COLLEGE-INDUSTRY INNOVATION FUND

Stream 1: Research Infrastructure

Technical Instructions

December 2016

Table of Contents

INTRODUCTION

These instructions are intended for researchers and institutional administrators completing the electronic forms for stream 1 of the College-Industry Innovation Fund (CIIF). For further information on this fund and other CFI funding mechanisms, please consult the CFI website.

APPLICATION PROCESS

Researchers and institutional administrators will use the CFI Awards Management System (CAMS) to prepare, share and submit their notice of intent (NOI) and proposal.

These instructions provide general assistance. For additional help in completing specific fields, point your mouse on the *i* in each section of the NOI or the proposal.

Most text fields indicate the maximum allowable number of characters. The system will not permit any more than this number. In cutting and pasting text from another application, ensure that the text is not truncated because it exceeds the character limit. Please note that the character count function of a word processor may differ slightly from the CFI forms, where spaces and carriage returns are counted as characters.

The application process is twofold:

1. The institution has to complete an NOI and submit it to the CFI; and,

2. Once the NOI has been submitted, the institution will have access to the proposal's online forms. These forms also need to be submitted to the CFI prior to the deadline.

SUBMITTING A NOTICE OF INTENT

The NOI is an integral part of the CIIF-stream 1 application process, and is used by the CFI to help recruit expert reviewers who will assess the merit of the proposal. It should contain accurate information about the infrastructure, the applied research program and the business innovation enabled by the infrastructure.

The following steps (see also diagram) are necessary for the submission of the NOI, from the creation of a researcher's account to the final submission to the CFI.
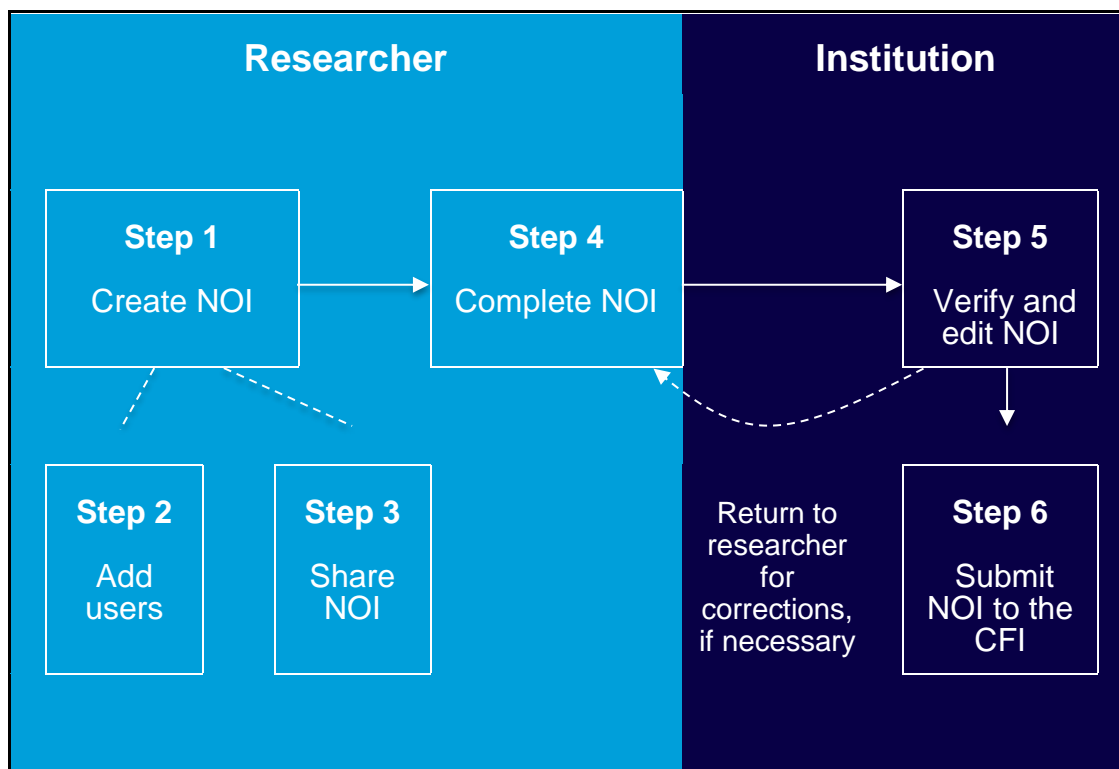
Fig. 1: NOI submission process

Creating an account: Researchers must first create an account by following the instructions on the **CAMS website**. Once the account is created, researchers can sign in to CAMS and access the 'researcher dashboard,' where they will be able to access all forms and information necessary for managing CFI proposals and awards.

1. **Creating an NOI:** From the 'researcher dashboard,' researchers can create proposals for all CFI funds. In this case, the 'College-Industry Innovation Fund — Funding for research infrastructure' should be selected. The researcher becomes the project leader of the newly created NOI. After the project leader has provided essential information (project title, applicant institution and language of proposal), he/she will be able to save the NOI and return to it at a later date, under its 'researcher dashboard.'

2. **Adding users to an NOI:** In addition to himself/herself, the project leader can include additional key participants in the NOI. Before the project leader can add others as key participants, they must create their own CAMS account from the CAMS sign-in page. These key participants will then receive an email invitation to participate in the newly created NOI. Key participants will need to sign in to CAMS and accept participation in the NOI from their researcher dashboard. Once they have accepted participation, the key participants will have read access to the NOI. Before the NOI is submitted to the CFI by the institution all key participants will need to accept participation in the NOI.

3. **Sharing an NOI:** In addition to key participants, the project leader can use his/her discretion in sharing the NOI with other CAMS users. This is done though the 'project sharing' section of the NOI. The project leader can give different levels of access to other users — from read to update access. If the project leader shares access with a user that also has access to the 'institutional dashboard' of CAMS, that user will need to first click on 'researcher dashboard' in the left navigation bar before he/she can access the NOI.

4. **Completing an NOI:** The project leader (or his/her delegate) should fill in all sections of the NOI. The users can either enter the text directly in to narrative sections or elect to copy and paste information from another software.

   Once the project leader has completed all sections of the NOI, he/she must submit it to their institutional administrators for approval and submission to the CFI. The project leader can indicate that the NOI is complete through the 'researcher dashboard.' If CAMS detects errors in the NOI, the project leader will need to fix them before the NOI can be set to 'complete' and submitted to the institution.

   Once the NOI has been submitted to the institution, the project leader will be able to read it, but will no longer be able to modify its content.

5. **Verifying and editing an NOI:** This step is done by institutional administrators through the 'institutional dashboard.' Administrators from the applicant institution will have access to any NOI created by researchers from their institution.

   Once the project leader has submitted the NOI to the Institution, institutional administrators should verify its content and edit it if necessary through their 'institutional dashboard.' Institutional administrators will also have the option to send the NOI back to the project leader for modifications.

6. **Submitting an NOI:** Once the institutional administrator has verified the NOI, he/she can submit it to the CFI through its 'institutional dashboard.' After the NOI has been submitted to the CFI, institutional administrators will be able to read it, but will no longer be able to modify its content.

Action		NOI status
Action		**NOI status**
Project leader creates NOI	⟶	In progress
Project leader completes NOI	⟶	Completed by researcher
Institutional administrators verify the NOI	⟶	Verified by institution
Institutional authorized signatory submits the NOI to the CFI	⟶	Submitted to the CFI

SUBMITTING A PROPOSAL

Once the NOI has been submitted by the institution, the researcher and institutional administrators will have access to the proposal form. The assessment process is largely based on the information provided in the proposal form. As such, the institution should take particular care in ensuring that the information provided is accurate and complete. In particular, it is essential that institutions address all the information requested for each section. Failure to do so will weaken the proposal.

The steps necessary to submit a proposal to the CFI are similar to those required to submit the NOI (see Figure 2 below).
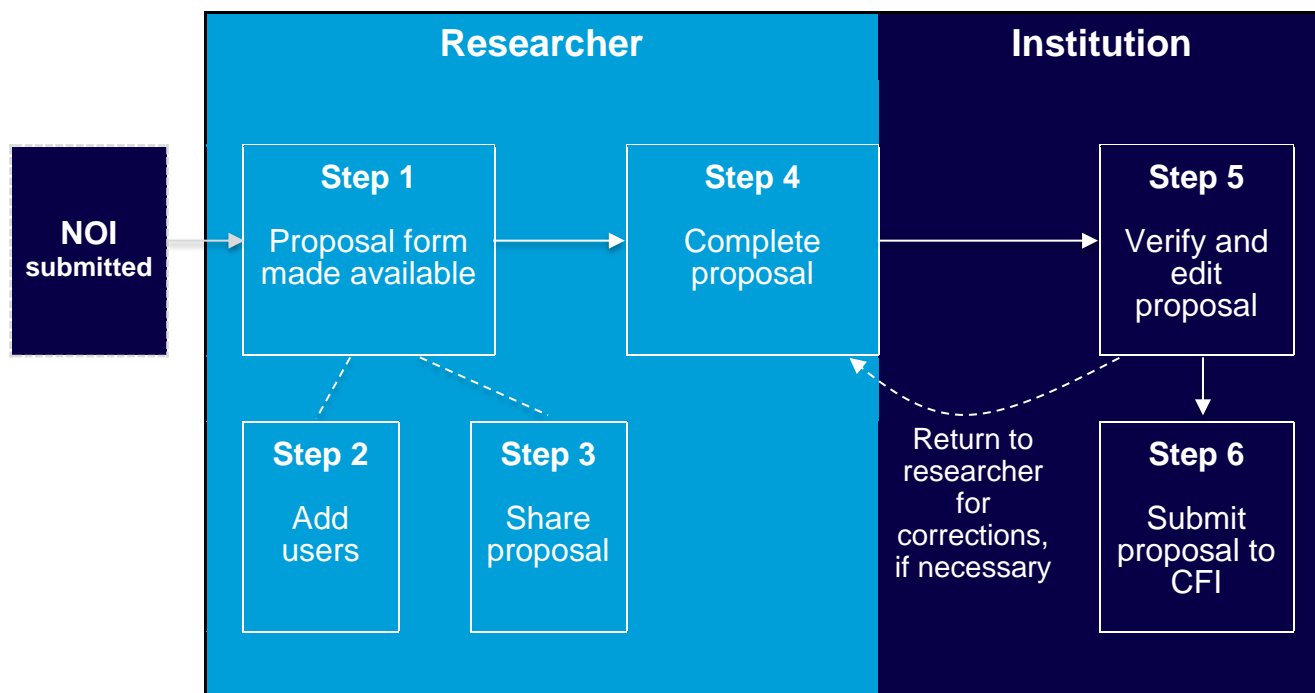

Fig. 2: Proposal submission process

1. **Proposal form made available:** Once an institutional administrator has submitted the NOI, the researcher gains access to the proposal form. From the 'researcher dashboard,' researchers can then begin to fill in the proposal form. The researcher will have access to three separate modules, the project module for information about the proposed project, the financial module for information pertaining to the budgetary details of the proposal and the suggested reviewer module for recommending potential reviewers of the proposal. While it can be modified in the proposal, some information will be carried over from the NOI, in particular the suggested reviewers and some information pertaining to the project leader and to the lead institution.

2. **Adding users to a proposal:** Any key participant that was identified in the NOI will also by default be identified as a key participant in the proposal and do not need to reconfirm its participation. As with the NOI, key participants will have read-only access to the proposal through their researcher dashboard.

   The project leader and the institution will be able to modify the key participants in the proposal before submitting it. Newly added participants will also have read access to the proposal. Before the proposal is submitted to the CFI by the institution all newly added key participants (i.e. key participants not part of the NOI) will need to accept participation from their researcher dashboard.

3. **Sharing a proposal:** In addition to key participants, the project leader can use his/her discretion in sharing the proposal with other CAMS users. This is done though the 'project sharing' section of the proposal. The project leader can give different levels of access to other users — from read to update access. If the project leader shares access with a user that also has access to the 'institutional dashboard' of CAMS, that user will need to first click on 'researcher dashboard' in the left navigation bar before he/she can access the proposal.

4. **Completing a proposal:** The project leader (or his/her delegate) should fill in all sections of the proposal. They can either enter the text directly in to narrative sections or elect to copy and paste information from another software.

   Once the project leader has completed all sections of the proposal, he/she must submit it to their institutional administrator for approval and submission to the CFI. The project leader can indicate that the proposal is complete through the 'researcher dashboard.' As with the NOI, if errors are detected in the proposal, the project leader will need to fix them before the proposal can be set to 'complete' and submitted to the institution.

   Once the proposal has been submitted to the institution, the project leader will be able to read it, but will no longer be able to modify its content.

5. **Verifying and editing a proposal:** This step is done by institutional administrators through the 'institutional dashboard.' Administrators from the applicant institution will have read and update access to any proposal created by researchers from their institution.

   Once the project leader has submitted the proposal to the institution, institutional administrators should verify its content and edit it if necessary through their 'institutional dashboard.' Institutional administrators will also have the option to send the proposal back to the project leader for modifications.

6. **Submitting a proposal to the CFI:** Once the institutional administrator has verified the proposal, he/she can submit it to the CFI through its 'institutional dashboard.' After the proposal has been submitted to the CFI, institutional administrators will be able to read it, but will no longer be able to modify its content.

   Proposals for the CIIF — Stream 1 competitions must be submitted through CAMS by May 15. The CFI does not require a hardcopy of the proposals. However, a cover letter (using the template in Appendix 1), signed by the President or authorized signatory at the institution as per the Institutional agreement with the CFI, must be sent to the CFI.

   If infrastructure is to be located outside of the premise of the applicant institution, the 'collaborating institutions' section needs to be filled out in CAMS. The collaborating institution must then send to the CFI a letter signed by the authorized signatory certifying its intention to receive a portion of the infrastructure.

. . . .

Please email as a PDF file attachment a scanned copy of the signed original letter to Elaine Salmon at elaine.salmon@innovation.ca no later than May 15.

Note: Should a Stream 1 submission deadline fall on a weekend or statutory holiday, the deadline will be moved forward to the next business day.

Action		Proposal status
Researcher fills in proposal forms	⟶	In progress
Project leader completes the proposal	⟶	Completed by researcher
Institutional administrators verify the proposal	⟶	Verified by institution
Institutional authorized signatory submits the proposal to the CFI	⟶	Submitted to the CFI