

A stylized map of Canada composed of various shades of blue and teal triangles, overlaid on a white background. The map is centered and occupies most of the page's width.

Upskilling for Industry Initiative

Applicant Guide

March 2022

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1. Introduction

This Applicant Guide was prepared to assist in the completion of an application for the Upskilling for Industry Initiative (UII).

It is important to read this guide before starting to fill out an application to ensure a better understanding of the objectives of the UII and determine if an organization, project, and proposed activities may be eligible to receive funding.

An application must be complete and have all of the required information as outlined in this guide to be considered for funding.

For questions about this call for applications, please contact: isedskills-isdecompetences@ised-isde.gc.ca.

1.1 About the call for applications

Through the call for applications for the UII, Innovation, Science and Economic Development Canada (ISED) is seeking to select one or a limited number of Lead Recipient(s) to enter into contribution agreements totalling of up to \$250 million that would be ending by March 31, 2025.

ISED will select application(s) based on merit, with the preference being to identify a pan-Canadian solution via a single Lead Recipient for program delivery. Applications for sector or regional specific interventions may be considered to increase UII's overall reach and capacity to achieve its objectives. In addition, the sought after pan-Canadian solution should also seek to leverage existing business networks, training providers, and digital platforms to maximize impact.

ISED will aim to select application(s) that seek to advance upskilling initiatives in the following high-growth sectors: digital technology, cyber security, agriculture technology, advanced manufacturing, clean technology, and biomanufacturing. Applicants may propose additional high-growth sectors based on their analysis and expertise.

1.2 What is upskilling?

For the purpose of this initiative, upskilling is an employer-driven approach that seeks to identify industries' skills needs in high-growth sectors and respond to them by delivering short-cycle training to workers. Short-cycle upskilling (about 4 to 16 weeks in duration) consists of a mix of specialized technical training as well as general business and interpersonal skills, such as communications, teamwork, and project management. The mix between technical, general business, and interpersonal skills may vary based on the employers' needs and the pre-existing qualifications of the pool of workers. The targeted program participants are workers with at least three years of work experience.

1.3 Context

Global and domestic workforce trends are accelerating. The continued rise of automation, digital technologies, and artificial intelligence, the shift towards a net-zero economy, and changes in employee demographics, among other trends, have created significant gaps between the skills demanded by employers and the supply of the existing workforce.

Further, while many Canadians who became unemployed during the COVID-19 pandemic have returned to their previous jobs, for some, shifts in the economy mean that their positions no longer exist. In addition, structural changes and labour market imbalances are driving many workers to look for new and better jobs in more resilient industries. A lack of knowledge of the skills in demand may hinder the job transition of workers, especially those from underrepresented groups¹ who were hardest hit during the pandemic.

Budget 2021 announced \$250 million over three years for the UII to scale-up industry-led, third-party delivered, approaches to upskill and redeploy workers to meet the needs of high growth sectors.

The UII seeks to help make Canada's training ecosystem more responsive to change, address employer skills needs, and support Canada's overall economic recovery and growth. By March 31, 2025, the UII is expected to have:

- supported employers, including small and medium-sized enterprises (SMEs), to better identify their skills needs
- led to the delivery of new upskilling programming that meets the needs of employers
- helped at least 15,500 Canadians, including those from underrepresented groups, connect with new work opportunities

Initially identified high-growth sectors include digital technology, cyber security, agriculture technology, advanced manufacturing, clean technology, and biomanufacturing.

1.4 Vision, mission, objectives

Vision: Support employers with their workforce challenges, including job creation and talent retention, and Canadians in becoming lifelong learners.

Mission: Scale-up employer-led, third-party delivered approaches to upskill and redeploy workers to meet the needs of high-growth sectors.

Objectives: Projects funded under the UII will:

¹ In the context of the UII, underrepresented groups refer to women, visible minorities, Indigenous Peoples, official language minority communities, newcomers, and people with disabilities.

- Strengthen Canada’s training ecosystem by fostering partnerships between employers and training providers and/or post-secondary institutions
- Identify, upskill and redeploy workers to new employment opportunities

1.5 Program timelines

Planning phase (2022-23):

- a. The creation and maintenance of partnerships with a variety of actors necessary for the success of the UII, including employers and public and/or private training providers guided by a clear governance structure
- b. Confirmation of priorities, employers skills needs, and high growth sectors
- c. The development of intensive short-cycle industry-driven upskilling programming (i.e. curriculum development)

Implementation phase (second half of 2022-23, 2023-24, and 2024-25):

- d. The leveraging of existing digital platforms to support the roll-out of upskilling interventions nationally and the sharing of best practices across delivery partners
- e. The identification of a pool of program participants and the matching of them with appropriate training
- f. The provision of training
- g. As required, the provision of further labour market integration supports for program participants
- h. Progressively increasing the ratio of third party contributions (e.g. from employers, local business associations, community partners, charities) in cash or in-kind, to reduce the initiative’s dependence on federal funding

2. Program requirements

2.1 Eligibility requirements

2.1.1 Lead recipient

Following the signature of a contribution agreement, the Applicant will be referred to as the “Lead Recipient.” The Lead Recipient will be the organization responsible for implementing the UII and for the administration and further redistribution of the federal contribution.

Eligible Lead Recipients include:

- Not-for-profit organizations
- For-profit organizations²

² For-profit organizations are only eligible if they do not expect to generate profits from the proposed initiative.

- Organizations involved in the post-secondary education sector, including universities, colleges polytechnics, technology access centres, and other public training organizations
- Private colleges and other private training institutions
- Industry associations, and other business/sector associations

The Lead Recipient must be in good financial standing, have a governance structure, staff, and partnerships that demonstrate their ability and experience to scale-up industry-led approaches to upskilling.

2.1.2 Partners

To carry out the project, the Applicant may establish partnerships with the two following types of partners: Network Partners and Delivery Partners.

- a) **Network Partners** will support the governance of the proposed project to ensure that the UII has cross-sectoral and national coverage, develops in-demand skills, and has effective strategies to increase the participation of individuals from underrepresented groups. Network Partners will do so by undertaking a variety of activities to support the Applicant and help survey key stakeholders on employers skills needs including through broad consultations, analysis, outreach and networking events. Furthermore, through their respective expertise, Network Partners will help refine skills investment priorities regarding sectoral, regional and underrepresented groups at program inception and throughout implementation. Network Partners may include but are not limited to:
- Not-for-profit organizations
 - For-profit organizations
 - Post-secondary institutions associations
 - Industry associations, and other business/sector associations
- b) **Delivery Partners** are those that will be leveraged by the Applicant for their expertise to directly deliver key upskilling activities. Delivery partners are expected to receive further distributed funds from the Applicant to undertake the key activities required to implement the UII. Delivery Partners may include but are not limited to:
- Organizations involved in the post-secondary education sector, including universities, colleges, polytechnics, technology access centres, and other public training organizations
 - Private colleges and other private training institutions
 - Digital platforms and other service providers

Throughout program implementation, both Network and Delivery Partners will work in close collaboration with the Applicant to achieve successful outcomes for the UII. The Application should provide a high-level description of project activities for each main partner, a timeframe for each

partner's engagement, how they may receive or be making cash and/or in-kind contributions and associated funding amounts.

2.1.3 Further distribution of funds

To carry out the project, the Lead Recipient may further distribute contribution funding to partners that will be participating in the delivery of the UII. They will do so independently from direct government intervention and in no event will be acting as an Agent of the Crown in distributing funds.

The Lead Recipient will maintain a selection and merit review process designed to ensure that the distribution of funding meets eligibility requirements and program objectives, and that partners are technically and financially sound and have sufficient capacity to carry out eligible activities successfully.

2.1.4 Eligible activities

Eligible Activities are those activities directly related to the following:

- Creation and coordination of networks of employers as well as private and public training providers to identify high growth sectors, employer skills needs and assess skills gaps and talent deficits
- Identification and recruitment of participants and the assessment of their existing skills
- Development and/or leveraging of digital platforms and tools to support the delivery of training and other related job readiness services
- Development and delivery of intensive and rapid re-skilling/up-skilling training programs designed to help participants transition to new work opportunities
- Development and delivery of additional training designed to assist upskilled participants in finding new employment opportunities that suit their skills and meet the needs of participating employer firms. This would include wrap-around supports (e.g. resume writing, interview preparation, together with efforts to mitigate hiring bias)
- Provision of experiential learning opportunities and / or subsidies for work placements to further support participants in their transition to new employment

2.1.5 Eligible expenditures

Eligible expenditures are reasonable expenses that are required to carry out eligible activities for the Lead Recipient and their partners to deliver on the goals of the UII. Eligible expenditures include the following:

- Salaries and other related costs for new hires, volunteers and personnel
- Materials, supplies and equipment
- Financial support for workers
- Expenses for professional services, instructors, training, coaching, and professional development
- Support for hosting conferences (including travel and accommodations) or other events to be carried out in accordance with the standards set by the *Directive on Travel, Hospitality, Conference and Event Expenditures*



- Payments made to employer partners to support work placements
- Costs associated with software and hardware infrastructure, web development and maintenance, information technology support, telecommunications and web hosting
- Expenditures directly related to operations and administration including salaries and benefits of management and staff, the lease of premises, travel (to be carried out in accordance with the Directive on Travel, Hospitality, Conference and Event Expenditures), materials and other expenses that are administrative in nature

Ineligible costs are those costs that are not covered under the UII. They include and are not limited to:

- Expenditures that are not related to the UII
- Expenditures incurred before the date of eligibility or after the project completion date
- Accounting and administrative expenses related to existing organizational activities
- Costs associated with the construction of or major renovation to building and structures
- Purchase or lease of land
- Hospitality where the primary benefactor is the Lead Recipient and/or an ineligible organization
- Costs associated with travel outside Canada

To support work placements, up to 50% of the salary (wage subsidies) for up to 16 weeks may be provided to help employers complete the transition of program participants into new jobs.

Administrative costs are limited to maximum ratio of 10% of total eligible costs. For activities taking place in Canada's North (e.g. Yukon, Northwest Territories, Nunavut) and remote communities (as defined by Statistics Canada), where circumstances like inclement weather and distance can significantly increase travel and accommodation costs, consideration will be given to cover higher administrative costs (e.g. travel, accommodation, food) up to a maximum of 30% with demonstrated proof of expenses.

2.2 Official languages

Lead Recipient is required to:

- Ensure that consultations with stakeholders regarding activities, projects and programs encourage participation in both official languages, as well as representatives from official language minority communities where appropriate
- Ensure that any communication, announcement, or documents for the general public are provided in both official languages (English and French)
- Deliver services, programs, projects or activities to employers and program participants in the official language of their choice
- Provide services to official language minority communities, when appropriate, in such a manner that they may participate in these services on a basis comparable to the majority language community

- Implement any other measures that ISED may identify including, without limitation, the inclusion of official languages provisions in the Lead Recipient agreements for further distribution of funding

In addition, the Lead Recipient should strive to communicate with individuals in the official language of their choice.

2.3 Intellectual property

The Government of Canada will not have an ownership interest in intellectual property resulting from activities funded under the UII by virtue solely of having provided the funding. The intellectual property will remain the property of the Lead Recipient and their partners. Where it is to the advantage of Canadians, and not detrimental to the goals of the Lead Recipient and their partners, ISED may negotiate the shared use of intellectual property developed by the Lead Recipient, their partners, or through a third-party.

2.4 Matching funds requirements

While the UII does not have a matching funds requirement, the intention is for federal funding to be increasingly supplemented by other actors who would see the value for themselves in employer-driven approaches to upskilling. As such, the UII would seek to leverage investments from other sources, including through nominal fees paid by participants to secure participation in training, employer contributions to increase the number of participants or other sources of funding such as partners, charities, and other levels of government.

The capacity of the Lead Recipient to leverage other sources (both financial and in-kind) will be assessed and expected to increase over time, as the results for early cohorts demonstrate the value of the upskilling model being advanced by the UII. ISED will work with the successful Lead Recipient to confirm contribution agreement targets that progressively raise the ratio of third party contributions, in cash or in-kind, to put the UII on the path for sustainability.

2.5 Stacking provisions

Where appropriate, the contribution may cover the entire cost of an activity. Alternatively, the cost of the activity may also be shared with the participants, private or public sectors, other levels of government, and / or not-for-profit organizations, with the objective of building a sustainable model for upskilling. Cost-sharing may be in financial terms, or in-kind; efforts will be made to increasingly leverage cost-sharing over the course of the UII.

Where the sharing of costs with the Lead Recipient and partners is not feasible, total government funding (i.e. federal, provincial/territorial and municipal) must not exceed 100 percent of eligible expenditures.

2.6 Results, measurement and reporting

2.6.1 Expected results and outcomes

The UII establishes an overarching performance framework. It includes key expected results and core indicators, which will inform and be part of the reporting obligations of the successful Lead Recipient. Contribution agreement(s) will further confirm specific performance indicators and targets and include a level of detail that supports ISED departmental priorities and accountability, including expected results that align with the UII parameters and are within the reasonable control of the Lead Recipient.

The Lead Recipient is expected to collect disaggregated data to measure and report on their performance and will be asked to submit annual reports tracking project outcomes as they relate to the firms involved, relevant sectors, as well as to the organization itself. They will be expected to generate adequate metrics to demonstrate the results and to work with ISED in reporting on UII's results.

Expected outcomes and indicators for which data will be collected include, but are not limited to³:

Expected outcomes		Key indicators
Immediate outcomes	Workers have access to upskilling opportunities (training and placements)	Number of workers participating in upskilling training and placements (where possible disaggregated by location, gender, visible minorities, Indigenous, official language, people with disabilities)
	Employers are engaged in the Upskilling ecosystem	Number of employers engaged in the program (by sector, size and location)
		Ratio of partner contributions (cash and in-kind) versus program funding
Intermediate outcomes	Workers have the skills and competencies to participate in new and competitive workforce opportunities	Number and share of participants who secured a job within 6 months of program completion (where possible disaggregated by location, gender, visible minorities, Indigenous, official language, people with disabilities)
		Share of participants who report that the program helped them acquire the necessary skills and competencies to participate in new and competitive workforce opportunities

³ Further key performance indicators might be added to the UII contribution agreement(s), to reflect specific project components or activities.

	Employers have the capacity they need to address their skills needs	Share of participating employers reporting a strengthened capacity to manage skills needs as a result of the program (by sector, size and location)
		Share of participating employers reporting that trained employees have the skills to fill their business needs as a result of the program (by sector, size and location)
Ultimate outcomes	Canadian businesses and industries are growing	Share of participating employers reporting business growth and/or other benefits (by sector, size and location)
		Average salary increase of participants (where possible disaggregated by location, gender, visible minorities, Indigenous, official language, people with disabilities)

2.6.2 Annual reports

The Lead Recipient will provide an annual report to ISED by June 30 for every Government of Canada financial year, from April 1 to March 31, covered by the contribution agreement, until the contribution and earned interest are fully expended. The annual report must include:

- Audited financial statements with respect to eligible expenditures, prepared in accordance with generally accepted accounting principles in Canada
- Any update of investment policies, standards, and procedures
- Statement of objectives for that financial year and a statement on the extent to which the recipient met those objectives
- List of activities, detailed by eligible expenditure type, completed in the past year to meet those objectives
- Statement of eligible expenditures incurred and paid
- Description of results achieved in the past year in accordance with a performance measurement strategy and performance information profile developed by ISED
- Results of evaluations and audits
- A summary of funds received from other sources

2.6.3 Corporate plan

The Lead Recipient will provide a corporate plan annually to the Minister of ISED before March 1 in advance of the next financial year of operation. The corporate plan must include:

- Reference to the Lead Recipient's corporate plan of the current fiscal year (if applicable), including its successes and remaining challenges
- Planned objectives, eligible activities and anticipated results for the upcoming financial year, by source of funding, along with a proposed schedule for their implementation
- Planned expenditures for the upcoming fiscal year

- Risk assessment and mitigation strategies
- Ongoing performance monitoring strategies
- Annual cash flow requirements, including plans to increasingly leverage cost-sharing over the course of the UII, in respect to eligible costs for the upcoming fiscal year, including funding to be disbursed to partners for eligible projects

3. Application details and deadline

The Applicant must provide a complete application consisting of one electronic version of the UII Application Form together with a written proposal and required appendices.

All **Applications** must be submitted online through the Application Form found on ISED’S UII webpage: <https://ised-isde.canada.ca/site/upskilling-industry-initiative/en>.

Email, mail, in-person and facsimile (fax) submissions will not be accepted. Applications must be received by the deadline posted on the UII webpage. Applicants are encouraged to submit their Application in advance of the specified date to ensure that applications are successfully transmitted and received prior to the deadline. Late submissions will not be retained for consideration.

Applications will be assessed following the closing of the Call for Applications with a view to finalize contribution agreements in time to flow funds in summer 2022.

Dates	Milestones
March 2022	Launch of the call for applications
March 2022	Webinar for preparing an application
May 2022	Application submission
June 2022	Application review
June 2022	Ministerial announcement
Summer 2022	Decision anticipated and contribution agreement

4. Application requirements

4.1 Assessment and selection process

An application will not be fully assessed until all required documents are submitted and it is deemed complete. Incomplete applications may be rejected by ISED. The assessment will be based on information provided in the application to which ISED may request additional documentation for assessment purposes.

Applications will be evaluated in three steps as outlined below.

4.1.1 Step 1 – Initial screening

Following the close of the application period, applications will be reviewed to:

- Confirm completeness of applications
- Confirm the eligibility of the Applicant, the project, and proposed activities

If an application is incomplete or ineligible, the Applicant will be notified in writing that their application will not be considered further.

4.1.2 Step 2 – Full assessment

Merit criteria will be used to establish a priority ranking of eligible projects. Applications will be assessed against the following core merit criteria:

1. Capacity to Create and Leverage Partnerships:

- Representation and depth of partnerships with a variety of key stakeholders across the following categories: employers, industry associations, private training providers, post-secondary institutions, and digital learning platform providers
- Partners identified bring the expertise, experience and capacity necessary to meet the purpose and objectives of the UII and have the capacity to manage funds redistributed to them by the Lead Recipient
- Ability to support scalability in multiple regions of Canada, in multiple high growth sectors, and in both official languages, with a preference for a national approach

2. Project Planning and Management:

- Clear and feasible approach to deliver the project on time, within scope and on budget, and achieving UII's intended results
- Demonstrated experience, effective management structure, and sound governance mechanisms, including in financial management, risk management, and bias mitigation strategies
- Funding requirements are well detailed, justified, and demonstrate value for money

3. Capacity to Achieve Results:

- Knowledge of the Canadian skills ecosystem and experience in developing and delivering upskilling initiatives that achieve results
- Credible plan to support upskilling opportunities for underrepresented groups including women, visible minorities, Indigenous peoples, official language minority communities, newcomers, and people with disabilities
- Capacity to progressively increase third-party financial contribution or in-kind support throughout the program implementation



4.1.3 Step 3 – Funding decision

ISED will select one or a limited number of Lead Recipient(s) in order to most effectively achieve the program objectives.

Preference will be given to Applicants that demonstrates a commitment to increasing the efficiency of contributions. For instance, ISED will favour applications that would be delivering higher quality upskilling programming and/or connect more than 15,500 workers to new opportunities.

The selected applicant(s) will be informed of the final decision in a formal letter from ISED. Funding decisions made by ISED are final. There is no appeal process.

4.2 Overview of application contents

All applications must include the following elements:

1. Ull application form
2. Written proposal that contains the following sections:
 - a. Organization experience
 - b. Partnerships
 - c. Key activities
 - d. Sectoral strategy
 - e. Project reach
 - f. Equity and inclusion
 - g. Expected results
 - h. Intellectual property
 - i. Governance
 - i. Organization model
 - ii. Management of program funds
 - j. Risks and mitigations
3. Appendices
 - a. Budget proposal (must use template)
 - b. Organizational chart (no template)
 - c. Letters of support (no template)
 - d. Financial statements (no template)
 - e. Incorporation document
 - f. Proof of compliance with M-30 legislation (Quebec-based organizations only)

Please note that only the appendices listed above will be considered during the assessment of applications. Additional appendices included as part of the application may not be reviewed. ISED reserves the right to seek additional information from the Applicant.

An application that seeks to achieve the national coverage of UII cannot exceed three-years, starting April 1, 2022 and ending by March 31, 2025 for a total amount of \$250 million. A regional or sector-specific application cannot seek less than \$15 million over the same period.

Funding sought from this initiative can be up to \$250 million and have to be within the limits of the following profile: \$25 million in 2022-23, \$100 million in 2023-24, and \$125 million in 2024-25.

4.3 UII application form

4.3.1 Organization information

4.3.1.1 Brief overview of the organization

Applicant must provide a short description of their organization, including its mandate and history.

(Maximum 1,000 characters, approximately 2 pages)

4.3.2 Project information

4.3.2.1 Project description

Briefly describe the main activities and timelines to be undertaken using UII funding.

(Maximum 2,000 words, approximately 4 pages)

4.3.2.2 Estimated start and end dates

The start and end dates refer to when incurred project costs are estimated to start and stop. Applicant can submit a project within a start date of April 1, 2022 and end date of March 31, 2025. Eligible project costs can only begin after the signing of a contribution agreement, in which ISED reserves the right to include a conditional approval or retroactive clauses. Expenditures prior to the signature of the contribution agreement may not be reimbursed.

4.3.2.3 Activities on federal land

As they fill the UII Application Form, applicants will be requested to flag whether program activities will take place on federal lands. From the *Canadian Environmental Assessment Act, 2012 section 2(1)*, **federal lands** means:

- a) lands that belong to Her Majesty in right of Canada, or that Her Majesty in right of Canada has the power to dispose of, and all waters on and airspace above those lands, other than lands under the administration and control of the Commissioner of Yukon, the Northwest Territories or Nunavut
- b) the following lands and areas:
 - i. the internal waters of Canada, in any area of the sea not within a province
 - ii. the territorial sea of Canada, in any area of the sea not within a province
 - iii. the exclusive economic zone of Canada

- iv. the continental shelf of Canada
- v. reserves surrendered lands and any other lands that are set apart for the use and benefit of a band and that are subject to the *Indian Act*, and all waters on and airspace above those reserves or lands

4.3.2.4 Budget summary table

Provide an overview of total costs expected to be incurred over the three-year duration of the project, including direct costs as well as partner costs to be supported by ISED, by other sources of funding (in cash) and by other sources (in-kind).

4.4 Written proposal detailed requirements

Written Proposals for the Application must be completed by providing information that corresponds to each of the sections listed below. Relevant information to be considered and assessed must be included in each of the appropriate sections found in the guidance of this guide.

4.4.1 Organization experience

This section focuses on demonstrating proven experience delivering similar programming. The Applicant must:

- Demonstrate knowledge of the skills ecosystem in Canada
- Describe prior experience in managing and financially administering projects
- Outline the experience of the applicant and their partners and results achieved (where applicable) in:
 - Developing rapid upskilling solutions (generally 4 to 16 weeks in duration) designed to help participants transition to new work opportunities
 - Leveraging digital platform and tools to support the delivery of rapid upskilling and other related job readiness services
 - Identifying firms seeking workers
 - Identifying and recruiting pools of workers who are seeking rapid upskilling
 - Identifying and assessing worker competencies
 - Ensuring upskilled workers find pathways to new employment in high-growth sectors

(Maximum 2,000 words, approximately 4 pages)

4.4.2 Key activities

This section focuses on the planned approach to deliver on UII's objectives. The Applicant must:

- Provide a detailed workplan and describe each activity that will be undertaken in this project
- Outline how each activity will support the overall objectives of the UII
- Include feasible milestones and timelines, as well as who will be responsible for the work under each activity. Plainly state each partner's responsibility for each milestone

(Maximum 4,000 words, approximately 8 pages)

4.4.3 Sectoral strategy

This section focuses on demonstrating strategic planning to deliver upskilling in identified high growth sectors.

Through the UII, ISED will give preference to applications that seek to advance the following high-growth priority sectors: digital technology, cyber security, agriculture technology, advanced manufacturing, clean technology, and biomanufacturing.

The Applicant must propose a strategy to advance upskilling initiatives in these sectors. In addition, the applicant should include a strategy to identifying and selecting other high-growth sectors, including data and contextual information to showcase the need for upskilling interventions in these sectors as well as how these sectors could benefit from such initiative in the short to long-term.

Moreover, based on their experience and knowledge of the skills ecosystem and of emerging industry and workforce needs, the Applicant should seek to explain their strategy to refine, and review its investment priorities. This could include any ongoing engagement, research projects and consultations or any other activities that would help shape the proposed sectoral strategy.

(Maximum 2000 words, approximately 4 pages)

4.4.4 Project reach

This section focuses on demonstrating the approach and ability to deliver a pan-Canadian initiative. The Applicant must:

- Provide details on how the project will leverage local partners to deliver upskilling opportunities across all Canadian regions, including Western/Northern, Central (with representation from both Ontario and Quebec) and Atlantic Canada
- Provide notional targets for regional distribution and implementation strategies to ensure national coverage by the end of the project
- Provide details on how the project will deliver upskilling opportunities in both official languages (see section 2.2 for specific requirements)

(Maximum 1500 words, approximately 3 pages)

4.4.5 Equity and inclusion

This section focuses on demonstrating clear plans to support underrepresented groups with UII. The Applicant must:

- Outline previous experience of the Applicant and their partners in working with underrepresented groups, including women, visible minorities, Indigenous peoples, official language minority communities, newcomers and people with disabilities

- Provide a credible plan, specific targets, and support measures to increase the participation of underrepresented groups.
- Describe the Applicant's gender balance and diversity plan, which includes description of activities that will be undertaken to ensure that underrepresented groups are meaningfully represented and benefit from the investment

(Maximum 1500 words, approximately 3 pages)

4.4.6 Expected results

This section provides an overview of the proposal's projected benefits for employers and workers and how it expects to obtain those results. The Applicant must demonstrate how the proposed project will contribute to the planned outcomes of the UII (see section 2.6.1)

(Maximum 2000 words, approximately 4 pages)

4.4.7 Governance

The Lead Recipient must put in place governance and administrative structures to support the activities of UII. This section focuses on demonstrating that a sound governance model that reflects private-sector leadership, as well as diversity considerations. The Applicant must:

- Describe the proposed governance model. An organizational chart will also be required as an appendix (see section 4.5.2)
- Explain governance oversight including details on decision-making and how conflicts of interest will be managed
- Explain how the Applicant will operate as an independent organization that takes into account the diversity of participating organizations
- Provide a notional distribution of firm size and sector representation from participating employers
- Demonstrate how participants from the private sector are involved in the leadership of the organization and in setting strategies and priorities
- Present which factors have been, or would be, taken into account in selecting candidates for a Board of Directors. In particular, explain how diversity, including gender, has factored or will be taken into consideration in the composition of the Board and the selection of candidates for leadership positions within the Applicant

(Maximum 2000 words, approximately 4 pages)

4.4.8 Management of program funds

This section focuses on the Applicant's approach and ability to manage revenue and finances according to program requirements. The Applicant must:

- Describe the Applicant's approach, financial systems and controls that will be used to ensure the sound management of program funds and participant contributions

- Describe how the Applicant will secure cash and in-kind contributions from other organizations and ensure that these are provided at fair market value
- Explain how funding will either flow directly through the Applicant or how it will be redistributed to partners, and provide the rationale for the chosen approach

(Maximum 1000 words, approximately 2 pages)

4.4.9 Risks and mitigations

This section focuses on the Applicant's approach to risk identification and mitigation. The Applicant must:

- Describe the main risks that could impact ability to carry out the program such as risks related to achieving national scale, adequately reach underrepresented groups, demand for programming exceeding available funding, achieving stated expected outcomes (see section 2.6.1), meeting program timelines and data security
- Indicate the probability and impact (low, medium or high) of the identified risk as well as the mitigation strategies for each risk

(Maximum 1500 words, approximately 3 pages)

4.5 Appendices detailed requirements

Appendices must be attached to the UII Application Form so that they are submitted simultaneously.

4.5.1 Budget proposal

This section focuses on providing details of the proposed budget, demonstrating suitability of allocated resources to fulfill the proposal and outlined projects. The Applicant must use the Budget Proposal Template provided. The Applicant must provide a budget with a detailed breakdown of the funding allocations over the three-year lifecycle of the program. The budget must include projected expenses and sources of funding for the duration of funding, ending on March 31, 2025. The Government of Canada may not fund expenses incurred before the signing of a contribution agreement. If an organization incurs expenses for the project before receiving written confirmation of funding approval, the organization will be doing so at its own risk.

Each application must include a breakdown of projected financial commitments and in-kind contributions from private sector participants as well as from other organizations and sources providing support (e.g. post-secondary institutions, provincial governments). Stated contributions should also represent incremental (i.e. not existing or previously committed) funding that is specifically linked to the execution of the proposal. In-kind contributions must be calculated at fair market value.

The Applicant is also required to provide past sources of government funding (municipal, provincial, federal) received by their organization in the last three years, and not specifically related to this project.

4.5.2 Organizational chart

The Applicant must provide an organizational chart and the list of key individuals who will be leading and working on the project. A template for the organizational charts is not provided. The organizational chart will highlight the key management and senior executive positions that the Applicant expects to fill.

4.5.3 Letter of support from partners

There is no template provided for this section.

Each main partner should provide a letter of support and depending on the nature of the organization (private sector or other), on official letterhead stating the nature of their participation in the project and the expected value of their contribution, as applicable.

As applicable, the letter may provide information on:

- How the applicant and partner have collaborated in the past, including their respective roles
- The partner may also demonstrate its track record and experience in collaborating with the applicant or with other organizations on similar initiatives
- The partner could provide examples that demonstrate expertise, experience and capacity in successfully managing skills or upskilling initiatives, its approach to stay on budget and deliver projects on time

4.5.4 Financial statements

There is no template provided for this section. The Applicant must provide financial statements for its last three years of operation, as applicable.

4.5.5 Incorporation document

There is no template provided for this section. The Applicant must provide an incorporation document.

4.5.6 Proof of compliance with M-30 legislation

Required for Quebec based organizations only.

4.6 Confidentiality, proactive disclosure and transparency requirements

Any information in the application that, in the Applicant's opinion, is of a proprietary or confidential nature must be clearly marked by the Applicant as "Proprietary" or "Confidential" on each relevant item or page or in a statement covering the entire application. No commercially confidential information which is submitted will be disclosed unless otherwise authorized by the Applicant or required to be released by law.

Information provided by the Applicant may be accessible under the *Access to Information Act*.

ISED may share information in an application with provincial and territorial governments or other federal organizations to improve national coordination and decision-making related to the UII.



Once projects are approved, as part of the Government of Canada's policies to ensure transparency and accountability, ISED is required to proactively disclose project information when it is in the public interest to do so. This may include but is not limited to open access pricing, work progress and the like. Additional disclosure, milestone reporting and transparency requirements can be found in recipient contribution agreements and on the Treasury Board of Canada [website](#).

Although information remains confidential under the above-mentioned conditions, any document or content submitted as part of the UII application process shall be deemed and remain the property of Innovation, Science and Economic Development Canada.

4.7 Templates

Templates in pdf are provided for the Application Form and Budget Proposal and instructions for the other required appendices are provided in this guide (see section 4.2). The available templates must be used and submitted in the format provided (e.g. using the same columns or headings, not saved as another file format). All available templates are accessible from the UII webpage: <https://ised-isde.canada.ca/site/upskilling-industry-initiative/en>

4.8 Formatting

- Document Type: All applications, including the UII Application Form and Budget Proposal, must be typed
- Font: Must be easy to read (12-point minimum). Smaller type may be used in figures and tables but must be clearly legible
- Line Spacing: Single
- Margins: One (1) inch top, bottom, left and right
- Word Count Limit: The word count limit specified under each section should not be exceeded.
- Tables, Graphs, Figures and Images: Must be of a size that is easily readable or viewable and may be landscape orientation
- Page Numbering: all pages must be numbered sequentially
- Paper Size: Letter (8 ½ inches by 11 inches)

Application Language: Official language (English or French) of choice. Applications will not be accepted in other languages.

Appendix A: Glossary

Delivery partners: It is expected that the Lead Recipient will work with key private sector partners and national organizations to engage post-secondary institutions (among others) to leverage their memberships in both strengthening participation and developing effective training materials.

Lead recipient: Organization that will have entered into a contribution with ISED under the UII. It may include not-for-profit organization; for-profit organization, organization involved in the post-secondary education sector, including universities, colleges, polytechnics, technology access centres, and other public training organizations, private colleges and other private training institutions; and industry associations, and other business/sector associations.

High-growth sectors: Sectors that are expected to be foundational to Canada's long-term prosperity based on existing strengths and broader transformational changes to the economy. In line with current government priorities, the call for applications identifies the following priority sectors: digital technology, cyber security, agriculture technology, advanced manufacturing, clean technology, and biomanufacturing. Applicants may also propose additional high-growth sectors based on their own analysis during the call for applications and later throughout the program implementation.

Network partners: Organizations that support the Lead Recipient in its national scale-up of the program and ensure the initiative reaches a variety of industry sectors, through their cross-sectoral and national representation. Network partners will help to refine investment priorities throughout program implementation. These include national and regional organizations such as not-for-profit organizations, for-profit organizations; and industry associations, and other business/sector associations.

Program fees and training: Nominal fee to be paid by participants in short-cycle rapid upskilling training. The nominal fee would help ensure that participants are engaged and committed to completing the program.

Program participant: Prime candidates for upskilling would be mid-career workers (with 3 years of experience or more) looking for better career opportunities in high-growth industries. Further eligibility criteria (e.g. pre-existing qualifications) may be defined by the Lead Recipient, depending on employers' needs and high growth sectors identified.

Targeted employers: As part of the UII, targeted employers are Canadian businesses, including SMEs and other Canadian firms, which often lack the capacity and attention required to identify their skills needs and implement plans for meeting them, including finding training programs for workers that are aligned with their needs.

Underrepresented groups: Women, visible minorities, Indigenous peoples, individuals in official language minority communities, newcomers, and people with disabilities.

Upskilling: Tailored short cycle (4 to 16 weeks) training aimed at bridging the gap between employer needs and workers' existing skill sets. These interventions provide technical, business and interpersonal skills, the mix of which can vary based on the pre-existing qualifications of the pool of workers and talent gaps identified by employers in high-growth sectors.