THE UNIVERSITY OF BRITISH COLUMBIA

Okanagan Campus

Critical Research Equipment & Tools (CRET) Program
2025-2026 Call for Proposals

KEY DATES	
Call for Proposals	Early September 2025
NOI Deadline	Wednesday, October 15, 2025 (11:59 pm)
Full Application Deadline	Monday, November 24, 2025 (11:59 pm)
Anticipated Notice of Award	February 2026

PROGRAM OBJECTIVE

Access to high-quality research equipment and tools is essential for conducting world-class research that produces tangible impact. Through this annual funding program, the Office of Research & Innovation (ORI) aims to improve the range and quality of UBC Okanagan's research infrastructure, support repair and upkeep of critical research infrastructure, and provide opportunities for student research training.

PROGRAM DETAILS

The Critical Research Equipment & Tools (CRET) Program was established in 2019 to provide funding to support the acquisition, development, creation, repair, or replacement 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 2025-2026 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 Tri-Agency Guide on Financial Administration (TAGFA) and SSHRC definitions of research tools as "any item (or interrelated collection of items comprising a system) of tangible and intangible (software, licenses, etc.) property"[1], which "enables researchers to collect, organize, analyze, visualize, mobilize and store quantitative and qualitative data and creative outputs"[2]. Applications from scholars and researchers in all research or knowledge-creation fields are encouraged.

[1] https://www.nserc-crsng.gc.ca/interagency-interorganismes/TAFA-AFTO/guide-guide_eng.asp#a-a38

[2] https://sshrc-crsh.canada.ca/en/funding/policies-regulations-and-guidelines/guidelines-support-tools-research-related-activities.aspx#2

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 or require urgent repair or upgrade.
- The identification of a research space in which to house CRET-funded equipment or tools is an essential requirement of the application process. CRET-funded infrastructure should be located within the UBC Okanagan system.
- As an exception, research equipment may be located outside UBC's Okanagan campus if the proposed location is necessary to achieve specific research objectives. In cases where the research equipment will be housed outside UBC's Okanagan campus, the applicant must seek pre-approval from their home Faculty (Dean's Office or equivalent) and the VPRI Office (vprawards.ubco@ubc.ca).
- For proposals requiring new research space, the applicant(s) must confirm space availability within the Faculty's current research space envelope. Details about the research space (e.g., allocation, use, services, etc.) should be known before submitting a CRET application.
- Applications for equipment to be housed in a UBC Okanagan shared research platform (Animal Care and Use Program, Fipke Laboratory of Trace Element Research, Plant Growth Facility, StatsCan Research Data Centre, and Survive and Thrive Applied Research) normally will be ineligible unless it fills a critical need specific to a particular research project that requires use of the facility.
- Stream 2 proposals that are eligible for the NSERC Research Tools & Instruments program must be submitted concurrently to the Tri-Council program.
- Applications to fund extended warranties or service contracts for essential research equipment and tools are eligible but must include confirmed 1:1 matching support from other sources (internal or external). The matching support cannot be in-kind or a supplier discount.
- Applications for research computing equipment and/or software must be reviewed by UBC IT Services prior to submission. You may contact Conor English or Jorden Harvey from Research Computing.
- Renovations and decommissioning of equipment are ineligible costs.
- Partial support from other internal or external funding sources is welcomed and encouraged.

APPLICANT ELIGIBILITY

- Individual faculty can be listed on a maximum of 2 applications in a single year.
- The Principal Investigator (PI) cannot submit more than one application as PI.
- PIs who successfully secure funding from CRET may submit applications in consecutive years.
- PIs 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 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.

SUBMISSION PROCEDURE

There are two stages to submit a CRET application using the UBCO Research + Innovation Apply portal: https://apply.research.ok.ubc.ca.

- To begin, log in as an Applicant using your UBC CWL.
- Navigate to Programs.
- Click MORE to expand the CRET program.
- Click APPLY to start an application.

STEP 1: Notice of Intent (NOI) to Apply – due October 15, 2025 (11:59 p.m.)

The NOI is non-competitive and used for eligibility and administration purposes. Details submitted at the NOI stage may be revised before the full application. The VPRI Office may share NOI information with Faculty leadership and auxiliary services to verify details. If there are any questions or concerns regarding your NOI submission, a member of the VPRI Office will contact you.

To complete the NOI, applicants are asked to provide:

- PI and co-applicant details (name, Faculty, department, email)
- Name of equipment or tool
- Application stream
- Estimated total budget, CRET ask + funding from other sources
- Location: building + room number
- Renovation requirements (if any)
- Technician / staff resource requirements
- NSERC RTI application history and plans
- 100-word summary

STEP 2: Full Application – due November 24, 2025 (11:59 p.m.)

As soon as the NOI is verified as complete, the full application tasks will be available. To complete the full application, applicants will be asked to provide:

- Application Details – pulled from NOI stage (can be revised as needed)
- RPIF – upload an RPIF signed by all applicable parties
- Proposal – upload a free-form proposal that addresses the selection criteria and adheres to the maximum page limit with standard formatting. Stream 1 may use up to 2-pages to address the criteria. Stream 2 may use up to 4-pages.
- Short-form CV (max of 2 pages, each) - upload a short-form CV for the PI and each co-applicant. A short-form CV highlights research experience, funding, student training, and publications that are relevant to the proposal.
- Quotation - upload a minimum of one quote or other evidence that demonstrates the cost of the equipment/tool. Include a summary table if the equipment/tool has multiple components and

highlight any confirmed discounts from suppliers.

- Appendix (optional) – use one extra page to provide references, budget details (e.g., annual operational costs, user fees), additional images, tables, figures, pictures, or schematics as needed.

Proposals and CVs must use 'standard formatting' with minimum of 0.5-inch margins, 11- point font, and single-spaced. References can be included in additional to the proposal page limit.

How to obtain a quotation:

For goods and services that are not IT related, quotes may be obtained from the vendor (i.e., an email with sufficient details, a PDF, purchase order, etc.) or a supply catalogue (i.e., take a screenshot, source URL, etc.). Consult the UBCO Supply Management page for details and support. For IT/computer quotes and consultation, please contact Conor English or Jorden Harvey from Research Computing or submit a ticket through the UBC Self Service Portal.

EVALUATION CRITERIA

NEW for 2025: Both **Stream 1** and **Stream 2** applications are evaluated using the **same selection criteria**.

Need, Urgency, Suitability and Uniqueness (40%):

- The proposal demonstrates the equipment/tool is essential for the research, and that there are no other more cost-effective ways to obtain the required results or meet the goals of the project(s).
- The equipment/tool will serve as a unique resource to the applicant(s) (i.e., similar equipment or tools are not available or accessible at UBC Okanagan).
- The proposal clearly demonstrates the impact of any delay in acquiring the equipment/tool on the research and its progress.
- There is a clear need to upgrade or replace obsolete or failed equipment.
- The proposal outlines the expected utilization of the equipment by the applicant, and if applicable, by co-applicant(s) and other users.

Feasibility and Impact (40%):

- The proposal demonstrates the quality and significance of the research program(s), including the potential for major advances and disciplinary impact resulting from the equipment/tool. *Journal-based metrics, such as journal impact factors, are not required.*
- The proposal presents a feasible plan for use of the equipment/tool. If it will be shared among individuals, labs, or studios, relevant details are provided (e.g., name, estimated usage, access, etc.).
- The proposal includes appropriate plans for purchasing and installing the equipment/tool, along with the status of required approvals. Evidence that EDI, Health, Environment, Safety, and Security considerations have been proactively addressed is provided.

- The proposal provides evidence that the equipment/ tool can be adequately operated and maintained over a reasonable period. This includes, where applicable, a breakdown of annual costs and resource needs (e.g., license fees, consumables, technical staff, etc.) and a clear plan to cover these costs (e.g., UBC unrestricted sources, user fees, Faculty support, external grants, donations, industry partnerships). For a complete list of eligible costs for the operation and maintenance of the equipment or tool, please refer to the CFI program terms.).

Training of Users and Students (20%):

- The proposal demonstrates the applicant(s) has/have relevant experience with the equipment/tool, or includes a training plan to gain the necessary expertise for its effective use.
- The proposal describes the quality and extent of training opportunities provided to students.
- The proposal highlights the potential to provide students with marketable and career-advancing skills through training on the equipment.
- The proposal outlines concrete actions to appropriately consider equity, diversity, and inclusion (EDI) within the research environment. This may include steps towards equitable training, time-sharing, and accessibility of the equipment/tool for co-applicants, students, and other users.

REVIEW PROCESS

Proposals will be adjudicated by a multidisciplinary review panel based upon the evaluation criteria. Preliminary rankings will be deliberated by the review panel in consultation with senior representatives from IT Services, Facilities Planning, Faculties, and the Office of Research and Innovation. The review panel is Chaired by the Associate Vice-Principal, Research and Innovation (AVPRI). Final funding decisions are approved by Vice-Principal, Research and Innovation.

Panel membership will be structured to ensure broad Faculty representation across UBC's Okanagan campus, reflecting disciplinary diversity, institutional needs, and a range of career stages as able.

EXPENSE ELIGIBILITY

Purchases made in the six-month period prior to 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 to create, design, or engineer research equipment and tools to enable researchers to collect, organize, analyze, visualize, mobilize, and store quantitative and qualitative data and creative outputs.
- Shipping, transport, 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.

If construction or renovations are required to house the research equipment or tool, the proposal must demonstrate space change approval and funding (internal or external) have been secured for the work.

Ineligible:

- Consumables and other direct costs of research activity.
- 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 individuals 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 for 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 shared on a pro-rated basis.

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 to ensure 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. Connect with experts as needed in Procurement, IT Services, Facilities, Risk Management, Health & Safety, and Campus Planning. Requests to modify the approved use of CRET funds must be submitted in advance to the Office of Research and Innovation (vprawards.ubco@ubc.ca) for review and re-approval.

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 are responsible for submitting confirmation of the purchase (e.g., a sales invoice) to the Office of Research and Innovation before the end of the grant term.

Partial funding: CRET grants normally are awarded for the full cost of the requested items, but partial support from other sources is welcomed. In situations where partial funding is awarded from CRET applicants must demonstrate that sufficient additional funding has been secured to allow for the purchase of a functional unit before VPRI Office funds will be released.

Operations & maintenance costs: The PI is responsible for operating, maintenance, and any other costs incurred during the useful life of the research infrastructure to ensure effective and optimal use of CRET-funded infrastructure. The useful life of 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.

Over the useful life of the CRET-funded research infrastructure, the PI will:

- Operate and utilize the research infrastructure in alignment with the approved research objectives
- Ensure effective oversight of infrastructure management and operations, including responsibility for access and scheduling, as relevant.
- Hold a majority interest in the research infrastructure, to ensure leadership and accountability.
- Assume responsibility for insurance coverage of CRET-funded research infrastructure, including powered vehicles, in accordance with institutional policies.
- Oversee the proper disposal or decommissioning of the equipment/tool at the end of its useful life, ensuring compliance with environmental and safety regulations.

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.

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