the contractor
- The address where the payment should be sent (if this is different from the contractor's address)
- The name of the project and the BCCAT org code for the project, as shown in the contract
- The reason for the payment (e.g. "completion of draft report")
- The amount of the payment, with each component identified separately (e.g. contractor fee, GST, expenses)

If the contractor has incurred expenses related to the project, these will only be reimbursed if an expense budget is explicitly included in the contract, and if receipts are submitted to verify



the expenditures. BCCAT procedures for expense reimbursement, documentation required for reimbursement. Learn more about [expenses that are eligible for reimbursement](#).

Even if expenses are part of the project budget in the contract, expenses cannot be reimbursed without receipts. When the invoice and documentation have been received and approved, BCCAT submits a cheque requisition to BCIT. Cheques are usually issued between two and four weeks after BCIT receives the requisition, but may take up to eight weeks, depending on BCIT staff workload and the time of year.

Final Payment

When the draft final report is submitted, it is reviewed by the BCCAT staff member assigned to the report. The staff member may request revisions or edits to the report. The report will also be sent to peer reviewers.

When the BCCAT staff member is satisfied with the content and format of the final report, including responses to peer reviewers' comments, the report is submitted to the committee that commissioned the report. The committee must approve the final report before the final payment on the contract can be authorized. The committee may approve final payment subject to changes and edits being made to the report. In this case, final payment will not be issued until the requested changes are completed.

Please remember that BCCAT's committees only meet two or three times per year. If a final report is submitted between committee meetings, the final approval of the report, and authorization of the final payment, may be delayed until the committee's next meeting. In some cases, committees can be asked to approve reports via email electronically; however, it is preferable to submit final reports for review and discussion at scheduled meetings.

Once the final payment has been authorized, the contractor issues an invoice to BCCAT, following the same format as the invoice for the interim payment. Any expenses incurred by the contractor since the previous invoice was issued must be submitted with documentation to be reimbursed. When the invoice and documentation have been received and approved, BCCAT will submit a cheque requisition to BCIT.

If total expenses are less than the budgeted amount for expenses in the contract, the difference cannot be used to increase payment for professional services or contractor fees



Project Dissemination

BCCAT reserves the right to disseminate the final approved report at its discretion. This may include formal design and publication, either in print or on the web, with communications distributed through BCCAT's network.

Please note that BCCAT and its committees may approve full payment for a completed project but choose not to publish or disseminate the final version of the report. If a contractor is undertaking another project (e.g. a conference presentation or academic article) and wishes to use data or text from an unpublished BCCAT report, they must submit a written request to BCCAT and receive approval before commencing the project.

BCCAT retains copyright to the report and its contents.