CANADA FOUNDATION FOR INNOVATION

John R. Evans Leaders Fund

Guidelines for completing a partnership proposal

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INNOVATION
Canada Foundation for Innovation
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Introduction

These guidelines are for researchers and research administrators of eligible institutions preparing and submitting a proposal to the CFI's John R. Evans Leaders Fund (JELF) jointly with one of our funding partners:

- The Tri-agency Institutional Programs Secretariat's (TIPS) Canada Research Chairs (CRC) and Canada Excellence Research Chairs (CERC) programs;
- The Natural Sciences and Engineering Research Council of Canada (NSERC) through its Alliance Grants program; and
- The Social Sciences and Humanities Research Council of Canada (SSHRC) through its Insight Grants and Partnership Grants programs.

Please refer to the section of these guidelines that contains information specific to the partner program you are applying to, such as submission deadlines and eligibility, and consult the respective partnering organization's website for additional information.

The CFI encourages researchers to consult with their research office and to refer to internal institutional practices for submitting JELF proposals. For further information on this fund, consult the JELF program description on the CFI's website, Innovation.ca.

NB: To submit a JELF application not affiliated with any of our funding partners' programs, consult the Guidelines for completing an unaffiliated proposal.

Program description

At a time of intense international competition, the JELF is a critical strategic investment tool designed to help institutions attract and retain the very best of today's and tomorrow's researchers. The fund's name pays tribute to the outstanding contributions of John R. Evans, the first Chair of the CFI's Board of Directors.

The JELF enables a select number of an institution's excellent researchers to undertake innovative research by providing them with the foundational research infrastructure required to be or to become leaders in their field. In turn, this enables institutions to remain internationally competitive in areas of research and technology development that are aligned with their strategic priorities.

Partnership proposals are assessed based on the following criteria:

- Infrastructure
- Benefits to Canadians (except if this criterion is also included in the application to the partnering organization).

To avoid duplication, the criteria to be addressed in your CFI proposal depend on what the partnering organization requests, as well as the amount requested from the CFI.

Submission deadlines

The submission deadlines for this program vary according to the partnering organizations.

Eligibility

Eligible institutions

Canadian universities recognized as eligible by the CFI receive an allocation of CFI funding commensurate with funding received from the three federal research funding agencies (Canadian Institutes of Health Research, Natural Sciences and Engineering Research Council of Canada and Social Sciences and Humanities Research Council of Canada) over the last three years.

The Small Institution Fund (SIF), which is part of our John R. Evans Leaders Fund, was created for institutions whose dedicated JELF allocation would be calculated as less than $800,000. Each SIF-eligible institution can draw from this fund to a maximum of $400,000 or $800,000, depending on their share of tri-agency funding. No special steps are required for eligible institutions to access the Small Institution Fund when submitting a proposal to the JELF.

Research hospitals and research institutes must apply through the eligible university with which they are affiliated.

We encourage institutions to develop multi-institutional projects. This can include collaborating with other institutions for research and technology development, knowledge or technology transfer or to share the research infrastructure to optimize its use and sustainability.

Eligible researchers

The researchers must be:

- Recognized innovative leaders or have demonstrated the potential for excellence in the proposed research fields;
- Engaged in or embarking upon research or technology development that is innovative, high quality, and meets international standards;
- A current faculty member with a full-time academic appointment or a candidate that the institution is in the process of recruiting to a full-time academic position in an important strategic sector.

Researchers who have previously been supported by the CFI can submit another proposal.

Eligible infrastructure projects

Eligible institutions can submit proposals requesting up to $800,000 from the CFI, with a maximum total eligible cost of $2 million. The CFI will allow the submission of proposals requesting less than or equal to $75,000 from the CFI from the social sciences, humanities and arts, and/or those universities that have access to the Small Institution Fund.

An eligible project involves the acquisition or development of research infrastructure to increase research capacity and enable innovative research activities. This includes the acquisition of workhorses (high usage equipment that routinely and dependably perform over a long period of time), and the upgrade or replacement of aging infrastructure.

Research infrastructure expenditures and in-kind contributions from eligible partners must have been incurred no earlier than six months prior to the proposal submission deadline. We consider expenditures incurred when goods are received, services have been rendered or work has been performed.

For more information on CFI eligibility guidelines, please refer to the Policy and program guide.

Maximum time to implement projects

Projects should demonstrate appropriate maturity. It is expected that projects will be finalized promptly and completed within a reasonable timeframe.

The CFI reserves the right to withdraw its support for projects not finalized within nine months of funding decisions, or for which the final financial report is not submitted within four years.

Advanced research computing infrastructure

Institutions may submit proposals including advanced research computing infrastructure and related resources to carry out a research or technology development project. However, proposals that focus predominantly on major, collective and shared advanced research computing infrastructure are not eligible. These advanced research computing needs are addressed through the Digital Research Alliance of Canada (the Alliance).

Advanced research computing infrastructure normally includes systems or resources such as:

- Capacity or throughput computing
- Capability computing supporting tightly coupled, fine-grained applications
- Shared memory systems
- Systems supporting very large memory requirements
- High-performance storage
- Long-term storage
- Cloud computing
- Computing using specialized accelerators, including GP-CPU and others
- High-performance visualization systems
- Systems suitable for computational steering and interactive use.

Advanced research computing infrastructure encompasses both the software and environment needed for a given discipline to effectively utilize these types of infrastructure such as high levels of data security and integrity.

Investments in advanced research computing infrastructure are maximized when those resources are shared. New or additional research computing resources costing more than $100,000 will typically be housed, managed and operated by the Alliance.

Consult with the Alliance if you are planning to request advanced research computing infrastructure. Visit the Alliance's website for information on their established process for facilitating collaboration with institutions.

To facilitate the consultation process and allow timely responses to institutions, the CFI will share with the Alliance the proposals including advanced research computing infrastructure costing more than $100,000. Release of this information will be done in a timely manner and on a confidential basis. By submitting such a proposal to the CFI, you acknowledge that this information can be shared with the Alliance for the purpose of determining if the infrastructure should be integrated at a national host site.

Guidelines for proposal preparation

Institutions must submit a partnership proposal to the JELF at the same time they submit a proposal to one of our partners.

Researchers and institutional research services personnel must use the CFI Awards Management System (CAMS) to prepare and submit the corresponding request for research infrastructure. Select "John R. Evans Leaders Fund – Funding for research infrastructure with an application for research support funding from another program" when creating a new proposal in CAMS.

We will merge the JELF proposal and application to the partnering organization before they are assessed. For multi-institutional proposals, contact the Associate Director of Annual Funds (jelf@innovation.ca) by the submission deadline to communicate the dollar value of your institution's share of the proposal.

It is important that all submissions conform to the guidelines provided on the CAMS electronic proposal forms as well as those outlined in this document. It is strongly recommended that researchers and institutional research services personnel review the completed forms before submitting them electronically to ensure that proposals comply with these guidelines.

Guidelines for attachments

CAMS will automatically paginate proposals when they are submitted. Documents should not be individually paginated prior to being uploaded to the electronic system.

Page formatting

Since reviewers will assess proposals electronically, the applicant should only use a standard, single-column on an 8.5" x 11" page layout for documents. Avoid using a two-column or landscape format since it may reduce legibility.

The proposal must be clear and easily readable. Legibility is of paramount importance and should take precedence in the selection of an appropriate font for use in the proposal. The applicant is strongly encouraged to use a 12-point, black-coloured font and use single line spacing (six lines per inch) with no condensed type or spacing.

Additionally, the CFI expects documents to conform to the following guidelines:

- **Header:** Indicate the applicant institution on the top left and the project number on the top right of each page.
- **Footer:** Do not include any information in the footer as this area will be used for automatic page numbering.
- **Page margin:** Insert a margin of no less than 1 inch around the page. The header may be within the margin.
- **File format and size:** Only PDF files may be uploaded. Documents in other formats should be converted to PDF prior to being uploaded and should not be encrypted or password protected. The file size must not exceed 20 megabytes.

Adherence to the page formatting guidelines noted above is necessary to ensure that reviewers receive legible proposals and that no applicant will have an unfair advantage by using smaller type, line spacing or margins to provide more text in the proposal. Failure to adhere to these guidelines may result in the CFI returning a proposal for revision.

Proposal structure

The proposal consists of two modules within CAMS:

- **Project module:** information about the proposed project and how it meets the criteria of the funding program
- **Finance module:** information pertaining to the budgetary details of the proposal
- **Research security module**

The forms in CAMS will dictate the maximum number of characters that can be included in each section and/or the page limits for uploaded documents.

Project module

The project module consists of the following sections:

- Project information
- Plain language summary
- Researchers
- Assessment criteria
- Financial resources for operation and maintenance
- Attraction and retention of leading researchers (to be completed by the institution)
- Past/current CFI investments (to be completed by the institution)

Project information

This section captures basic information about the project such as the title, applicant institution, keywords and research security information.

Plain language summary (1,500 characters)

Provide a short summary in plain language of the proposed project: what is being researched, how it is being done and why it is important. Focus on the expected impact and benefits to Canada, beyond research or technology development accomplishments. This summary will not be used in the review process but it may be used in the CFI's communications products and on its website if the project is funded.

Researchers

Researchers included in the proposal must have a CAMS account and agree to participate in the project before the proposal can be submitted to the CFI. The researchers' curricula vitae will be automatically appended to the proposal by the partnering organization.

Assessment criteria

Upload a PDF document that contains key information on how the proposal meets the assessment criteria for this program. Ensure that the document follows the guidelines for attachments. Address each criterion in the order in which they appear below.

Each assessment criterion will be evaluated against a standard. Each criterion includes aspects that must be addressed in the proposal. Failure to do so will weaken the proposal. Expert reviewers and/or expert review committees will be asked to rate the degree to which the proposal meets each standard.

The number of criteria to address and the page limits for this PDF document depend on the amount requested from the CFI in the proposal. The attachment allows institutions maximum flexibility to address each criterion, including the use of figures or diagrams where appropriate. The exact distribution of pages for each criterion is at your discretion.

Assessment criteria for CRC and CERC programs

Total CFI request ($)	Assessment criteria	Maximum number of pages
Less than or equal to $75,000	Infrastructure	4
More than $75,000 to $800,000	Infrastructure and Benefits to Canadians	6

Assessment criterion for NSERC and SSHRC programs

Total CFI request ($)	Assessment criterion	Maximum number of pages
Less than or equal to $800,000	Infrastructure	4

Assessment criteria

Infrastructure

The infrastructure is necessary and appropriate to conduct the research or technology development activities.

- Describe each item and justify its need to conduct the proposed activities. For construction or renovation, provide a description of the space including its location, size and nature. Use the item number, quantity, cost and location found in the "Cost of individual items" table. Provide a cost breakdown for any grouping of items.
- Explain why existing infrastructure within the institution and the region cannot be used to conduct the proposed activities.

Note: For construction or renovation, a detailed cost breakdown, timeline and floor plans must be provided in a separate document as part of the finance module.

Benefits to Canadians

The research or technology development results will be transferred through appropriate pathways to potential end users and are likely to generate social, health, environmental and/or economic benefits to Canadians, including better training and improved skills for highly qualified personnel.[1]

- Briefly describe potential socioeconomic benefits, including better training and improved skills for highly qualified personnel.
- Delineate the knowledge mobilization plan and/or technology transfer pathways, including partnerships with end users.

[1] Highly qualified personnel include technicians, research associates, undergraduate students, graduate students and postdoctoral fellows.

Financial resources for operation and maintenance

This section of the project module captures the annual costs and sources of committed support to ensure the effective operation and maintenance (O&M) of the infrastructure for the first five years after implementation.

When the useful life of the requested infrastructure is longer or shorter than five years, the "Assessment criteria" section of the proposal should provide complementary information regarding the operation and maintenance needs for these items over their useful life. Do not include costs related to research and/or technology development.

The useful life of the research infrastructure is considered to be the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose as per the proposal, factoring in normal repairs and maintenance.

The CFI will contribute to the operation and maintenance costs of funded projects under the JELF through its Infrastructure Operating Fund (IOF). Support from the IOF will be equivalent to 30 percent of the CFI contribution to the capital cost of projects funded under the JELF. If funding sources include the IOF, list this amount in the "institutional contribution" category. The institution has the flexibility to distribute its IOF allocation based on actual operating and maintenance needs as opposed to allocating the exact amount to the project that generated it, in accordance with its internal plan for the provision and administration of operating and maintenance support.

Attraction and retention of leading researchers

This section is to be completed by the institution by selecting whether the infrastructure requested will be used to attract a new researcher to the institution or to retain an existing faculty member. The information is used for statistical purposes only.

- **Attraction:** Less than 24 months since researcher's full-time academic appointment
- **Retention:** More than 24 months since researcher's full-time academic appointment

Past/current CFI investments

This section is to be completed by the institution to indicate whether the infrastructure will support research activities in which the CFI has or has not previously invested. This information is used for statistical purposes only.

Finance module

The finance module consists of the following sections:

- Cost of individual items
- Construction or renovation plans (if applicable)
- Contributions from eligible partners
- Infrastructure utilization
- Overview of infrastructure project funding (generated automatically – read only).

The tables in the "Overview of infrastructure project funding" section in CAMS will be automatically populated with information taken from other sections of the finance module. Note that the amount requested from the CFI is calculated based on the difference between the total contributions from eligible partners and the total eligible costs.

Cost of individual items

The CFI recommends that institutions bundle items into functional groupings when completing the "Cost of individual items" section, and provide details and justification for each item within a group when addressing the infrastructure criterion in the assessment criteria document. The CFI's Policy and program guide outlines the eligible costs for infrastructure projects.

List only the eligible infrastructure acquisition and development costs. List the full cost of each item. Retain documentation (price lists, quotes, etc.) so that they can be provided to the CFI if requested.

Please note:

- If the infrastructure will be used for purposes other than research or technology development, list only prorated research or technology development costs.
- The total eligible costs must include taxes (net of credits received), shipping and installation. However, taxes must not be calculated on the in-kind portion.
- Follow your existing institutional policies and procedures when preparing budget estimates. Costs included in this budget are expected to be close estimates of fair market value. Refer to the Policy and program guide for information on how in-kind contributions must be assessed.

Construction or renovation plans

Applicant institutions must provide the following information:

- A timeline identifying key dates for the various stages of the proposed construction or renovation;
- Floor plans of the proposed new area(s), showing the location of the infrastructure and the scale of the plans (when construction or renovation involves multiple rooms). The floor plans must be legible when printed in black and white on standard letter-size paper (8.5" x 11");

- The overall cost of the construction or renovation project, categorized by cost component (i.e. direct costs, soft costs and contingency costs), when these costs are expected to be in excess of $500,000.

Note: The timeline, floor plans and cost breakdown should be uploaded as a separate PDF document. These pages do not count towards the page limit for the "Assessment criteria" section of the proposal.

Contributions from eligible partners

List all contributions from eligible partners. Do not include the amount requested from the CFI. Provide the partner name and type, as well as a breakdown of contributions (cash and in-kind) for each eligible partner. Bundle all expected in-kind contributions from vendors into a single line. If partner contributions are expected but have not yet been confirmed, outline the plans for securing these funds.

Infrastructure utilization

Explain the use of the requested infrastructure for CFI-eligible and non-eligible purposes and any applicable prorating of costs.

Research security module

All institutions applying to partnerships programs have research security obligations at the time of application under the Policy on Sensitive Technology Research and Affiliations of Concern (STRAC). Institutions applying to **NSERC Alliance Grants** or **SSHRC Partnership Grants** have additional research security obligations at the time of application under the Government of Canada's National Security Guidelines for Research Partnerships. Visit our research security web page for more details on research security requirements.

If you answer "yes" to the research security question in the project module, you will have access to the STRAC attestation forms. For projects submitted to **NSERC Alliance Grants** or **SSHRC Partnership Grants**, visit the specific partnership web page to find out what your institution needs to provide with proposals to meet the National Security Guidelines for Research Partnerships requirements.

Use of generative artificial intelligence

The use of generative artificial intelligence (AI) in preparation of proposals is an emerging and complex issue. We encourage you to review and follow the Draft guidance on the use of artificial intelligence in the development and review of research grant proposals and, where applicable, disclose any use of generative AI in the preparation of the proposal. Individuals remain personally accountable for the complete contents of their application.

Review and decision making

Review process

The expert review process is administered by the partnering organization. Provide sufficient information to allow reviewers to assess your proposal against each CFI criteria (refer to the "Assessment criteria" section of these guidelines).

The CFI will first undertake an administrative review of the proposals to ensure they are eligible and complete. CFI staff will follow up with institutional research services personnel if needed.

During the infrastructure component assessment of the review process, a CFI representative will provide clarification on our policies and procedures, if necessary.

Funding decisions

The partnering organization will make funding decisions for its component, while the CFI Board of Directors will make the funding decisions for the infrastructure component at its next scheduled meeting. The CFI's approval of a positive funding recommendation is conditional upon a positive funding decision from the partnering organization

JELF – CRC and CERC partnerships

Assessment criteria

Total CFI request ($)	Assessment criteria	Maximum number of pages
Less than or equal to $75,000	Infrastructure	4
More than $75,000 to $800,000	Infrastructure and Benefits to Canadians	6

Application process

The CFI partners with the Tri-agency Institutional Programs Secretariat (TIPS) of the Canada Research Chairs (CRC) and Canada Excellence Research Chairs (CERC) programs. CRC nominations are due on dates set by TIPS. Phase 2 CERC nominations can only be submitted by invitation.

To apply to these partnership streams, submit separate proposals to TIPS and to the CFI at the time of nomination or renewal of a Chair. Submission deadlines are set by TIPS. Researchers and institutional research services personnel must use the CFI Awards Management System (CAMS) to prepare and submit the CFI proposal. Select "John R. Evans Leaders Fund–Funding for research infrastructure with an application for research support funding from another program" when creating a new proposal in CAMS. We will merge the JELF proposal and CRC or CERC proposal before they are assessed.

Normally, the CFI will fund up to 40 percent of a project's eligible infrastructure costs. For institutions with a special Chair allocation through the CRC Program, the CFI may fund up to 100 percent of the project's eligible infrastructure costs if the total project costs do not exceed $75,000.

Consult TIPS' website for more information (CRC and CERC).

Review process

Proposals for these joint initiatives (CFI – CRC/CERC) are assessed using TIPS' multilevel peer review process. The infrastructure request is assessed at the first level by a minimum of three experts recruited by the TIPS. These experts provide a funding recommendation for the CFI infrastructure request. Should the CFI infrastructure request of the joint proposal receive divergent reviews, have a proposed research plan that spans diverse disciplines or is otherwise complex, the CFI may choose one of the following options to make its funding recommendation:

- Request a teleconference with reviewers of the proposal;
- Seek the input of additional expert reviewers; and/or,
- Seek the input of the JELF Advisory Committee.

Decision process

TIPS will make funding decisions for the CRC/CERC components, and the funding recommendation for the CFI infrastructure request is sent to the CFI Board of Directors for a funding decision at its next scheduled meeting. The CFI Board of Directors' approval of the positive funding recommendation is conditional upon a positive funding decision for the CRC or CERC component. TIPS will share the reviewers' comments with institutions. When the CFI seeks the input of additional expert reviewers or the JELF Advisory Committee, it will share these additional comments with the institutions directly.

JELF – NSERC partnership

Assessment criterion

Total CFI request ($)	Assessment criterion	Maximum number of pages
Less than or equal to $800,000	Infrastructure	4

Submission deadlines and process

The CFI partners with the Natural Sciences and Engineering Research Council of Canada's (NSERC) through its Alliance Grants program.

To apply to the John R. Evans Leaders Fund (JELF) for research infrastructure support associated with NSERC Alliance Grants, submit separate proposals to NSERC and to the CFI. Submission deadlines are set by NSERC. Researchers and institutional research services personnel must use the CFI Awards Management System (CAMS) to prepare and submit the CFI proposal. Select "John R. Evans Leaders Fund – Funding for research infrastructure with an application for research support funding from another program" when creating a new proposal in CAMS. We will merge the JELF proposal and NSERC proposal before they are assessed.

Consult NSERC's website for more details.

Review process

Proposals for this joint initiative are assessed using NSERC's review process. The infrastructure request will be assessed against the CFI's criteria. During the review process, the CFI will provide clarification on our policies and procedures, if necessary.

Funding decisions

NSERC will make funding decisions for the Alliance component, and the funding recommendation for the CFI infrastructure request is sent to the CFI Board of Directors for a funding decision at its next scheduled meeting. The CFI's approval of a positive funding recommendation is conditional upon a positive funding decision for the NSERC Alliance Grant. NSERC will share the reviewers' comments with institutions.

JELF – SSHRC partnership

Assessment criterion

Total CFI request ($)	Assessment criterion	Maximum number of pages
Less than or equal to $800,000	Infrastructure	4

Submission deadlines and process

The CFI partners with the Social Sciences and Humanities Research Council of Canada's (SSHRC) Insight Grants and Partnership Grants programs. For the Partnership Grants program, the JELF proposal is only required if you are invited to Stage 2.

To apply to this partnership stream, submit separate proposals to SSHRC and to the CFI at the same time. Submission deadlines are set by SSHRC. Researchers and institutional research services personnel must use the CFI Awards Management System (CAMS) to prepare and submit the CFI proposal. Select "John R. Evans Leaders Fund – Funding for research infrastructure with an application for research support funding from another program" when creating a new proposal in CAMS. We will merge the JELF proposal and SSHRC proposal before they are assessed.

Review process

Proposals for this joint initiative are assessed using SSHRC's merit review process.

Consult SSHRC's website for more details.

Funding decisions

SSHRC will make funding decisions for its component, and the funding recommendation for the CFI infrastructure request is sent to the CFI Board of Directors for a funding decision at its next scheduled meeting. The CFI's approval of a positive funding recommendation is conditional upon a positive funding decision for the SSHRC component. Institutions will be notified by email by the CFI when decisions and review materials are uploaded in CAMS.