



Critical Research Equipment & Tools (CRET) Program 2024-2025 Call for Proposals

KEY DATES	
Call for Proposals	October 1, 2024
NEW NOI Deadline	November 25, 2024
Full Application Deadline	January 17, 2025
Notice of Award	March 2025

PROGRAM OBJECTIVE

Access to cutting-edge, high-quality research equipment and tools is essential for conducting world-class research that produces tangible impact. Through this annual funding program, the Vice-Principal Research & Innovation (VPRI) Office aims to improve the range and quality of UBC Okanagan's research infrastructure, keep pace with technology, and provide opportunities for student research training.

PROGRAM DETAILS

The VPRI Office established the Critical Research Equipment & Tools (CRET) Program in 2019 to provide funding to support the acquisition, development, repair, replacement, or creation of critical research infrastructure in all academic disciplines and research areas at UBC Okanagan.

Applicants may submit funding requests between \$2,500 and \$100,000. The 2024-2025 competition has a budget envelope of up to \$400,000.

Application Stream	Total Funding Requested
Stream 1	\$2,500 to \$25,000
Stream 2	\$25,001 to \$100,000

The term “research equipment and tools” is inclusive of instruments that support research or knowledge creation activities in any discipline.

The CRET grant program embodies the SSHRC definition of research tools as “items that enable researchers to collect, organize, analyze, visualize, mobilize and store quantitative and qualitative data and creative outputs”. Applications from scholars and researchers in all research or knowledge-creation fields are encouraged.

PROJECT ELIGIBILITY

- Successful applications will be driven by the need to support specific research activities and projects requiring critical equipment or tools that are not currently available on campus.



- The identification of a research space in which to house CRET-funded equipment or tools is a critical requirement of the application process. CRET-funded infrastructure should be housed within the UBC system and its affiliated centres. The research equipment may be located outside UBC's Okanagan campus if the proposed location benefits the research objectives. In cases where the research equipment is to be housed outside UBC's Okanagan campus, the applicant should seek pre-approval from their home Faculty and the VPRI.
- For proposals requiring new research space in which to house the requested infrastructure, the applicant and the Associate Dean of Research should confirm what space may be available within the current faculty research space envelope. The details about your research space should be known before submitting an application.
- Applications for equipment to be housed in one of the shared research platforms on campus (Animal Care and Use Program, Fipke Laboratory of Trace Element Research, Plant Growth Facility, Research Data Centre, and Survive and Thrive Applied Research) will normally not be eligible unless it fills a critical need specific to a particular research project that makes use of the facility.

APPLICANT ELIGIBILITY

- Individual faculty can be listed on a maximum of 2 applications in any single year.
- The Principal Investigator (PI) cannot submit more than one application as the PI.
- PIs who received funding in last year's competition cannot re-apply as a PI in this year's competition.
- The PI must be a faculty member at UBC Okanagan with a full-time academic appointment in the tenured or tenure-track research stream.
- Co-applicants must be faculty members at a UBC Okanagan with a full-time academic appointment in the tenured or tenure-track research stream.
- Each application may have up to four co-applicants.
- The PI must hold active external research funding as a PI or co-PI at the time of application.

SUBMISSION PROCEDURE

Use your CWL to log into the UBCO VPRI Office Apply portal <https://apply.research.ok.ubc.ca>.

STEP 1: Notice of Intent (NOI) to Apply

The NOI is used for eligibility review and administration purposes. The VPRI Office may share NOI information with Faculty leadership and auxiliary services to verify details and confirm Faculty support.

To complete the NOI, log into the UBCO VPRI Apply portal and provide:

- **Application Details** - PI and co-applicant details, title, location, application stream and type, budget ask, other funding sources, renovation requirements, infrastructure grant applications under review.



STEP 2: Full Application

An email will be sent to the PI once the NOI is confirmed as eligible and moved to the full application stage. To complete the full application, log back into the Apply portal and share the following:

- **Application Details** - pulled from the NOI
- **RPIF** – upload an RPIF signed by all applicable parties
- **Proposal** – upload a free-form proposal that addresses the specific selection criteria and adheres to the respective page limits as per the application stream (see table below)
- **Contribution to EDI** – describe concrete actions to appropriately consider equity, diversity, and inclusion. For resources and best practices, applicants may wish to refer to [VPRI](#), [NSERC](#), [CIHR](#), and [SSHRC](#) websites (300-words, maximum).
- **Short-form CV** - upload a short-form CV for the PI and each co-applicant. The short-form CV should highlight research experience, funding, student training, and publications that are relevant to the proposal (2 pages, each).
- **Quote** - upload a minimum of one quote or other evidence to demonstrate the cost of the equipment or tool. Requests over \$75,000 (exclusive of taxes, duties, customs, and freight charges), have must two quotes unless a sole source procurement justification can be provided.
- **Appendix** – use one extra page to provide references, additional images, tables, figures, pictures, or schematics as needed (optional).

Table of Application Requirements by Stream		Stream 1	Stream 2
RPIF		Yes	Yes
Proposal	Suitability & Capability	2 pages	4 pages
	Need & Urgency		
	Research Impact		
	Affiliated Research Programs	Not applicable to Stream 1	
	Plan for Operations & Maintenance		
	Training & Usage Considerations		
Contribution to EDI		300-words	300-words
Short-form CV(s)		2 pages, each CV	2 pages, each CV
Quote(s)		1 minimum	1 minimum 2 minimum if > \$75K
Appendix (optional)		1 page	1 page



Proposals and CVs must use standard formatting (0.5-inch margins, min 11-point font, and single-spaced). References can be included in the proposal page limits or as part of the appendix.

SELECTION CRITERIA

Selection Criteria	Stream 1 - Weight	Stream 2 - Weight
Contribution to EDI	10%	10%
Capability & Suitability	30%	15%
Need & Urgency	30%	15%
Research Impact	30%	15%
Affiliated Research Programs	-	15%
Plan for Operations & Maintenance	-	15%
Training & Usage Considerations	-	15%

STREAM 1 & 2

Contribution to EDI

The proposal includes concrete actions to appropriately consider equity, diversity, and inclusion in the research environment. For example, steps towards equitable training, time-sharing, and accessibility of the equipment for co-applicants and other users may be described. Demographic data of the research team and training environment is not requested nor required to assess the impacts of EDI contributions.

Capability & Suitability of Proposed Equipment or Tool

The proposal clearly describes the capabilities and suitability of the equipment or tool, and that there are no other more cost-effective ways of obtaining the results or meeting the goals of the project(s).

Need & Urgency

The proposal demonstrates why the equipment or tool is essential for the research and how it will be a unique resource to the research community (e.g., similar equipment or tools in the vicinity are not available). The proposal describes the impact on the applicant’s research and/or the pace of progress if there was a delay in the acquisition or upgrade of the equipment or tool.

Research Impact

The proposal clearly describes the potential for major advances in the discipline and/or impact on other audiences as a result of the equipment or tool (e.g., student training, research and innovation outputs, competitive external research funding, publications, community and/or industry engagement, etc.).

STREAM 2 ONLY

Affiliated Research Programs

The proposal describes the quality and significance of the research project(s) and program(s) affiliated with the equipment or tool. If the equipment or tool is used by more than one individual, lab, or studio,



the names of the individuals are explicitly mentioned. Journal-based metrics, such as Journal Impact Factors, are not required.

Plan for Operations & Maintenance

The proposal provides evidence that the research equipment or tools can be adequately operated and maintained for a reasonable number of years, including, if applicable, details on other sources of funding (e.g., UBC unrestricted sources, user fees, external grants, donations, industry partnerships) to support the operations and maintenance needs (e.g., annual license fees, consumables, technical staff, etc.).

For a complete list of eligible costs for the operation and maintenance of the equipment or tool, please refer to the [CFI](#) program terms.).

Implementing, Training & Usage Considerations

The proposal provides appropriate plans for purchasing and installing the equipment or tool and the status of required approvals (e.g., Faculty Leadership, IT, Facilities, etc.). Where applicable, evidence that Health, Environment, and Safety considerations have been proactively addressed are included (e.g., hazardous materials storage cabinets, fume hood / BSC requirements, cleanable (non-fabric) surfaces, emergency washing facilities, ventilation, etc.).

The proposal also provides appropriate plans for training users of the equipment or tools, as well as optimizing the usage of the equipment or tool as a shared resource (internal and, if appropriate, external).

REVIEW PROCESS

Proposals will be adjudicated by a multidisciplinary review panel using the applicable selection criteria and rating scale. A score of 6.0 or above is required in all the criteria in order to be recommended for funding. Each proposal will be reviewed by two panel members. The VPRI Office endeavors to assign a minimum of one reviewer with the same tri-council discipline as the PI to each application.

Rating Scale	Description
9.0-10.0	Outstanding
8.0-8.9	Very Strong
7.0-7.9	Strong
6.0-6.9	Good
4.0-5.9	Moderate
0-3.9	Insufficient

Top-ranked proposals will be recommended for funding. If any budget envelope remains, proposals that are deemed fundable but are not among the top-ranked may be entered into a lottery. The use of a lottery system to determine the remaining allocations is at the discretion of the Chair.



EXPENSES ELIGIBILITY

Purchases made in the previous six months before the application deadline are eligible.

Eligible:

- Costs to purchase new, used, or refurbished research equipment and tools.
- Costs to replace, upgrade, repair, enhance, or otherwise improve existing research equipment and tools.
- Costs for the creation, design, or engineering of research equipment and tools to enable researchers to collect, organize, analyze, visualize, mobilize, and store quantitative and qualitative data and creative outputs.
- Shipping, transportation, and installation of research equipment and tools, including brokerage fees, excise taxes, and duties.
- Extended warranties or service contracts for new or existing equipment and tools.
- Initial training of the main operator(s).
- Software subscriptions and licenses.
- Costs for renovations will only be approved under exceptional circumstances. If renovations are included, your proposal must show that you have pre-approvals in place as well as matching funds available, equal to the amount requested for renovations from CRET.

Renovations are defined as: Construction or renovation of space essential to house and use the infrastructure or to conduct the research activities described in the proposal.

Ineligible:

- Consumables and other direct costs of research activities.
- Operational costs.
- Maintenance costs, with the exception of warranties and services contracts listed above.
- Non-equipment items, except as described above.
- Lease or rental costs.
- Salaries and trainee stipends except for those directly involved in the creation, design, or engineering of the research equipment or tool.
- General purpose (personal) computer equipment or software.
- Office equipment and furniture.
- Administrative costs.
- Travel costs except for travel directly required in the creation of research equipment or tools or training of main operators in their use.
- Equipment or tools primarily used for teaching and/or non-research use such as knowledge mobilization. When equipment is dual purpose (e.g., research and teaching use), costs must be pro-rated accordingly.



AWARD TERMS

Purchasing approvals: The university must ensure that research/lab equipment is housed and operated in a safe environment. Prior to any purchase, the PI is responsible for reviewing the [UBC Finance's purchasing guidelines](#) and ensuring the equipment meets Canadian and Provincial regulations and standards. Refer to UBC Facilities for a list of [infrastructure requirements](#) that researchers should consider when purchasing research equipment and tools.

Financial terms: All funds must be spent within one year or they will be returned to the funding source. With proper justification, a six-month extension to the end date may be requested by submitting an email to vprawards.ubco@ubc.ca. PIs will be responsible for submitting a copy of the purchase (e.g., a sales invoice) to the VPRI Office Apply portal before the end of the grant term.

Partial funding: CRET grants are normally for the full cost of the recommended items. In rare cases, the review panel may recommend partial funding, but the amount recommended must be sufficient to allow for the purchase of a functional unit.

Operations & maintenance costs: The PI is responsible for all operating, maintenance, and any other additional costs incurred over the useful life of the research infrastructure to ensure the effective and optimal use of CRET-funded infrastructure. The useful life of the research infrastructure is considered to be the period of time over which the infrastructure is expected to provide benefits and be usable for its intended purpose, factoring in normal repairs and maintenance.

Ownership responsibilities: All CRET-funded research infrastructure is owned by UBC. If the PI leaves the University, CRET-funded research infrastructure will remain at UBC Okanagan. In these circumstances, a new PI will be identified, subject to VPRI approval.

The recipient will:

- Operate and use the research infrastructure
- Exercise de facto control over the research infrastructure, including assuming responsibility for its access and for the associated scientific programming
- Where appropriate, hold a majority interest in the research infrastructure
- Assume responsibility for insuring all CRET-funded research infrastructure, including powered vehicles.
- These responsibilities hold over the useful life of the research infrastructure and for a minimum of five years.

PROGRAM CONTACT

For any questions regarding this program or application process, please contact: Nicole Bennett, Internal Programs Manager, Office of the Vice-Principal, Research & Innovation nicole.bennett@ubc.ca