Policy and program guide (2017)

The 2017 revision of the *Policy and program guide* (PPG) details the CFI's overarching policies and guidelines. Fund-specific requirements (from application, to financial administration, to reporting and communications) are outlined on Innovation.ca.

The PPG was streamlined and updated to reflect changes that took place since 2013 (e.g. availability of new tools for award management through the CFI's Awards Management System (CAMS)) and to remove outdated information (e.g. Outcome Measurement Studies). Additionally, all links to internal and external websites were removed to avoid expired links. Overall, the PPG underwent only minor revisions.

The key changes are outlined below (the relevant PPG sections are in parentheses):

Section 4: Eligible projects, costs and contributions

- Introduced CFI's expectations for the disposal of infrastructure at the end of its useful life[1] (4.4 Infrastructure control)

- Changed terminology of high performance computing to advanced research computing (ARC) and increased the threshold for ARC infrastructure from $50,000 to $100,000 (4.6.4 Advanced research computing)

- Expanded the description of CFI funds for operation and maintenance (O&M) to recognize the diversification of O&M funding through the Major Science Initiatives fund (4.7 Eligible costs for operation and maintenance of the infrastructure and 4.7.2 Major Science Initiatives)

- Broadened the definition of Infrastructure Operating Fund-eligible services[1] (e.g. electricity, security, cleaning) to include those that directly support the CFI-funded infrastructure whether or not the space essential to house and use CFI-funded infrastructure has been funded by the CFI (4.7.1 Infrastructure Operating Fund)

Section 5: Application and review process

- Created new forms available at Innovation.ca including a fillable PDF form for the institutional agreement (5.1.1 Institutional agreement)

- Added the option for institutions to submit either the full strategic research plan or a summary plan (up to five pages). Plans may be submitted by the liaison. The strategic research plans will no longer be used in most merit-review processes (unless otherwise stated in fund literature); however, the CFI continues to expect submitted proposals to align with institutional strategic research plans (5.1.2 Strategic research plan)

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[1] Recent change or addition not previously communicated in CFI updates

Section 6: Administration of CFI awards

- Created new forms and developed new CAMS tools, including tools for award finalization and associated documents (6.2.2 Award finalization documents), amendment module (6.2.5 Revised budget and 6.6.1 Changes to the infrastructure) and submission of financial reports (6.7.1 Submission deadlines)

- Further clarified when CFI approval must be sought for extending a project's end date (6.6.2 Delays in the acquisition of the infrastructure and project completion)

Section 7: Evaluation and outcome assessment

- Introduced the expectation that CFI support be acknowledged in publications and conference or congress materials to facilitate tracking and assessing impacts (7 Evaluation and outcome assessment)

Section 8: Communications

- Provided guidance on how to acknowledge CFI support in institutions' public communications activities and products (8.1 Acknowledging CFI support)

- Elaborated on CFI's commitment to collaborate with institutions on social media campaigns (8.3 CFI communications and social media)