

## Institutional Agreement

### (the "Institution"):

This Agreement is made as of the date it is executed by the Institution as set out below. The Institution will adhere to the following terms and conditions for all projects funded by the Canada Foundation for Innovation (CFI) in which it is involved (e.g. as applicant, recipient, participating institution, etc.).

1. CFI funds will only be used to pay the agreed share of the total eligible costs, up to the pre-determined maximum amount of any approved project.
2. To cover the remaining costs, the Institution will secure eligible partner contributions or will make the contributions itself.
3. The Institution, alone or as a member of a group (the majority of which are eligible institutions), will exercise de facto control over and where appropriate, hold a majority interest in the research infrastructure over its useful life and for a minimum period of five years from the date of acquisition and installation. The useful life of research infrastructure is considered to be 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.
4. The Institution will obtain adequate insurance for all CFI-funded research infrastructure.
5. The Institution will administer the funds in accordance with CFI policies and will conform to CFI reporting requirements. It will use accounting and purchasing procedures that conform to its usual institutional policies and procedures.
6. The Institution will notify the CFI immediately if a project cannot be completed or if there is any evidence that CFI funds have not been used in an appropriate manner.
7. To achieve the full potential of CFI-funded research infrastructure, the Institution will ensure that appropriate resources are provided for the operation and maintenance of existing and future research infrastructure over its useful life.
8. For projects that involve two or more eligible institutions sharing CFI funding, including instances when the funding is transferred entirely to another institution (e.g. an affiliated entity), an inter-institutional agreement that is in compliance with the CFI's [Policy and program guide](#) will be in place and a copy will be sent to the CFI.
9. The Institution will comply with the requirements outlined in the [Policy and program guide](#) regarding:
  - research involving human subjects
  - research involving clinical trials
  - research involving databases containing personal information
  - research involving animals
  - research involving biohazards
  - research involving radioactive materials
  - research involving possible adverse impacts on the environment
  - research involving facilities in the Yukon, the Northwest Territories and Nunavut.

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10. The Institution will obtain the consent of the project leader and all researchers designated in a proposal to the collection, use, and disclosure of their personal information in connection with the project and the merit-based review of other proposals submitted to the CFI, pursuant to CFI's [researcher privacy notice statement](#).
11. The Institution understands that the CFI is subject to the Access to Information Act and the Privacy Act. Information submitted to the CFI, including personal information, will be managed in accordance with these acts.
12. The Institution understands that the CFI may request reimbursement, delay funding or terminate funding for a specific project, or withhold payments for any or all of the Institution's projects, if it does not comply with CFI policies, terms and conditions as outlined in:
  - this Agreement
  - the [Policy and program guide](#)
  - the award finalization forms
  - the award agreements.
13. Where a significant demand exists for services from the Institution to the public in one or both of Canada's official languages, the Institution will communicate with the public in the applicable language(s).
14. This Agreement is made in accordance with and is governed by the laws of the Province of Ontario and the federal laws of Canada applicable therein.

In signing this Agreement, the President of the Institution agrees to conform to the terms and conditions specified herein, and agrees that the designated individuals and account privileges listed in Appendix A are accurate.

Name:

Title:

Department:

Institution:

Phone:

Email:

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Signature

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Date

Note: Following receipt of this Agreement, a CFI Awards Management System (CAMS) account will be created for the President and will include highest institutional privileges.

**Appendix A - Institutional roles and accounts**

**Designation of roles**

The President hereby designates one or two authorized signatories, an account administrator and a liaison to act on his or her behalf and assume the responsibilities specified below. Upon receiving the signed institutional agreement, the CFI will update or create respective accounts in the CFI Awards Management System (CAMS). Privileges will be assigned according to the responsibilities and privileges indicated below. At minimum, read-only access to all modules will be granted automatically to the account administrator, liaison, and authorized signatories. When determining access privileges, institutions are encouraged to plan for backup resources to ensure business continuity when a given individual is away.

**Account administrator**

The account administrator has custody of the CFI funds and is accountable for the institutional CFI financial accounts, related records and supporting documentation. The account administrator is authorized to sign award agreements and submit in CAMS award finalization forms, financial reports and Infrastructure Operating Fund annual reports.

Additional privileges in CAMS (check if required):

Notices of Intent and proposals (includes viewing decisions)	Project progress reports	Amendment requests
<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture
<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit

Name:

Title:

Department:

Phone:

Email:

\_\_\_\_\_

Signature

**Liaison**

The liaison interacts with the CFI on a day-to-day basis. The liaison is authorized to submit Notices of Intent, proposals, award finalization forms, amendment requests, and project progress reports in CAMS. The liaison is also authorized to submit the strategic research plan.

Additional privileges in CAMS (check if required):

Financial reports	Infrastructure Operating Fund
<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture
<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit

Name:

Title:

Department:

Phone:

Email:

\_\_\_\_\_

Signature

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## Authorized signatory

The authorized signatory is authorized to sign and submit the letters confirming the submissions of Notices of Intent, proposals, and award agreements. The authorized signatory is also authorized to submit Notices of Intent, proposals, award finalization forms, and project progress reports in CAMS.

Additional privileges in CAMS (check if required):

Amendment requests	Financial reports	Infrastructure Operating Fund
<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture
<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit

Name:

Title:

Department:

Phone:

Email:

\_\_\_\_\_  
Signature

Additional privileges in CAMS (check if required):

Amendment requests	Financial reports	Infrastructure Operating Fund
<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture	<input type="checkbox"/> Data capture
<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit	<input type="checkbox"/> Data capture and submit

Name:

Title:

Department:

Phone:

Email:

\_\_\_\_\_  
Signature

## Institutional account management

The liaison and account administrator are responsible for setting appropriate access privileges in CAMS for institutional administrators and project leaders, in accordance with institutional control frameworks and practices. The institution thus accepts full responsibility for privilege delegation and its impact on data access and integrity.

## Changes to institutional accounts

The President must inform the CFI as soon as possible of any changes in the designated authorized signatories, account administrator and/or liaison by submitting a revised institutional agreement with appropriate signatures. For security reasons, all access privileges will be removed from the related CAMS institutional account by the CFI for any individual who has been replaced/removed from the institutional agreement. Note that access privileges can be set subsequently by the CFI liaison or account administrator, as in the case for any institutional administrator who is not part of the institutional agreement.