

MODERNIZING THE JOHN R. EVANS LEADERS FUND

The overall goal of the exercise to modernize the Canada Foundation for Innovation's John R. Evans Leaders Fund (JELF) is to ensure that the fund *is* and *remains* a flexible, critical, strategic investment tool designed to enable a select number of an institution's excellent researchers to undertake leading-edge research by providing them with the foundational research infrastructure required to be or become leaders in their field.

This exercise was conducted with the view that the program objectives are still relevant, based on the pan-Canadian consultation the CFI undertook in the fall of 2015, and should not be significantly changed. However, adding more flexibility to how the JELF envelope could be used was strongly encouraged, and most of these changes reflect that.

The following are the main changes introduced to the John R. Evans Leaders Fund, which will take effect on March 28, 2017:

1. **Application requirements:** We streamlined and simplified application requirements for the fund. Specifically, we incorporated the budget justification and the sustainability section into the Assessment criteria which will result in the elimination of six out of 23 pages. The assessment criteria section is now an attachment of 17 pages. For the JELF Partnership proposal, the page allocation has been reduced to 10 pages.
2. **Attraction/retention:** We provided a clear definition of attraction and retention under this fund and reinstated check boxes in the application form to better track the two types of candidates.
3. **Past/current CFI investments:** The institution will need to indicate whether:
 - The proposal enhances research capacity in an area in which the CFI has/has not previously invested;
 - The infrastructure supports the research activities of the researcher(s) listed in the proposal, or the needs of the researcher(s) or department; and, The requested infrastructure is a stand-alone, integrates an institutional core facility or supports the needs of an MSI facility.

This data will be used for statistical purposes only and will not be used in the review process.

4. **Rating system:** In order to assist our reviewers, we adopted a five-point rating system by introducing the "SW" rating, which indicates that the project "satisfies the criterion with only a few minor weaknesses." This allows our reviewers to distinguish projects with minor weaknesses from ones with significant weaknesses. The instructions to the applicant and reviewers have been modified accordingly.
5. **Fit with an institution's strategic research plan:** We recognize that the strategic research plan remains a key tool for institutions to identify and select proposals to be submitted to JELF. It is the responsibility of institutions to ensure that all proposals submitted to the CFI are aligned with their strategic research plan. Therefore, we eliminated the need to explain how the project fits within the institution's strategic research plan as part of the merit review process. Rather, we now require that institutions, at the time of submission, confirm that their proposals fit with their strategic research plan. We will ask reviewers to assess whether the evidence provided in the "institutional commitment and sustainability" section represents a tangible demonstration of institutional priority.
6. **Compute Canada condition:** We expect all institutions to continue consulting with Compute Canada when planning to request advanced research computing infrastructure. We now require institutions to develop their proposal with Compute Canada when the system costs more than \$100,000 (up from the previous threshold of \$50,000).

7. **Upgrade or replacement of aging workhorses:** We are considering ways to maximize the impact of JELF as a key strategic tool to build and enhance research capacity. We recognize that upgrades in performance and versatility are needed to keep up with changes in the competitive and technological landscape of research. While we ask that the research infrastructure be centered on the research needs of one to three researchers, we also actively promote the sharing of infrastructure and have funded numerous projects with basic and routine laboratory equipment. We reiterate that the research must be innovative and leading-edge, even if the instrumentation requested is basic. The guidelines for completing JELF research infrastructure proposals have been revised to reiterate our commitment towards supporting workhorses and institutional core facilities.
8. **JELF allocation balance available in CAMS:** We will offer institutions access to their JELF allocation through the CFI Awards Management System (CAMS), which will help them plan the strategic use of their institutional envelope. We expect the deployment of this tool by late summer to early fall 2017.