**Strategic Science Fund**
**Merit Review Evaluation Grid for the Full Application**

| Principle / Rating | Element | High<br>5 | High-Medium<br>4 | Medium<br>3 | Medium-Low<br>2 | Low<br>1 |
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| **Strategic value aligned with core federal responsibilities and priorities** | Successful execution of the proposed strategic plan would significantly advance federal responsibilities and/or priorities | Successful execution of this proposal would **significantly advance** federal responsibilities and / or priorities | Between High and Medium | Successful execution of this proposal would **make a measurable contribution to advancing** federal priorities and / or priorities | Between Medium and Low | Successful execution of this proposal **would not advance** federal priorities or responsibilities |
| | The proposed objectives are effectively linked to federal priorities and responsibilities | **All** proposed objectives are **effectively linked** to federal priorities and responsibilities | Between High and Medium | Objectives are **somewhat linked** to federal priorities and responsibilities | Between Medium and Low | Proposed objectives are **not linked** to federal priorities and responsibilities |
| **Added value to federal science, technology and innovation (ST&I) investment** | There is a strong value proposition | The application **clearly outlines a strong and unique value proposition** to the ST&I ecosystem (e.g., identifying specific benefits to Canada that would not otherwise occur) | Between High and Medium | The application outlines a value proposition which **adds some value** to the ST&I ecosystem. | Between Medium and Low | There is **no compelling value proposition** to the application |
| | Other federally-supported organizations and programs in the ecosystem are effectively leveraged | The proposal **effectively leverages** other federally-supported organizations and programs in the ecosystem (e.g., with details on how existing investments are systematically considered) | Between High and Medium | The proposal leverages **some of** the federally-supported organizations and programs in the ecosystem. | Between Medium and Low | The proposal **does not effectively leverage** other federally-supported organizations and programs in the ecosystem. |
| **Presence at the national level** | The organization will have reach across the country (including in both official languages) and will incorporate viewpoints from across Canada into its operations. | The proposed activities will be **accessible to all relevant populations across Canada** and the organization will incorporate **viewpoints from across Canada into its operations** (e.g. with regionally diverse staff or other means).<br><br>If not already established nationally: there is **strong evidence** of support to expand nationally (e.g., concrete national commitments in Letters of Support) | Between High and Medium | The proposed activities will be accessible to **many relevant populations across Canada** and will **somewhat incorporate viewpoints from across Canada into its operations.**<br><br>If not already established nationally: there is **some evidence** of support to expand nationally (e.g. some commitments in Letters of Support) | Between Medium and Low | The proposed activities will only be accessible to a **limited segment of relevant populations across Canada.**<br><br>If not already established nationally: there is **no clear evidence of support to expand nationally** (e.g. only regional support within Letters of Support) |
| | The organization has engaged key stakeholders in the setting of objectives and delivery of activities. | It is clearly outlined **how** key stakeholders (including clients/end-users, for example Indigenous communities) have been **meaningfully engaged** in setting objectives and clear **how** they will be meaningfully engaged in the delivery of activities (e.g., as evidenced within Letters of Support) | Between High and Medium | It is stated **in general terms** that stakeholders have been engaged in setting objectives and that they will be engaged in the delivery of activities | Between Medium and Low | It is **unclear** that stakeholders have been engaged in setting objectives, and whether there are plans to engage them in the delivery of activities |
| | The organization has established key national partnerships (e.g. co-funders), including demonstrated engagement with relevant provinces and territories. | There is **strong evidence** (e.g., within letters of support) that **key partnerships** necessary to deliver at a national level have been established, including **strong** engagement with relevant provinces and territories. | Between High and Medium | There is **some evidence** that key partnerships necessary to deliver at a national level have been established | Between Medium and Low | There is **no clear evidence** that key national partnerships have been established. |
| | Regional diversity in the governance and advisory structures of the organization has been appropriately considered. | The Board of Directors **has significant and appropriate regional diversity,** or **clear plans** to reach significant and appropriate regional diversity **within a reasonable time frame** | Between High and Medium | The Board of Directors has **some regional diversity,** or plans to become **somewhat regionally diverse within a reasonable time frame** | Between Medium and Low | The Board of Directors **is centred around one region,** with **no clear plans** to increase regional diversity |

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| **ST&I capacity, sound governance, operational efficiency** | The proposed activities are likely to achieve the expected outcomes | There is a **robust link** between **all** proposed activities and the expected outcomes (e.g. as demonstrated through the logic model) | Between High and Medium | There is a **coherent link** between **some** of the proposed activities and the expected outcomes | Between Medium and Low | The proposed activities are **unlikely to achieve** the expected outcomes. |
| | The organizations will have the right mix of specialized mechanisms and expertise (e.g. scientific, financial, IP, diversity, interdisciplinarity) to deliver on the proposed activities. | The expertise necessary to deliver on the proposed objectives **is clearly outlined,** as is **the extent to which it is already present** (or the extent to which there is a **clear plan to secure this expertise** if not already present) | Between High and Medium | The type of expertise necessary to deliver on the proposed objectives **is outlined**, and there is **some mention of the extent** to which it is already present (or **some mention** of a plan to secure the expertise if not already present) | Between Medium and Low | The type of expertise necessary to deliver on the proposed objectives **is not mentioned.** |
| | Effective governance is in place (or planned), including the breadth of expertise necessary to effectively oversee the proposed functions. | The Board of Directors **has or plans to have** the breadth of expertise necessary to oversee the proposed functions. There is **strong evidence** of effective governance (e.g. demonstrated in the Board minutes, audits and evaluations), showing appropriate input in strategy development, monitoring progress, and ensuring the right advisory structures are in place.<br><br>If the organization is newly established, there is a **strong plan** in place for effective governance, including a plan to recruit the breadth of expertise necessary to oversee the proposed functions. | Between High and Medium | The Board of Directors has or plans to have **some** of the breadth of expertise necessary to oversee the proposed functions. There is **some limited evidence** of effective governance.<br><br>If the organization is newly established, there is a **high-level plan** in place for effective governance. | Between Medium and Low | There is **no clear evidence** that effective governance is or will be in place. |
| | The right policies, recourse mechanisms, guidelines and training have been identified to ensure the organization meets the highest standards of governance and operations in all areas of activities | The organization **has put in place** or planned with a **specific timeline (e.g. by July xx, 20xx)** the necessary organizational policies, recourse mechanisms, guidelines and training for the proposed activities. There is **strong evidence** that they align with best practices in **all** proposed areas of activities. | Between High and Medium | The organization has **identified and planned some** of the necessary organizational policies, recourse mechanisms, guidelines and training for the proposed activities. There is **some evidence** that they align with best practices in proposed areas of activities. | Between Medium and Low | The organization **has not identified or planned** the necessary organizational policies, recourse mechanisms, guidelines and training for the proposed activities. |
| | Research security and integrity, cybersecurity and physical security have been adequately considered and addressed, including within the selection of proposed partners | The organization **has put in place** or planned with a specific timeline (e.g. by July xx, 20xx) the appropriate processes to identify and mitigate risks related to any applicable areas of research security and integrity, cybersecurity and physical security. | Between High and Medium | The organization has **identified and planned some** of the appropriate processes to identify and mitigate risks related to any applicable areas of research security and integrity, cybersecurity and physical security. | Between Medium and Low | The organization **has not identified or planned** the appropriate processes to identify and mitigate risks related to any applicable areas of research security and integrity, cybersecurity and physical security. |
| | The plan to protect and manage intellectual property to the greatest benefit to Canada is appropriate | There is a **strong plan** which considers the process for disclosure of new IP, the ability to share IP for research and educational purposes, and that maximizes potential benefits to Canada.<br><br>In cases where no IP is expected to be generated: There is an adequate justification for why no IP is expected. | Between High and Medium | There is a **high-level plan** for IP management with **some details** on how benefits to Canada will be maximized. | Between Medium and Low | There is **no plan** to protect and manage IP and no justification as to why no IP is expected to be generated. |
| | The operational plan has appropriately integrated Equity, Diversity and Inclusion considerations | The operational plan has appropriately considered EDI in **all areas of activities.** The organization **has secured or has strong plans to secure** the necessary EDI expertise (e.g. individuals with the skill-sets to reach target populations in a culturally appropriate way). | Between High and Medium | The organization has considered EDI in **some areas of activities.** There are **general statements** about securing EDI expertise in the future. | Between Medium and Low | The organization **has not appropriately integrated EDI considerations.** |
| | A credible plan is in place for the organizational make-up to reflect Equity, Diversity and Inclusion goals, including gender parity (50% women) and significant representation of other under-represented groups (30%) within the Board and Senior Management | The organization has **established a strong plan (e.g. as evidenced within hiring policies, succession plans for senior management, recruitment plans)** with a **specific timeline which:**<br>• **Achieves** 50% women and 30% significant representation of other under-represented groups within its Senior Management and Board of Directors (including from under-represented groups specifically intended to benefit from the proposed activities), and discusses how it will build from this plan to set more ambitious goals.<br>• Ensures that the overall organizational make-up reflects Equity, Diversity and Inclusion goals. | Between High and Medium | The organization has **established a reasonable plan** to reach 50% women and 30% significant representation of other under-represented groups within its Senior Management and Board of Directors, and for the overall organizational make-up | Between Medium and Low | The organization **has not planned** any actions to reach representation goals within a reasonable time frame. |

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| **Critical role of federal funding** | The application fully justifies the requested level of funds | The necessary level of funds are **fully justified** to realize the proposed activities and **could not reasonably be scaled down**. | Between High and Medium | The applications gives **some reasonable justification** for the size of the funding request. | Between Medium and Low | The application **does not adequately justify** the size of the funding request. |
| | The financial plan is viable, with assumptions and risks adequately explained | The financial plan appears viable, with assumptions and risks that are **clearly explained and appear reasonable.** | Between High and Medium | Assumptions are **explained and appear generally reasonable**. | Between Medium and Low | High-level assumptions for the budget **are not explained.** |
| | The role and importance of federal funding has been effectively explained | There is a **clearly articulated role and importance** (e.g. anchor function) for federal funding of the proposed activities; partner funding alone **would not** be able to sustain proposed activities (e.g. due to scale or jurisdiction) | Between High and Medium | There is an **articulated need** (e.g. anchor function) for federal funding of the proposed activities; partner funding would **not likely** be able to sustain proposed activities | Between Medium and Low | The application **does not outline** a clear need for federal funding in relation to other commitments from partners. |
| | The role of non-federal funding has been effectively explained and the expected matched funding ratio is appropriate | The expected level of matched funding **meets or exceeds** ratios in the context of previous federal funding (**and/or is appropriate relative to the activities proposed**)<br><br>If fundraising is a material part of expected matched funds, there is a **robust** fundraising strategy in place. | Between High and Medium | The level of matched funding **is somewhat below** ratios in the context of previous federal funding for similar activities (and/or is **somewhat below** what is appropriate relative to the activities proposed) | Between Medium and Low | The level of matched funding is **at an unacceptable level** for the activities proposed. |
| | There is a reasonably decreased reliance on federal funds over time (where appropriate) | There is a **strong plan** for decreased reliance on federal funds over time and an **appropriate** diversification of funding sources.<br><br>Or<br><br>There is a **clear and compelling justification** for not planning a decreased reliance on federal funds over time. | Between High and Medium | There is a **plan** for some decreased reliance on federal funds over time.<br><br>Or<br><br>There is **generally** reasonable justification for not planning a decreased reliance on federal funds over time. | Between Medium and Low | There is **no clear plan** for decreased reliance on federal funds over time.<br><br>Or<br><br>There is **no clear justification** for not planning a decreased reliance on federal funds over time. |
| **Demonstrable impact** | The selected objectives and linked performance indicators are realistic and achievable within the timeframe. | Indicators and targets are **convincingly linked** to the proposed objectives, **are appropriate to measure** the overall success, and are realistic and achievable. | Between High and Medium | Indicators and targets are **somewhat linked** to the proposed objectives and **will give some measure** of the overall success. | Between Medium and Low | **No convincing rationale** was given for selecting the Key Performance Indicators and related targets. |
| | The plan for ongoing risk and performance monitoring is appropriate, including specific mechanisms to terminate and re-allocate funding (where appropriate) | There is a **robust plan** for monitoring performance and risks, **including specific mechanisms** to terminate and re-allocate funding (where appropriate) | Between High and Medium | There is a **general plan** for monitoring performance and risks, including the **general intent** to have the ability to terminate and re-allocate funding (where appropriate) | Between Medium and Low | There is **no appropriate plan** for ongoing risk and performance monitoring. |
| | For organizations with a track record of federal funding: The organization has established a track record of significant achievement | There is **strong evidence** that the organization has a track record of significant achievement with past federal funding. | Between High and Medium | There is **evidence** that the organization has had **some success** in reaching its past objectives with federal funding. | Between Medium and Low | There is **no indication** of success at reaching past objectives with federal funding. |