CANADA FOUNDATION FOR INNOVATION

2027 Innovation Fund

Guidelines for Multidisciplinary Assessment Committees

November 2026

INNOVATION
Canada Foundation for Innovation
Fondation canadienne pour l'innovation



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About the Canada Foundation for Innovation

With a bold, future-looking mandate, the CFI equips researchers to be global leaders in their fields and to respond to emerging challenges. Our investments in state-of-the-art tools, instruments and facilities at universities, colleges, research hospitals and non-profit research institutions underpin both curiosity- and mission-driven research that cuts across disciplines and bridges all sectors. The research infrastructure we fund mobilizes knowledge, spurs innovation and commercialization, and empowers the talented minds of a new generation.

The Canada Foundation for Innovation respectfully acknowledges that its head office is located on the traditional, unceded territory of the Anishinaabe Algonquin People.



A word of thanks

The CFI would like to thank you for agreeing to participate in the review process for the 2027 Innovation Fund competition. The review process relies on dedicated people like you who generously lend their time and expertise to its success. The CFI and Canada's research community greatly appreciate your efforts.

Part 1: What you need to know about this competition

Purpose of the Innovation Fund

The Innovation Fund provides investments in research infrastructure across the full research spectrum, from the most fundamental investigations to applied research and technology development, and across all research disciplines from natural sciences and engineering, life sciences and health, to social sciences, humanities and the arts. These investments help keep Canada competitive, resilient and ready to tackle complex national and global challenges. Through this competition, we will invest in research environments that are equitable, inclusive and equipped to build Canada into the world's leading hub for science and innovation.

Objectives of this competition

The 2027 Innovation Fund competition is designed to help Canadian institutions respond strategically to a constantly changing world and to strengthen the country's long-term competitiveness, security and prosperity. The objectives of this competition are to:

- Strengthen researchers' ability to excel and compete internationally
- Build sustainable research capacity
- Generate relevant and impactful benefits for Canadians.

Competition budget

The CFI will invest up to $325 million in research infrastructure funding and will fund up to 40 percent of a project's eligible infrastructure costs. We will also provide up to $97.5 million for associated operating and maintenance costs through the Infrastructure Operating Fund.

Competition streams

For this competition, there are three streams with tailored assessment criteria. There is no predetermined distribution among the funding streams.

STREAM 1

Stream 1: Leading edge of exploration and knowledge generation (open)

This stream is open to proposals from all disciplines.

STREAM 2

Stream 2: Leading edge of exploration and knowledge generation in the social sciences, humanities and arts (SSHA)

To access this stream, the primary field of research must be in SSHA.

STREAM 3

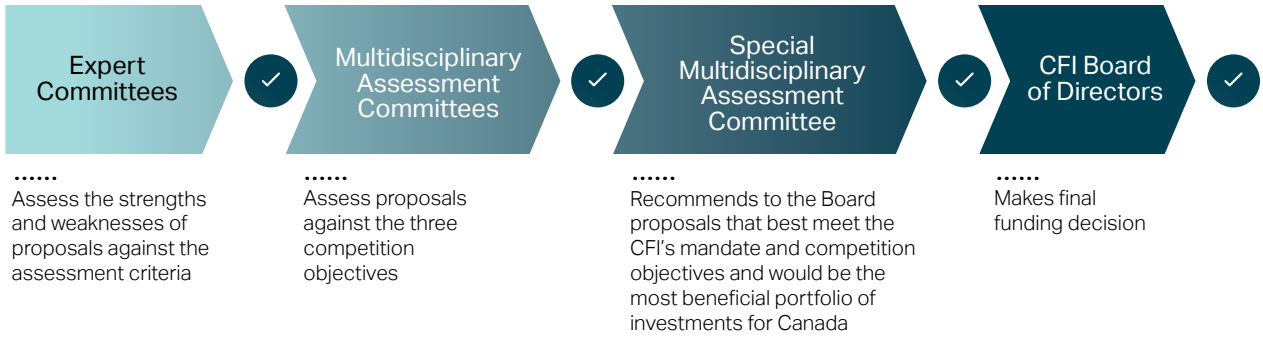
Stream 3: Creation, renewal and upgrade of core facilities

To access this stream, all requested infrastructure must be housed in and managed by a core facility.

Review process

Proposals will be evaluated in a three-step review process, with final funding decisions made by the CFI's Board of Directors.

Figure 1: Review process



Expert Committees

In the first stage of review, Expert Committees review small groups of proposals from the same area of research. They evaluate proposals based on five assessment criteria:

- Research[1]
- Team
- Infrastructure
- Sustainability
- Benefits.

The assessment criteria for all streams are similar, but the sub-criteria have been tailored to better fit the types of proposals in those streams.

1 Throughout this document "research" refers to the full spectrum of research (e.g., fundamental research, applied research, technology development or creative works).

See "Part 3: Criterion standards and instructions" for details on the requirements for each assessment criterion under each competition objective.

Only proposals that meet a minimum threshold across the five assessment criteria will move to the next stage. Proposals meet the minimum threshold to advance to the MAC unless they receive three or more ratings of "Satisfies the criterion standard with minor weaknesses" or one of either "Partially satisfies the criterion standard" or "Does not satisfy the criterion standard."

Multidisciplinary Assessment Committees

In the second stage of review, the Multidisciplinary Assessment Committees (MACs) review groups of proposals of similar size or complexity and assess them against the three competition objectives. Proposals from all three streams will be assessed together.

One or more MACs exclusively review proposals submitted by small institutions. Small institutions are defined as those whose share of research funding received from the three federal research funding agencies is less than one percent.

We choose MAC members for their broad understanding of the research environment, and their expertise across many domains including health, natural sciences, engineering, social sciences and the arts. All MACs will include members who are well-versed in principles of equity, diversity and inclusion and members with core facility experience. We structure our committees to reflect the proposals they will assess; for example, the MAC that reviews proposals from small institutions will be composed of members who have experience in and knowledge of that environment.

The MACs conduct a careful analysis of the proposals and of the Expert Committee reports. They have two responsibilities:

- Identifying proposals that demonstrate excellence and best meet the three competition objectives
- Providing a funding recommendation and funding amount for each proposal for the next stage of review.

Special Multidisciplinary Assessment Committee

In the third and final stage of review, a Special Multidisciplinary Assessment Committee (S-MAC) reviews reports from the MAC meetings for the proposals that the MACs recommend for funding. The S-MAC makes sure the MACs were consistent in their assessment. If recommendations from the MACs exceed the available budget, the S-MAC recommends to the CFI Board of Directors the proposals that best support the CFI's mandate, meet the objectives of the competition and represent the most beneficial portfolio of investments for Canada.

Funding decisions

The CFI Board of Directors will make funding decisions for this competition at its November 2027 meeting. Following this meeting, the CFI will notify institutions of the decisions and share the committee reports with them.

Part 2: How to conduct your review

Principles of merit review

Our merit review process is governed by the underlying principles of integrity and confidentiality. This is to ensure that we continue to have the trust and confidence of the research community, the government and the public.

Integrity

We expect reviewers to maintain the highest standards of ethics and integrity. This means that personal interests must never influence, or be seen to influence, the outcome. You are appointed as an individual, not as an advocate or representative of your discipline or organization. All Expert Committee members must follow our Conflict of interest and confidentiality agreement. Consult the list of team members and affiliated institutions for the proposals being reviewed by your committee and declare to the CFI any conflicts of interest in advance of the committee meeting. We will determine if the conflict of interest is manageable or if it would be best for you not to review this proposal.

Confidentiality

Our review process is confidential. When you agree to review for the CFI, you are bound by our confidentiality agreement. This means that everything we send you is confidential and must always be treated as such. You must not discuss or share proposals with anyone who is not a member of the committee. If you do not think you have the expertise to provide a useful review without discussing it with a colleague, you should decline the invitation. All notes and supporting materials must be destroyed once the review meeting is complete.

The CFI, with consent from the committee members, will record committee discussions to facilitate writing Expert Committee reports. These recordings are kept confidential and are for CFI use only. They are destroyed once the review process has concluded.

Use of generative artificial intelligence

Privacy, confidentiality, data security and the protection of intellectual property must be prioritized in the development and review of proposals. Please avoid using generative AI tools in the review of proposals. Inputting proposal information into generative AI tools such as ChatGPT or DeepL, which may store and reuse the data for future enhancement of the tool, could result in breaches of privacy and the loss of custody of intellectual property and would place you in breach of our Conflict of interest and confidentiality agreement. We encourage you to review and follow the Government of Canada's Guidance on the use of Artificial Intelligence in the development and review of research grant proposals.

Avoiding bias

Merit review is subjective by nature. Bias can be unconscious and show up in several ways. It could be based on:

- A school of thought or ideas about fundamental versus applied or translational research, areas of research, sub-disciplines or approaches (including emerging ones)
- The size or reputation of a participating institution
- The age, language, identity factors or gender of the applicants.

We strongly encourage you to complete the Excellence in Peer and Merit Review, modules 1 and 2, developed by the Canadian Institutes of Health Research, the Natural Sciences and Engineering Research Council of Canada and the Social Sciences and Humanities Research Council. This short, online module promotes understanding of bias, how it can affect merit review and ways to mitigate bias.

Official languages

The CFI offers its services in both of Canada's official languages — French and English. Committees must ensure that all proposals in either official language receive a full and detailed review. If you have been assigned a proposal in a language that you cannot understand, contact us immediately and we will reassign the proposal to another reviewer. We normally conduct committee meetings in English.

Merit review process

Assessing proposals against the competition objectives

MACs assess proposals against the three competition objectives after Expert Committees have assessed proposals based on five assessment criteria that expand on the competition objectives. In the call for proposals, we instructed applicants to provide enough information to clearly present how their project meets each assessment criterion and competition objective so that you can evaluate the project's merits. (See "Part 3: Criterion standards and instructions.")

Table 1: Relationship between competition objectives and assessment criteria

Competition objectives (reviewed by MACs)	Assessment criteria (reviewed by Expert Committees)
Strengthen researchers' ability to excel and compete internationally	Research
	Team
Build sustainable research capacity	Infrastructure
	Sustainability
Generate relevant and impactful benefits for Canadians	Benefits

Rating scale

We use a five-point rating scale with statements about the degree to which a proposal meets each competition objective and corresponding criterion standards. (See "Table 2: Rating scale and interpretation of ratings.") Your rating must be supported by the strengths and weaknesses that you identify in the proposal.

Table 2: Rating scale and interpretation of ratings

Rating	Interpretation
4+ Exceeds the standard	The proposal clearly satisfies all elements of the objectives and exhibits qualities or strengths that **exceed** what is required.
4 Satisfies the standard	The proposal **clearly satisfies** all elements of the objectives. No weaknesses have been identified.
3 Satisfies the standard with minor weaknesses	The proposal **mostly satisfies** the objectives. While **minor weaknesses** have been identified, they could be addressed by the research team. The strengths outweigh the weaknesses.
2 Partially satisfies the standard	The proposal **partially satisfies** the objectives. The **major weaknesses** identified would be difficult for the research team to address without significant changes to the project. The weaknesses outweigh the strengths.
1 Does not satisfy the standard	The proposal **does not satisfy** the objectives. The information provided is inadequate or does not address all elements of the objectives.

Tools to conduct your review

Use the CFI Awards Management System (CAMS) to access the documents and information you need to conduct your review. If you do not already have a CAMS account, we will create one for you.

CAMS is divided into dashboards for different types of users. The "Reviewer" dashboard is where you will access the review materials and conduct your preliminary assessments. To access the review materials, click on the committee name. This will bring you to the "Review and documentation" page, where you will find:

- Expert Committee reports
- Proposals
- Assignment table
- Preliminary assessment form
- Meeting agenda.

Consult Getting started with CAMS: A guide for reviewers for more information on using CAMS.

Multidisciplinary Assessment Committee roles and responsibilities

The **Chair** is responsible for leading the Multidisciplinary Assessment Committee (MAC) meeting and ensuring that the committee functions effectively. We expect the Chair to read all the proposals in advance of the meeting and uphold the CFI's values of providing an equitable and constructive review process.

During the meeting the Chair will ensure that:

- All members are given speaking time and consideration
- All proposals are reviewed fairly, consistently and in accordance with the guidelines in this document
- Each proposal is discussed in sufficient detail
- A consensus rating is achieved for each competition objective
- The ratings are sufficiently substantiated for the consensus report, which is drafted by the CFI.

The **Chair** is also responsible for ensuring that the consensus report for each proposal accurately reflects the discussion at the meeting.

MAC members have a broad understanding of the research environment, the niches of excellence in institutions and the breadth of outcomes and impacts of research. You will be assigned a role as either reviewer or reader for each proposal to be assessed by your committee.

Reviewers will provide preliminary comments and ratings for their assigned proposals in advance of the committee meeting. Each MAC member will review approximately 10 proposals, some of which will intentionally be outside of their general area of expertise. They will present their review at the committee meeting and will be asked to achieve a consensus rating.

Proposals for which you are a reviewer are identified on the "Your review" tab on the "Review and documentation" page in CAMS. You are required to enter your ratings and your comments in CAMS only for those proposals assigned to you as a reviewer.

Readers will have access to all proposals but are not required to submit a preliminary review. Their participation in the discussions is welcomed and will aid in reaching consensus ratings. For proposals for which you have been assigned the role of reader, please read, at minimum, the three-page project summaries and the Expert Committee reports.

CFI staff members are responsible for supporting the work of the Chair and the committee members. They will provide insight and clarity about the competition objectives, assessment criteria, the rating scale and any other aspect of the competition and will take detailed notes and draft a MAC report for each proposal.

Observers, including other CFI staff, sometimes attend committee meetings.

Steps in the Multidisciplinary Assessment Committee review

Before the meeting

Access the review materials

You will receive an email to activate your account on the CFI Awards Management System (CAMS). If you already have an account, you will receive an email to notify you when the review materials are available in CAMS. Consult Getting started with CAMS: A guide for reviewers for more information on using CAMS.

Attend a briefing session

The CFI will schedule briefing sessions on the review process. These briefing sessions will primarily focus on your role as a MAC member or Chair to ensure there is a shared understanding of the competition objectives and rating scale. This will also be an opportunity to ask any questions you may have about the review process.

Complete a bias in peer review training session

To ensure an equitable review process, we ask that you complete the recommended Excellence in Peer Review and Merit Review, modules 1 and 2 prior to evaluating your assigned proposals.

Conduct your preliminary assessment

The materials provided **must be** the sole information source upon which you base your review. Applicant institutions were asked to demonstrate in the proposal how the project satisfies each competition objective.

For each proposal, you will:

- Identify the proposal's relevant strengths and weaknesses based on the competition objectives
- Use the five-point rating scale to assess the degree to which the proposal meets each competition objective based on the strengths and weaknesses identified
- In CAMS, select your rating for each competition objective from a drop-down menu and input the strengths and weaknesses in the relevant comments section. You may also submit your comments in a Word document template we will provide.
- Complete and submit your preliminary assessment **at least one week before the committee meeting**.

Preliminary assessments will not be provided to applicant institutions. They will only be used to help us identify areas for discussion at the meeting and to inform MAC reports.

At the meeting

Multidisciplinary Assessment Committees will meet by videoconference on Microsoft Teams over two five-hour sessions in September 2027.

The committee will discuss each proposal for approximately 25 minutes. The discussion will be moderated by the committee Chair.

Each competition objective will be discussed in turn, allocating sufficient discussion time for situations of significant discrepancies among the members' preliminary assessments. The discussion will proceed, as follows:

- The Chair will invite the first reviewer to provide a brief overview of the proposal.
- The first reviewer will provide their rating and a brief rationale that highlights the proposal's strengths and weaknesses in relation to the first competition objective.
- The Chair will invite other assigned reviewers to provide their rating and any additional information or differing viewpoints.
- The Chair will open the discussion to the rest of the committee members.
- The Chair will summarize the strengths and weaknesses identified and will help the committee to reach a consensus rating for the competition objective before moving to the next competition objective.
- The rating assigned should accurately reflect the proposal's strengths and weaknesses identified during the discussion for each competition objective. Where there are discrepancies between the MAC's assessment and comments in the Expert Committee report, a substantive explanation will be required.
- The Chair will ask the committee to agree on a funding recommendation for each proposal.

After the meeting

MAC reports

CFI staff members will draft a report for each proposal that summarizes the committee's consensus ratings and comments. The Chair will be asked to review and approve the reports. MAC reports do not list the committee membership.

Table 3: Summary of key activities for Multidisciplinary Assessment Committees

Timing	Activities
Before the meeting (June to August 2027)	**Chairs:** • Log in to the CFI Awards Management System (CAMS) account • Access the review materials on the "Reviewer" dashboard • Inform the CFI of any potential conflict of interest • Participate in a briefing session • Complete the recommended Excellence in Peer Review and Merit Review, modules 1 and 2 • Read the Expert Committee reports and the proposals **Committee members:** • Log in to the CFI Awards Management System (CAMS) account • Access the review materials on the "Reviewer" dashboard • Inform the CFI of any potential conflict of interest • Participate in a briefing session • Complete the recommended Excellence in Peer Review and Merit Review, modules 1 and 2 • Evaluate the proposals against the competition objectives • Provide preliminary assessments to the CFI **at least one week before the meeting**
At the meeting (September 2027)	The Chair guides the committee in reviewing each proposal in turn. The committee discusses the strengths and weaknesses for each competition objective to reach consensus on a rating. This discussion informs the MAC report.
After the meeting (September 2027)	CFI programs staff draft the MAC consensus report for each proposal. The Chair reviews and approves the reports.

Part 3: Criterion standards and instructions

This section describes important concepts that applicants were asked to keep in mind in the development of their proposal followed by detailed instructions on what to include in their proposals according to which stream they applied to.

Research

Equity, diversity and inclusion in research design

A significant body of evidence clearly shows that designing research around equity, diversity and inclusion (EDI) principles fosters excellent research outcomes that are both impactful and reflective of the broader Canadian population. While the relevance of EDI in research design may vary across fields and types of research activities, these principles should be considered for each proposal.

Rigorous research involves embracing inclusive practices at every step, from developing the original research questions to selecting collaborators, and from interpreting findings to sharing results. In addition, by addressing barriers to participation in research, we harness talent, enhance innovation, foster creativity, encourage diverse problem-solving approaches, and ensure excellence.

Here are some examples of research-related practices to consider, where applicable:

Research planning and design

- Include diverse perspectives from relevant populations to be studied including marginalized or underrepresented groups.
- Ensure research design accounts for different types of biases and includes measures to mitigate them.
- Co-develop your research questions and methods with a diverse range of people and groups who are interested in or have influence in your field.
- Consider what impacts your research will have on relevant people and communities (e.g., patient populations, special interest groups, potential technology users).

Literature review

- Consider databases, journals and repositories from different regions and languages.
- Consider authors or knowledge holders from diverse backgrounds (e.g., from within and outside academia).

Data collection and analysis

- Use data collection methods that are culturally sensitive and inclusive of diverse populations relevant to the research activities.
- Consider intersecting identity factors (e.g., sex/gender, ethnicity/race, disability, socioeconomic status, geography, age) during analysis to understand differential experiences and impacts.
- Clearly address data control, ownership, and stewardship, particularly for data involving Indigenous Peoples or marginalized or underrepresented communities.

Team

Capturing scholarly output: more than a number

Capturing research output often relies on familiar quantitative metrics like h-index, journal impact factor and citations, despite evidence that these indicators are narrow, often misleading and insufficient to capture the full richness of scholarly work. While it is critical to assess the quality and impact of research outputs, we recognize the value of a broad range of impact measures. You may include article-level metrics like citation counts to demonstrate uptake of your work, but you should also give qualitative examples of important research outputs or further indicators of quality or impact. Reviewers are instructed not to use quantitative metrics alone as surrogates of quality when assessing proposals. For more information, see the Declaration on Research Assessment (DORA) website.

Inclusive work environment

Overcoming systemic barriers is critical to creating an inclusive work environment. Systemic barriers are policies or practices that result in the marginalization of specific groups of people and thus limit access to talent and ideas costing Canada in potential innovation. Individuals from these groups receive unequal access to or are excluded from participation in employment, services or programs, which ultimately perpetuates their marginalization and underrepresentation. Underrepresented groups can include, but are not limited to: women; Indigenous, racialized or 2SLGBTQI+ people; persons with disabilities; and, early-career researchers.

We expect that proposals submitted to this competition will identify the systemic barriers to participation of underrepresented groups, as relevant to their research domain, and will demonstrate concrete, evidence-supported practices that will help overcome these barriers and create an inclusive work environment.

It is insufficient to rely exclusively on institutional guidelines and policies. There is a large body of peer-reviewed literature to support effective and impactful best practices for implementing EDI into your work environment. You should develop and apply your own plans for your team, provide supporting references, and have mechanisms to demonstrate if they are working. Your plans must consider recruitment and how to support members of underrepresented groups once they have been hired.

Examples of concrete practices to create an inclusive work environment include, but are not limited to:

- Appropriate institutional financial support for EDI actions
- Equitable and inclusive access practices (e.g., independent access committee)
- Focus on cultural humility and establishment of an environment of constructive cultural learning
- Implementation of gender equity and equality programs (e.g., NSERC Dimensions)
- Inclusion of early-career researchers within the leadership and advisory bodies
- Inclusive recruitment and hiring practices
- Individuals with clearly identified responsibilities to support underrepresented groups, with attention to issues related to “minority tax”
- Plans to re-assess EDI activities regularly
- Robust and safe feedback mechanisms
- Targeted financial support for underrepresented groups (e.g., reduced cost to access infrastructure)
- Team culture statements.

Sustainability

Responsible and ethical data management

Responsible and ethical data management means that you have a clear plan to collect, store, use and share research data in ways that protect privacy, confidentiality and data integrity. This may include mechanisms such as, but not limited to:

- Using secure, institution-approved storage systems
- Encrypting files and devices
- Protecting data with strong passwords and multi-factor authentication
- Limiting access to authorized team members only
- Regularly backing up data
- Curating data for long-term use, including data disposal policies.

Sensitive or personal information, particularly health data, should be de-identified or anonymized where possible, and data should be retained only for as long as required.

Ethical data management also means respecting the rights and expectations of research participants and communities. Data must be collected and used only for approved purposes, in line with informed consent and ethical approvals. We expect that you will minimize the collection of personal or sensitive data, avoid sharing data through unsecured methods (such as personal email or unencrypted USB drives), and ensure that any data sharing or disposal is done responsibly and transparently, in accordance with ethical guidelines, institutional policies, and applicable laws. Research involving First Nations, Métis and Inuit data must follow the OCAP® principles of ownership, control, access and possession and the CARE Principles for Indigenous Data Governance (Collective Benefit, Authority to Control, Responsibility, Ethics).

Benefits

Consider the full diversity of benefits

The benefits of research are wide-ranging:

- Health benefits could be new diagnostic tools, treatments or therapeutics.
- Environmental benefits could be monitoring climate change impacts, land and water conservation, pollution reduction, carbon emission reduction, or informing policies for environmental protection.
- Sociocultural benefits could be improved wellbeing through strengthening communities, increased safety, increased public engagement, new policies or practices or improved decision making.
- Economic benefits could be new jobs, products, services or sustainable industries.

Turning research outputs into outcomes and impacts

As a signatory to DORA, the CFI is committed to recognizing and assessing diverse forms of impactful research. Research outputs can be mobilized and translated into many outcomes and impacts including, but not limited to:

- Conducting community engagement or outreach activities
- Contributing to policy or business decisions
- Creating intellectual property or patents
- Curating public exhibitions or events
- Developing commercial products or new technologies
- Discussing an article, book or presentation on social media, podcasts or blogs
- Disseminating results on open access platforms
- Media coverage or op-eds

- Plays, dance performances or films
- Presenting at conferences or other venues
- Producing community products such as Indigenous scholarly works or cultural sensitivity training
- Producing software or digital resources
- Publishing research articles, technical reports or books
- Training industry-ready, highly qualified personnel.

For more information, see the DORA document Rethinking Research Assessment: Building Blocks for Impact.

Information to provide about highly qualified personnel

When describing the training of highly qualified personnel:

- Indicate how many technicians, research associates, undergraduate students, graduate students and postdoctoral fellows are expected to be trained.
- Describe which skills they will acquire.
- Specify how the new infrastructure will enrich the training environment.
- Describe their potential career paths or further related contributions.
- Report on career paths of past highly qualified personnel, as available.

Useful resources

Canadian Institutes of Health Research

- Equity, diversity and inclusion resources

Natural Sciences and Engineering Research Council of Canada

- Dimensions Canada grants
- NSERC guide on integrating equity, diversity and inclusion considerations in research
- Complementary video: Strengthening research by integrating equity, diversity and inclusion considerations in the research process

Social Sciences and Humanities Research Council

- Guide to addressing equity, diversity and inclusion considerations in Partnership Grant applications

Stream 1:
Leading edge of exploration and knowledge generation (open)

Multidisciplinary assessment committee review

Objectives and assessment criteria guide

4+	4	3	2	1
Exceeds the objective	**Satisfies** the objective in all aspects	Satisfies the objective with **minor weaknesses**	**Partially satisfies** the objective	**Does not satisfy** the objective

STREAM 1

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Objective 1: Strengthen researchers' ability to excel and compete internationally		
Research	The research program is innovative, feasible and internationally competitive.	• Details of the research program, its innovative aspects and breakthrough potential. Position the program within the national and international context. Include benchmarks and references. • The approach, methodology and key challenges as well as how the team will overcome them. • How principles of equity, diversity and inclusion have been considered and applied to the design of the research program. Where EDI considerations are not applicable, explain why.
Team	The team members and their partners have all the experience and expertise to conduct the proposed activities and will do so in an inclusive work environment.	• How the team members' experience, expertise and roles meet the needs of the research program. Include a competency matrix. • How collaborators, partners and communities are meaningfully engaged to support the research program. • Evidence-based, specific and concrete actions to nurture a work environment that enables full participation of individuals from underrepresented groups and early-career researchers.
Objective 2: Build sustainable research capacity		
Infrastructure	The requested infrastructure is necessary and appropriate to conduct the research program.	• Each requested item and a justification of its need. Include a table matching infrastructure to proposed activities and methodologies. • How the requested infrastructure complements the existing infrastructure at the institution and at partner institutions.

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Sustainability	The infrastructure will be well managed, appropriately used and financially sustainable to ensure reliable long-term operation.	• How the infrastructure will be managed, operated and maintained. • How the infrastructure will be appropriately used. Include information about user access policies and the current and expected levels of use. • Plans for responsible and ethical data management. • Plans for financial sustainability with details about operating and maintenance costs and revenue sources.
Objective 3: Generate relevant and impactful benefits for Canadians		
Benefits	The project will generate relevant and impactful benefits for Canadians. The team members and their partners have defined pathways for real-world uptake through knowledge mobilization, technology transfer and end user engagement.	• Relevant benefits and their real-world impact for Canadians. • Plans for knowledge mobilization, technology transfer and engagement with partners and end users (e.g., collaboration with communities, clinicians and the public or private sector). • Training of highly qualified personnel.

Stream 2:
Leading edge of exploration and knowledge generation in the social sciences, humanities and arts

Multidisciplinary assessment committee review

Objectives and assessment criteria guide

4+	4	3	2	1
Exceeds the objective	**Satisfies** the objective in all aspects	Satisfies the objective with **minor weaknesses**	**Partially satisfies** the objective	**Does not satisfy** the objective

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Objective 1: Strengthen researchers' ability to excel and compete internationally		
Research	The research program is innovative, feasible and internationally competitive.	• Details of the research program, its innovative aspects and its significant contribution to knowledge. Position the program within relevant national and international scholarly or creative discourse. Include references. • The approach, methodology and key challenges as well as how the team will overcome them. • How principles of equity, diversity and inclusion have been considered and applied to the design of the research program. Where EDI considerations are not applicable, explain why.
Team	The team members and their partners have all the experience and expertise to conduct the proposed activities and will do so in an inclusive work environment.	• How the team members' experience, expertise and roles meet the needs of the research program. Include a competency matrix. • How collaborators, partners and communities are meaningfully engaged to support the research program. • Evidence-based, specific and concrete actions to nurture a work environment that enables full participation of individuals from underrepresented groups and early-career researchers.
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Infrastructure	The requested infrastructure is necessary and appropriate to conduct the research program.	• Each requested item and a justification of its need. Include a table matching infrastructure to proposed activities and methodologies. • How the requested infrastructure complements the existing infrastructure at the institution and at partner institutions.

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Sustainability	The infrastructure will be well managed, appropriately used and financially sustainable to ensure reliable long-term operation.	• How the infrastructure will be managed, operated and maintained. • How the infrastructure will be appropriately used. Include information about user access policies and the current and expected levels of use. • Plans for responsible and ethical data management. • Plans for financial sustainability with details about operating and maintenance costs and revenue sources.
Objective 3: Generate relevant and impactful benefits for Canadians		
Benefits	The project will generate relevant and impactful benefits for Canadians. The team members and their partners have defined pathways for real-world uptake through knowledge mobilization and end-user engagement.	• Relevant benefits and their real-world impact for Canadians. • Plans for knowledge mobilization, cultural dissemination and engagement with end users (e.g., collaboration with communities, policymakers or other relevant audiences). • Training of highly qualified personnel.

Stream 3:
Creation, renewal and upgrade of core facilities

Multidisciplinary assessment committee review

Objectives and assessment criteria guide

4+	4	3	2	1
Exceeds the objective	**Satisfies** the objective in all aspects	Satisfies the objective with **minor weaknesses**	**Partially satisfies** the objective	**Does not satisfy** the objective

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Objective 1: Strengthen researchers' ability to excel and compete internationally		
Research	The facility enables innovative, feasible and internationally competitive research.	• At a high level, the core facility and the types of projects and services the infrastructure will enable. • Innovative aspects and breakthrough potential of a representative sample of projects. Position the core facility and the projects within the national and international context. Include benchmarks and references. • The breadth and diversity of the core facility's users. Describe the current or planned user base including the number of internal and external users, their geographic distribution (by region/province and country) and sector (academia, communities, public or private sector).
Team	The team has all the experience and expertise needed to enable multiple research activities and will do so in an inclusive work environment.	• How the team members' experience, expertise and roles enable multiple research activities. Include a competency matrix. • Evidence-based, specific and concrete actions to nurture a work environment that enables full participation of individuals from underrepresented groups and early-career researchers.
Objective 2: Build sustainable research capacity		
Infrastructure	The requested infrastructure is necessary, appropriate and will enhance the facility's services.	• Each requested item and a justification of its need. Include a table matching infrastructure to proposed activities and methodologies. • How the requested infrastructure integrates with the existing infrastructure and fits within the mission of the facility. • The role in operating, maintaining or managing the facility of any personnel for whom funding is being requested. Provide a table that includes the job title, role, estimated annual salary and duration of employment using this funding.

Assessment criterion	Criterion standard	Descriptions to be included in the proposal
Sustainability	The infrastructure will be well managed, optimally used and financially sustainable to ensure reliable long-term operation.	• How the facility will be managed, operated and maintained. • How the infrastructure will be optimally used. Include information about user access policies and the current and expected levels of use. • Plans for responsible and ethical data management. • Plans for financial sustainability with details about operating and maintenance costs and revenue sources. Distinguish between personnel costs described in the "infrastructure" section and personnel costs supported by other sources (e.g., institutional support, user fees).
Objective 3: Generate relevant and impactful benefits for Canadians		
Benefits	The facility and the projects it enables will generate relevant and impactful benefits for Canadians. The team members and their partners have defined pathways for real-world uptake through knowledge mobilization, technology transfer and end user engagement.	• Relevant benefits and their real-world impact for Canadians. • Plans for knowledge mobilization, technology transfer and engagement with partners and end users (e.g., collaboration with communities, clinicians and the public or private sector). • Training of highly qualified personnel.