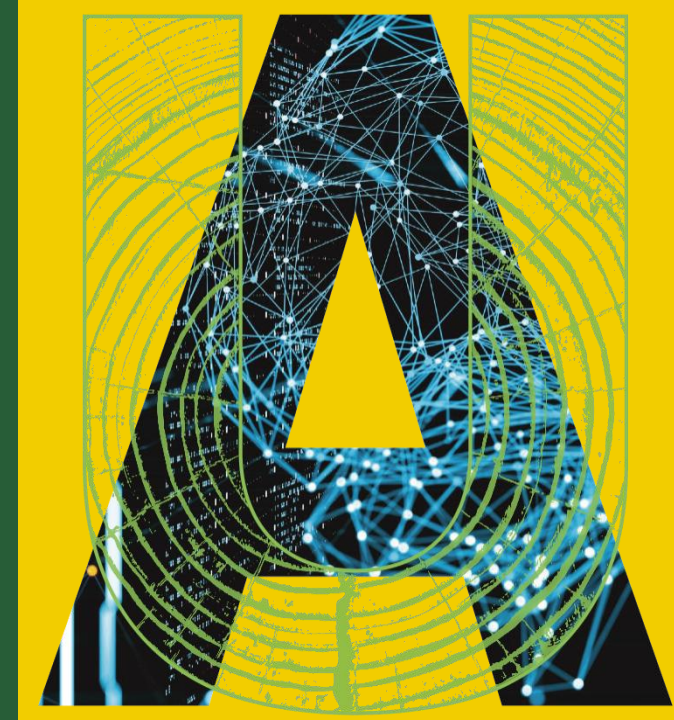


CFI John R. Evans Leaders Fund (JELF)

June 2027 Competition

FoMD INTERNAL SELECTION Presentation and Q&A Session

August 27, 2026



FACULTY OF MEDICINE AND DENTISTRY
Office of Research

Presentation Topics

- Welcome & introduction
- CFI Award Structure
- JELF Program Overview
- Why are you here?
- Internal Selection Process
 - Timeline and integration with RAS 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

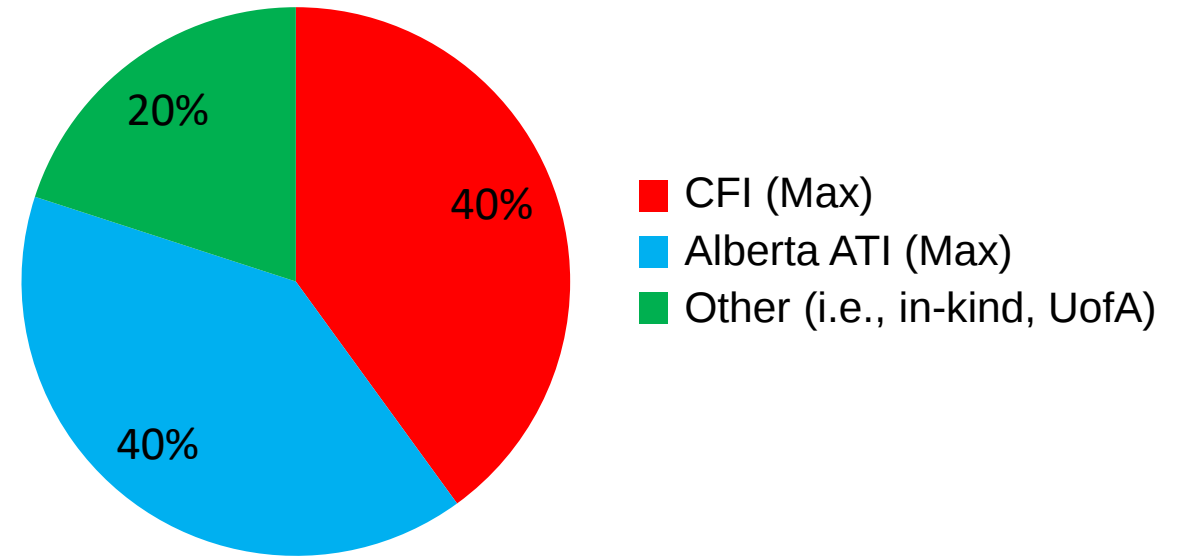
- The Canada Foundation for Innovation (CFI) funds acquisition of infrastructure, ***not research***
- CFI awards are held by the *institution*
 - Vice President (Research) is the project holder
 - PI is the Project Leader (PL)



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 (PI and two co-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 in Spring of the following 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 16, 2027	June, 2027	October 22, 2027	July, 2028
June 15, 2027	November, 2027	October 22, 2027	July, 2028
October 15, 2027	March, 2028	October 22, 2028	July, 2029

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



Why are you here?

The FoMD CFI funding allocation is finite



2026-2028 UofA
Allocation \$14.7
million



Other Faculties stream (\$2,392,467)

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.



FACULTY OF MEDICINE AND DENTISTRY
Office of Research

Faculty-Managed streams, allocations

- FoMD (\$4,269,282)
- ALES (814,696)
- ENG (3,395,870)
- SCI (2,597,031)

Strategic Priorities stream (\$1,230,754)

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.
- RAS approval of FoMD centrally-managed allocation RTA is automatic.
- Maximum CFI allocation per applicant is \$200K (up to 10% more if instrument(s) go into core facility).

Strategic Priorities stream (\$1,230,754)

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

Strategic Priorities stream (\$1,230,754)

- ***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 RAS RTA

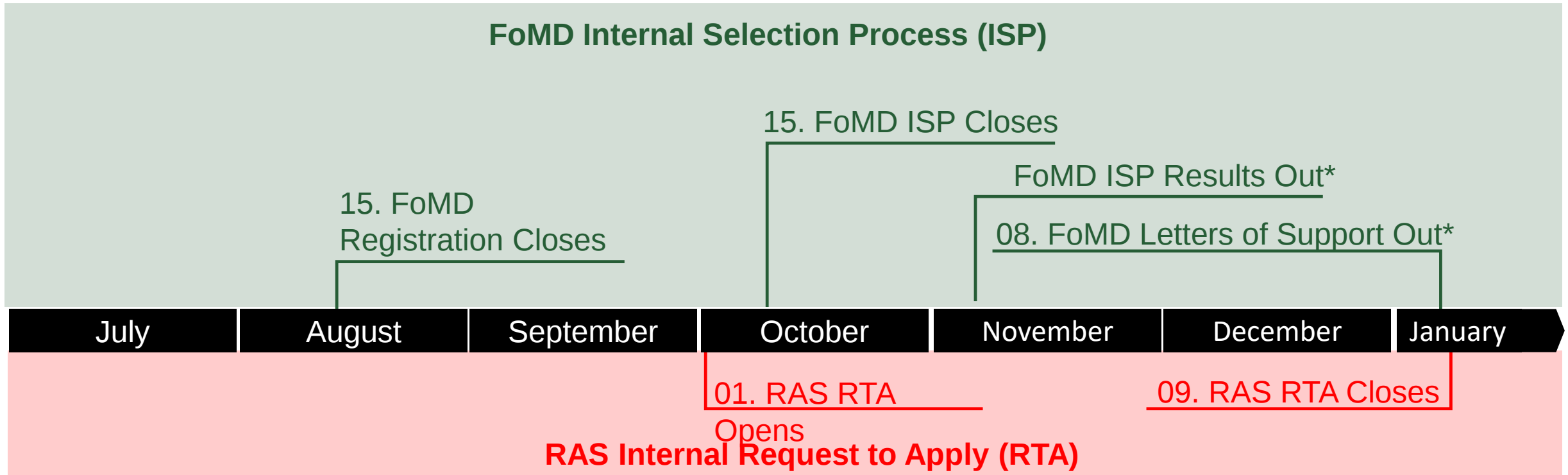
The FoMD Internal Selection Form is based on the main components of the RAS RTA

- Research or Technology Development Summary (ISP: max 1 pages, 12-point font, RAS: 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 RAS 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?



**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.)



Budget

JELF Budget Spreadsheet

INSTRUCTIONS:

Please only enter data in the green cells. Other cells have been locked to preserve the formulas. If you have any questions about how to use this template, please contact us (ormandy@ualberta.ca)

1. Download a copy of this spreadsheet, and name it according to the convention "PI Last Name_JELF Budget"

2. Enter the amount your Faculty has approved you to apply for from the CFI in cell E4 below. If multiple Faculties are contributing allocation, please use the total allocation.

3. Enter budget line items and pricing in Table 1. If your budget includes more than 25 line items, please contact ormandy@ualberta.ca. Make sure to verify that currency and exchange rate are correct for each line (otherwise, the calculated costs may be incorrect).

4. A contingency of 5% of the Total Project Cost will be added to provide a cushion for any renovations to research space identified necessary by UofA Facilities & Operations during proposal development. If you believe your project will need renovations

that will cost significantly more than this amount, please contact RSD.

5. **Table 2** will autopopulate based on information added in **Table 1**.

6. Once all items have been entered, check the **BALANCE** showing in **Table 2** (Yellow

Table 1: Infrastructure budget

Item Description		Currency and Exchange Rate		Cost Calculation							Cost Adjustments for GST & Exchange rate		Total Project Cost Calculation
Item number	Item Description Each Line should include a "whole" piece of equipment. E.g. if you are purchasing a microscope with filters and other accessories, roll it up into one line. If there are items on the quotation that you do not intend to purchase, make a note of that on the quote that you upload.	Currency (e.g., CAD, USD, EUR, etc.)	Exchange Rate: Line 1 for CAD, 1.5 for USD, 1.7 for Euro. Other currencies: ----- max	List Price	Normal discount (if not offered, enter 0)	Educational Discount (if not offered, enter 0)	Fair Market Value (Educational Price before CFI in-kind contribution)	CFI in-kind contribution	CFI contribution %	CFI price (net cash)	Cash Cost (including exchange rate adjustment & 5% GST)	In-kind contribution (exchange rate adjustment)	Total Item cost (Cash Cost + in-kind including all adjustments and contingency)
1		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
2		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
3		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
4		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
5		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
6		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
7		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
8		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
9		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
10		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
11		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
12		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
13		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
14		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
15		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
16		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
17		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
18		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
19		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
20		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
21		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
22		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
23		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
24		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
25		CAD	1.0				\$ -			\$ -	\$ -	\$ -	\$ -
NUMBER OF LINE ITEMS				0			\$ -	\$ -		\$ -	\$ -	\$ -	\$ -

Source	Amount (USD)	Percentage (%)
Local Government	1,200,000	40.0
State Government	800,000	26.7
Federal Government	500,000	16.7
Private Donations	300,000	10.0
Grants	200,000	6.7
Interest Income	100,000	3.3
Other	50,000	1.7
Total	3,000,000	100.0

Do not enter data in this table - it populates automatically from the other tables.

	Amount	% of Total Project Cost
Total Project Cost (incl. renovation contingency)	\$ 50,000	
Approved CFI request:		0.00%
Alberta IFI match:		0.00%
Estimated in-kind contributions:		0.00%
Other Funding Sources:		0.00%
*Balance	\$ 50,000.00	100.00%

If the *Balance is positive, there is a funding shortfall and additional eligible funding must be brought to the project.
Please enter other funding sources in Table 3 to bring balance to \$0.

Table 3: Other Eligible Funding Sources

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

[illegible]

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.**

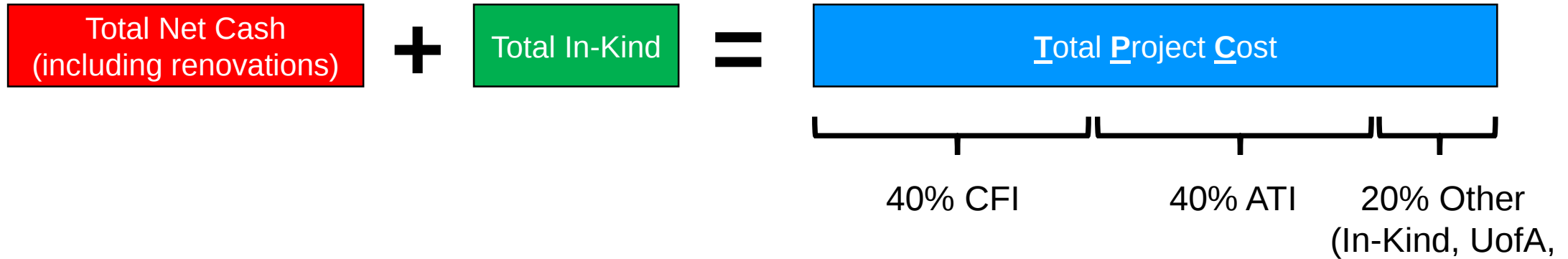
Spreadsheet is pre-loaded with \$50K for renos. If the final renovation costs during the application development phase are lower than the preset \$50,000, applicants will be allowed to use the remaining allocation to purchase extra warranties and/or upgrades for the items indicated in the budget.

For all questions about Space, Renovations and Equipment requirements, please contact Brian Reuter, Scientific Equipment Advisor (breuter@ualberta.ca, 780-492-2305).

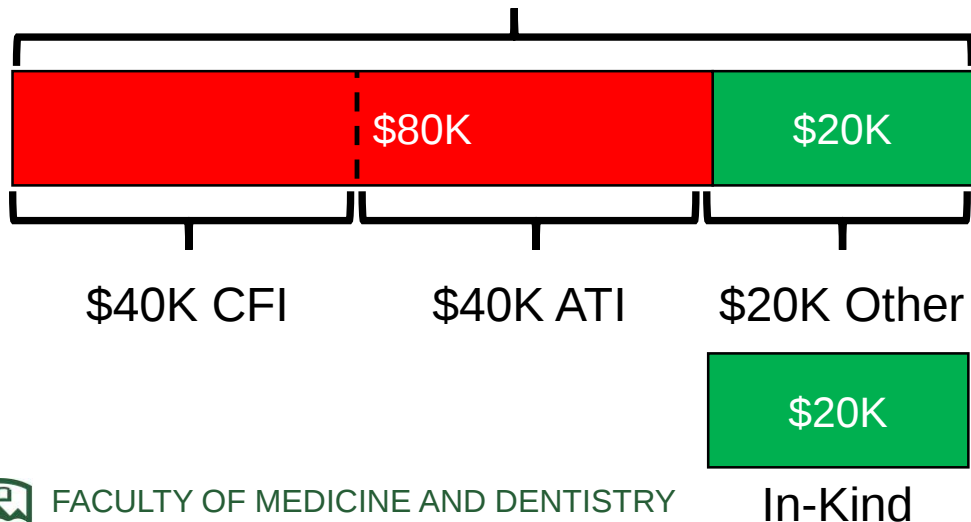


Internal Selection Process (ISP)

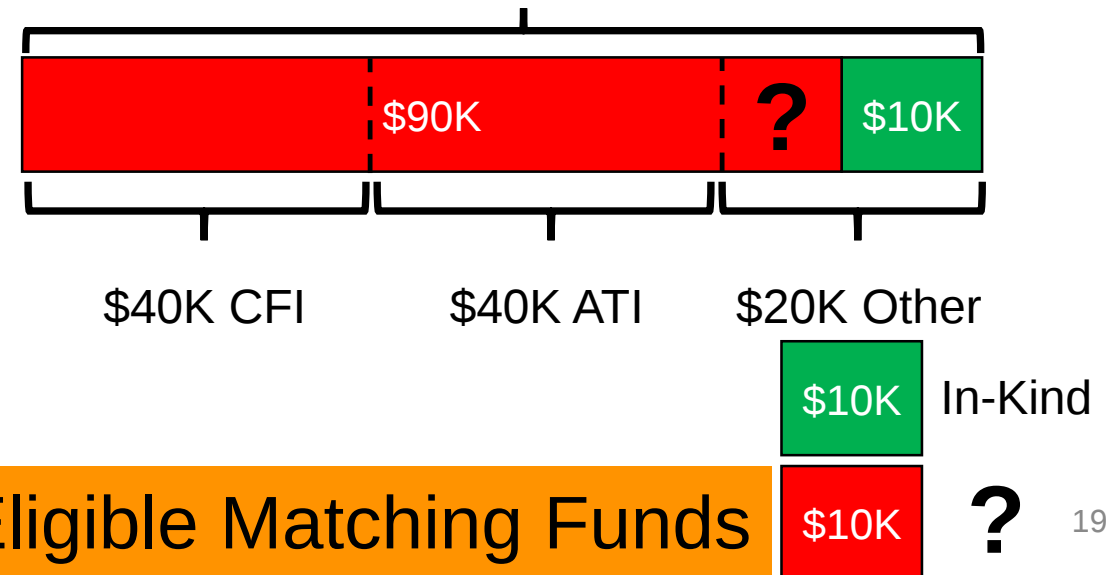
Budget



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 (Biomedical) will be adjudicating these applications.
- Letters of decision will be sent in November.
- Official FoMD letters of support required for the RAS RTA will be provided by January 8, 2027.
- Applicants approved to apply will be required to submit an [RTA form](#) and all attachments to RAS by January 9, 2027 at 9 a.m.



Where to start

FoMD JELF Internal Selection Form:

<https://docs.google.com/forms/d/e/1FAIpQLSevQM5M-ICzGdJmTnH4GClI3-DhqEDgIM-yXaoHayS6vFw-Aw/viewform?usp=sharing&oid=110623170051378346859>

FoMD JELF: <https://www.ualberta.ca/medicine/research/funding-grants-awards/fundingopportunities/cfi-john-r-evans-leaders-fund.html>

Once your proposal is selected to submit an RTA by FoMD

[Home](#) > [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 2026 CFI JELF intake is now **CLOSED**.

The RTA for the June 2026 CFI JELF intake will open on October 1, 2025.

[Request to Apply for Submission Form](#)

OVERVIEW

- JELF awards are held by the institution rather than by individual researchers.
 - The applicant is the Project Leader.
 - The Vice President (Research and Innovation) (VPRI) is the Project Holder.

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](#)

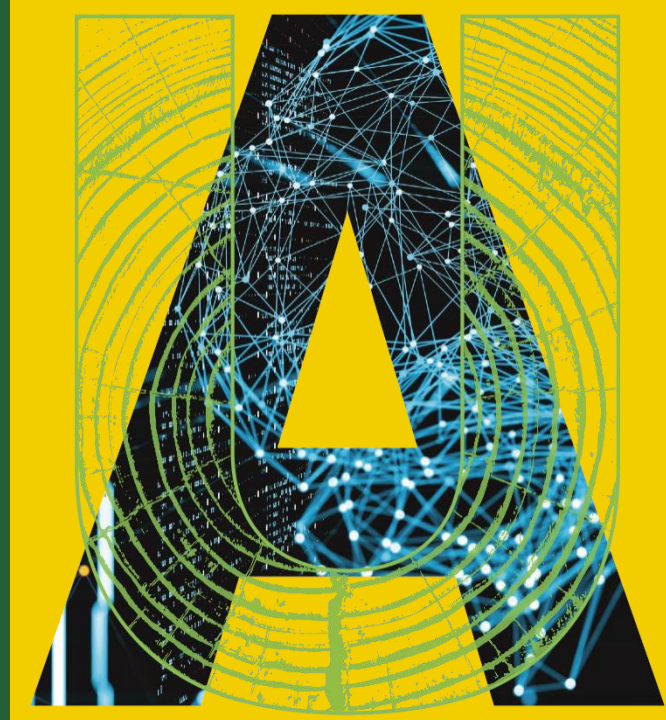
[Contact](#)

Contacts

Campus Unit	Name	Role	Phone	email
Office of Research	Joanne Lemieux	Vice-dean Research (Biomedical)		vdradmin@ualberta.ca
Office of Research	Gonzalo Vilas	Director, Research & Innovation	780.680.1109	gvilas@ualberta.ca
Office of Research	Matt Ormandy	Infrastructure Project Specialist		ormandy@ualberta.ca
Core Research Facilities	Colleen Sunderland	Manager, Core Research Facilities	780.492.0715	crreid1@ualberta.ca
Facility Planning & Projects	Brian Reuter	Scientific Equipment Advisor	780.492.2305	breuter@ualberta.ca



QUESTIONS ?



FACULTY OF MEDICINE AND DENTISTRY
Office of Research