



**Natural Sciences and Engineering Research Council
Alliance Society Grants | Rolling Intake**

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NSERC Alliance Society Grants – RSO application guide

(formerly known as Alliance - Option 2)

Objectives:

The [Alliance Grants](#) encourage university researchers to collaborate with partner organizations, which can be from the private, public or not-for-profit sectors. These grants support research projects led by strong, complementary, collaborative teams that will generate new knowledge and accelerate the application of research results to create benefits for Canada.

Alliance Society grants (formerly Alliance cost-sharing option 2) fund projects with societal impact as the main driver.

Award Amounts and Duration:

Limit on number of applications per year: none Value: over \$20,000 to \$1 million per year Duration: one to five years	
Partner requirements	NSERC contribution to project's direct costs
At least one partner up to an unlimited number of partners. Partners can be from the private sector, government or not-for-profit organizations	100%

You and your co-applicants may receive funds from other sources to cover the direct costs of your project. These sources of funds could include cash contributions provided by the university or other funding agencies. Such funds would add to and complement those requested from NSERC. You must include all of the project's direct costs funded by sources other than NSERC in the budget table. All costs must be explained in the proposal and will be considered in the merit assessment of your proposal.

Note: In-kind contributions are important for the success of the project even though they are not considered in the cost-sharing calculations with NSERC.

Eligibility:

1. Applicants' eligibility:

If you are a Canadian university researcher who is **eligible** to receive NSERC funds, you can apply on your own or as a team with co-applicants who are also **eligible** academic researchers.

Note: You do not need to hold an NSERC Discovery Grant or any other NSERC grant to apply for Alliance Society.

2. Partner Organization eligibility

Your partner organizations can be private, public or not-for-profit.

You may involve whichever partner organizations you need to achieve your research goals and successfully mobilize your research results to achieve the desired impact. At least one of these partners must have a demonstrated ability to exploit such research results, while other partners may be chosen for their ability to generate and mobilize knowledge.

Each partner organization must actively play a role in the project and support it through in-kind contributions. Such involvement must be achieved by doing at least one of the following:

- playing an active role in the project's research activities
- using the project's research results to help achieve its desired outcomes
- playing an active role in translating or mobilizing knowledge to ensure that the research results have an impact

Active participation in the project and in-kind contributions are not required from funding organizations (e.g., other provincial or federal funding agencies) providing financial support to the project.

If you are applying for an Alliance Society grant, you can include just one partner organization or several—whichever you need to support the planned activities (given their size and scope) and produce the desired research results and widest possible benefits.

Note: It is best to run your partner organization's information through NSERC's [Partner Organization Self-Assessment tool](#) to verify their eligibility.

Resources to start with:

- [Program Guidelines](#)
- [Application Instructions](#)
- [Instructions for the NSERC Canadian Common CV](#) and the Canadian Common CV [Help Manual](#)
- [NSERC Alliance application checklist](#)
- [NSERC Online System \(Alliance application portal\)](#)
- [Selecting the Appropriate Granting Agency](#)
- [Partner Organization Self-Assessment tool](#)

RSO review process and deadlines:

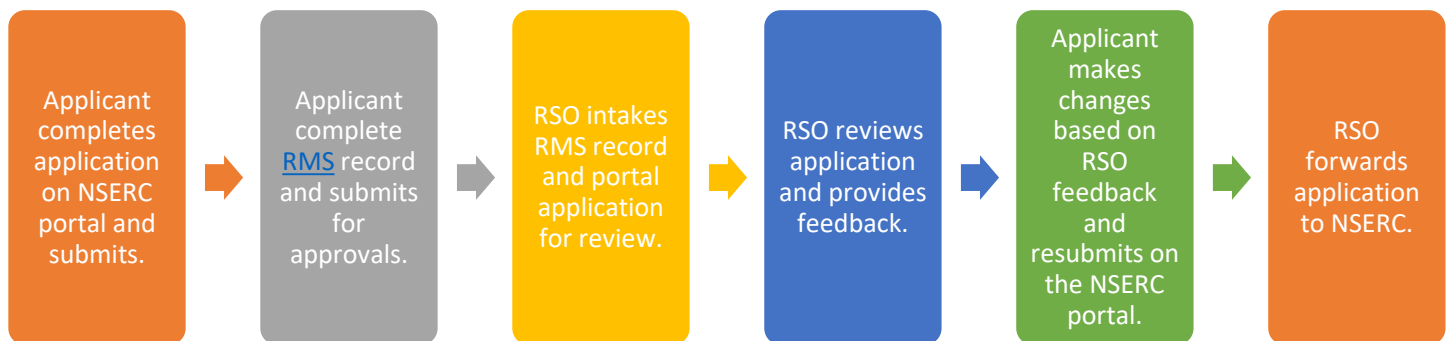
Deadline for Detailed Review: 2 weeks prior to final submission.

Deadline for basic administrative review: 3 business days prior to final submission.

Please note, your application will not be considered submitted and will not be reviewed until the application is submitted in the NSERC Portal (a paper copy is not required) and the RMS Approvals have been received. As Alliance is a rolling intake, once we have received both the completed RMS record and the NSERC application in the NSERC portal, please indicate if you would like a basic (allowable turnaround time is 3 days) review or a detailed (allowable turnaround time is 2 weeks) review.

The **detailed administrative review** includes a detailed review of the application, checking for eligibility and UofC commitments and risk, compliance with program guidelines, completeness of application, and the opportunity for feedback to improve the application.

The **basic administrative review** involves a minimal check of the application for eligibility and any UofC commitment or risk.



This competition will be run through Research Management System (RMS).

1. Complete your application in the NSERC On-line system. Once the application is complete (including required attachments and your CCV), verify each section, and then press "Submit". Your application will be sent to the Research Services Office. Please ensure your application is final and complete; Research Services will not review drafts, and, once received, your application may be submitted to NSERC without further notice.
2. Complete the Pre-Award record in RMS (login at <https://research.ucalgary.ca/rms>) and "Submit for academic approvals" (Under Save & Progress) in good time to allow for approvals from your Department Head and/or ADR prior to the Research Services deadline. Consult your department and faculty for more information on their approval processes and timelines.
3. RSO will reach out to you with clarification on whether you would like a detailed review or a basic review. The assigned Research Grants Officer (RGO) will get back to you with feedback and provide the opportunity to make changes to the application file by returning the application back to the applicant in the NSERC portal.
4. Once any required changes have been made by the applicant, they can resubmit in the NSERC portal. This sends the application forward to the RSO. The assigned RGO will have a final look through the application and send it forward for institutional approval through RMS followed by submission to NSERC on the NSERC portal.

Recent changes (2024 onwards):

Cost-sharing

A greater range of partners can now be recognized for cost sharing in Alliance grants. Potential partner organizations now include:

- all registered charities
- unions
- registered companies

Additionally, industrial associations and producer groups have been more clearly differentiated to better recognize the unique role that each type of organization plays in the research and innovation ecosystem.

The requirement that partner organizations must operate from their own offices or facilities has been relaxed in light of the expansion of virtual work. Provided the partner can exploit the research results and interact with highly qualified personnel, NSERC will consider a partner organization that works virtually.

Promoting participation of early career researchers in Alliance Society

To help more ECRs participate in Alliance Society grants, they will no longer be required to hold an active peer-reviewed grant from NSERC as a condition for internal review when they are co-applicants for small Alliance Society grants (now up to \$75,000 annually). This will encourage established researchers to mentor ECRs as co-applicants and provide ECRs opportunities to build relationships with partners. For more information, [see Alliance Society – Review of your application](#).

Research Security

1. Tri-agency guidance on the [Policy on Sensitive Technology Research and Affiliations of Concern](#) (STRAC)

Grant applications submitted by a university or affiliated research institution to the federal granting agencies and the Canada Foundation for Innovation involving research that aims to advance a [Sensitive Technology Research Area](#) will not be funded if any of the researchers involved in activities supported by the grant are currently affiliated with, or in receipt of funding or in-kind support, from a [Named Research Organization](#).

For all NSERC grants, [STRAC Attestation forms](#) are now required for all applicants and collaborators for any research that is being conducted in a [Sensitive Technology Research Area](#).

2. [National Security Guidelines for Research Partnerships](#) (NSGRP)

To ensure the Canadian research ecosystem is as open as possible and as secure as necessary, the Government of Canada has introduced the NSGRP. The purpose of the guidelines is to integrate national security considerations into the development, evaluation, and funding of research partnerships.

All researchers are encouraged to use the [National Security Guidelines for Research Partnerships](#) to assess all research partnerships, with any partner or funder, to protect their work. The National Security Guidelines for Research Partnerships will be applied to relevant federal research partnership funding opportunities.

For Alliance grants, a [Risk Assessment Form \(RAF\)](#) is now required for all applications involving a partner from the private sector.

The Research Security Division is available to assist researchers adhere to research security guidelines and policies, including the *National Security Guidelines for Research Partnerships* ([NSGRP](#)) and the new policy on *Sensitive Technology Research and Affiliations of Concern* ([STRAC](#)). Visit the Research Security [website](#) to learn more or contact researchsecurity@ucalgary.ca

Application Checklist

To apply, submit a [Form 101](#), Form 100A with a [NSERC Common CV attachment](#). Click [here](#) for full NSERC instructions.

Application Overview

Form 101

- Application Profile
- Cover Letter (optional)
- Areas of Research
- Certification/Requirements
- Partnership/Conflict of Interest
- Sensitive Technology Research Areas***NEW**
- Co-Applicants
- Collaborators
- Summary of Proposal for public release
- Proposal and References
- Proposed Expenditures
- Budget Justification
- Partner Organization(s) Contributions
- Justification for In-kind Contributions
- Risk Assessment Form (required for applications with private sector partners) ***NEW**
- Review Suggestions
- Collaborator Biographical Sketches
- Other Documents
 - You may also use this section if you need to provide other documents requested by NSERC.
- Environmental Information Form (Appendix A), if applicable

Form 100A with Canadian Common CV attachment (for each applicant and co-applicant)

- Personal Data Form
- Contributions to research and training explanation
- CCV

Partner Organization Form (filled out by Partner Representative(s) – one form for each partner)

- Organization Information
- 1-page partner profile
- Partner organization supplemental information questionnaire (Optional – only required for organizations with fewer than 5 staff members)

All the above checklist items are explained in more detail below.

Detailed Form 101 Instructions

Application Profile

Title of proposal should use lay language. Spell out scientific symbols and acronyms, and do not include a company or trade name.

Cover Letter (optional)

- Attach a cover letter if you wish to provide NSERC with information that will not be shared with external reviewers, such as an explanation of how the project has changed since a previous submission (optional).
- Include: your name, the NSERC program to which you are applying, and the title of your application.

Areas of Research

Research subject codes – primary area required, secondary is optional

Area of application codes – primary area required, secondary is optional

Key words – provide a maximum of 10 descriptive key words

Certification/Requirements

Certification requirements

- Indicate if your research will involve human subjects, pluripotent stem cells, animals, or biohazards.

Environmental impact

- If required, you will need to include the [Environmental Information Form](#) (Appendix A)
- For more information, consult [NSERC's Guidelines on Environmental Review and Assessment](#)

Partnership/conflict of interest

1. National Security Guidelines for Research Partnerships' risk assessment form

In accordance with the [National Security Guidelines for Research Partnerships](#), applications involving at least one partner organization from the private sector (including industrial associations and/or producer groups) are required to be submitted with a Risk Assessment Form. You must select “yes” or “no” to indicate whether your application includes at least one partner organization from the private sector.

If you answer “yes,” you must complete and attach the [Risk Assessment Form](#) (please review the Risk Assessment Form [instructions](#))

2. Compliance with Institutional Conflict of Interest Policies

All researchers and their institutions must adhere to the [Tri-Agency Framework: Responsible Conduct of Research \(2021\)](#). Adherence to the Framework includes appropriately identifying and addressing any real, potential or perceived conflicts of interest, in accordance with all participating institutions' policies on conflicts of interest in research. You must attest on behalf of you, your co-applicants and all other members of the research team that this collaboration complies with the conflict of interest policies of all participating institutions.

STRAC

In accordance with the [Policy on Sensitive Technology Research and Affiliations of Concern](#) (STRAC), applicants must select “yes” or “no” to indicate whether your application aims to advance a [Sensitive Technology Research Area](#).

If you answer “yes,” you must complete and attach [STRAC Attestation forms](#) for all applicants and collaborators.

The **Research Security Division** is available to assist researchers adhere to research security guidelines and policies, including the *National Security Guidelines for Research Partnerships* ([NSGRP](#)) and the new policy on *Sensitive Technology Research and Affiliations of Concern* ([STRAC](#)). Visit the Research Security [website](#) to learn more or contact researchsecurity@ucalgary.ca

Co-Applicants

- Indicate co-applicants who will participate in your application (enter the email address and family name). Co-applicants will automatically be invited to provide their Personal Data Form with CCV attachment (Form 100A). When co-applicants link a Personal Data Form with CCV Attachment (F100A) to the application, their personal information will appear on the Co-applicant page, and the status will change to Linked.
- Advise co-applicants outside your institution that the authorized officer of their institution must agree to their participation. NSERC will confirm this agreement directly with the authorized officer.

Collaborators and Collaborator Biographical Sketches

- Indicate any collaborators (government scientists, academic researchers or company staff member). Collaborators contribute to the overall intellectual direction of the research project and bring their own resources to the collaboration. The collaborator will not have access to the grant funds and must be qualified to undertake research independently.
- On behalf of your collaborators, you may attach a biographical sketch or CV for collaborators and key staff of partner organizations whose role in the project is similar to that of a co-applicant (optional).
 - In a maximum of two pages for each person, provide the individual's Name/affiliation, Education/training, Employment/affiliations, Research funding, and up to five significant contributions related to the project.

Note: For upload purposes, **all** collaborator biographical sketches or CVs must be saved as a single PDF file.

Summary of Proposal

- Summary (text box)
 - This is not an attachment and must fit into the field provided.
 - The summary is intended to explain the proposal in language that the public can understand.
 - Indicate why and to whom the research is important, the anticipated outcomes/advancements, and how Canadians will benefit economically, socially and/or environmentally.

Proposal

Complete the [proposal template](#) provided by NSERC. The headings and the bulleted instructions of the template cannot be removed and must remain in the document. Ensure that the [evaluation criteria](#) and [merit indicators](#) are reviewed when completing this section.

The maximum number of pages allowed for the application is outlined in the table below.

Proposal sections and length

Note: The number of suggested, maximum or additional pages always includes the NSERC template text.

Proposal sections and length	
Section	Average annual request
	Suggested number of pages per section

	Up to \$75,000/year	\$75,001 to \$300,000/year	\$300,001 to \$1,000,000/year
Background	0.5	0.75	1
Partnership	1	2	5
Research plan	1.5	4	11
Team	1	1	4
Training plan	2	2	4
Impacts and benefits to Canada	1	1.25	2
	Maximum total number of pages		
	7	11	27
Public impact value proposition (PIVP): Alliance Society applications only	Add three pages to the maximum above for the PIVP (see proposal template)		

Pages exceeding the maximum or documents not requested by NSERC (e.g., letters of support) will be removed and not considered in the application assessment. NSERC may return or reject applications exceeding the maximum number of pages.

In preparing your proposal, consult NSERC's [Guide for applicants: Considering equity, diversity and inclusion in your application](#).

If relevant to your research, consult NSERC's [Guidelines for the preparation and review of applications in interdisciplinary research](#) and/or [Guidelines on the assessment of contributions to research, training and mentoring](#).

Proposal Template:

Background

- Explain the challenge to be addressed, the importance of the topic and the need for new concepts or directions.
- Outline the objectives of the project and briefly explain its anticipated outcomes and impact.
- Position the proposed research relative to other efforts and to the state-of-the-art.

Partnership

- List all partner organizations participating in the project. For each, describe their core activities and how they align with the project, their need for the proposed project, and their experience related to it, such as efforts to date to address the challenge.
- Describe each partner organization's active role in the project, including defining the research questions, designing the research plan, collaborating or contributing to the research activities, co-supervising trainees and monitoring progress.
- Describe how the partner organizations will translate, mobilize and/or apply the research results to achieve the intended outcomes.

- Explain the value and importance of each partner organization’s involvement and other in-kind contributions to achieving the project’s intended outcomes. If applicable, discuss how the combination of partner organizations is beneficial to the project.

Proposal

Research Plan

- Specify the research objectives and expected results. Describe the planned research activities, methodology and experimental design.
- Provide approximate timelines for the activities, milestones and deliverables. You may use a Gantt chart, table or diagram.
- Describe how equity, diversity and inclusion are considered in the research process (e.g., research questions, design, methodology, analysis, interpretation and dissemination of results) and how these considerations are integrated where relevant.

Team

- List the applicant, any co-applicants, key participating staff of the partner organizations and any other key academic team members. For each, explain how their knowledge, expertise, experience and contributions align with the proposed project and describe their role in the project, as well as their roles and capabilities in training and mentoring trainees.
- Briefly describe the plan for managing the project, along with the qualifications, roles and responsibilities of the team members involved in this respect.

Training Plan

- Describe the learning experiences the project will provide, including the nature of interactions between trainees (undergraduate and graduate students, postdoctoral fellows) and partner organizations.
- Describe the research and professional skills that trainees will develop through these experiences and through their roles in the project.
- Explain how the research and professional skills gained by the trainees will prepare them for their future careers.

Note: The EDI section under ‘Training plan’ is often overlooked by applicants. EDI sections must be personalized, generic statements are not accepted.

Resources: For an overview of EDI, guidance on how to consider EDI in your training program, and some examples of practices that could be implemented to support EDI in your training program, the resources below may be helpful.

- [NSERC’s Guide for Applicants: Considering EDI in your application](#)
- [Best Practices in EDI guide for applicants to the New Frontiers in Research Fund](#), including the section on [Research team and environment](#)

Proposed Expenditures/Budget Justification

Before completing this page, first read the instructions, [Funding your research project](#) and consult the [Tri-Agency Financial Administration Guide](#).

In the **Proposed Expenditures** section, enter the planned spending in each budget category for each year of the project. For the **Budget Justification**, prepare a separate PDF document that provides a breakdown of each category and a detailed justification for spending in each category. Provide sufficient information to allow reviewers to assess whether the resources requested are appropriate. Attach the document in the Budget Justification section. The categories are as follows:

- Salaries and benefits
 - Give the names (if known), categories of employment, proposed salaries, and non-discretionary benefits) of students, postdoctoral fellows, research staff such as technical/professional assistants and the project manager. Briefly describe the responsibilities of each position and indicate the percentage of time they will be spending on this project over its life span. Do not include salaries of faculty in project costs.
 - Use departmental rates for student stipends and Post-doctoral fellows.
 - Post-doctoral fellows can only be paid out of the grant for 2 years. If post-doc employed for less, suggest applicant indicate support for second year.
- Equipment or facility
 - Give a breakdown of the items requested. Provide details on models, manufacturers, prices and applicable taxes. Justify the need for each item requested. Describe any fees for the use of equipment or a facility (e.g., hours and rate).
 - Any request over \$400,000 over the total project should seek other avenues of funding, unless otherwise directed by NSERC.
- Materials and supplies
 - Provide details of materials and explain major items. Equipment and materials obtained from the partner organizations must be provided as in-kind contributions.
- Travel
 - Explain briefly how each planned travel activity relates to the proposed research.
- Dissemination and knowledge mobilization
 - Provide details of publication costs, user workshops or other activities that support collaboration and knowledge mobilization related to the project.
- Technology transfer activities
 - List the expenditure for field trials, prototypes, scale-up costs, demonstration projects, workshops and other activities to develop and grow the research collaborations with the partner organizations.

Partner Organization Contributions

Note: First, Use the [Partner Organization Self-Assessment for Alliance Grants](#) tool to ensure the partner organization's eligibility for this program.

Use this page to provide the contributions committed to the research project by the partner organizations, post-secondary institutions, as well as other funders, and to invite the partner organizations to complete the Partner organization section. The invitation will be sent to the authorized contact.

Provide the information required for each organization. For each organization, you must select one of four categories:

- Partner organization recognized for cost sharing (
- Partner organization not recognized for cost sharing
- Other funder (not involved in the research)
- Post-secondary institution

To determine the appropriate category for partner organizations (recognized or not recognized for cost sharing), refer to [Alliance Society: Partners](#).

Select the organization from the list or enter the name if not available.

List the resources the partner organization will provide for the proposed research, including:

- (Optional for Alliance Society) cash contributions from your partner organizations paid to your institution for the direct costs of your research project (not including overhead); this amount will be transferred to the appropriate line on the Proposed expenditures page
- in-kind contributions (staff time and donations of services, materials and equipment, travel expenditures for staff)
- amounts paid to your institution for overhead (see note below)

Note: Currently, there is no overhead applicable at UCalgary for NSERC Alliance grants. Please keep checking the [Research opportunity Database](#) in case there is a change.

- After you have created, completed and saved the Contributions page in form 101 for a given partner organization, click on the Lock/Invite button to automatically email a link to the partner organization representative
- The invitation will be sent to the authorized contact you have provided. When you send the invitation, the contact person will receive an email with a link to NSERC's Online System, where they will be asked to complete a Partner Organization Form providing information about their organization.
- Send [these instructions](#) to the partner representative to prepare them for filling out the form. Please note that a reference to the partner organization's website is not acceptable in lieu of the one-page profile that the partner representative will need to upload.
- You can monitor the status of the partner form in the Contributions section of form 101. The status will change from "Invitation sent" to "Invitation accepted" to "Completed by partner."
- **If changes are required after the partner organization representative has submitted the partner organization form, you can release it for changes by using the *Edit, Save, Lock/Invite* buttons to modify the content.**

Justification for In-Kind Contributions

Provide a detailed explanation of all in-kind contributions. All documents must be saved as a single PDF in order to be uploaded.

.This information will be used to assess the level and nature of the partner organization's involvement and the importance of its contribution to the success of the project's success.

- Salaries for scientific and technical staff: list the name of each staff member, their role at the partner organization and their specific expertise, details as to what they will be providing to the project (link to milestones if possible), the number of hours they will devote to the project and their hourly rate
- Salaries of managerial and administrative staff: list the name of each staff member, their role at the company, details as to what they will be providing to the project, the number of hours they will devote to the project and their hourly rate
- Donation of equipment, software: list each item of equipment and/or software being donated to the project, explaining how it will be used and its importance to the success of the project; provide details on how the cost of the equipment/software was calculated
- Other contributions: describe the contributions to be provided (e.g., travel expenditures for staff), their importance to the project and how their cost was calculated

Impact assessment form (appendix A)

An [Impact assessment form \(appendix A\)](#) must be completed and uploaded to the *Environmental impact* page, as required.

National Security Guidelines for Research Partnerships' risk assessment form

You must use this section to provide your completed [National Security Guidelines for Research Partnerships' risk assessment form](#) in the case where your partnership involves one or more partner organizations from the private sector (including industrial associations and producer groups and/or when they participate alongside other partner organizations from the public and/or not-for-profit sectors).

For resources to assist in completing the Risk Assessment Form, please consult the array of [Guidelines and Tools to Implement Research Security](#) and [Research Security Training Courses](#) available on the [Safeguarding Your Research](#) portal.

Before you attach your completed risk assessment form to your application, you must convert it from a fillable to a read-only PDF format. For this purpose, one option is to click on *Print* in the form, select the PDF format as the printer, and save the file.

The **Research Security Division** is available to assist researchers adhere to research security guidelines and policies, including the *National Security Guidelines for Research Partnerships* ([NSGRP](#)) and the new policy on *Sensitive Technology Research and Affiliations of Concern* ([STRAC](#)). Visit the Research Security [website](#) to learn more or contact researchsecurity@ucalgary.ca

Environmental Information Form (Appendix A)

If required, an [Environmental Information Form \(Appendix A\)](#) must be completed and uploaded to the Environmental impact page.

Reviewer Suggestions

Consider the Review of your application to find out if external reviewers will be used in the assessment and if suggestions are needed here.

- Suggest the names of five independent experts who can assess the technical aspects of the proposal as well as reviewers who can assess any research aspects outside the natural sciences and engineering. Ensure EDI is considered.
- Give the name, address, telephone number, email address and the area(s) of expertise of potential external reviewers.
- Reviewers should not be in [conflict of interest](#).

Reviewer Exclusions (optional)

You can request that an individual, a group of individuals, or a specific non-academic organization not be involved in the review of your application (optional). Specify a general reason for this request (e.g., perceived conflict of interest, prior disputes, school of thought bias, professional or personal association not specified in the Conflict of Interest Policy). You may include in this list any exclusions requested by the partner organizations. While NSERC cannot be bound by this information, it will take it into consideration in the selection of reviewers.

Formatting Attachments

In the Application Overview page, click Upload to attach each required document. Attachments are free-form and must respect NSERC's presentation standards. All text, including references (where applicable), must conform to these standards:

1. Explain any acronyms and abbreviations fully;
 2. **Pages must be 8 ½" x 11" (216mm x 279mm)** (you may have to crop the document to the correct dimensions in Adobe Acrobat or Mac OS X Preview);
 3. Pages must be **single-spaced**, with no more than six lines of type per inch;
 4. All text must be in **12 pt Times New Roman font**;
 5. Condensed fonts will not be accepted;
 6. NSERC will now accept colour images;
 7. **Margins** must be set at a minimum of ¼" (1.87 cm);
 8. Your **name** must appear outside the set margins of the page, at the top right corner of every page;
 9. For multi-page attachments, **pages must be numbered** sequentially; and
- If you have supporting documents written in a language other than English or French, you are required to provide NSERC with a certified translation of the document.

Form 100A and NSERC Common CV Instructions

Form 100A Instructions

- The Form 100A is available in the NSERC Online System's "Portfolio" section.
- Follow the [step-by-step instructions here](#) to complete the form 100A.
- "Verify" the Form 100A for completeness, you will need to attach the CCV in the "CCV attachment" field for it to be considered complete.
- Use the "Link Manager" to link your Form 100a and CCV to the relevant applicant.

CCV instructions

- Go to the [Canadian Common CV](#) website. Follow the instructions to complete your CCV
- Do not use the PIN/System Account functionality to submit your CCV. NSERC does not use this functionality to validate your account.
- Once you have completed the NSERC CCV, click **Submit**.
- A confirmation number will automatically be provided onscreen after you agree to the consent statement. Click History in the top menu bar to view your Submission History.
- For the NSERC Online System (including Alliance Grants)
 - To upload a PDF version of your completed Common CV, from History select the PDF icon to Preview your completed version.
 - Download and save a copy
 - Attach that copy to the Personal Data Form with CCV Attachment (Form 100A)

In absence of these steps, only a draft copy will be included with your Personal Data Form with CCV Attachment.

Merit Indicators

The complete Merit Indicators chart should be accessed [here](#). For your application to be considered “Exceptional”, NSERC will expect the following level of detail:

1. Partnership	Details required for an “Exceptional” rating
1.1 Partner organizations' roles in the project and value of their involvement and any other in-kind contributions	All partner organizations have clear roles, and they are integrally engaged in the project. Their involvement and any other in-kind contributions are highly valuable to the project and/or its intended outcomes.
1.2 Relevance of the partnership and capacity of the partner organizations to translate, mobilize and/or apply the research results	The partner organizations' activities are highly relevant to the project. The partner organizations demonstrate full capacity to translate, mobilize and/or apply the research results to achieve the intended outcomes. The project brings together a highly synergistic combination of partner organizations to achieve a greater impact.
2. Research plan and team	Details required for an “Exceptional” rating
2.1 Clarity of the research objectives and expected results, appropriateness of the research plan, and suitability of the budget	The research objectives and expected results are clearly defined and comprehensive, and the planned activities are clear, well-developed and effective to achieve them. Expenditures are well justified, and the budget is suitable for the planned activities.
2.2 Appropriateness of the expertise of the team (academic and partner organization participants) for carrying out the planned research activities, as well as for managing the project and providing training	The team has the highest levels of relevant and complementary expertise needed to successfully conduct the proposed research and achieve the intended outcomes. The team has very strong capabilities to successfully manage the proposed project and to provide highly valuable training and mentorship to the project's trainees.
3. Training	Details required for an “Exceptional” rating
3.1 Opportunities for enriched learning experiences for research trainees (undergraduate and graduate students, postdoctoral fellows) to develop relevant research skills, as well as professional skills (e.g., leadership, communication, collaboration and entrepreneurship)	The project's training plan is exemplary. It is comprehensive and includes valuable learning experiences and interactions with the partner organizations that go beyond a traditional university training environment. An appropriate number of trainees of suitable levels for the project will develop high-quality, transferable research and professional skills that will best prepare them for success in their future careers.
3.2 Consideration of equity, diversity and inclusion in the project's training plan	The training plan identifies context-specific challenges to equity, diversity and inclusion within the project's training environment and includes specific, concrete and evidence-based practices to address these challenges across multiple aspects of the training plan (e.g., training philosophy, recruitment, training environment, development opportunities for and skills gained by trainees). Methods to monitor and adapt the plan based on non-demographic indicators of success are included
4. Impact and benefits to Canada	Details required for an “Exceptional” rating
4.1 Innovativeness of the proposed research and its	The project will overcome important knowledge gaps in the natural sciences or engineering disciplines or contribute to a scientific / technological breakthrough

potential to lead to advancements or new knowledge in the natural sciences or engineering disciplines	
4.2 Significance of the outcomes and of the economic, environmental and/or other societal benefits for Canada and Canadians	The project will lead to extremely important new or improved technologies, products, processes, services, policies, standards or regulations in Canada, and its outcomes will produce the highest benefits for Canadians.