

Partnership Playbook

An Overview to Partnering on CIHR's Funding Opportunities



Also available on the Web in PDF and HTML formats

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Introduction

Research funding is essential for progress and innovation. With an annual budget of over \$1 billion, the Canadian Institutes of Health Research (CIHR) launches more than 100 funding opportunities each year, attracting thousands of applications from health researchers across Canada.

However, we do not do this alone. We collaborate with government, public, academic, with not-for-profit and private sector organizations, as well as charities, and Indigenous communities to support equity, diversity, and inclusion efforts and advance impactful health research across all stages from scientific discovery to knowledge mobilization. By working together, CIHR and partners are better able to leverage resources, enhance our efforts, and collectively achieve outcomes that benefit not only Canada but the global health community.

It is through these partnerships that we are able to fully realize our [mandate](#) to “excel, according to internationally accepted standards of scientific excellence, in the creation of new knowledge and its translation into improved health for Canadians, more effective health services and products and a strengthened Canadian health care system”.

To learn more about CIHR please visit [our website](#).

Who is the Partnership Playbook For?

Partnering with CIHR can take many forms – both formal and informal – such as co-hosting meetings and events, committee or advisory board involvement, or planning conferences, to name just a few. This Partnership Playbook, however, is intended as a high-level overview on what to expect when collaborating with CIHR on a funding opportunity—otherwise known as a **competition partnership**. For simplicity, this Playbook focuses on **CIHR-led competitions**, where CIHR is managing or administering the competition. If CIHR were to join another organization’s funding opportunity, the same general principles and considerations would apply but the process detailed below might differ in accordance with the other organization’s practices and processes.

What is a Competition Partner?

[Competition partners](#) collaborate with CIHR on specific health research funding opportunities. They can be engaged across the entire funding opportunity process: from its initial development and launch to post-funding activities. They are built on a shared commitment to a common purpose, vision, and goal, with the aim of achieving mutually beneficial outcomes that enhance the success and impact of the funding opportunity. The relationship goes a step further by documenting roles, responsibilities, contributions, and important dates in signed agreements.



Principles of Partnering

CIHR is guided by the following principles when considering potential competition partnerships:

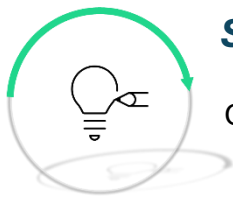
- I. **Shared Values and Objectives:** CIHR seeks to partner with organizations whose objectives align closely with those of CIHR, ensuring that the partnership is rooted in shared goals and values. Partnerships must also align with broader [policies and guidelines](#).
- II. **Public Interest:** All partnerships must serve the public interest by advancing societal benefits through the promotion and mobilization of research findings. Outputs from funded research must be made publicly accessible through open access and with a focus on addressing the health challenges we face today and preparing us for the ones we'll face tomorrow.
- III. **Conflict of Interest:** CIHR and partners share a responsibility to avoid when possible, and otherwise properly manage conflicts of interest.
- IV. **Transparency:** All partnership activities should be conducted transparently, with a focus on fairness, credibility, and openness to public scrutiny.
- V. **Accountability:** CIHR and partners are both accountable for the appropriate use of public funds.

The Competition Partnership Process

Generally, CIHR's competition partnership process begins with initial conversations around shared research interests and objectives, progresses through the collaborative agreement phase, followed by the competition process itself, and ends with post-funding management.



Timing The earlier the discussions begin, the better, since a funding opportunity can take 12 to 18 months to fully develop, launch, and fund.



Step 1: It Starts with a Conversation

Competition partnerships begin with a considerable amount of time exploring shared research interests and objectives; if and how these interests can be addressed through a funding opportunity, and what each party can contribute.

Typically, these initial conversations are between a CIHR Strategic Lead, from one of our [Institutes](#) or [Initiative units](#), and the potential partner. This Strategic Lead and often a CIHR partnership advisor typically remains the partner's primary point of contact throughout the competition partnership process. This initial conversation is the starting point and marks the beginning of a continued evolving dialogue as we move forward.

During these conversations, CIHR will likely ask you several questions in order to understand your partnership needs.

Question- Do you want to be a competition or an applicant partner?

Are you looking to collaborate with CIHR on a funding opportunity and fund research with CIHR in a particular area (a [competition partner](#), the focus of this Playbook) **OR** are you looking to collaborate to provide resources to a specific project or team? If the latter, then you are looking to be an [applicant partner](#). In this case, you will be engaging with the researchers directly.

Question- What are you looking to fund?

This question leads to numerous sub-questions for consideration:

- a) Are you looking to fund a [grant](#) or an [award](#)? Grants fund research projects, and typically involve larger amounts of money, while awards provide salary support or stipends for capacity building.
- b) Are you looking to develop a new funding opportunity, create a broader initiative encompassing multiple opportunities, or join an existing CIHR funding opportunity or initiative?
- c) Do you have a specific health research area or priority you are looking to support? For example, are you looking to fund research projects for a particular disease or health sector?
- d) Are you looking to fund a new or established area of science? This informs the [type of grant](#) that is offered. For example, supporting a new field lends itself best to a shorter-term grant, while a multi-year team grant might be most appropriate when a research field is well established and requires an interdisciplinary group of researchers.
- e) Do you have specific eligibility requirements or conditions of funding? For example, are you required to limit your support to a specific geographical location in Canada, or do you want to target your funding towards researchers at a specific career stage?
- f) What type of contribution are you hoping to make and over what time frame? In other words, what level of funding are you able to commit and for what duration?

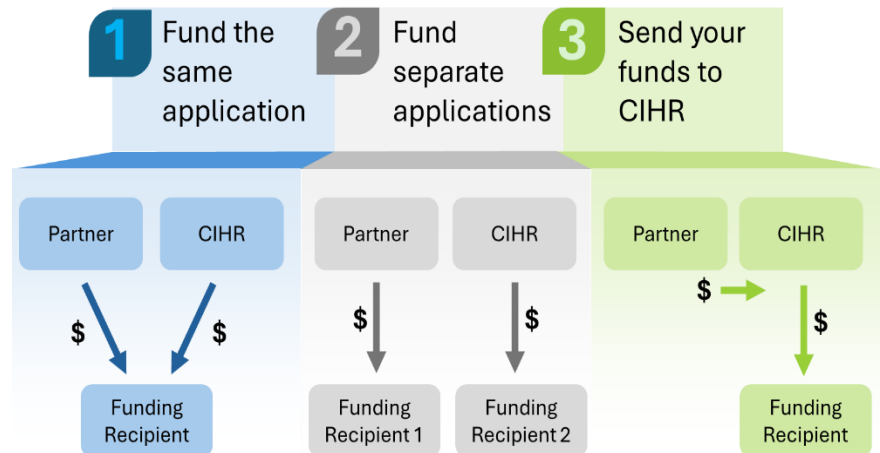
g) Any specific condition that you would like or need in the funding opportunity?

Answers to these questions, and others, will help determine the most suitable path for collaboration.

Question- How do you want your funding to flow?

When partnering with CIHR, there are three main models on how funds can eventually flow to the recipient (successful applicant):

1. Co-fund recipients together with CIHR; or
2. Fund separate recipients within the same opportunity; or



3. Send your funds to CIHR to administer on your behalf.

In other words, CIHR and the partner will each send their contributions directly to the funding recipient's research institution (scenarios 1 & 2) OR CIHR can invoice the partner as funds are required which will then flow the funds to the recipient (scenario 3). Of note, CIHR can only transfer its funding either directly to the recipients' research institution or to another federal government department. To learn more visit [The Tri-agency Guide on Financial Administration](#).

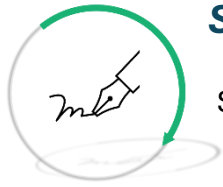
Question- Do you have any critical timepoints?

Funding opportunities have many critical timepoints. It is very helpful for partners to share any internal approvals or decision-making milestones that might influence timelines, key decision points, or any steps outlined in this Playbook. CIHR itself has many critical timepoints and competition timelines are often developed working backwards from when the funding is to be released.

Some of CIHR's include:

- Signing the collaborative agreement (~8-12 weeks).
- Launch of the funding opportunity (~6-8 weeks from final draft).
- Notice of an upcoming funding opportunity (~2-6 weeks prior to launch if applicable).
- Deadline for applicants to submit their research proposals (~4-24 weeks).
- Peer review date(s) (~4-16 weeks after the application deadline).

- Governance approvals (~2 weeks after peer review).
- Funding decisions sent to applicants (Notice of Decision) and any other announcements (*FO dependent*).
- Funding start date (*FO dependent but the first of the month*).



Step 2: Reach and Formalize an Agreement

Should we agree that we have mutual objectives and interests and that they can be achieved through a competition partnership, the next step is to formalize our collaboration. This is done through a collaborative agreement, which outlines the roles, responsibilities, and expectations for each partner.

Aligning Funding Conditions and Requirements

Timing Our goal is to have an agreement signed prior to the funding opportunity launch and before any public announcements are made.

Aligning our funding conditions is key to establishing partnerships in a way that ensures our collective expectations are met while aligning with our respective relevant policies and procedures. A sample of CIHR funding conditions are outlined below for reference and it is important for partners and CIHR to have open discussions around any required conditions during this step. The first is relevant during the competition itself

while the others after the funding has been awarded, however, all should be discussed up front.

1. Document Sharing

- CIHR must comply with the Privacy Act. While much of CIHR's information is protected, some documents can be shared once an agreement is signed and confidentiality is mutually agreed upon. Examples of shareable documents include:
 - Draft Funding Opportunity can be shared to ensure alignment and/or co-design of competition objectives and research areas (see [Step 3: Create and Shape the Funding Opportunity](#)).
 - Parts of the application will be shared for relevance review (see [Step 5: Eligibility Assessment and Relevance Review](#)).
 - Funding recommendations (see [Step 7: Prepare and Release the Results](#)).
 - Annual reports, mid-term or other joint reports (see [Step 8: Post-Funding Management](#)).

2. Monitoring & Reporting

- Partners and CIHR can together define a performance monitoring plan as well as discuss how reports will be collected and shared.

- Typically, CIHR requires, at a minimum, that all grantees submit an [end-of-grant report](#). However, CIHR and partners have flexibility and together can request more frequent and customized progress reports from funded applicants for monitoring and reporting purposes. The nature and frequency of the reports should be commensurate with the objectives and nature of the program and not place undue burden on the funded applicant (e.g., duplicating reporting needs).

3. Use of Data

- CIHR has [strategies and policies](#) that guide its approach to research data management and sharing. For example, CIHR has an open access policy on publications to increase the dissemination of research results and accelerate knowledge mobilization.

4. Intellectual Property

- While CIHR encourages the utilization of results of research funded wholly or in part by CIHR for the benefit of Canada and Canadians, neither CIHR nor partners can claim direct ownership, exploitation, or proprietary rights to [intellectual property](#) stemming from the research.

5. Parental Leave

- Recognizing that many graduate students and post-doctoral fellows rely on short-term contracts, CIHR places importance on supporting paid parental leave to retain and encourage promising early-career researchers. CIHR will ask whether partners are able to support paid parental leave for trainees in line with CIHR's Paid Parental Leave policy for awards – see the [Tri-Agency Research Training Award Holder's Guide](#) or the [Tri-Agency Financial Administration Guide](#) if support is being paid through a supervisor's grant. We understand that this may present different considerations for each partner and encourage open discussion with CIHR.

Note Steps 2 and 3 can be done in parallel.

Any agreed-upon conditions should be documented in the collaborative agreement for posterity.



Step 3: Create and Shape the Funding Opportunity

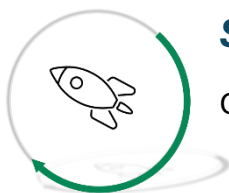
Once there is mutual agreement on overarching objectives and interests, and that they can be achieved through a competition partnership, CIHR will engage with partners to define the scope and objectives of the funding opportunity. This

includes determining whether to incorporate specific eligibility or relevance criteria (e.g., geographic location, career stage, or research area) and outlining any funding conditions discussed in [Step 2: Reach and Formalize an Agreement](#), such as progress reporting requirements.

Note All requirements and conditions of funding must be clearly documented in the funding opportunity.

Timing

Organizations can still join as a competition partner after the funding opportunity launches. However, eligibility criteria, research areas, and other key conditions will have been finalized and cannot be modified. Furthermore, depending on the timing and specific circumstances, CIHR may not be able to include the new partner organization's name to the funding opportunity.



Step 4: Launch the Funding Opportunity

CIHR and competition partners will discuss whether an advance notice of the funding opportunity should be developed for promotional purposes in newsletters and other information channels prior to its launch on CIHR's online research portal [ResearchNet](#).

Once the funding opportunity is officially launched, partners are welcome to simultaneously promote it through their own websites and networks. CIHR will work together with partners on all joint communications, and ensure they are available in both English and French.

For large or complex funding opportunities, information sessions/webinars for prospective applicants are often planned in which partners are welcome to participate.



Step 5: Eligibility Assessment and Relevance Review

Once the application deadline closes, CIHR ensures that all applications meet the eligibility criteria of the funding opportunity, including any requested by a partner. Applications that do not meet eligibility requirements will be withdrawn from the competition.

When partners have outlined interest in supporting a specific research area or scope, partners will be asked, generally before peer review (see [A Word on Priority Announcements...](#) for the big exception), to perform a relevance review to assess alignment to the specific research area or scope. To do so, CIHR will provide partners with select parts of the submitted applications.

CIHR respects and relies on partners' assessments for an application's strategic alignment to them, and therefore it is essential that partners are clear on which applications they might support as CIHR does not question the rationale received for when an application is deemed not relevant. Those not deemed relevant to the partner will not be considered for funding within that specific research area or scope.



Step 6: Peer Review

CIHR begins preparing for [peer review](#) following the launch of the funding opportunity, including inviting potential peer reviewers. Partners are encouraged to recommend potential peer reviewers for CIHR to consider. CIHR strives to ensure that peer review committees reflect the nature

Note To learn about CIHR's peer review processes visit [CIHR's Peer Review website](#).

and scope of the funding opportunity, have the necessary experience and/or expertise to assess the applications, and represent a balance in terms of region, gender, and language.

CIHR welcomes partners to observe the peer review meeting as long as they agree to abide by the [Conflict of Interest and Confidentiality Agreement for Peer Reviewers and Peer Review Observers](#).

While we can share the official notes from the peer review meeting (the Scientific Officer's notes) if requested, CIHR does not normally share the individual peer review assessments.



Step 7: Prepare and Release the Results

CIHR will generate application rankings from the peer review committee's recommendations and discuss with partners the funding scenarios for the relevant applications recommended for support.

Note Applications are funded top down until funding is exhausted and/or there are no more applications in the fundable range.

CIHR must seek governance approvals prior to releasing final funding decisions and if partners also require that their governance channels approve any funding decisions, this should be communicated to CIHR during the initial planning stages (see [Step 1 – Question: Do you have any critical timepoints?](#)).

CIHR sends a 'Notice of Decision' letter to all applicants through ResearchNet, letting them know whether or not their application was funded. Partner names are included in these decision letters and partner logos, on occasion, as well. Partners may also wish to send, in parallel, their own letters to successful applicants, which CIHR can help support.

CIHR also works closely with partners to draft and coordinate public announcements for competition results and discuss whether additional public communications should be made. Results are not made public until successful applicants have been officially informed.

In cases where the partner provides funding directly to the successful applicant, if the partner is sending its funding directly to the recipient, CIHR will provide their institutional contact information. CIHR will also send a copy of the 'Authorization for Funding' (AFF) which is the official record of funding for the partner's records. The partnership is also acknowledged in this document.



Step 8: Post-Funding Management

Although day-to-day interactions between CIHR and partners may naturally lessen once funding has been released, this phase marks a transition rather than an end of the relationship. As the competition concludes, partners take on more of the role of [knowledge partner](#), as CIHR and partners move into the post-funding management phase.

Post-funding management involves collecting and sharing applicant progress reports to monitor funded grants and awards, organizing collaborative activities such as hosting midterm or end-of-

grant meetings and workshops, and promoting and disseminating findings and outcomes with the broader health research community.

The time and effort invested to cultivate a respectful and productive relationship is vital as we work together to better support the health research ecosystem. We encourage partners to continue to engage with CIHR to explore new opportunities for collaboration and look to our next competition partnership.

Contact Contact the [Partnerships](#) team if you have any questions about this Playbook and/or are interested in funding health research with us.

A Word About Priority Announcements...

CIHR Priority Announcements (PAs) offer additional sources of funding for highly rated applications that are relevant to specific research areas. Applications can be submitted through the following open competitions:

- [Project Grant Program](#): designed to capture ideas with the greatest potential to advance health-related fundamental or applied knowledge, health research, health care, health systems, and/or health outcomes.
- [Canada Postdoctoral Research Award \(CPRA\) Program](#): provides support to highly-qualified applicants at the postdoctoral (post-PhD) or post-health professional degree stages to add to their experience by engaging in health research either in Canada or abroad.
- [Canada Research Graduate Scholarship – Doctoral \(CGRS D\) Program](#): provides support to students who are pursuing a doctoral degree in a health-related field either in Canada or abroad and promotes research excellence.

The steps listed in the competition partnership process all generally apply although there are notable differences in timing and speed of conducting the relevance review. Relevance review may occur before or after peer review.