



John R. Evans Leaders Fund - partnerships

Guidelines for completing the research infrastructure
component of a partnership application

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SECTION 1 – Introduction

These guidelines are intended for researchers and institutional research services personnel wishing to prepare and submit a proposal to the Canada Foundation for Innovation's (CFI) John R. Evans Leaders Fund (JELF) for funding for research infrastructure associated with an application for research support funding from another program (also known as JELF – partnerships). This mechanism should be used when submitting a joint application with any CFI [funding program partners](#).

NB: Applicant institutions submitting a JELF proposal that is not affiliated to another funding program should consult the [JELF guidelines](#). Similarly, applicant institutions intending to submit a proposal for a current Canada Excellence Research chair holder should consult the [JELF – CERC guidelines](#).

For further information on this fund, consult the JELF program description on the CFI's website. Researchers and institutional research services personnel will use the CFI Awards Management System (CAMS) to prepare and share proposals for this fund. Links to the technical instructions for using CAMS to create JELF proposals and other useful resources are listed below.

Helpful links

Getting started with CAMS: [An overview document for researchers](#)

Getting started with CAMS: [An overview document for institutional research services personnel](#)

Deadlines

The submission deadlines for this fund vary according to the partnering organizations. Please consult the respective partnering organizations' website for specific deadlines and additional information.

SECTION 2 – Guidelines for attachments

Electronic requirements

The CFI does not distribute paper copies of its forms. Proposals for JELF must be completed and submitted to the CFI through CAMS. The electronic version submitted through CAMS is the official copy.

Conformance with instructions for proposal preparation

It is important that all proposals conform to the instructions provided on the electronic proposal form as well as those in this guide. Prior to electronic submission, it is strongly recommended that researchers and institutional research services personnel review the forms to ensure that proposals comply with these proposal preparation guidelines.

Proposal pagination instructions

CAMS will automatically paginate proposals submitted to the CFI. Attachments *must not* be individually paginated prior to upload to the electronic system.

Page formatting

Since many reviewers will be assessing proposals electronically, applicants should only use a standard, single-column on an 8.5" x 11" page layout for attachments. Avoid using a two-column or landscape format since it may cause difficulties when reading the document electronically.

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.

Applicants are 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. Small font sizes make it difficult for reviewers to read the proposal; consequently, the use of a small font not in compliance with the above recommendation may result in the CFI returning the proposal for further revision.

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

- **Header:** Indicate the applicant institution on the top left of each page and the project number on the top right of each page.
- **Footer:** Do not include any information in the bottom right side of the page as this area will be used for automatic page numbering.
- **Page margin:** Insert a margin of no less than 2.5 centimetres (1 inch) around the page. The header and footer may be within the margin.
- **Document format:** Only PDF files may be uploaded. Documents in other formats should be converted to PDF prior to upload and should not be encrypted or password-protected.

Adherence to the page formatting guidelines and requirements noted above is necessary to ensure that no applicant will have an unfair advantage by using smaller type, line spacing or margins to provide more text in the proposal.

SECTION 3 – Proposal structure

The proposal should clearly present the merits of the project. The requisite proposal preparation guidelines are contained herein. Sufficient information should be provided to enable reviewers to evaluate the proposal in accordance with the merit review criteria established by the CFI, as outlined below (refer to *Assessment criteria*).

The proposal consists of two separate modules:

1. **Project module:** Information about the proposed project and how it meets the fund's objectives; and
2. **Finance module:** Information pertaining to the budgetary details of the proposal.

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

Project module

The project module consists of the following sections:

- Project information
- Project summary
- Candidates
- Assessment criteria (attachment)
- Financial resources for operation and maintenance
- Past CFI investment (to be completed by the institution)

Project information

The *Project information* page captures basic information about the project such as the title, applicant institution and keywords.

Plain language summary (1,500 characters)

The CFI's ongoing efforts to remain accountable to the Government of Canada include showing how CFI investments lead to tangible social, economic and environmental outcomes for Canada and Canadians. To do so, we need your help in providing information that will help us tell the stories about how CFI-funded infrastructure plays a key role in outcomes such as creating jobs and spin-off companies, and improving products, policies, processes and services. Please provide a short summary of the proposed project in plain language, focusing on the expected outcomes and benefits for Canada, beyond the academic accomplishments.

Note: This summary will not be used in the review process. Should the project be funded, the CFI may use it in its communications products.

Project summary (maximum two pages)

Applicants are to provide an executive summary that concisely addresses the established criteria for this competition by describing:

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- The proposed research and technology development program;
 - The expertise and ability of the candidates to undertake the proposed research or technology development program;
 - The requested infrastructure and how it will enable the proposed research or technology development program;
 - The expected benefits to Canadians; and
 - The operating and maintenance needs of the infrastructure.

Candidates

Up to three candidates may be listed on the proposal when there is a demonstrated need to share infrastructure. When more than one candidate is listed, the CFI requires that the justification for the need for the infrastructure be articulated for each candidate. The sharing of infrastructure is encouraged provided the candidate(s) have sufficient access to carry out the proposed research program. **Candidates must have a CAMS account and must agree to participate in the project before the proposal can be submitted to the CFI.** The designated project leader should be the same on the applications to both the CFI and the partnering agency.

Assessment criteria (maximum four pages)

For this section of the online form, upload a PDF document that contains key information on how the proposal meets the objectives and established review criteria for this fund. Ensure that the document follows the guidelines on format, spacing and font detailed in this document. Additionally, applicants should address each criterion in the order in which they appear below. Each assessment criterion will be evaluated against a standard. Reviewers will be asked to rate the degree to which the proposal meets each standard.

The attachment allows institutions maximum flexibility to address each criterion, including the use of figures or diagrams where appropriate. The exact distribution of pages among sections is at the applicant's discretion, up to the total page limit noted. The following criteria will be assessed:

Need for the infrastructure

Each of the following must be addressed:

1. Describe the requested infrastructure and how it will enable the proposed research or technology development program.
2. Explain how the infrastructure will be fully utilized by the candidate(s) and other users (if applicable).
3. Identify similar infrastructure available within the institution, the region and the country.
4. In cases where a candidate has previously received a CFI award, describe how an additional award would add value to the research project.

Criterion standard:

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

In cases where the infrastructure will not be fully used by the candidate(s), the institution has developed plans to maximize its utilization within and/or outside the institution.

Benefits to Canadians

Each of the following must be addressed:

1. Beyond the creation of new knowledge and the training of highly qualified personnel, describe the expected benefits to Canadians and why they are significant.
2. Identify potential end users of the research or technology development results and describe the plans for knowledge mobilization and/or technology transfer.

Criterion standard:

The research or technology development program has the potential to lead to tangible benefits for society, health, the economy and/or the environment.

There are measures in place to transfer the research results and outputs of the technology development to potential end users in a timely manner.

Financial resources for operation and maintenance

This page of the project module captures the annual costs and sources of committed support to ensure the effective operation and maintenance of the infrastructure for the first five years after implementation.

Past CFI investments

This portion of the project module is to be completed by institutional research services personnel. The data is captured for statistical purposes only and is not part of the review process.

Finance module

The finance module consists of the following sections:

- Cost of individual items
- Contributions from eligible partners
- Infrastructure utilization
- Budget justification
- Floor plans (if applicable)

For each section of the finance module, the applicant should ensure that all requested information has been entered into the relevant fields.

The CFI finance module is separate from and does not replace any budgetary details requested by the partnering agency in their application forms. The CFI finance module should only include CFI-eligible infrastructure.

Note: The finance module has changed from previous JELF competitions. Specifically, the per-year breakdown of costs and funding from eligible partners is no longer required. Recognizing that institutions must follow their purchasing and tender policies, the CFI also no longer requests the name of the contributing partner for each item in the *Cost of individual items* section.

Contributions from eligible partners

Institutions are encouraged to bundle all expected in-kind contributions from vendors into a single line in the *Contributions from eligible partners* table. If partner contributions are expected but have not yet been confirmed, outline the plans for securing these funds.

Cost of individual items

When completing the *Cost of individual items* section, the CFI recommends that applicant institutions bundle items into functional groupings (e.g. list small items together). The budget justification should, however, detail and provide justification for each item within a group. Section 4.5 of the [CFI Policy and program guide](#) outlines the eligible costs for infrastructure projects.

Infrastructure utilization

This section of the finance module captures the use of the requested infrastructure for CFI-eligible and non-CFI-eligible purposes and any applicable pro-rating of costs.

Budget justification (maximum six pages)

In this section of the online form, upload a PDF document that conforms to the page formatting instructions provided in Section 2: *Guidelines for attachments*.

The budget justification should provide a clear and concise explanation for the requested infrastructure items. Applicants are strongly encouraged to reference items with their respective line item number and description as presented in the *Cost of individual items*

section. For proposals that include renovation costs, institutions must include in the budget justification a description of the space and the nature of the renovations.

Sufficient information should be provided to enable reviewers to answer the following questions:

1. Is the requested infrastructure necessary, effective and efficient in view of the research activities planned?
2. Are the cost estimates realistic?
3. If applicable, are the plans adequate for the renovations proposed?

Floor plans (if applicable)

JELF projects may involve renovations in existing buildings only when the space is essential to house and use the eligible infrastructure. While the CFI recognizes that some projects may involve complex renovation components, institutions are expected to have completed planning and development work for such projects at the proposal stage. Applicants must include floor plans of the proposed area(s), showing the location of the infrastructure and the scale of the plans (when renovation involves multiple rooms).

Note: Floor plans must be provided in an attachment that is clearly legible. The floor plans will be a separate attachment and *not* included in the six page maximum for the budget justification attachment.

SECTION 4 – Submission process

Proposal submission

JELF proposals must be submitted to the CFI through CAMS. Note that the CFI does not require a hardcopy of the proposal. Rather, a list of all proposals being submitted to the CFI for a given submission deadline must be provided. The CFI encourages institutions to use the template provided for submission of proposals (refer to Appendix 1). The letter is provided [online](#) in MS Word format. Should you require this document in another format, please contact the JELF administrative assistant at the CFI.

This letter must be signed by an authorized signatory at the institution, as per the Institutional agreement with the CFI, and sent to the CFI by courier or regular mail service by the appropriate submission deadline.

Appendix 1

Template: JELF proposal submission letter to the CFI

Patrick Pilot
Manager, JELF
Canada Foundation for Innovation
450 - 230 Queen Street
Ottawa ON K1P 5E4

Re: Confirmation and institutional approval of proposals to the Canada Foundation for Innovation's (CFI) John R. Evans Leaders Fund

Dear Mr. Pilot,

I am pleased to approve the submission of the proposals outlined in the attached document to the John R. Evans Leaders Fund.

In signing this letter, I confirm that the institution:

- Agrees to and accepts the conditions governing CFI funding, as outlined in the *CFI Policy and programs guide* and the Institutional agreement;
- Accepts its commitment to ensure appropriate resources are provided for the operation and maintenance of the proposed CFI-funded research infrastructure over its useful life (i.e. the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose, factoring in normal repairs and maintenance); and,
- Has previously, or as an attachment to this letter, submitted to the CFI its most recent strategic research plan.

Sincerely,

President (or authorized signatory)

Signature

Institution

