



Strategic Science Fund: **Program guide**

May 4, 2022 Version

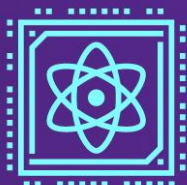


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Summary of updates

May 4, 2022:

- Clarified situations where individuals can receive funds under section 2.3;
- Added reference to participation in the SSF Community of Practice in Section 2.4;
- Added reference to the new definition of matched funds under section 2.5, including ineligible sources of matched funds;
- Clarified that the Reserve Fund relates only to the SSF-supported operations in 2.10.7;
- Clarified that incremental salary costs can be included under Mobilization of Knowledge and Networking, and expanded on support for indirect costs of other entities in section 3.2;
- Added SSF glossary (Appendix C).

1. Overview

1.1. Goals and objectives

The Strategic Science Fund (SSF) aims to mobilize the expertise and resources of independent science and research not-for-profit organizations to enhance Canada's science, technology and innovation (ST&I) excellence. SSF investments will achieve results for Canadians by addressing critical needs, such as supporting Canada's knowledge economy, in areas or in ways that advance federal objectives. The SSF program is jointly administered by Innovation, Science and Economic Development Canada (ISED) and Health Canada, via a Program Management Committee and Steering Committee.

By supporting a diverse portfolio of organizations, the SSF will achieve the following objectives:

- Research: Increase the quality of internationally competitive leading-edge research in areas critical to health, economic, and social and well-being of Canadians;
- Talent: Develop, attract and retain world-class research and innovation talent in scientific areas that are aligned with Canada's priorities;
- Knowledge Mobilization: Accelerate the exchange of research results and the translation of this knowledge into action in Canada and abroad; and,
- Culture: Strengthen evidence-based decision-making, innovation skills development, and science culture.

1.2. Expected outcomes

Targeted funding to the eligible recipients of the SSF will contribute to achieving the following outcomes:

Immediate:

- Interdisciplinary and equity-focused research, training and learning is conducted;

- Increased collaboration among academia, research institutes, non-profit, private and public sector, and diverse international and community organizations;

Intermediate:

- Scientific knowledge is produced and disseminated to diverse end users;
- Scientific literacy and scientific skills are developed among diverse target populations;

Ultimate:

- Scientific research and innovation produces economic, societal and health benefits; and
- Skilled, diverse people fulfill industry and societal needs.

1.3. Competitions

SSF competitions will be launched periodically to support organizations for 5-year funding cycles. Competitions will use a 2-phase application process: letters of intent (LOIs) and full applications.

Letter of intent

The LOIs will be reviewed and assessed by the SSF Secretariat, with input from other governmental departments and agencies, as appropriate, to confirm the extent to which each LOI responds to the merit-review criteria. Based on assessments and advice at this stage, applicants will be invited to submit a full application. The SSF Program Management committee will review assessments and present advice to the SSF Steering Committee who will make the final decision on organizations to be invited to submit full applications.

Full application

The review and assessment of full applications will include:

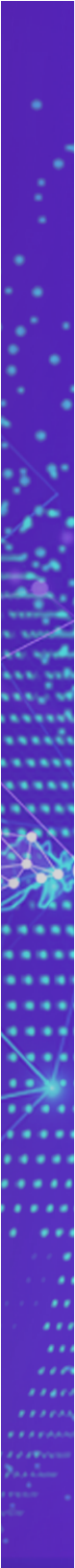
- a technical review by at least 2 subject matter experts; and
- a multidisciplinary expert panel that will consider technical reviews and provide recommendations on a strategic portfolio of proposals to support.

Based on the advice of the expert panel and the SSF Program Management Committee, the SSF Steering Committee will make funding recommendations to the Minister of Innovation, Science and Industry and the Minister of Health.

1.4. Criteria

Applications from eligible applicants will be evaluated using a principles-based approach against the following criteria:

- Strategic value aligned with core federal responsibilities and priorities
- Added value to federal ST&I investments
- Presence at the national level
- ST&I capacity, sound governance and operational efficiency



- Critical role of federal funding
- Demonstrable impact

More information about the elements considered within the criteria will be provided in each competition's letter of intent and full application guides and assessment matrices.

2. SSF requirements for funded recipients

2.1. Eligible recipients

Eligible Recipients are not-for-profit organizations, which are incorporated in Canada, undertaking activities, as generally described in section 3.1.

2.2. Contribution agreement

Prior to receiving funds under the SSF, a successful applicant is required to enter into a contribution agreement with the appropriate authority (ISED or Health Canada).

Non-repayable contributions will be negotiated to be the minimum amount required, in the opinion of the Ministers of ISED and Health, to allow a successful applicant to proceed with its approved proposal.

2.3. Further distribution by recipients

In certain cases, the contribution agreement may allow the SSF Recipient to further distribute funds to other entities through the use of separate agreements. Other entities may include:

- Post-secondary institutions;
- Research hospitals;
- Not-for-profit organizations;
- Research networks; and
- Start-up companies housed in Canadian post-secondary-linked incubators.

They do not include federal departments, agencies or crown corporations of the Government of Canada.

Where payments can be considered low-value and low-risk, the contribution agreements may allow the SSF Recipient to further distribute funds to individuals through the use of separate agreements. Such individuals may include:

- Canadian and international students, post-doctoral fellows;
- Canadian researchers.

Where the Recipient further distributes funds to another entity or individual, it must ensure that this decision is based on merit. Specific provisions regarding the Recipient's further distribution of funding will be set out in the contribution agreement. Guidelines on requirements for separate agreements to further distribute funding are available in [Appendix A](#).

2.4. Governance and management requirements for recipients

Recipients must be governed by a Board of Directors with the breadth of expertise necessary to oversee the functions of SSF-funded activities. At least one third of the Board must be composed of independent members. The Chair must be independent (including from other Directors).

The Board of Directors should be responsible for:

- developing strategy and ensuring that strategic goals have been translated into measurable objectives and benchmarks that can be monitored by the Board;
- hiring and setting the compensation of the President / CEO, as well as conducting their performance evaluation; and
- ensuring that the right policies, guidelines and training have been established to allow the organization to meet the highest standards of governance.

The Board must conduct annual self-evaluations to identify areas of possible improvement.

The President / CEO is responsible for building the overall team and managing day-to-day operations. This includes ensuring access to the specialized expertise required to support the SSF activities. For example:

- For organizations that support research:
 - Establishing an independent advisory structure to conduct peer-review of research proposals;
 - Recruiting a body of international, diverse and independent advisors to advise on the overarching research program;
 - Putting structures and mechanisms in place to receive and respond to feedback from the community of key stakeholders (including those with lived experience).
- For organizations that support knowledge mobilization and commercialization:
 - Ensuring the presence of knowledge brokers with specific expertise in the creation of products and tools for specific groups of end-users and receptors;
 - Hiring staff with specialized expertise in Knowledge Mobilization, IP or commercialization that will enable the creation of spin-off companies.
- For organizations that support training and talent development:
 - Creating an advisory structure of diverse trainees and experienced advisors to advise on the training program offerings.

They are also responsible for ensuring their organization contributes to the broader Science, Technology & Innovation ecosystem, including participation to the SSF Community of Practice, which will aim to:

- Improve overall coordination;
- Help position the Canadian ST&I ecosystem for success; and,
- Amplify potential impacts.

2.5. Matched funds

Matched funds are new, incremental contributions (of cash or in-kind) for **Eligible SSF Expenditures**, which would not exist in the absence of an SSF award (see the definition in the glossary for further details). They do not include the leveraged funds (see definition), representing existing investments in the ST&I ecosystem.

When reviewing the full applications, the expert panel will make recommendations on whether a matched funding model should be required for the organization. The expert panel will consider factors such as type of organization and the work it undertakes, past experience with matched funding, and individual context including whether the benefit of matched funding would outweigh the burden imposed upon the organization. It is recognized that in certain cases, past matching ratios may have combined leveraged funds and matched funds, and in those cases would not be considered the established SSF ratio.

If appropriate, the expert panel will recommend an appropriate minimum threshold of cash/in-kind contributions for the proposed activities, and this threshold which will be set within the recipient's contribution agreement.

In the case where a material portion of matching funds is expected to come from donations, a specific fundraising strategy must be established and maintained, and the Recipient must explain how they are positioned to meet their fundraising objectives.

The method for calculating the value of in-kind contributions must align with the guidelines outlined in **Appendix B**.

Ineligible sources of matching funds include:

- Contributions from co-funders where an analysis of partner risk has not been conducted. For more on this topic, see section [2.10.4 Research Security and Cybersecurity](#);
- All federal sources of funds, including all federal funds that flow through separate entities (e.g., Tri-Agency funding to universities, federal funding to other organizations). While these sources of funds cannot count as matching, collaborations with the holders of those funds and with Federal Science-Based Departments and Agencies are encouraged; and
- Funds that have been reported as matching for another federal program.

2.6. Financial and performance reporting

Reporting requirements will be identified in the contribution agreements. Recipients will implement a data collection and management strategy (see [2.10.5 Data Management](#)) to enable the capture of necessary information. The frequency of reporting (“reporting period”) will be established using a risk-based approach, and may be quarterly, biannual or annual. Requirements include:

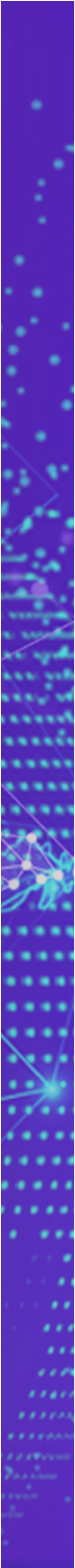
Plans for the upcoming fiscal year / reporting period: the Recipient shall provide plans related to the upcoming reporting period to the satisfaction of the respective Minister for which the Recipient is awarded a contribution. Such plans will include, but not be limited to:

- A statement outlining whether and how the strategic plan (originally submitted as part of the full application) has been adapted to ensure continued alignment with the strategic priorities and responsibilities of the federal government;
- A statement of the organization’s objectives for the upcoming year / reporting period with respect to the funded initiative;
- Recipient’s short-term and medium-term outcomes associated with their planned activities;
- A description of the proposed activities to be undertaken in the upcoming year / reporting period, including expected outputs/ anticipated results of those activities and planned expenditures for the activities by source of funding and how those activities will advance the outcomes and federal priorities;
- Annual cash flow requirements for proposed expenditures including, but not limited to, the amount requested for disbursement in the upcoming year / reporting period;
- Risk assessments and mitigation strategies and ongoing performance monitoring strategies; and
- Planned activities designed to advance equity, diversity and inclusion (in the Recipient organization as well as in its activities).

Reporting on progress and results: The Recipient shall report on results achieved for each reporting period in which funding has been received. The reports to the Ministers shall include, but will not be limited to:

- A description of the extent to which the Recipient has met its objectives for the reporting period, including a description of eligible activities undertaken with the contribution, funding detailed by expenditure type, a description of progress achieved to date, a statement of eligible expenditures incurred and paid, and a summary of risks identified and the plans to mitigate them;
- Any update of Recipients’ investment policies, standards and procedures, where relevant;
- A summary of the result of audits and evaluations carried out during the year, if any;
- A summary of funds leveraged from other sources, which may include provincial, regional, and municipal government, the private sector, other federal government departments and other private sources;
- An account of performance and activities undertaken to advance equity, diversity and inclusion; and
- Statistical information, as well as disaggregated data to support equity, diversity and inclusion analysis (where possible), including:

Requirement	Example of relevant data to support EDI
Number and value of projects and number of R&D collaborations supported	Composition of the project teams
Amount leveraged from other sources per dollar invested by the SSF	Amount contributed by EDI-focused organizations



Number of projects involving partners in different sectors (e.g., academia, private sector, not-for-profit) and international collaborators on funded projects	Number of collaborations with EDI-focused organizations; Number of collaborations with businesses that are majority-owned or co-owned by under-represented groups
Number of individuals who have developed new skills (e.g., scientific, entrepreneurial, business, scientific literacy) and training and learning opportunities supported.	Number of individuals from under-represented groups who have developed new skills or been offered training and learning opportunities
Number of new or improved products (including knowledge products), services and processes accessible to end-users	Number of new or improved products (including knowledge products), services and processes accessible to women, gender-diverse individuals and under-represented groups
Number and type of intellectual property and publications	Composition of the owners of intellectual property

In addition, Recipients must publish a corporate public-facing annual report accessible on their website in both official languages.

2.7. Communications

The Recipient's activities, results and accomplishments should be conveyed to external audiences, including potential participants from all sectors, public policy makers, the media and the public. Communications are subject to official language requirements (see section 2.10.6 Official Languages for details).

For the duration of the contribution agreement, the Recipient's communications activities and messages must acknowledge the contribution of the federal government to SSF-funded activities.

2.8. Requirements for certain types of research

Recipients must ensure compliance with the federal [Framework for Responsible Conduct of Research](#), which includes requirements for certain types of research:

- Research involving human subjects shall meet the requirements of the [Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans](#).
 - In particular, the provisions of [Chapter 9: Research Involving the First Nations, Inuit and Métis Peoples of Canada](#) should be well understood by all individuals involved in a component of research involving Indigenous Peoples of Canada.

- Research requiring the use of animals shall be conducted in accordance with the policies and guidelines of the [Canadian Council on Animal Care \(CCAC\) Guide to the Care and Use of Experimental Animals](#) and hold a valid Certificate of Good Animal Practice.
- Research involving biohazards or infectious agents must adhere to the standards outlined in the latest edition of the [Canadian Biosafety Standards and Guidelines](#) prepared by the Public Health Agency of Canada.
- Research involving radioactive materials must comply with all Canadian Nuclear Safety Commission (CNSC) [Acts and Regulations](#), including recommended procedures and safety precautions governing the use of such materials in Canada.
- Research activities having potential effects on the environment must adhere to the [Impact Assessment Act](#) (see [Practitioner's Guide to the Impact Assessment Act - Canada.ca](#) for further details).
- Research involving controlled information must comply with all laws and regulations regarding Controlled Information, including but not limited to the *Defence Production Act*, *Export Control Regulations*, and the *Controlled Goods Regulations* before, during or after the tenure of the contribution. The Recipient will ensure that information reported to the SSF will not include information subject to restrictions or controls under the *Export and Import Permits Act* or its regulations, the *Export Control Regulations* or the *Controlled Goods Regulations* (see [Controlled goods: Examining, possessing or transferring – Canada.ca \(tpsgc-pwgsc.gc.ca\)](#) for details).
- Research performed in the Yukon, the Northwest Territories and Nunavut must be accompanied by the appropriate licences for all researchers. Research in the North should be governed by a set of ethical principles as described in the publications by the Association of Canadian Universities for Northern Studies titled - [Ethical Principles for the Conduct of Research in the North](#).

2.9. Open access and research data management

Where activities include research, recipients must ensure compliance and alignment with the federal [Open Access Policy on Publications](#) and the [Research Data Management policy](#). The Recipient should adopt Open Science principles that maximize the value of all research activities, including by making negative research findings accessible where possible.

2.10. Other requirements for recipients

The Board of Directors is responsible for ensuring that the Recipient is managed according to the rules and regulations of governing a not-for-profit organization. Activities specific to an incorporated Recipient, such as reports to the Canada Revenue Agency, are not under the purview of the SSF Program and will be the responsibility of the SSF Recipient.

In addition, the Recipient must develop policies, codes of conduct and/or training in the following areas:

2.10.1. Privacy and protection of personal information

Recipients are required to meet the applicable federal, provincial and/or territorial privacy legislative requirements in order to safeguard any personal information resulting from the activities funded by the contribution agreement.

Recipients are also required to have comprehensive internal privacy policies which address how they collect, use, and disclose personal information in order to safeguard any personal information resulting from the activities funded by the contribution agreement.

2.10.2. Conflict of interest policy

Achieving the objectives of the SSF involves various types of interactions, some of which may place individuals in positions of potential, apparent or actual conflict of interest. The Recipient must adopt a code of conduct for directors, officers, employees and committee members designed to prevent real or perceived conflicts of interest.

2.10.3 Equity, diversity and inclusion policy

The participation of diverse individuals, inclusive of members of under-represented groups and Indigenous peoples, is essential to create and mobilize Canada's best research, technological development and entrepreneurial expertise to create excellent, innovative and impactful results. Recipients are expected to support the inclusion and advancement of under-represented groups (e.g., Indigenous Peoples, racialized Canadians, LGBTQ2+ individuals, persons with disabilities) and must develop policies and practices that ensures the use of an Equity, Diversity and Inclusion lens in all of its activities. The Recipient must also develop a plan and timeline to move towards gender parity (50%) and significant representation (at least 30%) of under-represented groups on its Board of Directors and Senior Management.

Where applicable, Recipients should ensure the direct involvement and participation of Indigenous peoples in activities. The Government of Canada is committed to a renewed relationship with Indigenous peoples, based on recognition of rights, respect, cooperation and partnership, including in the way that research, knowledge mobilization and training are funded and conducted.

2.10.4 Research security and cybersecurity

As noted in the [Research Security Policy Statement \(Spring 2021\)](#), Canada's world-class research, and its open and collaborative research environment, are increasingly targeted by espionage and foreign interference activities.

The Recipient must establish processes respecting the [National Security Guidelines for Research Partnerships](#), which includes an analysis of risks in sensitive research areas and an analysis of partner risks. For meritorious projects deemed to have risks, the analysis must be reported to the Government of Canada before projects commence. Contribution agreements will reserve the right of the Government of Canada to decline the participation of any partner and review activities on national security grounds.

The Recipient must adopt practices to mitigate potential research security risks, including by accessing existing tools available such as through the [Safeguarding Your Research](#) portal and [Safeguarding Science](#)'s workshops.

The Recipient must also develop a cyber security plan, which outlines how it intends to ensure cyber resilience, including strategies to identify, protect, detect, respond and recover from potential cyber security incidents.



Where relevant, Recipient's partners are encouraged to apply for the [CyberSecure Canada certification](#). CyberSecure Canada is a federal cyber certification program that aims to raise the cyber security baseline among SMEs in Canada. The CyberSecure Canada certification gives those certified official recognition by the federal government for demonstrating their compliance to the baseline security controls.

2.10.5 Data management

The Recipient must implement a data management strategy that will respect principles of data management (i.e., data governance, ownership, collection, sharing, integrity) in its operations. The strategy should be mindful of the requirement outlined in [2.9 Open Access and Research Data Management](#).

2.10.6 Official languages

The Recipient's specific obligations related to Part IV of the *Official Languages Act* will be specified within their contribution agreement. Recipient's annual reports will be made available to the public in both official languages. Any nation-wide communications or announcements aimed at the general public will be provided in both official languages. Additional official languages requirements will be determined on a case by case basis.

2.10.7 Reserve fund

The SSF is geared to support initiatives closely aligned with federal priorities, which are subject to evolve over time. Recognizing that funded activities may not be supported beyond the current funding term, the recipient is required to establish a reserve fund policy to ensure the availability of enough unrestricted funds to support the wind-down of the operations supported by the SSF. Alternatively, the organization may opt to develop a sustainability plan in order to continue the initiative without federal support.

2.10.8 Psychological and sexual harassment

The Recipient must establish and make available to employees a policy on prevention of psychological and sexual harassment, including a mechanism for complaints.

2.10.9 Intellectual property and benefits to Canada

Where activities may generate intellectual property, the Recipient must establish a policy that encourages and facilitates commercialization for the greatest benefit to Canada. Every effort must be made to have the results of SSF-funded activities exploited in Canada, for the benefit of Canada and the Canadian population. Ahead of finalizing a decision to pursue exploitation by a foreign company, the Recipient must seek approval from SSF Program officials.

Specific additional IP obligations may be imposed in contribution agreements to ensure that the IP benefits resulting from the contributions adequately accrue to Canada and Canadians. These additional obligations could include:

- Requiring the Recipient to provide the respective Minister an acceptable IP strategy or IP policy;

- Requiring the Recipient to provide the respective Minister an acceptable plan to support IP education and awareness of researchers, firms or others supported;
- Requiring the Recipient, or those who receive funds by the Recipient, to maintain a sufficient interest in resulting Intellectual Property, such as through ownership or licence;
- Ensuring the Recipient owns or holds sufficient IP rights to carry out the project; and,
- Imposing additional reporting requirements around IP obligations.

3. Eligible activities and expenditures

3.1. Eligible activities

The Eligible activities are those that will contribute to attaining the objectives of the SSF. Eligible recipients must clearly outline how their proposal's activities will meet the objectives and expected results of the SSF. Eligible activities include:

- Research and the translation of research in critical areas of science and technology for the development of products and services, including treatments, technologies, interventions, as well as for informing public policy development and decision-making;
- Communication, dissemination and exchange of research results;
- Collaborative activities, including participation of Canadian researchers in international projects;
- Stakeholder engagement and efforts to convene the research community;
- Activities to support the creation, growth and retention of companies;
- Training and delivery of work integrated learning;
- Internships;
- Activities to attract, retain and develop highly qualified and industry-ready personnel;
- Development and delivery of science, technology, engineering and mathematics (STEM) learning activities;
- Public education and communications related to science;
- Fundraising efforts designed to generate awareness and interest in research activities and help to secure additional financial resources; and,
- Day-to-day operations as they relate to the fulfilment of the terms of the contribution agreements.

3.2. Eligible expenditures

Eligible expenditures are those incurred by the Recipient and which, in the opinion of the respective Minister, are reasonable and required to carry out the eligible activities to which they relate. Without limiting the generality of the foregoing, the following expenditures are eligible:

- **Research** includes expenses related to:
 - Incremental research costs, including salaries* of researchers and research staff, related costs of students, highly qualified personnel (HQP), trainees;
 - Operations of core research facilities;

- Equipment (except where the scale of costs fall within the mandate of the Canada Foundation for Innovation) ; scientific collections; costs of computer hardware or software (except where the scale of costs fall within the mandate of the Digital Research Alliance of Canada) ; information databases;
- Direct cost of knowledge creation;
- Professional and technical services;
- Material and supplies; and
- Research-related travel and accommodation costs**.
- **Mobilization of knowledge or technology transfer** includes expenses related to:
 - Incremental knowledge mobilization and technology transfer costs, including salaries of staff, related costs of students, highly-qualified personnel (HQP, trainees);
 - Policy development;
 - Tool development and evaluation;
 - Intellectual property protection;
 - Market study;and
 - Prototype development.
- **Networking** includes expenses related to:
 - Incremental networking costs, including salaries of staff, related costs of students, highly-qualified personnel (HQP, trainees);
 - Seminars and workshops;
 - Networking meetings;
 - Conferences**; and
 - Communications.
- **Operations:** As these expenditures depend on the nature and scope of the Recipient's activities, they will be specified in the contribution agreements but will not generally surpass 15%. The portion of operations funded by the SSF will be expected to decline over time. Includes expenses related to:
 - Administrative salaries*, benefits (e.g.,: workplace safety insurance, pension benefits, medical, vision and dental care benefits, parental leave – the costs of the benefits package should be in the average market range) and management fees;
 - Goods and services of contractual personnel*;
 - Consulting and/or technical services (including translation)*;
 - Office supplies/services;
 - Insurance (e.g., liability);
 - Staff travel and accommodation**;
 - Rent and utilities; and
 - Audits.
- **Other:** Any other expenses. Use of this category requires additional justification through reporting to the SSF. Includes expenses related to:
 - Support for overhead costs (indirect costs) of other entities to which funds have been redistributed for projects. This type of expense is eligible provided that the rate is established considering the scale of the project (i.e., not using a general flat-rate charge which does not consider context), and does not generally surpass 15% of project costs. Funding from the SSF is not part of the calculation for the Research Support Fund.

* **Salaries:** Maximum remuneration costs paid with SSF Funds (including all salaries and rates charged by contractors) cannot exceed the current Full-Time Equivalent [rates of pay](#) for public service employees for similar function and classifications (e.g.,: SE Scientific Research ; AS

Administrative Services; CM Communications; EX for leadership positions). The organization may decide to pay above these scales, but cannot do so with SSF funds.

****Travel and Accommodation Costs:** Costs must be generally aligned with the National Joint Council's [Travel Directive](#) or similar institutional directive.

Ineligible expenditures

The following expenses are **non-eligible**:

- Costs associated with the construction of, or major renovation to building and structures;
- Flat-rate charges for overhead costs (indirect costs);
- The purchase or lease of land;
- Alcoholic refreshments;
- Hospitality costs for meetings attended by Recipient staff; and
- The acquisition of major research equipment (the limit amount for each Recipient will vary depending on the nature and scope of their activities and will be specified in the contribution agreements).

For guidelines on the calculation of in-kind contributions, refer to [Appendix B](#).

4. Program administration

4.1. Amount and payments

Funding delivered through the SSF will be provided in the form of non-repayable contributions. The contribution amount is the amount of assistance that, in the opinion of the Ministers, is the minimum level of support required by the Eligible Recipient to ensure the attainment of the stated SSF program objectives and expected results. Payments will be made in the form of advance payments, which will be subject to a risk assessment of the funding and to the Recipient's annual cash flow requirements to be provided to the respective Minister by the Recipient as part of its annual plan (see section 2.6).

Payments will be reconciled with cash flow requirements. At any time, Recipients may be requested to provide satisfactory evidence to demonstrate that eligible expenditures claimed have been incurred.

Provisions on requirements for document retention will be detailed in contribution agreements.

4.2. Stacking provisions

Total Canadian government assistance to the eligible activities is not to exceed 100% of eligible expenditures. The assessment of required funding levels will take into consideration the total Canadian government assistance (federal, provincial, territorial and municipal) towards the eligible expenditures supported by the contribution. For contributions that support research activities that take place within industry and primarily benefit an industrial partner, the maximum amount of total Canadian government assistance is 75% of the total eligible expenditures.

Recipients may choose to involve federal or other public organizations in the execution of their plans (e.g., as part of funded projects). Seeking other funding to expand the scale or scope of activities to further the objectives of the contribution agreement is encouraged.

All Recipients will be required to inform the Ministers on a continuous basis of any other government (federal, provincial, territorial, municipal) financial assistance they have requested and/or received.

4.3. Monitoring, guidance and support

ISED and Health Canada officials will designate specific staff to liaise with the Recipient, monitor its progress to date and offer guidance on relevant policies. This may include periodic attendance at Board meetings as an observer. Regular and frequent contact will facilitate the sharing of information between parties to the contribution agreement and the facilitation of linkages between the Recipient and other federal organizations.

4.4. Use and protection of information

Confidential information submitted as part of the review process or administration of the SSF will only be used by the federal government for the purpose for which it was collected, namely: reviewing applications, administering the SSF Program and monitoring recipients, or otherwise as required by law.

Applicants and Recipients must mark any commercially confidential information as such, and may also wish to become familiar with the terms of the *Access to Information Act* and the *Privacy Act*.

Any qualified third parties reviewing applications (e.g., expert reviewers) will be required to sign Non-Disclosure and Conflict of Interest Agreements, and are required to uphold the confidentiality of privileged information accessed in the assessment of applications, including trade secrets, proprietary business information or information that is commercial or financial.

4.5. Official languages

The SSF's call for proposals and its related funding decisions will be announced to the public in both official languages in accordance with the *Official Languages Act*. Other products and services related to the SSF, including website and reference material, templates, and assistance to Recipients, will also be available in both official languages.

The federal departments will be responsible for assessing the extent to which each resulting contribution agreement from the SSF's decisions falls under Part IV of the *Official Languages Act* and whether it should include the standard required language clauses.

The Recipient's annual reports will be made available to the public in both official languages. Any nation-wide communications or announcements aimed at the general public will be provided in both official languages. Additional official languages requirements will be determined on a case by case basis.



4.6. Intellectual property

ISED and Health Canada make no claim to ownership of intellectual property (IP) resulting from activities funded. Recipients shall take appropriate steps to protect and enforce the IP resulting directly or indirectly from activities supported through the Fund.

Contribution agreements may require that Recipients grant the Government of Canada a non-exclusive licence to the IP resulting from activities funded, including for the purpose of conducting research, policy development, or to publicly share program results and impacts.

4.7. Lobbying act

Recipients must comply with the *Lobbying Act* throughout the application process and the life of any SSF-funded project. Prior to communicating about an application, please review the provisions of the Act. For more information on lobbying and the *Lobbying Act*, consult the [Office of the Commissioner of Lobbying of Canada](#).

5. Contact us

If you have any questions or require additional information, you can reach the program at:

Email: strategicsciencefund-fondsstrategiquedessciences@ised-isde.gc.ca



Appendix A – Guidelines for agreements to further distribute funds

The SSF Recipient is the steward of SSF funds and related co-funding, and is responsible for the delivery of specific commitments to the federal government. In certain cases, the contribution agreement may allow the SSF Recipient to further distribute funds through the use of separate agreements. The SSF Recipient should solicit independent legal advice as necessary before entering into such agreements, and should include (where applicable):

- The goal and/or objectives of the SSF Funding;
- An overview of how the various types of participants (e.g.,: those receiving funding, those providing funding) interact with the SSF Recipient and each other;
- A description of the funding categories and any co-funding requirements, including an overview of eligible in-kind contributions;
- The processes to invite, identify, select and fund projects, if applicable;
- The approach to dealing with potential and real conflicts of interest;
- The term by which the agreement will be in effect with a possibility of extension depending on the results of a renewal, if applicable;
- The mechanisms and process for dispute resolution and withdrawal from the agreement.
- Provisions around the events of default that result in a termination of funding;
- A description of SSF-Supported Intellectual Property, including a general overview of how Intellectual Property is identified, who are the owners, the process of protection and the mechanism of access available to the various participants across the organization;
- An overview of the reporting requirements (i.e. frequency, conditional funding, review and decision making) and expected deliverables;
- The minimum time required for maintaining records;
- Requirements of declarations of any additional government funding received for the activities funded by the SSF Recipient (to enable oversight of the stacking requirements);
- A statement that all SSF funding, co-funding and all expenditures must be auditable and must not be double counted towards other federal government matching fund programs;
- A description of the benefits/rights of organizations providing funding for the activities as a result of their participation and contribution;
- If relevant, discuss the rights and limitations of access to the results of funded activities, as well as the maximum period that publications can be delayed when such a delay will interfere with the graduation of an individual;
- Acknowledgement of the receipt of funding from the SSF Recipient and the SSF Program in public documentation and/or publications;
- Requirements around the ethical conduct of research and where relevant, inclusion of the requirements for certain types of research as it applies to the areas of research;
- Requirements around research security and cybersecurity;
- A statement on the ownership of capital equipment purchased using SSF Funds, where that equipment resides, and what happens to that equipment following the term; and
- Where a significant demand exists for services in either official language, a clause requiring the communications to the public meet the linguistic demand.

Appendix B – Guidelines for calculating the value of in-kind contributions

In-kind contributions are defined as cash-equivalent goods or services that represent an **incremental expense** that would not otherwise be incurred and which would have to be paid for with cash if not provided.

In-kind contributions:

- Must be relevant and central to the activities or mandate of the Recipient;
- Must be eligible expenses as per the program guidelines; and
- Cannot have been used to fulfill the leveraging requirements of other federal programs.

The nature of an in-kind contribution and its valuation must be detailed. It is the responsibility of the Board of Directors to ensure that a proper accounting framework is created to ensure that the reported value for all items is reasonable. Justifications may be requested in the case of questionable valuations.

Calculation table

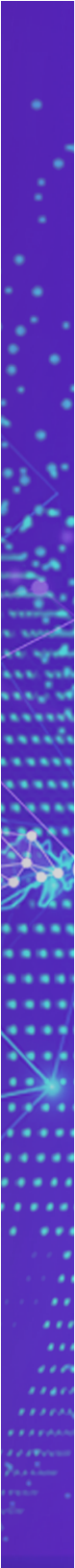
The table below is a non-exhaustive list of in-kind contributions, with an indication of how to calculate their value. If in doubt about a particular item, please contact program staff.

Category	Acceptable valuation	Not acceptable
Access to unique databases	Incremental cost of access	Cost of developing or maintaining database
Analytical and other services	Internal cost of services	Commercial cost of access
Equipment	<p>Donated (used)</p> <ul style="list-style-type: none"> -Fair market value -Company book value <p>Donated (new)</p> <ul style="list-style-type: none"> -Selling price to most favored customer (if stock item) -Cost of manufacture (if one of a kind) <p>Loaned</p> <ul style="list-style-type: none"> -Rental equivalent based on depreciation -Rental equivalent to highest-volume rate 	<p>List price or discounted list price</p> <p>Rental equivalents exceeding accepted values had the equipment been donated or sold</p> <p>Development costs</p>
Hospitality	Cost	Alcoholic refreshments

Materials	<ul style="list-style-type: none"> -Unit cost of production for commercial products -Selling price to most favoured customer -Price for internal transfers -Cost of production of prototypes and samples (excluding product under study in a clinical trial if it is a partner's product) 	<ul style="list-style-type: none"> -Development costs -In the case of randomized controlled trials, the cost of the medication under study, if it is a partner's product
Intellectual property	Fair market value of licencing and royalties	<ul style="list-style-type: none"> -Cost of maintenance and litigation -Licensing fees paid to partners
Professional and technical service contracts	Cost	
Salaries (General)	Actual salary cost (including benefits).	Salary overheads, external charge-out or consultant rates, cost of benefits outside the average market range.
Salaries (Academic researcher)	Actual costs to the institution for release time from teaching duties (e.g., the cost of hiring a sessional instructor for course release may be counted).	Academic faculty salaries
Salaries (Clinicians)	Portion of their salary for time devoted to working on SSF projects that are additional to their routine (including teaching or service work) activities	Remuneration already received for teaching or service work
Student stipends	Cost of the stipend equivalent to the portion of their time working on SSF work	The portion of time dedicated to non-SSF work
Software	<ul style="list-style-type: none"> -Most-favoured-customer cost for 1 licence per software package -Cost of equivalent commercial product (where donated software is not commercially available) -Cost of training and support (at the university/college site) for software by industrial partner personnel 	Development costs



Travel costs	Travel and accommodation costs (generally aligned with the National Joint Council's Travel Directive or similar institutional directive)	
Use of facilities	<ul style="list-style-type: none"> -Cost of access to the facility -Internal rates for use of specialized equipment -Internal rates for value of lost production, resulting from downtime 	



Appendix C – Glossary

Term	Definition
Leveraged funds	<p>Existing investments in the ST&I ecosystem being leveraged to further the objectives of the SSF Recipient.</p> <p>Includes cash or in-kind from federally-funded entities (e.g., CFI, organizations primarily funded by the federal government) and from federal departments and agencies.</p>
Matched funds	<p>New, incremental contributions (of cash or in-kind) for <i>Eligible SSF Expenditures</i>, which would not exist in the absence of an SSF award. Eligible sources include non-federal partners or revenues (including donations).</p> <p>Ineligible to be considered matched funds:</p> <ul style="list-style-type: none"> • Leveraged Funds (see definition) • funding from federally-funded entities (e.g., CFI, Digital Research Alliance of Canada, and organizations primarily funded by the federal government) and from federal departments and agencies. • funding already used to meet a matching requirement for a federal program.
Partner	<p>An organization that helps the SSF-funded organization carry out its mandate. Includes, but is not limited to Ultimate Recipients of SSF Funds (see definition), and entities involved in the delivery of programs or projects.</p> <p>An analysis of partner risk must be conducted in order for partners to be considered eligible. See the program guide for more detail.</p>
Partner funding	<p>Depending on the nature, can be considered either:</p> <ul style="list-style-type: none"> • Leveraged funds (see definition) • Matched funds (see definition)
Ultimate recipients	<p>Eligible entities to whom the SSF Recipient further distributes funds through the use of separate agreements, described in section 2.3.</p>

