The following has been prepared to provide a high-level overview of some of the key characteristics, from a Research Finance perspective, of some of the major types of research grants. This list is not exhaustive. For specific use of grant funds, review the [Tri-Council guidelines](http://www.nserc-crsng.gc.ca/Professors-Professeurs/FinancialAdminGuide-GuideAdminFinancier/FundsUse-UtilisationSubventions_eng.asp). For more information consult the research analyst serving your [Faculty](http://sites.uoit.ca/finance/departments/research-trust-accounting/contacts.php).

[Natural Sciences and Engineering Research Council of Canada (NSERC) Engage](http://www.nserc-crsng.gc.ca/Professors-Professeurs/RPP-PP/Engage-Engagement_eng.asp)

|  |  |
| --- | --- |
| Typical Grant Amount and Duration | Financial Characteristics |
| * Up to $25,000
* Up to 6 months
 | * Engage grants are intended to foster the development of new research partnerships by supporting short-term research and development projects aimed at addressing a company-specific problem.
* Requires industry partner who must (a) provide a contribution which may be cash or other support such as in-kind, and (b) have been in operation for at least 2 years.
* Researchers are limited to 1 Engage grant per fiscal year – i.e. cannot simultaneously hold multiple Engage grants.
* May request an extension – for a maximum of 60 days.
* Detailed allocation of expenditures – as set out in the proposed budget. 20% variation from budgeted type of expenditure without explicit permission is allowed. More significant changes require explicit permission.
* Acquisition of any equipment must be carefully detailed and justified.
* Office supply expenses are limited to $250.
* Unspent residual balances greater than 50% must be reimbursed.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th.
 |

[NSERC Discovery G](http://www.nserc-crsng.gc.ca/Professors-Professeurs/Grants-Subs/DGIGP-PSIGP_eng.asp)rant (DG)

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| Typical Grant Amount and Duration | Financial Characteristics |
| * Grant amount varies
* Up to 5 years with automatic extension period of 1 year
 | * The Discovery Grants Program supports ongoing programs of research (with long-term goals) rather than a single short-term project or collection of projects. These grants recognize the creativity and innovation that are at the heart of all research advances. Discovery Grants are considered ‘grants in aid’ of research as they provide long term operating funds to support the costs of a research program.
* Renewal request is required where such would extend the total grant to beyond 6 years.
* Flexible on budget allocation – the funder will not hold the researcher to budget in a strict sense as long as the grant is used for the broad purpose for which it was originally awarded.
* Unspent residual balances greater than 50% must be reimbursed.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th.
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[NSERC Collaborative Research and D](http://www.nserc-crsng.gc.ca/Professors-Professeurs/RPP-PP/CRD-RDC_eng.asp)evelopment (CRD)

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| --- | --- |
| Typical Grant Amount and Duration | Financial Characteristics |
| * Grant amount varies
* Generally 2 to 3 years, can be up to 5 years
 | * CRD Grants are intended to give companies that operate from a Canadian base access to the unique knowledge, expertise, and educational resources available at Canadian postsecondary institutions and to train students in essential technical skills required by industry.
* Requires at least one industry partner that must (a) provide a contribution which may be cash or other support such as in-kind, and (b) have been in operation for at least 2 years.
* Not renewable however may be extended depending on the circumstances.
* Detailed budget set up needed for expenditures – as proposed in original budget.
* Annual progress report from Primary Investigator (PI).
* Agency must approve payments to a Post-Doctoral Fellow.
* Unspent residual balances greater than 50% must be reimbursed.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th and on anniversary date.
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[Social Science and Humanities Research C](http://www.sshrc-crsh.gc.ca/home-accueil-eng.aspx)ouncil (SSHRC)

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| --- | --- |
| Typical Grant Amount and Duration | Financial Characteristics |
| * Grant amount varies
* Up to 3 years; some programs have automatic extension period of 1 year
 | * SSHRC supports postsecondary-based research, research training and knowledge mobilization activities in the social sciences and humanities.
* Must apply for renewal.
* Flexible on budget allocation – the funder will not hold the researcher to budget in a strict sense as long as the grant is used for the broad purpose for which it was originally awarded.
* Unspent residual balances greater than 50% must be reimbursed.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th.
 |

[Canadian Institutes of Health Research (CIHR](http://www.cihr-irsc.gc.ca/e/193.html))

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| Typical Amount and Duration | Financial Characteristics |
| * Grant amount varies
* 1 to 5 years with automatic extension period 1 year for all grants
 | * CIHR provides funding opportunities for four themes of health research: biomedical, clinical, health systems services, and social, cultural, environmental and population health.
* Residual balance must be returned and cheque must accompany a signed Form 300; cannot be transferred.
* May request additional extension (1 year) beyond the automatic extension period.
* Detailed budget set up needed for expenditures – as proposed in original budget.
* For equipment: a cost quotation must be provided for equipment or service contracts greater than $10,000. Two competitive quotes as well as letters from an appropriate institutional official documenting the availability and status of similar equipment are required for items costing more than $25,000.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th.
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[Canada Research Chair (CRC)](http://www.chairs-chaires.gc.ca/home-accueil-eng.aspx)

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| Typical Amount and Duration | Financial Characteristics |
| * Tier 1: $200,000 annually for term of 7 years
* Tier 2: $100,000 annually for term of 5 years
 | * The Canada Research Chairs Program (CRC) stands at the centre of a national strategy to make Canada one of the world's top countries in research and development. Chairholders aim to achieve research excellence and improve our depth of knowledge and quality of life, strengthen Canada's international competitiveness, and help train the next generation of highly skilled people through student supervision, teaching, and the coordination of other researchers' work.
* Tier 1 – can be renewed indefinitely.
* Tier 2 – renewable only once.
* Unused funds from original CRC can be transferred to a renewal.
* Flexible on budget allocation – the funder will not hold the researcher to budget in a strict sense as long as the grant is used for the broad purpose for which it was originally awarded.
* UOIT policy for CRCs provide a stipend for the holder, overhead recovery to UOIT, and a teaching release.
* Unspent balances must be returned to the Receiver General.
* Financial Reporting: Annual Statement of Account (Form 300) due June 30th.
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[Canada Foundation for Innovation (CFI](https://www.innovation.ca/))

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| --- | --- |
| Typical Amount and Duration | Financial Characteristics |
| * Grant amount varies
* 40% CFI (Fed)
* 40% MEDI (Prov)
* 20% other (UOIT, industry)
* 1 to 3 years, most common is 1 year
 | * The Canada Foundation for Innovation (CFI) funds research infrastructure which consists of state-of-the-art equipment, buildings, laboratories, and databases required to conduct research.
* Budget allocation: need approval for significant changes in budget or change in functionality.
* Purchase Orders are mandatory for large ticket purchases
* Cannot expense salaries, with the exception of technicians that develop software related to the project.
* In-kind contributions must be documented – with several specific requirements:
* Calculated CFI in-kind calculation is based on listed price LESS discounts.
* On an invoice or P.O., in kind needs to be listed
* An Operational Report must be filed by the Principal Investigator once the equipment is operational.
* Up to 15% of the total grant amount may be used for eligible administration expenses not covered by the research support fund program. Administrative expenditures above this 15% must come from non-NCE funds.
* Can apply for extension.
* 6 months grace period after end date to prepare final report, F300 **not** required.
* Final report includes detailed analysis of personnel costs – record of time and activities performed.
* Projects with a CFI contribution of under $1M will complete a progress report annually for 4 years. Those that are $1M or greater must submit a progress report annually for 5 years.
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[CFI-Infrastructure Operating Fund (IOF](https://www.innovation.ca/en/OurFunds/CFIFunds/InfrastructureOperatingFund))

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| --- | --- |
| Typical Amount and Duration | Financial Characteristics |
| * Grant amount varies
* Typically 1 to 2 years
 | * IOF funds help cover a portion of the [maintenance and operating costs](https://www.innovation.ca/en/OurFunds/CFIFunds/infrastructure-operating-fund) to ensure optimal use of CFI-funded infrastructure. Direct costs of research, student stipends, and clerical support salaries are INELIGIBLE.
* 30% of CFI (Fed) amount granted above, no partner funding required in IOF.
* [Certification form](file:///N%3A%5CResearch%20Accounting%5CRTA%20Manual%5CForms%5CCertification%20-%20Salary%20of%20Technicians%20and%20Professionals.pdf) required if technician is needed to maintain equipment.
* **IOF funding begins after CFI funding is done.**
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[Ontario Research Fund (ORF)](https://www.ontario.ca/page/ontario-research-fund)

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| Typical Amount and Duration | Financial Characteristics |
| * Amount ranges from $1M to $4M
* Typically 5 years or more
 | * Funding supports the direct and indirect (overhead) costs of research.
* Facilities and equipment costs up to 10% of total direct costs; Management and Administration costs up to 5% of total direct costs.
* Funding source:  the Ontario government and the Canada Foundation for Innovation. Each provides up to 40% of eligible costs. The remaining 20% needs to come from private funding partners and/or UOIT.
* Funds are always subject to audit – requires significant effort from a Research Finance perspective.
* Budget allocation: specific line items as proposed in original budget, can ask to re-allocate (with justification), subject to reimbursement once we prepare and submit report (report is quarterly, due 30 days after the quarter closes).
* Requires certification for in-kind contributions
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[Networks of Centres of E](http://www.nce-rce.gc.ca/index_eng.asp)xcellence of Canada (NCE)

|  |  |
| --- | --- |
| Typical Amount and Duration | Financial Characteristics |
| * Grant amount varies
* Networks receive funding over 5-year funding cycles
 | * Collaborative programs between CIHR, NSERC, and SSHRC. Granting agencies make payments on behalf of NCE
* Funding agreement sets terms and conditions of the grant and cannot be modified.
* Can apply for renewal based on mandate and apply for additional funding prior to the end of a funding cycle.
* Financial reporting – Annual Statement of Account (Form 300) due June 30th.
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[MITACS](https://www.mitacs.ca/en)

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| Typical Amount and Duration | Financial Characteristics |
| * Amount varies
* Scalable in 4-month internships
 | * MITACS builds partnerships between academia, industry and the world – to create a more innovative Canada.
* Grants support salaries for post-doctorate fellow and graduate students including international students.
* Research project application is made to MITACS on the basis of an industry partner matching the award.
* MITACS funds up to $15,000 for each four month internship period. Post-doctoral fellows can receive up to 2 years of funding.
* MITACS Accelerate grants cannot match funds received from granting agencies like NSERC, CIHR, SSHRC or funds received from UOIT.
* Financial Reporting: Form 300 due to MITACS by May 31st each year, plus a final F300 within 30 days of the grant end date.
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[Ontario Centres of Excellence (OCE](https://www.mitacs.ca/en))

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| --- | --- |
| Typical Amount and Duration | Financial Characteristics |
| * Amount varies
* 6 months to several years
 | * In partnership with industry, [OCE](http://www.oce-ontario.org/about-us) co-invests to commercialize innovation originating in the province’s publicly funded colleges, universities and research hospitals. OCE drives the commercialization of cutting-edge research across strategic market sectors to secure Ontario’s and Canada’s global competitiveness. OCE focuses on areas and projects that will deliver not only the greatest economic benefits but those that will have a positive social impact in communities across the province.
* OCE typically holds back 10% of the grant, to be paid upon final report submission. Invoicing required for final holdback in some cases.
* Financial Reporting: Final report due at end of grant along with an Attestation of Use of Funds (needed for release of holdback).
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Federal Economic Development Agency ([FedDev](http://www.feddevontario.gc.ca/eic/site/723.nsf/eng/home))

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| --- | --- |
| Typical Amount and Duration | Financial Characteristics |
| * Amount varies
* Typically 1 year
 | * Funding is received when claims of eligible costs are submitted for reimbursement. These submissions must be made quarterly, stringent back up is necessary in order for reimbursement to be processed as each document is audited.
* Recipients must meet the terms and conditions outlined in the contribution agreement before being reimbursed for incurred costs.
* Detailed budget set up needed for expenditures; strict adherence to budget necessary. Only costs that are reasonable, incremental and relate directly to project are funded. Hospitality costs not eligible.
* Reporting: Recipients are required to report quarterly on activities and outcomes as projects are implemented. Must report on project expenditures and completion of deliverables, including achievement of performance indicators identified in agreements.
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