CFI Update
2019 CAP Congress
June 6, 2019
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Part 1 | Pan Canadian conversation: Summary of feedback

Part 2 | 2020 Innovation Fund: Changes & improvements
Conversation on the future of research and research infrastructure in Canada

A discussion paper
November 2018

Trends & topics

1. International collaboration & engagement
2. Smaller institutions
3. Equity, diversity & inclusion
4. Core facilities & regional platforms
5. Convergence
International cooperation & collaboration

- CFI programs enable successful international projects
- Challenges: envelope model, matching sources, timing, travel costs, lack of an international strategy for Canada
- Adapt funding approach to size and scope – consider lifecycle approach
- Facilitate access to facilities in Canada and abroad

Immediate CFI response:
- CFI spearheading a CRCC decision-making framework for international research initiatives
Supporting smaller universities, colleges & cégeps

- Key strengths: close connections to community and industry partners
- Challenges: constrained resources, distance from major centres of research, limited envelopes, competition with larger institutions
- Diverse opinions on desired CFI actions
- Facilitate access to external infrastructure

Immediate CFI response:
- 30% increase of JELF allocations + bonuses to small institutions
- Dedicated MAC for 2020 Innovation Fund
Equity, diversity and inclusion

- EDI key priority for institutions
- Challenge: cultural shift
- Mixed messages - EDI in review criteria

Immediate CFI response:
- Created internal EDI action groups
- Participate in several inter-agencies working groups
- Provide training for CFI staff and reviewers
- Establishing an EDI data framework
Core facilities and regional platforms

- Building more shared facilities – of interest to most
- Core facilities viewed as conducive to convergence research
- Challenge: availability of O&M funding
- CFI encouraged to promote best practices in management of facilities

Immediate CFI response:
- Broaden eligibility of warranties/service contracts for existing equipment
- Growing the CFI Navigator into a more comprehensive database
- Convened a Core Facility Advisory panel
Core facility

A core facility provides access to state-of-the-art research services, analyses, instruments and technology, expertise, and training and education that are generally too expensive, complex or specialized for researchers to cost-effectively provide and sustain themselves. A core facility is broadly available to many researchers to conduct their research, irrespective of their administrative affiliation and with no requirement for collaboration or co-authorship.

A core facility:
• Has dedicated equipment and serving one or more institutions;
• Is recognized and supported by the research institution where it’s located;
• Has a clearly defined governance and management structure and a sound management plan reflective of its mandate, breadth and complexity; and,
• Has dedicated management involving individual(s) with the technical and subject matter expertise necessary to oversee all aspects of the facility.
Convergence

- CFI programs support convergence
- Solid disciplinary foundation is critical. Don’t force convergence!
- Multi-sectoral collaborations benefit convergence
- Encourage inclusion of SSH
- Shared spaces and core facilities are effective targets for CFI investment

Immediate CFI response:
- Funding of collaborative space and support diverse teams
Extended warranties & service contracts for existing infrastructure

- Both CFI-funded and non-CFI-funded equipment
- Non-CFI-funded equipment must meet the CFI’s eligibility guidelines
- Demonstrate need for infrastructure
- Optimal option for the project
- IOF eligible for continued sustainability
Collaborative space

- To enable research collaborations
- Purpose-built and essential for the proposed research program
- Primarily used for research activities (e.g., focus groups)
Team

Key changes

• Up to **two team leaders** vs. one project leader

• Team members vs. principal users

• Team criterion standard: *The diverse team comprises the breadth of expertise needed*
Equity, diversity and inclusion (EDI)

Expectations for 2020 IF projects:
• Be guided by the institution’s EDI policies
• Be guided by the CFI’s EDI statement

Proposals should explain how EDI principles were considered in composing the research team within the context and needs of the project.

For information, not assessment
New or updated CAMS tools

- Leave (parental, medical, etc. section in CV module)
- Liaison contact list
- Early CAMS notification for collaborating institutions
- Report repository:
  Team member tracking
  Envelope management
Additional resources

• Strengths and weaknesses analyses – 2017 IF
  (see IF Documents & Resources at innovation.ca)

• Best practices for preparing and managing multi-institutional projects
  (see CARA’s resource library)
CFI funding in SAP

The bar chart shows the CFI funding in SAP from 2002 to 2019, categorized by Theory, Astroparticle, High Energy, and Nuclear. The funding amounts are represented in millions of dollars, with peaks in 2009, 2010, 2015, and 2017.
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