Innovation Fund 2025 – Round 12
Project planning and iNOI preparation tips

The following are general tips for prospective CFI Innovation Fund project leaders and teams for consideration during early project development and the internal Notice of Intent (iNOI) preparation process. The document reflects recommendations from past applicants and awardees, and common feedback provided by the Vice-President (Research)'s *SUPPORT: Research Infrastructure Programs* committee. The tips are summarized in an **iNOI checklist** on the last page of this document.

Detailed tips

1. The CFI's Innovation Fund offers an opportunity for transformative investment in a research area. The application development process is rigorous and time-consuming, and requires significant commitment from (at a minimum) the project lead(s). As well as the expertise and capacity to undertake the innovative research, project teams should ensure they have capacity to meet all deadlines associated with the application and post-award processes.

2. Think about the entire project plan – the research objectives, necessary expertise, how participants will interact, and what equipment is required to support these goals – when drafting the iNOI.

3. Ensure all questions asked or points identified in the iNOI template are addressed.

4. The iNOI should be primarily written for a multi-disciplinary audience, but still convey to expert readers that the team has a clear understanding of the technical challenges, has a project plan which is positioned at the leading edge of the field, and that the project appears feasible.

5. iNOIs must identify a clear research question or questions that the proposed project, using the requested infrastructure (equipment), will address.
   - How will this problem be solved with the requested infrastructure? What will the infrastructure enable which cannot otherwise be accomplished?
   - Include specific details regarding how the proposed research is unique and innovative.

6. If the University of Calgary is the leading the proposal, why is it the best possible institution to do so?
   - The environmental scan of real or perceived overlap nationally and internationally is critical; the team must demonstrate an understanding of what is leading-edge in the field(s), and must include all appropriate expertise. If this is not available at the University of Calgary, other participants should be sought. Note that if approved to proceed to full application, the CFI will arrange for an expert review panel which will be aware of discipline-specific developments.

7. Use concrete examples to effectively explain or demonstrate the project challenges or methodologies to a multi-disciplinary audience, indicate the benefits to Canadians, etc.

8. iNOIs should clearly outline how the proposed research program will create lasting benefit for Canadians.
   - Explain the gap to be filled, and what follows the successful completion of this research program.
   - What value will the project add to what is happening in Canada and on the world stage?
   - Ensure considerable attention is put to identifying pathways for knowledge transfer to end-users and meaningful social, health, environmental and/or economic benefits
   - Where possible, note specific metrics or references that can be used to demonstrate the potential impacts of this research. Can the magnitude of benefits be measured?

9. Consider what similar equipment is already in place at the university or reflected in other Innovation Fund project proposals, and consider opportunities to access existing infrastructure rather than requesting funding for new equipment. The CFI will require applications to comment on existing equipment capacity.

10. If appropriate, demonstrate how the requested infrastructure will complement and build upon past investments.

11. Ensure there is a governance model in place to manage the team and equipment, particularly where projects are multi-institutional. For example, successful projects will include a designated project lead, and will often include theme leaders, scientific and/or operational leadership, a project coordinator or project manager, committees (e.g. organizing training, outreach with appropriate industry or other contacts), etc. Consider whether some equipment will be managed within a core facility, how appropriate access for the core team and others will be managed, etc. Actual structure will depend on the nature of the project and participants.

12. When planning the project, consider real or perceived risks to implementation and begin to identify plans for mitigation. For example, if a project includes five phases which build sequentially on one another, what will happen if phase one fails? While this will only be assessed at a high level at the iNOI stage, detail will be required in a full application.

13. Reference the unique skills and experience to be gained by highly qualified personnel (HQP) through their participation in the project.

14. Space required to house the equipment and activities proposed within projects must be allocated within each faculty. Carefully consider the possible infrastructure and project needs and speak with your Associate Dean (Research) regarding next steps.

15. The addition of equipment frequently necessitates minor or significant renovations to ensure it can function as intended. Scoping these needs can take significant time and effort; contact Facilities (following internal faculty processes) as soon as possible to begin this needs assessment. Including a reasonable estimate of required renovations and costs in the iNOI is an important measure of feasibility.

16. Consider any computing requirements associated with your proposed project, including hardware, networking and data storage needs, and consult with IT contact/IT Research Computing Services as soon as possible so needs may be appropriately assessed.

17. Minimize acronyms and buzzwords to make iNOI/application materials accessible to multidisciplinary readers. Where technical terms must be used, include clear and accessible definitions at first use.

iNOI checklist

The iNOI:

☐ Addresses all questions in all sections of the iNOI template

☐ Identifies a clear research question or questions

☐ Demonstrates that all necessary expertise to implement the project is represented on the team, or otherwise reflected in the project plan

☐ For projects led by UCalgary, makes clear why this is the best place to lead

☐ For projects led at other institutions, makes clear what role of the UCalgary participants play in the projects and how much envelope is being requested from the UCalgary

☐ Outlines the lasting value of the project and the benefits to Canadians

☐ Justifies the need for the equipment, referencing other similar equipment available and why new equipment is required

☐ Addresses how the project will build on past investments, where applicable

☐ References a project governance model

☐ Demonstrates an awareness of project risks

☐ References skills and experience to be gained by HQP

☐ Has identified space required to implement the project

☐ Addresses renovation requirements (as assessed by Facilities)

☐ Addresses IT requirements (as assessed by IT/IT Research Computing)

☐ Is written for a multi-disciplinary audience

☐ Uses a minimum of acronyms, jargon and buzzwords

Additional resources available

In planning your research, note the following specialized resources now available within Research Services:
- Indigenous Research Support Team (IRST) offers guidance and support for Indigenous research activities
- Research Services Equity, Diversity and Inclusion support is provided by Erin O'Toole (erin.otoole@ucalgary.ca) and Noor Fatima (noor.fatima1@ucalgary.ca)
- Knowledge Engagement team offers guidance and support for connecting research with community organizations and developing responsible and inclusive research impact assessment strategies
- International Research & Innovation team offers assistance in identifying international partners or opportunities
- Research Security team offers guidance on safeguarding your research
- Research Data Management team assists in the preparation of data management plans