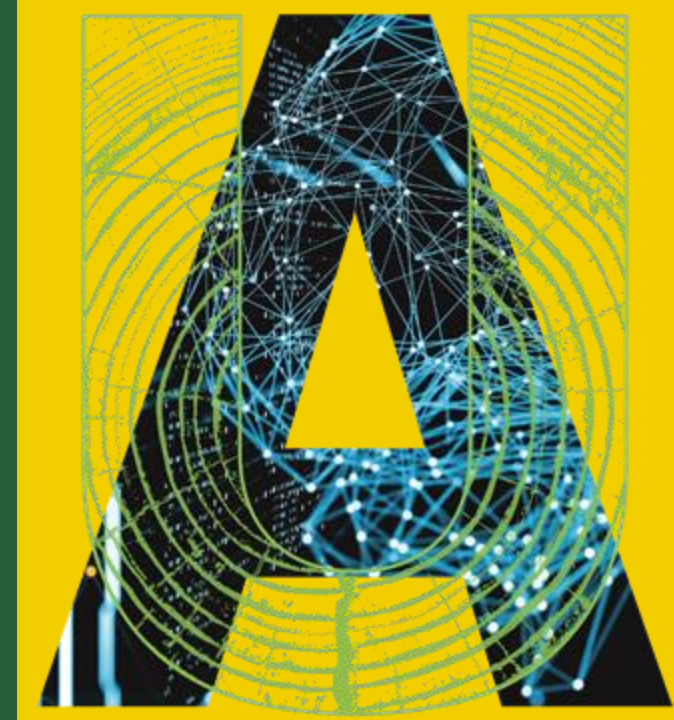


# CFI John R. Evans Leaders Fund (JELF) June 2025 Competition

## FoMD INTERNAL SELECTION Presentation & Q&A Session

August, 2024



# Presentation Topics

- Welcome & introduction
- CFI Award Structure
- JELF Program Overview
- Why are you here?
- Internal Selection Process
  - Timeline and integration with RSO process
  - Proposal development
  - Space & Renovations
  - After you submit your Internal Selection Form
- Contacts
- Questions



# CFI Award Structure

The Canada Foundation for Innovation (CFI) is a non-profit corporation, created by the federal government in 1997, that invests in research infrastructure (not research activities) at Canadian universities, colleges, research hospitals and non-profit research institutions.

## The objectives of the CFI are to:

- Support economic growth and job creation, as well as health and environmental quality through innovation
- Increase Canada's capability to carry out important world-class scientific research and technology development
- Expand research and job opportunities by providing support through research infrastructure for the development of highly qualified personnel
- Promote productive networks and collaboration among Canadian universities, colleges, research hospitals, non-profit research institutions and the private sector



# CFI Award Structure

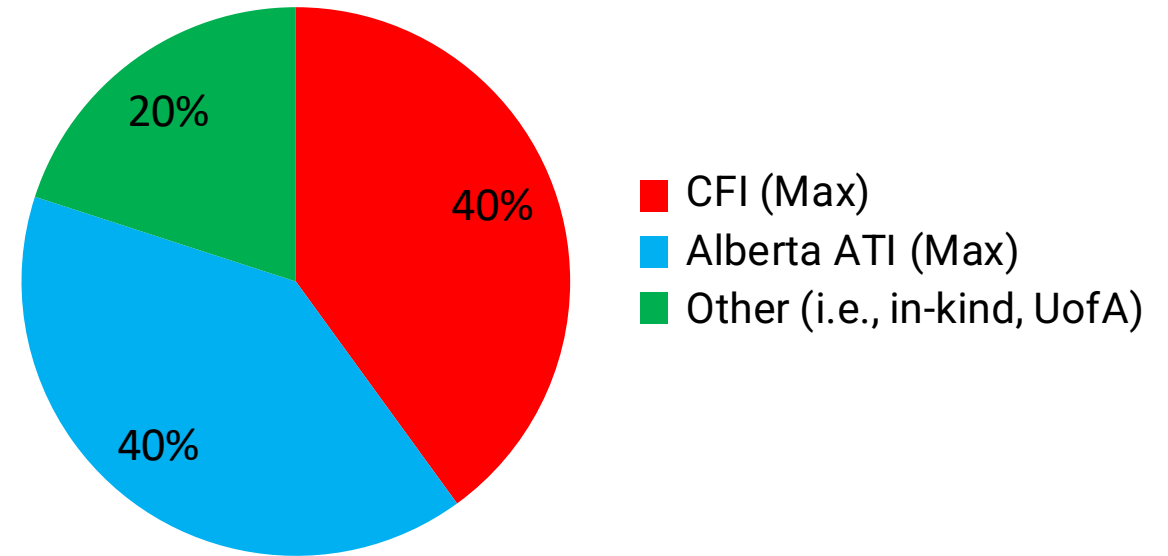
- The Canada Foundation for Innovation (CFI) funds acquisition of infrastructure, ***not research***
- CFI awards are held by the *institution*
  - Vice President (Research and Innovation) is the project holder
  - PI is the Project Leader (PL)



# CFI Award Structure

- CFI: up to 40% of total project cost (TPC)
- Alberta Technology & Innovation (ATI): Small Equipment Grant (SEG) will match the JELF award
- PL is responsible for covering the remaining 20%

Total Project Cost



# John R. Evans Leadership Fund (JELF) Program Overview

- Assists universities in attracting and retaining excellent faculty
- Enables institutions to undertake leading-edge research by providing them with research infrastructure to be or become leaders in the field
- Maximum 3 applicants
- Allocation-based – the maximum amount of funding is pre-determined
- There are 3 JELF competitions per year: February 15, **June 15**, and October 15 (or nearest Monday if the date falls on a weekend).

Maximum CFI request for JELF = \$800,000 (\$2,000,000 TPC)

**Maximum CFI allocation for FoMD JELF projects = \$200,000 (\$500,000 TPC)**



# John R. Evans Leadership Fund (JELF) Program Overview – Why June?

**Only 1 GoA Small Equipment Grant (SEG) intake per year:** October 22 results Spring next year. Only JELF applications submitted on October (previous year), February and June are eligible.

JELF applications		GoA – SEG applications	
Submission date	Anticipated decision date	Submission date	Anticipated decision date
February 17, 2025	June, 2025	October 22, 2025	April, 2026
June 16, 2025	November, 2025	October 22, 2025	April, 2026
October 15, 2025	March, 2026	October 22, 2026	April, 2027

**Maximum CFI allocation for FoMD JELF projects = \$200,000 (\$500,000 TPC)**



# Why are you here?

The FoMD CFI funding allocation is finite



Government of Canada



2023-2025 UoA  
Allocation \$14.1M



~~Other Faculties stream (\$2.14M)~~

## Internal Selection Process

(FoMD-led projects & Non-FoMD-led projects)

Support of applications that align with the FoMD's research and strategic priorities and CFI's objectives :

1. New faculty\* with equipment housed in core research facilities
2. New faculty\* to equip their laboratories
3. Faculty managed core research facilities
4. Shared infrastructure (Dept, Institutes, etc.)
5. Individual investigators\*

\* Investigators should have a significant portion of their time ( $\geq 40\%$ ) dedicated to research.



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### Faculty-Managed streams

- FoMD (\$4.53M, \$2.07M remaining)
- ALES (\$0.96M)
- ENG (\$2.95M)
- SCI (\$2.33M)

### Strategic Priorities stream (\$1.2M)

Multi-Faculty projects that are collaborative, interdisciplinary, and aligned with an area of institutional strength and strategic importance.



# Why are you here?

Two different streams to consider

## Faculty-Managed streams

- Successful Internal Selection Process applications that align with the FoMD's research and strategic priorities and CFI's objectives.
- RSO approval of FoMD centrally-managed allocation RTA is automatic.
- Maximum CFI allocation per applicant is \$200K (up to 10% more if instrument(s) go(es) into core facility).

## Strategic Priorities stream (\$1.2M)

- Multi-Faculty projects that are collaborative, interdisciplinary, and aligned with an area of institutional strength and strategic importance.
- RSO conducts its own selection process for RTAs submitted through this stream.
- FoMD will match other Faculties contributions up to \$200K. Ideally total CFI envelope contribution split equally between VPRI and participating Faculties\*.
- Not limited to \$200K max CFI allocation ∴ bigger TPC.
- Applicants will require approval from all participating faculties to apply.



# Why are you here?

\*Extraordinary Changes to the Strategic Priorities stream

## Strategic Priorities stream (\$1.2M)

Effective for the final two competitions (Jun 2025 and Oct 2025), and only for these two competitions:

- **Eligibility under the SP allocation:** For faculties that have an assigned allocation, the requirement to include Team Members from more than one Faculty, along with the commitment(s) from their own faculty allocation(s), will not be applied.
- **Funding structure under SP allocation:** The total CFI JELF allocation includes faculty allocation with additional funds from the Strategic Priorities allocation. For requests where the Strategic Priorities allocation contributes 60% or more of the total CFI JELF allocation request, a justification must be provided that clearly demonstrates alignment with Institutional Priorities.



# Internal Selection Process (ISP)

## Timeline and integration with RSO RTA

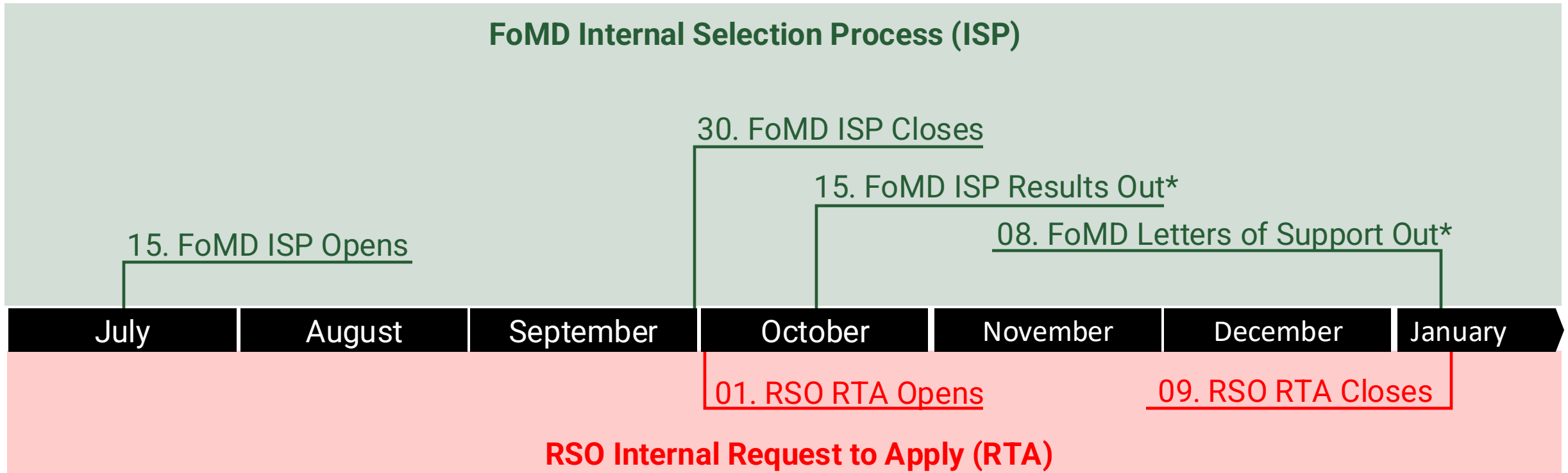
The FoMD Internal Selection Form is based on the main components of the RSO RTA

- Research or Technology Development Summary (ISP: max 1 pages, 12-point font, RSO: max 3 pages, 12-point font)
- Infrastructure request justification (max 2 pages, 12-point font):
- **Equipment Budget**
- Quotations
- Building(s) and room number(s) of space requested for the project



# Internal Selection Process (ISP)

## Timeline and integration with RSO RTA



\*Latest date



# Internal Selection Process (ISP)

## Proposal development

### Research or Technology Development Summary

**What is the research project? Why is it important? What problems will you be able to solve that previous investigators haven't been able to?**

- How does the research align with an area(s) of Faculty & institutional strategic priority?
- Describe innovativeness and feasibility
- Position the research within the international context



# Internal Selection Process (ISP)

## Proposal development

### Infrastructure Request Justification

#### **What is it? What does it do? Why do you need it?**

- Describe each item (not just suites/systems – every item) and justify why is the equipment necessary to carry out the proposed research
- Indicate where will the equipment be located and why
- Justify why existing similar infrastructure/equipment can't be used
- Explain how you plan to maximize the use of the equipment (if you won't use it 100% of the time for your research project are there collaborators or other users who could be brought into the proposal?)



# Internal Selection Process (ISP)

## Proposal development

Could the infrastructure be placed in a core facility?



A business card with a black background. The text 'BETTER CALL' is in yellow, bold, italicized, sans-serif font. Below it, 'Colleen' is written in a large, red, cursive script. To the right is a yellow line-art illustration of a balance scale. At the bottom, contact information is written in white: 'crreid1@ualberta.ca, (780) 492-0715' and 'Manager, Core Research Facilities'.

**BETTER  
CALL**

*Colleen*

crreid1@ualberta.ca, (780) 492-0715  
Manager, Core Research Facilities

[Guidelines for Equipment Purchases and Placement in Core Facilities or Other Research Spaces](#)



# Internal Selection Process (ISP)

## Quotations

- Ideally Quotes should be in 'CFI' format
- All discounts should be indicated clearly
- The CFI has a [quote template](#) that can be sent to vendors unfamiliar with CFI in-kind
- Vendors are not obligated to offer CFI discount/in-kind
- You may request CFI in-kind on a quote, but you **may not** ask for a specific amount or percentage
- CFI in-kind is over and above all other discounts:
  - Educational/academic discount
  - Other discounts (normal, regional, volume, etc.)





# Internal Selection Process (ISP)

## Budget

### Budget Details

1. The budget must be submitted in the form of a spreadsheet. The spreadsheet must be submitted in both PDF and Excel format. The PDF format must be used for the final submission. The Excel format must be used for the review process. The spreadsheet must be submitted in the following format:
 

- File name: [Project Name]\_Budget\_Details.xlsx
- File size: Maximum 10 MB
- File type: Microsoft Excel 2010 or later

 2. The budget must be submitted in the form of a spreadsheet. The spreadsheet must be submitted in both PDF and Excel format. The PDF format must be used for the final submission. The Excel format must be used for the review process. The spreadsheet must be submitted in the following format:
 

- File name: [Project Name]\_Budget\_Details.xlsx
- File size: Maximum 10 MB
- File type: Microsoft Excel 2010 or later

Table 1: Infrastructure budget

Item #	Description	Unit	Quantity	Unit Cost	Total Cost	Source	Start Date	End Date	Notes
1				\$ -	\$ -	#DIV/0!			
2				\$ -	\$ -	#DIV/0!			
3				\$ -	\$ -	#DIV/0!			
4				\$ -	\$ -	#DIV/0!			
5				\$ -	\$ -	#DIV/0!			
6				\$ -	\$ -	#DIV/0!			
7				\$ -	\$ -	#DIV/0!			
8				\$ -	\$ -	#DIV/0!			
9				\$ -	\$ -	#DIV/0!			
10				\$ -	\$ -	#DIV/0!			

Table 2: Summary of Funding Sources (Revenue)

Funding Source	Amount	% of Total Project Cost	Notes
CFI request	\$ 20,000	40.00%	Set at 40%
AJET match	\$ 20,000	40.00%	Set at 40%
Es. mated In	\$ -	0.00%	Aiming for 20%
Other Fundin	\$ -	0.00%	If 20% in-kind is not reached, additional funding is needed.

If the total is positive, it should be brought to the project. If negative, it should be zero.

Table 3: Other Eligible Funding Sources

Amounts entered here will appear in "Other Funding Sources" in Table 2

Funding Source	Amount
	\$ -

Table 4: Strategic Priorities stream CFI allocation request split.

Only use this table if you are submitting your ISF to be considered for the Strategic Priorities stream. Indicate the Faculty name and the amount of CFI allocation committed. The total amount should match the value indicated in Table 2.

Faculty Name	Amount
	\$ -

# Internal Selection Process (ISP)

## Space, Renovations & Equipment Requirements

**Space** - Indicate the building name and room numbers allocated to your infrastructure.

[Request for new or expanded research space or change in space allocation](#)

**Renovation Estimated Cost** – **There is no In-Kind contribution for renovations.**

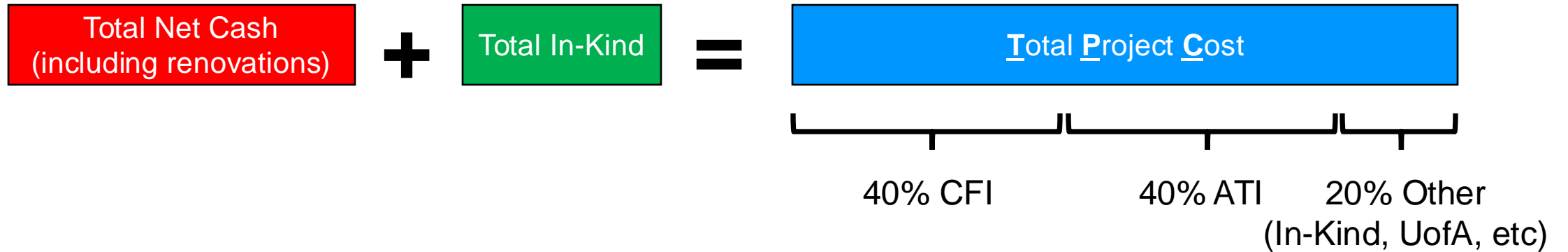
Spreadsheet is pre-loaded with \$50K for renos. If the final renovation costs during the application development phase are lower than the preset \$50,000, applicants will be allowed to use the remaining allocation to purchase extra warranties and/or upgrades for the items indicated in the budget.

For all questions about Space, Renovations and Equipment requirements, please contact Brian Reuter, Scientific Equipment Advisor ([breuter@ualberta.ca](mailto:breuter@ualberta.ca), 780-233-3436).

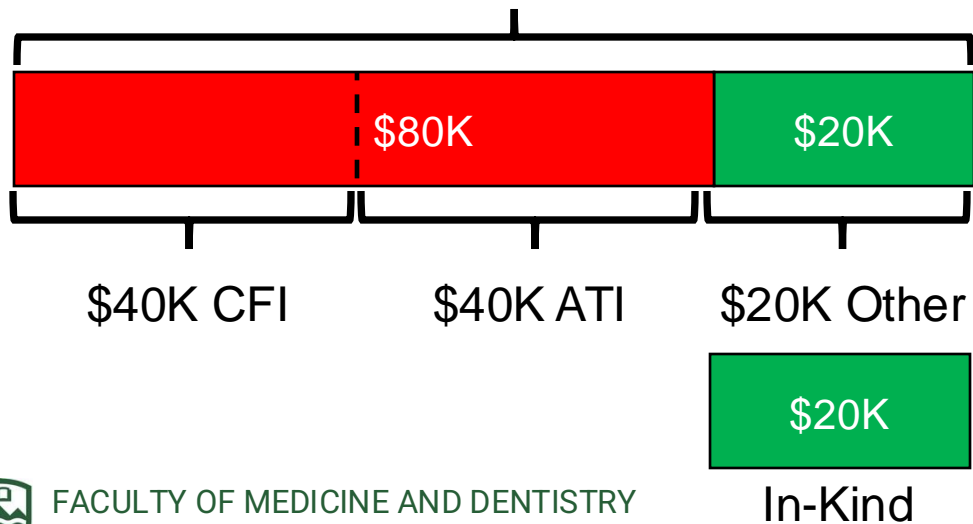


# Internal Selection Process (ISP)

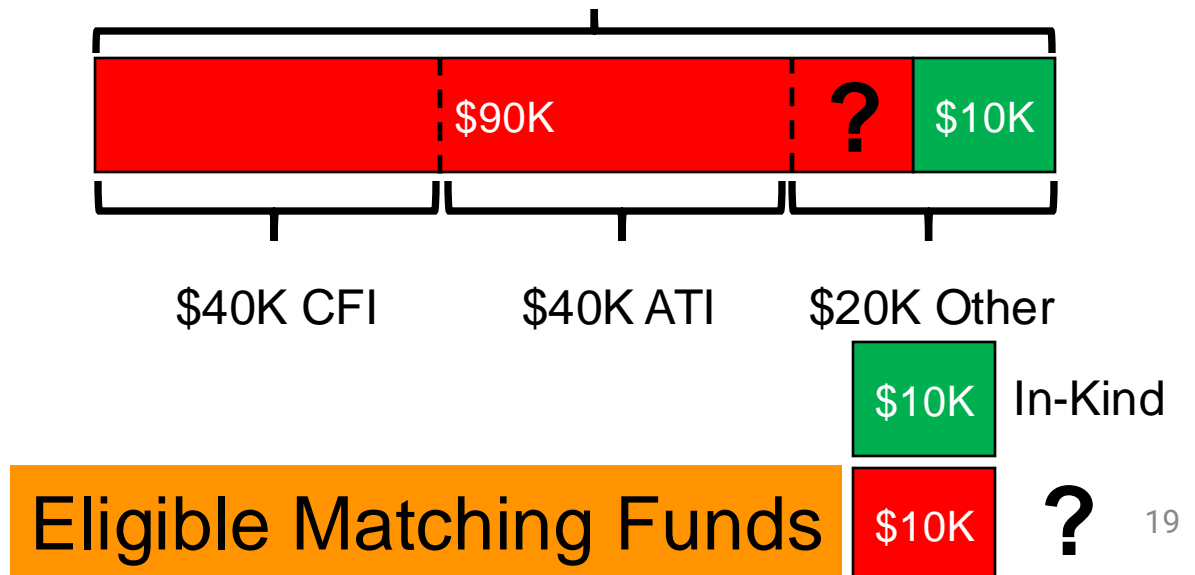
## Budget



**Scenario 1: No extra cash required**  
\$100,000 TPC



**Scenario 2: Extra cash required**  
\$100,000 TPC



# Internal Selection Process (ISP)

## Budget

- If vendor in-kind cannot cover the 20% match completely, another source(s) of funds will be needed

### Eligible sources

- Institutional funds
- Departments and agencies of the federal government
- Departments and agencies of provincial, territorial, and municipal governments
- Firms and corporations
- Donations from individuals and non-profit organizations

### Non-eligible sources

- Tri-Agency (NSERC, SSHRC, CIHR) awards
- Tri-Agency program awards (Networks of Centres of Excellence, Canada Research Chairs, CFREF, etc.)
- Industry awards that are already matched to a Tri-Agency award (e.g. industry match to an NSERC CRD)



# Internal Selection Process (ISP)

## After you submit your ISF

- A review committee chaired by the Vice-Dean Research, Basic will be adjudicating these applications.
- Letters of decision will be sent by October 15
- Official FoMD letters of support required for the RSO RTA will be provided by January 8, 2025.
- Applicants approved to apply will be required to submit an [RTA form](#) and all attachments to RSO by January 9, 2025 at 9 a.m.



# Where to start

🏠 > Research > Funding, Grants and Awards > Funding Opportunities > CFI JELF

**Funding Opportunities**

Sponsor Listing

**CFI John R. Evans Leaders Fund**

FoMD Visitor Speaker Funding

Conference/Symposium Fund

University Hospital Foundation Medical Research Competition (UHFMR)

## CFI John R. Evans Leaders Fund (JELF)

### NEW-June 2025 JELF Competition-Internal FoMD Selection Process

The Faculty of Medicine and Dentistry invites its faculty members who require eligible infrastructure to submit an Internal Selection Form (ISF) for the June 2025 JELF competition.

**Timeline:**

- Internal Selection Forms intake start date: **July 15, 2024**
- Internal Selection Forms intake end date: **September 30, 2025**
- Internal Selection decision communication: **October 15, 2024**
- FoMD letters of support: Provided before **January 9, 2025**
- RTA Submission Reminder: Successful projects must submit an RTA to RSO by **January 9, 2025**

Before choosing the appropriate link to start your submission for the Internal Selection process, please read the eligibility for FoMD allocation and the maximum amount of funding that can be requested by opening appropriate links in the "More information about the JELF program" section below.

<b>FoMD-led projects</b> (FoMD faculty members who are the lead applicant of the proposed JELF project)	<b>Non-FoMD-led projects*</b> (FoMD faculty members who are co-applicants in JELF projects <u>led by other Faculties</u> )
<a href="#">June 2025 JELF - FoMD INTERNAL SELECTION FORM</a>	<a href="#">June 2025 JELF - Statement of Interest</a>

\*FoMD co-applicants must ensure that all lead Faculty processes and internal deadlines are followed and met. Please note that the deadlines indicated in the JELF 2025 FoMD Internal Selection Process Timeline above also apply to non-FoMD-led CFI JELF projects.

# Once your proposal is selected to submit an RTA by FoMD

**UNIVERSITY OF ALBERTA** Research + Innovation

Our Research Innovation Awards + Funding Opportunities Services Tools Support + Related Offices

Services > Awards + Funding Opportunities > CFI > John R. Evans Leaders Fund (JELF)

**Canada Foundation for Innovation (CFI)**

- John R. Evans Leaders Fund (JELF)**
- Innovation Fund (IF)
- Major Science Initiatives (MSI) Fund (2023-2029)
- Biosciences Research Infrastructure Fund (BRIF)
- Infrastructure Operating Fund (IOF)
- Award Administration

## John R. Evans Leaders Fund (JELF)

The Canadian Foundation for Innovation (CFI) [John R. Evans Leaders Fund \(JELF\)](#) provides funding support for the acquisition or development of research infrastructure for projects with a maximum total eligible cost of \$2,000,000. The JELF helps the institution to attract and retain researchers who are leaders in their field and to remain competitive in areas of strategic research priority.

### CURRENT REQUEST TO APPLY (RTA) INTAKE

The RTA for the February 2025 CFI intake is now **OPEN**.

The RTA will close Thursday August 1, 2024 at 9 am.

[Request to Apply for submission form](#)

**On this page:**

- [Overview](#)
- [Important Dates for the Current JELF Allocation Period](#)
- [Step I: Request to Apply \(RTA\)](#)
- [Step II: Proposal Development](#)
- [Step III: Notice of decision and project setup](#)
- [Contact](#)

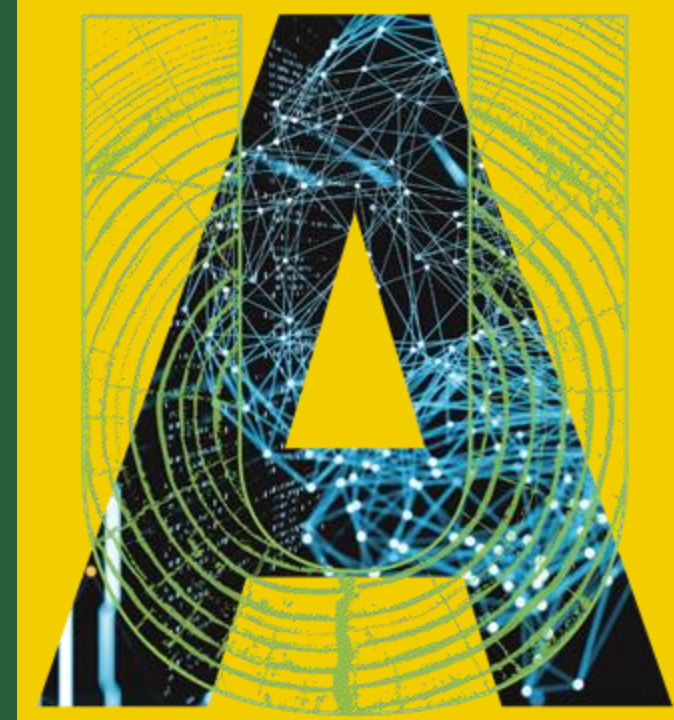
# Contacts

Campus Unit	Name	Role	Phone	email
Office of Research	Richard Lehner	Vice-dean Research (Basic)		<a href="mailto:vdradmin@ualberta.ca">vdradmin@ualberta.ca</a>
Office of Research	Gonzalo Vilas	Director, Research & Innovation	780.680.1109	<a href="mailto:gvilas@ualberta.ca">gvilas@ualberta.ca</a>
Core Research Facilities	Colleen Sunderland	Manager, Core Research Facilities	780.492.0715	<a href="mailto:crreid1@ualberta.ca">crreid1@ualberta.ca</a>
Facility Planning & Projects	Brian Reuter	Scientific Equipment Advisor	780.233.3436	<a href="mailto:breuter@ualberta.ca">breuter@ualberta.ca</a>





# QUESTIONS ?



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