Eligibility
We encourage institutions to contact their senior programs officer to discuss any questions or concerns regarding the eligibility of a facility.

1. Is there a process by which a facility can become eligible to be funded at 60 percent from the CFI?
   No, only the facilities identified in Appendix 1 of the Call for proposals as eligible to apply for up to 60 percent funding from the CFI may do so.

2. How will the CFI determine if a facility meets the $1-million threshold in annual operation and maintenance costs?
The annual operation and maintenance costs are typically calculated by averaging three years of historical data, from fiscal years 2019–20 to 2021–22. The CFI will consider a shorter timeframe for newer facilities that have just recently become fully operational. Applicants should describe any circumstances that may have affected their average operation and maintenance costs over this period, as relevant. This could include, for example, the impacts of COVID-19 on the facility’s operations. Note that the eligibility criterion refers to the facility’s total annual eligible operation and maintenance costs, and not solely the CFI portion (e.g. 40 percent or 60 percent).

3. Will we need to submit evidence of expenditures (e.g. invoices) to justify the historic budget provided in the notice of intent or application?
   No, the CFI does not require supporting evidence of the historic budget to be provided in the application. All necessary information required from applicants should be included in the tables provided in the call for proposals. However, we do expect institutions to retain supporting evidence in the event of an audit.

4. Are multi-partner or multi-institutional applications eligible?
   Yes, multi-partner or multi-institutional applications are allowed.

5. Are facilities that may not have a 20-year lifespan eligible?
   Yes, facilities that may not have an anticipated 20-year lifespan are eligible to apply. We encourage applicants to address and discuss the particularities of the facility and its lifespan, as relevant.

6. Can we still apply if our facility is managed or operated by an incorporated non-profit?
   Yes. Per the “Ownership” eligibility criteria, the facility’s infrastructure must be owned by a CFI-eligible institution. The facility can, however, be managed or operated by an incorporated non-profit.

7. Are facilities eligible if they are not yet operational but expect to be by 2023?
   No. The MSI Fund is meant to support existing facilities that are fully operational at the time of application.
8. Does the facility’s governance model need to be in place at the time of application?
   Yes, to a degree. As an operational facility, there is an expectation that it operates with some form of governance. We understand that facilities vary in their complexity and maturity and, therefore, applicants may provide information regarding the facility’s current governance model as well as any plans to grow and evolve the governance model.

9. Can an expression of interest or application be submitted if the facility website does not exist or is under development?
   Yes. A website is not a prerequisite for eligibility to the fund. However, the eligibility criterion “Established access policy” states that the facility must have a publicly available user access policy. Therefore, applicants can apply to the fund without an active facility website, but the user access policies must be publicly accessible in some other way.

Application

10. Is there a minimum amount that can be requested from the CFI?
    No, there is no minimum amount that can be requested from the CFI. However, per the eligibility criteria, facilities must demonstrate at least $1 million in annual operation and maintenance costs.

11. Who can submit an expression of interest (EOI) to the CFI?
    EOI will only be accepted if they are sent from an individual from the administrative institution with the authority to submit CFI proposals (e.g. CFI liaison). EOI received from other sources will be shared with the administrative institution for confirmation of the institution’s intent to submit them.

12. Can the amount requested from the CFI vary between the expression of interest (EOI), the notice of intent (NOI) and the submission of the full proposal?
    Yes, to a degree. Budgets presented in the NOI are expected to be reasonable estimates of the annual operating costs of each facility. Therefore, the CFI expects the variation between the requested amount in the NOI and the proposal to be no more than 10 percent. This limitation does not apply to the EOI, though we ask that the information at that stage be your best estimate because we will use EOI as a first step toward planning the competition.

13. Will the designated management team members have access to the application in the CFI Awards Management System (CAMS)?
    Yes. The project leader must first create the application in CAMS and add the management team members in the relevant section of the notice of intent. Management team members must have a CAMS account and will receive an automated invitation by email to participate in the proposal. Once the management team members accept to participate in the proposal, they will gain read-only access to the application. The project leader may then assign write-access using the “Proposal sharing” section of the CAMS form. For additional details on using the “Proposal sharing” function of the application, please consult our CAMS Guide.

14. Will the designated participating institutions listed in the notice of intent have to formally accept to participate in the proposal before it can be submitted?
    No, the participating institutions are not required to confirm their participation in the proposal through CAMS. However, we do expect the applicant institutions to have communicated with the participating institutions to ensure their awareness of the proposal and willingness to participate.
15. Are there prescribed page limits to address each criterion within the assessment criteria attachment of the application form?
No, the distribution of pages among the six criteria is at the applicant’s discretion, within the total page limit imposed for the attachment.

16. Is there a standard format or template required for the management team CVs?
No, the CFI does not require the use of a specific template or format for the management team CVs. Beyond the technical guidelines provided in the Call for proposals (e.g. three pages per CV, portrait PDF), applicants are encouraged to submit their management team CVs in the format best suited to demonstrate their expertise and core competencies related to their role within the facility.

17. Are there specific core competencies that must be demonstrated within the management team?
No. Due to the variable nature of the facilities, the CFI has not defined specific core competencies that must be demonstrated as part of the proposal. Rather, it is at the applicant’s discretion to determine the core competencies required to effectively manage the facility. The expert committee will assess the appropriateness of the identified core competencies and related management personnel.

18. Are the user distributions, either by type, geography or sector, differentially weighted during the review process?
No. The CFI encourages facilities to cater to a diverse user base, including international users and users in various sectors. We have not assigned a specific weighting to the various types of users (e.g. in-person versus remote) or prescribed a specific ratio of Canadian to international users. However, assessment committees will evaluate the degree to which the facilities meet the objectives and assessment criteria defined for this fund. This includes enabling pan-Canadian research communities to undertake world-class research and technology development that lead to benefits for Canadians and supporting facilities whose capabilities, if lost, would be a setback to Canada. Facilities that do not meet these goals will not receive a favourable review.

19. If a facility does not have an equity, diversity and inclusion (EDI) policy distinct from the university with which they are associated, should they submit the university’s EDI plan or policy?
Yes. We encourage you to submit the EDI plans and policies that are relevant to and implemented in your facility. This may be the university’s EDI plan or your own internal documents. Regardless of the origin, we encourage you to discuss how these plans and policies are enacted within your facility.

20. Are matching funds expected to be secured at the time of application?
No. At the time of application, the CFI expects reasonable estimates and plans for securing matching funds. For successful facilities, CFI instalments are subject to annual confirmation that partner funding has been secured for the upcoming year in question. For example, the matching funds for the 2023–24 fiscal year must be secured prior to finalization of the award.

21. Can the CFI’s share of total eligible costs exceed 40 percent (or 60 percent) in any given year?
Yes. The CFI’s share of the total eligible costs is calculated cumulatively from the start of the funding period. The CFI’s share of the total eligible costs may vary from year to year, but at any given time, the cumulative CFI contribution to a facility may not exceed the agreed-upon maximum share of funding (typically 40 percent or 60 percent).

22. How does the CFI define eligible technology development costs?
Eligible technology development costs include costs to directly improve or enhance the services that a facility offers to its users. For example, the salaries of scientific and technical personnel (excluding faculty members) working on the development of new protocols; the costs of integration of new tools, methodologies and optimization; and the costs of information technology development and support (e.g. cybersecurity) are eligible. Eligible costs related to technology development can appear in various expense categories and are not limited to salary costs. Technology development activities conducted by users of the facility for their own purposes are considered research activities and are not eligible.

23. **Is there a limit on the eligible cost of minor upgrades acquired through the MSI Fund?**
   No. The facilities supported by the MSI Fund operate and maintain infrastructure that vary greatly in scale and scope. Therefore, the CFI will not impose a fixed limit on the eligible cost for minor upgrades. Rather, we will assess any requests for upgrades on a case-by-case basis. The MSI Fund is intended to contribute to the facility’s operating and maintenance costs. It is not intended to support significant infrastructure upgrades to increase capacity or to add new capabilities to the facility. Funding requests for major infrastructure upgrades can continue to be submitted through other funds, such as the CFI’s Innovation Fund.

**Review Process**

24. **Is there a predetermined amount of funding set aside for existing versus new facilities?**
   No, the CFI has not predetermined funding allocations for new applicants and facilities funded in the 2017 MSI Fund competition. The review process will determine the best portfolio of investment within the available competition budget, regardless of prior funding history.

25. **Will any of the review committee meetings, including the face-to-face meeting with applicants, take place in person?**
   No. All meetings are expected to be held by videoconference. Attendance will be virtual for both experts and applicants.

26. **What is the purpose of the face-to-face meetings?**
   The purpose of the face-to-face meetings is to gain a better understanding of the facility’s operational realities, features, and outcomes and impacts. The insight gained from these discussions will assist the Expert Committee in its evaluation of the established assessment criteria. In other words, the face-to-face meetings provide an opportunity for the Expert Committee to ask questions of applicants and obtain clarification on how the facility meets the review criteria. Each session will focus on a subset of the evaluation criteria, allowing the institution to tailor the five institutional representatives present to the types of questions being asked in each session.

27. **What information will the CFI provide to review committees in their assessment of the proposals?**
   The Expert Committee will receive the proposal, as submitted in CAMS, including all uploaded documentation. For facilities funded in the 2017 competition, the CFI will also provide the 2019 midterm review report to the Expert Committee. The Multidisciplinary Assessment Committee will receive all documentation included in the proposal, as submitted in CAMS, as well as the CFI-written report summarizing the Expert Committee’s consensus review.

**COVID-19**
28. Does the CFI allow for variances in the budget and the number of users due to COVID-19?
Yes, to a degree. The CFI recognizes that the COVID-19 pandemic may have had an impact on a facility’s annual operating and maintenance budgets and user access. We expect to see some variability and encourage applicants to provide explanations for any variations in the notice of intent and proposal, as applicable, so that this may be considered during the review.

29. Does the CFI take into consideration the impacts of COVID-19 when evaluating if a facility meets the $1-million threshold in annual operation and maintenance costs?
Yes, to a degree. The annual operation and maintenance costs are typically calculated by averaging three years of historical data, from fiscal years 2019–20 to 2021–22. However, the CFI recognizes that the COVID-19 pandemic may have impacted facility operations and costs. Any impacts of COVID-19 can be detailed in the notice of intent and proposal, as relevant, and will be considered by the review committees when determining whether the $1-million threshold has been met.

Other

30. Will the CFI post the list of submitted expressions of interest or notices of intent on its website?
No, the CFI will not share the list of expressions of interest or notices of intent received in this competition.

31. As a facility of national importance, is there a requirement for the facility to provide its documentation in both official languages?
Not at this time. The CFI does not currently require a facility to provide outward-facing resources (e.g. website, user access policy) in both official languages. However, the CFI encourages facilities to work toward this goal as we evaluate how to further incorporate equity, diversity and inclusion principles in our programs and assessment processes.

32. What changes were made between the draft call for proposals and the final version of the call?
After the CFI received feedback from the draft call, the following changes were made to the call:

• We clarified the requirement for institutional eligibility to apply to the fund (p. 5).
• We set a limit of 10 percent variation between the amount requested from the CFI between the notice of intent and the proposal (p. 11).
• We clarified expectations on the members of the management team identified in the proposal. These individuals should have the core competencies to manage the facility regardless of the title of their position (pp. 13 and 23).
• We changed the language for the user categories to remove a perceived difference in relative importance of user types. We eliminated the word “hierarchical” and specified that users should be reported in the user category that best reflects their use of the facility (p. 14).
• We clarified that the research security, cybersecurity, data management, and equity, diversity and inclusion plans can be uploaded as separate documents in CAMS if not already included in the management plan (pp. 23–24).