

Application Instructions—Partnership Grants—Stage 2

- For the purposes of these instructions, the terms “applicant” and “project director” are used to refer to individual applicants and the person acting on behalf of an institutional applicant.

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Documents to read before applying

Important links

Helpful tips

Write your proposal in clear, plain language. Use non-technical terms that can be understood by a range of audiences with varied areas of expertise.

SSHRC advocates for the practices listed below when applicable in your application. In addition, costs related to these activities are eligible:

- responsible research data management strategies;
- open access publishing activities;
- dissemination in both official languages;
- promotion and support of official language minority communities; and
- effective research training.

Tools for research and related activities

In addition to the description of your overall proposal, if you are submitting a request for support for a tool for research or related activities, consult SSHRC's [Guidelines for Support of Tools for Research and Related Activities](#). The Guidelines are intended to provide assistance to researchers submitting requests for support for tools distinct from a typical component of a research grant. If your review of the Guidelines and the [Canada Foundation for Innovation website](#) indicates that your tool request corresponds with SSHRC requirements, include in your description the points outlined in the [Guidelines for Support of Tools for Research and Related Activities](#).

- If you experience technical difficulties, contact the [helpdesk](#) as early as possible in the application process. The helpdesk has a higher volume of requests during peak periods (i.e., September 1 to December 1) and on deadline days.

Application process

Grant funds may be administered only by an [eligible postsecondary institution or eligible not-for-profit organization](#).

- Where possible, data from your Stage 1 application was transferred to the Stage 2 application form to ease the process. **It is your responsibility to verify the accuracy of transferred information and to update it as required.** SSHRC will not be held responsible for any inaccuracies in submitted applications.

Accessibility

If you need help completing online application forms due to circumstances arising from a [disability](#), contact your institution (scholarship liaison officer, research grant office or other applicant support office) as early in the application process as possible to investigate available supports. If your institution cannot provide help, or needs SSHRC to collaborate on a solution, contact SSHRC at accommodation@sshrc-crsh.gc.ca. You can also contact SSHRC if you have questions or are seeking specific adaptation arrangements. You do not need to share your medical or sensitive personal information, and, to protect your privacy, should avoid doing so.

Frequently requested accommodations include, but are not limited to:

- one-on-one phone or video appointments to clarify funding program information or the application process, or receive technical support;
- alternative formats of online materials to enable access using assistive technology; and
- submission of the application (in full or part) through alternate means or format (e.g., hard copy, voice recording, or data entry by SSHRC staff on the applicant's behalf).

Applicant or project director responsibilities

By clicking "Submit," the applicant or project director certifies that all information is accurate. They are also responsible for:

- completing all mandatory fields (bold labels);
- attaching mandatory electronic files (application);
- ensuring all co-directors, co-applicants and collaborators have submitted their "Accept Invitation

Form;”

- verifying and correcting the data until the “Verification Report” confirms verification;
- clicking “Submit” (to research administrator) for approval by your institution’s or organization’s internal deadline. The electronic submission process ensures validation of the information by an institution’s or organization’s administrator before they forward your application to [SSHRC](#) on your behalf (status is “Forwarded”). Once processed by [SSHRC](#), the status will change to “Received;” and
- ensuring that invited partner organizations have submitted their “Partner Invitation Form.”

Research or financial administrator responsibilities

By clicking “Forward” (Forward to [SSHRC](#)), **the research administrator or designated financial administrator for not-for-profit organizations** (institutional approval) certifies that:

By clicking “Forward” (Forward to [SSHRC](#)), **the research administrator or financial administrator (institutional approval)** certifies that:

- the applicant or project director:
 - is affiliated with the institution or organization; and
 - has the necessary time and facilities to carry out the activity;
- the postsecondary institution:
 - is willing to administer any grant received according to [SSHRC](#) policies;
 - agrees to take the necessary steps to ensure that machine-readable files or computer databases are preserved and accessible under conditions agreed to by the institution and the researcher;
 - will release funds to the successful candidate once all necessary certification requirements and conditions have been met;
 - will notify [SSHRC](#) of changes in the composition of the partnership; and
 - has verified that the budgetary estimates are in accordance with its rates and policies.

Electronic submission process and acknowledgement of receipt of applications

Applicants must allow enough time for their institution’s or organization’s internal approval process, as specified by the relevant authorities. [SSHRC](#) will acknowledge receipt of your electronic application form and will assign you an application number. Cite this number in all correspondence with us.

- Applications remain available for download via the [SSHRC](#) online system for **30 days after the deadline, after which they are deleted.**

Attaching a document

Many modules in your application will require you to attach a PDF document. You must follow the specified requirements for margins and font size, or your application will be deemed ineligible. An error message will appear if the file you are trying to attach does not meet the required specifications for page length and file size. Once you have attached the electronic file, we recommend you click “View attached file” to ensure you have the proper file and that your file is not corrupted.

Identification (mandatory)

Program name

Based on the objectives put forward in the [Insight](#), [Connection](#) and [Talent](#) programs, select and rank, in descending order of relevance, the program(s) related to your proposal.

Select the [Talent](#) program only if your proposal is primarily for a partnered research training initiative. Talent can be ranked only as entry #1. If you select the Talent program, you must select “Partnered research training initiatives” as a partnership approach in the [Activity details/research activities section](#).

Application title

Provide a short, descriptive title for your proposal in non-technical terms. Restrict use of acronyms (e.g., UN, NATO). Use uppercase for only the first word of the title, proper nouns and acronyms.

Type of partnership

Indicate whether this is a new or existing partnership. A new partnership is one that was developed for the purposes of submitting an application to this funding opportunity.

Joint initiatives

See the [funding search tool](#) for a complete list of joint initiatives that may be relevant to your application. If you want your project to be considered for one of these initiatives, select it in the drop-down list in the “Joint or special initiative” field in the Identification module.

Research-creation proposals

Before you select “Yes,” refer to the definition of [research-creation](#) for more information and examples of fields involving research-creation. If you select “Yes,” refer to [Research contributions and relevant experience](#) and the [Guidelines for Research-Creation Support Materials](#) for instructions regarding creative outputs and support material.

Does your proposal involve Indigenous research, as defined by SSHRC?

Select “Yes” if you wish to signal to the adjudication committee that your application should be reviewed in the context of SSHRC’s definition of [Indigenous research](#) and its [Guidelines for the Merit Review of Indigenous Research](#).

Project director

Carefully review the [Eligibility](#) section of the Partnership Grants funding opportunity description before completing this module. Enter complete information about the project director (the person responsible for the overall intellectual leadership of the partnership and accountable, with the host institution, for coordinating the grant's overall financial and administrative aspects). If you have an existing [SSHRC CV](#) and wish to indicate a different position from the one already on record, use this section to enter a new organization, department or division.

Applicant (or lead organization for institutional grants) □

Enter complete information about the applicant (the institution or organization that will manage or administer the funds). Along with the information requested, enter the contact person at the organization.

Names and initials

This information has automatically been transferred from your account. To change your family name or first name, you must contact webgrant@sshrc-crsh.gc.ca. To change your initials, you must return to the “My Account” section of your portfolio to update the information.

Organization

The organization has automatically been transferred from the “current position” screen of your [CV](#). To have a different affiliation on record for this application, click “List...” and make the necessary selection.

Address

Complete the address section only if the department is not listed.

Administering organization (individual grants) or lead organization (institutional grants)

Only an [eligible Canadian institution or organization](#) can administer grant funds. Institutions or not-for-profit organizations interested in administering [SSHRC](#) individual or institutional grants must meet the [Institutional Eligibility Requirements for the administration of grants and awards](#), which is independent of the application process.

Host organization involvement (mandatory)

Maximum one page

Partnership Grants are institutional/organizational applications. At Stage 2, you must attach a letter of engagement from your host institution/organization, written on official letterhead and signed by appropriate officials. The letter should include the following information:

- a statement that the institution/organization has read the proposal and agrees to its role and level of participation as outlined;
- a statement that the institution/organization is willing and able to complete activities assigned to it;
- a statement confirming the institution/organization's financial and non-financial contribution(s), including intended support for the project director in leading these large grants (e.g., administrative support, course release, etc.);
- an overview of the institution/organization's research-related priorities/strategy, and of how the partnership will advance those objectives; and
- a statement confirming the institution/organization's commitment to equity, diversity and inclusion (EDI) and details about the support it will provide to advance the partnership's EDI plan. Refer to SSHRC's [Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#).

- If applicable, the letter of engagement should also include contributions from departments within the host institution.

Organization information (not-for-profit organizations only) Maximum two pages

When a not-for-profit organization is the administering organization and proposes to manage the funds, you must include the following information:

- the mandate of the organization;
- descriptions of the staff position(s) assigned to the proposed project and the qualifications of individuals in these positions;
- an overview of the organization's outcomes and, if applicable, specific outcomes related to research;
- discussion of research protocols, including the freedom to conduct research and publish findings;
- proof of incorporation; and
- the organization's website.

Activity details / research activities (mandatory)



Ethics

State whether or not your proposal involves human beings as research subjects. If it does, select “Yes” and consult the [Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans —TCPS 2 \(2018\)](#) and submit your proposal to your organization’s research ethics board.

Impact assessment

The [Impact Assessment Form \(Appendix A\)](#) must be completed and submitted with grant applications **ONLY** if at least one of the following situations applies to your research or research-related activities, as per the [Impact Assessment Act](#), 2019 (IAA):

- A. any phase of the proposed research takes place on federal lands, other than lands under the administration and control of the Commissioner of Yukon, the Northwest Territories or Nunavut, as interpreted in section 2 of the IAA;
- B. any phase of the proposed research takes place in a country other than Canada;
- C. the grant funds permit a designated project (listed in the [Physical Activities Regulations](#)) to be carried out in whole or in part; or
- D. any phase of the proposed research depends on a designated project (listed in the [Physical Activities Regulations](#)) being led or carried out by an organization other than SSHRC.

Items A and B above apply **only** to designated projects / physical activities listed in the [Physical Activities Regulations](#) (e.g., projects that involve physical work / alterations to the land or environment).

If none of the above situations apply to your proposed research activities, you do not need to complete or submit the Impact Assessment Form.

Keywords

List keywords, separated by semicolons, that best describe your proposal.

Disciplines, areas of research, temporal periods, geographical regions and countries

Indicate and rank each entry relevant to your proposal, with Entry 1 as the most relevant and the last entry the least relevant.

Partnership approaches

Partnership arrangements are defined by the nature of the activity/activities to be carried out. Select

one or more possible [formal partnership](#) approaches in the drop-down menu. If your approach is not listed, select “Other” from the list and type your approach in the box provided.

Approaches available within the Partnership Grants can include, but are not limited to, the following, as well as a combination thereof:

- cross-sector co-creation of knowledge and understanding;
- disciplinary and interdisciplinary research partnerships;
- networks for research and/or related activities;
- partnered chairs (see [Guidelines for Partnered Chairs](#));
- partnered knowledge mobilization;
- partnered research centres; and
- partnered research training initiatives (see [Guidelines for Partnered Research Training Initiatives](#)).

- If you have selected the Talent program as a program name under Identification, you must select partnered research training initiatives as an approach.

Previous SSHRC funding (if applicable) **Maximum one page**

If the proposed partnerships’ activities are the result of previous [SSHRC-funded](#) activities, explain how they differ from those previously financed through [SSHRC](#) grants. Describe the results and impacts of past [SSHRC-funded](#) activities, and explain how these could influence the new activities offered in your proposal. Describe any potential or perceived overlaps with, as well as value added for, other continued [SSHRC](#) funding. Also describe any links developed with the partner organizations as part of previous [SSHRC-funded](#) activities.

Co-director(s)

You can invite one or more co-directors in this module if your proposed partnership uses a [co-director](#) governance approach in which a co-director (or co-directors, if justified) shares intellectual leadership with the project director. This approach should be outlined and justified in the narrative portions of your application in relation to the research and related activities being proposed in the partnership. The project director is responsible for the overall intellectual leadership of the team or partnership, and is accountable, with the host institution, for coordinating the grant’s overall financial and administrative aspects.

- Ensure that co-directors invited in this section are eligible for that role. See the [eligibility section of the Partnership Grants—Stage 2 funding opportunity description](#). CVs for co-directors who are ineligible can be removed from your application prior to its evaluation.

Co-director invitation process:

- Select “academic” or “non-academic.”
- Enter the family name. **If you incorrectly type in a co-director’s family name**, you will receive an error message. The system will recognize the discrepancy only after the **co-director** has accepted the invitation. For your application to be successfully verified, the **co-director’s** family name must be identical to the family name found in [SSHRC’s](#) database.
- Enter the email address.
- Click “Save.” The system will generate an email to each person, inviting them to participate in the application.

Each invited person is responsible for completing, verifying and submitting their “Accept Invitation Form.”

- Your application will not be “Verified Successfully” until all the co-directors you invited have successfully completed and verified their invitation.

Status	Definition
Invitation not yet accepted	A co-director has not accepted the invitation. OR If the co-director deleted the system-generated invitation email by error, as the applicant you can click “Resend email,” and the same invitation will be sent again. OR If the co-director has declined the invitation, you must remove the person from the application by clicking “Clear entry.”
Invitation accepted but not yet verified	A co-director has accepted the invitation and a copy of their CV was attached to their “Accept Invitation Form” on creation. The “Accept Invitation Form” has not yet been verified. Click “View CV ” to preview the co-director’s CV and form.
Invitation accepted and verified	A co-director’s “Accept Invitation Form” has been completed and verified. Click “View CV” to preview the co-director’s CV and form.

[SSHRC CV](#)

Co-directors affiliated with a **postsecondary institution** must submit a full [SSHRC CV](#).

Co-directors from a **non-academic organization** have the option of submitting a full [SSHRC CV](#) or only completing the following mandatory fields:

- Identification module—Correspondence language
- Identification module—Permanent postal code
- Current position module—Organization, department, start date
- Current position module—Address
- Current position module—Primary phone number
- Research expertise module—Keywords
- Research expertise module—Discipline #1

Research contributions and relevant experience attachment

In addition to meeting the [CV](#) requirements above, co-directors must also provide PDF attachments describing their research contributions and relevant experience.

A copy of the co-director's [CV](#) will be attached to the “Accept Invitation Form” on creation. As the project director, you will then be able to view each co-director's [CVs](#) as applicable. The instructions provided to co-directors outline the sections that can be included in the attachment. Co-directors can devote more space to certain sections depending on the nature of their past contributions and experience (for example, non-academic participants can have a larger Relevant experience section).

Co-applicants with [SSHRC CV](#)

You may invite up to 10 co-applicants with [CVs](#). Additional co-applicants may be invited without [SSHRC CVs](#) in the Participants module; those co-applicants will have the option to add a one-page [Biographical Sketch](#) to their Accept Invitation form.

- Ensure that co-applicants invited in this section are eligible for that role. See the [eligibility section of the Partnership Grants funding opportunity description](#). [CVs](#) for co-applicants who are ineligible can be removed from your application prior to its evaluation.

Co-applicant invitation process:

- Select “academic” or “non-academic.”
- Enter the family name. **If you incorrectly type in a co-applicant's family name**, you will receive an error message. The system will recognize the discrepancy only after the co-applicant has accepted the invitation. For your application to be successfully verified, the co-applicant's family name must be identical to the family name found in [SSHRC's](#) database.
- Enter the email address.
- Select “Save.” The system will generate an email to each person, inviting them to participate in the application.

- **It is the responsibility of each invited person to complete, verify and submit their Accept Invitation form.**

- Your application will not be “Verified Successfully” if all the co-applicants you invited have not successfully completed and verified their invitation.

Status	Definition
Invitation not yet accepted	<p>Co-applicant has not accepted the invitation.</p> <p>OR</p> <p>If the co-applicant deleted the system-generated invitation email by error, as the applicant you can click “Resend email,” and the same invitation will be sent again.</p> <p>OR</p> <p>If the co-applicant has declined the invitation, you must remove the person from the application by clicking “Clear entry.”</p>
Invitation accepted but not yet verified	<p>Co-applicant has accepted the invitation and a copy of their <u>CV</u> was attached to their Accept Invitation form on creation. The Accept Invitation form is incomplete. Click “View <u>CV</u>” to preview the co-applicant’s <u>CV</u> and form.</p>
Invitation accepted and verified	<p>Co-applicant’s Accept Invitation form has been completed and verified. Click “View <u>CV</u>” to preview the co-applicant’s <u>CV</u> and form.</p>

SSHRC CV

Co-applicants with CVs must do the following:

- Co-applicants affiliated with a **postsecondary institution** must submit a full SSHRC CV.
- Co-applicants from a **non-academic organization** have the option of submitting a full SSHRC CV or only completing the following mandatory fields:
 - Identification module—Correspondence language
 - Identification module—Permanent postal code
 - Current position module—Organization, department, start date
 - Current position module—Address
 - Current position module—Primary phone number
 - Research expertise module—Keywords
 - Research expertise module—Discipline #1

Research contributions and relevant experience attachment

In addition to meeting the [CV](#) requirements above, co-applicants must also provide PDF attachments describing their research contributions and relevant experience.

A copy of the co-applicant's [CV](#) will be attached to the "Accept Invitation Form" on creation. As the project director, you will then be able to view each co-applicant's [CVs](#) as applicable. The [Co-applicants with SSHRC CV](#) instructions outline the sections that may be included in the attachment. Co-applicants may choose to devote more space to certain sections depending on the nature of their past contributions and experience (for example, non-academic participants may choose to have a larger Relevant experience section).

Participants

Participants invited in this section **do not submit SSHRC CVs**. See module [Co-applicants with SSHRC CVs](#) to invite up to 10 co-applicants with [CVs](#). Additional co-applicants without [CVs](#) may be invited in this module along with any collaborators. Co-applicants invited in this section may include an optional one-page Biographical Sketch.

The categories of "co-applicant" and "collaborator" accord with financial regulations outlined in the [Tri-Agency Guide on Financial Administration](#), so project directors are encouraged to discuss roles and involvement in the team at the outset and to be clear about whether participants will have access to research funds prior to inviting them in a particular role.

Participant invitation process:

- Select the role.
- If applicable, select "academic" or "non-academic."
- Enter the family name. **If you incorrectly type in a participant's family name**, you will receive an error message. The system will recognize the discrepancy only after the participant has accepted the invitation. For your application to be successfully verified, the participant's family name must be identical to the family name found in [SSHRC's](#) database.
- Enter the email address.
- Click "Save." The system will generate an email to each person, inviting them to participate in the application.

It is the responsibility of each invited person to complete, verify and submit their "Accept Invitation Form" and Biographical Sketch (if applicable).

Note : Your application will not be "Verified Successfully" until each participant you invited has successfully completed and verified their invitation.

Status	Definition
Invitation not yet accepted	Participant (co-applicant or collaborator) has not accepted the invitation. OR If the participant deleted the system-generated invitation email by error, as the applicant you can click “Resend email,” and the same invitation will be sent again. OR If the participant has declined the invitation, you must remove the person from the application by clicking “Clear entry.”
Invitation accepted	Participant has accepted the invitation and the “Accept Invitation Form” was created. Click “View” to preview the form.

Invited partner organizations (mandatory) □

Partner organization invitation process:

- Enter the family name, first name and email address of each partner organization contact.
- Click “Save.” The system will generate an email to each contact person, inviting them to participate in the application.

□ **It is your responsibility as the project director to ensure that the invited person verifies and completes the form in advance of the application deadline.**

□ **Note :** Your application will not be “Verified Successfully” if all the contacts you have invited have not successfully completed and verified their invitation.

Status	Definition
Invitation not yet accepted	Partner organization contact has not accepted the invitation. OR If the partner organization contact deleted the system-generated email by error, as the applicant, you can click “Resend email,” and the same invitation will be sent again.

Invitation refused	Partner organization contact was unable to complete the form.
Invitation accepted but not yet verified	“Partner Organization Form” has been created but is incomplete. Click “View” to preview the form.
Form completed	“Partner Organization Form” has been verified and completed. The form will be attached electronically to your application once it has been submitted to SSHRC .

It is the responsibility of each invited partner organization contact to complete, verify and submit their “Accept Invitation Form,” including their Letter of Engagement. Each letter should be written on official letterhead and include the following:

- the relevance and significance of the project objectives for the partner organization;
- the exact nature of the involvement of the partner organization during the lifespan of the project, including the intellectual leadership and governance of the partnership, where appropriate;
- precise details on the financial and/or [in-kind contributions](#) to be provided by the partner; and
- the expected outcomes that the partner organization wishes to achieve.

By submitting, the partner organization is acknowledging that it has read and agrees in principle with the objective(s) of the proposal.

Summary of proposal (mandatory)

Maximum one page

Provide a clear summary of your proposal indicating:

- the challenges or issues to be addressed;
- the overall goal and objectives of the proposed partnership; and
- the breadth of the partnership, and the meaningful engagement of the partner organizations involved.

Knowledge mobilization plan (mandatory)

Maximum two pages

In planning your research project, consider the ways in which merit reviewers assess knowledge mobilization activities. For example, reviewers are advised to evaluate, under the Feasibility criterion, the “quality and appropriateness of knowledge mobilization plans, including effective dissemination, exchange and engagement with stakeholders within and/or beyond the research community, where applicable.” Reviewers are also advised to evaluate EDI considerations in the design of the knowledge mobilization activities, as applicable.

SSHRC encourages its funding recipients to disseminate research knowledge in both official languages, whenever feasible and/or appropriate.

Include a plan to increase knowledge uptake by target audiences, and anticipated outputs, outcomes and/or impacts of social sciences and humanities knowledge among various appropriate audiences or participants (academic and/or non-academic), including:

- methodologies and approaches to engage appropriate target audiences or participants, including, as applicable, diverse groups of researchers, policy-makers, business leaders, community groups, educators, media, international audiences, practitioners, decision-makers and the general public;
- details about how EDI considerations will be addressed in the design of knowledge mobilization activities, as applicable (refer to SSHRC’s Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications, and in particular, the section EDI in research design)—a rationale must be provided in cases where a research team believes EDI considerations are not applicable to the design of knowledge mobilization plans;
- timeframes or a schedule for the intended knowledge mobilization activities; and
- justifications for how the above points fit within the project’s particular knowledge mobilization objectives.

Open access and data management

Grant holders must follow the Tri-Agency Open Access Policy on Publications. To the extent possible, and in keeping with this policy and SSHRC’s endorsement of open access forms of knowledge dissemination, grant holders should make their research results openly available through, for example, open access publications, websites, publicly accessible databases and/or institutional repositories. To learn more, consult the Open Access overview.

List of references or bibliography (mandatory)

Maximum ten pages

List all references cited or works referred to in your proposal. SSHRC recognizes and allows the use of different referencing styles.

If you have included references by the project director, co-directors, co-applicants or collaborators, indicate these in bold type.

Expected outcomes (mandatory)

The project's expected outcomes are essential for the adjudication of the proposal and are part of the Challenge evaluation criterion. Elaborate on the potential benefits and/or outcomes of your proposed project. You will be able to share how your outcomes have evolved in follow-up achievement reports.

Outcomes

Research and related outcomes include enhanced curriculum and teaching material, enriched public discourse, improved public policies, enhanced business strategies and increased innovations in every sector of society, as well as graduate supervision opportunities. Research outcomes, which are facilitated by the effective mobilization of knowledge, then permeate daily life in the form of new thinking and behaviour that lead to improvements in our economic, social, cultural and intellectual well-being.

For "Scholarly benefits," "Social benefits" and "Audiences," indicate and rank selections in order of importance. If the information is not listed, select "Other" from the list and type the information in the box provided.

Expected outcomes summary

Describe the potential benefits and outcomes (e.g., evolution, effects, potential learning and implications) that could emerge from the proposed project as a result of knowledge mobilization activities.

Goal and project description (mandatory)

Maximum eight pages

Before writing your proposal, consult the [evaluation criteria](#) in the funding opportunity description. SSHRC encourages the use of tables and charts, as they are often the most effective and efficient way to capture the proposed structure and co-ordination of [formal partnerships](#) and activities.

Provide the following information in your description:

- Clearly justify your proposal in the stated program objectives (i.e., Insight, Connection, Talent) and partnership approaches, and state the overall goal and specific objectives that the partnership will address during the lifespan of the grant. Demonstrate the relevance and significance of these objectives for all the participating partner organizations.
- Describe the proposed project's originality, significance (economic, social, cultural and intellectual) and expected contribution to knowledge in the social sciences and/or humanities.
- Demonstrate the appropriateness of the theoretical and methodological approaches that will be chosen to meet the stated objectives. Include a literature review. SSHRC encourages applicants to discuss, if applicable, how research data arising from the project will be managed, including collection, preservation and sharing.
- Include EDI considerations in the research design, as applicable (refer to SSHRC's [Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#), and in particular, the section [EDI in research design](#)). A rationale must be provided in cases where a research team believes no aspect of the research design could benefit from an analysis that considers EDI.
- Address the appropriateness of the duration (four to seven years) chosen to achieve the objectives.
- For **partnered research training initiatives** only, also:
 - describe the merit of the proposed initiative and how it meets SSHRC's [Guidelines for Partnered Research Training Initiatives](#);
 - include, in a table, information on the number of registered students and/or postdoctoral researchers expected to participate on an annual basis; and
 - briefly indicate how the training of each group of trainees will be structured and managed.

Contingency plans related to the potential impact of the COVID-19 pandemic on your research project may be described in this section, if appropriate. This is not mandatory, but it may assist the merit review committee in assessing the feasibility of your proposal if your research plans are significantly disrupted, e.g., if international travel is not possible.

Research-creation support material (if applicable) □

□ **Maximum one page**

If in the [Identification module](#) you have self-identified yours as a [research-creation](#) project, you **must** include a website link to provide samples of work that best illustrate the qualifications of the team and/or the nature of the proposed research-creation.

When including a website link, follow these instructions:

- Provide the complete and exact URL and indicate the path to access the intended support

material on the website.

- Include a list of up to three works or excerpts of works to which you would like to direct the reviewers (e.g., images, audio, video, written material). Provide titles, dates of creation/production and a brief context for the works presented. Explain why you are including these items and how they relate to your proposed project.
- Ensure that the website and all links involved will be operational up to six months after the application deadline.
- Specify the browser and version that should be used.

□ SSHRC assumes no responsibility in cases where links provided are broken or the server is unavailable during the adjudication period. Reasonable efforts will be made to view or listen to support material; however, due to technical challenges, SSHRC cannot guarantee that the samples will be accessed. Consider that reviewers will have very limited time per application to view, read or listen to samples of work. Note that only links provided in the support material attachment will be used by merit reviewers.

□ See SSHRC's [Guidelines for Research-Creation Support Materials](#) for more information.

Description of formal partnership (mandatory) □

□ **Maximum four pages**

Prior to filling out this section, see SSHRC's definitions of [partner organization](#) and [formal partnership](#), and the exclusions in the [Guidelines for Cash and In-Kind Contributions](#).

Define and fully describe the partnership, so committee members can clearly understand that your proposal is a genuine [formal partnership](#). In this attachment, explain:

- why a partnership approach is appropriate for the proposed activities, and demonstrate, specifically, how such a partnership adds value beyond what could be achieved through other approaches;
- how the partner organizations will participate in the intellectual leadership of the partnership;
- the extent to which the partner organizations will participate in the partnership's [EDI plans](#), if applicable (refer to SSHRC's [Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#));
- the anticipated challenges in building the partnership, and how these will be addressed;
- how partner organizations will benefit from participating in the partnership;

- how your application integrates the expertise of all partner organizations in the conduct of the activities; and
- how the partnership has evolved since Stage 1.

Partnered chairs (if applicable) □

□ **Maximum one page**

If you are using a partnered chair approach, identify the proposed partnered chairholder(s), and provide the following information:

- the identity of the proposed partnered chairholder(s) and the selection process used;
- the track record of the proposed partnered chairholder(s);
- the relevance of the partnered chair(s) for achieving the proposed project goals;
- evidence demonstrating that the host institution and/or its partners have the confirmed cash to cover the salary of the partnered chair(s) for the duration of the grant; and
- an outline of the proposed program of research, training and related activities to be undertaken by partnered chair(s).

Governance (mandatory) □

□ **Maximum two pages**

Define and fully describe your proposed partnership governance structure. You are strongly encouraged to include a diagram to illustrate the governance structure. In this attachment:

- explain the choice of management and governance arrangements, as well as of leadership, in the design and conduct of the research, research training, and/or research-related activities. If your proposed partnership uses a co-director governance approach in which a co-director (or co-directors, if justified) shares intellectual leadership with the project director, outline and justify the approach in relation to the proposed research and related activities. The project director and host institution are accountable for coordinating the grant's overall financial and administrative aspects;
- describe the nature of the co-directors', co-applicants', collaborators' and partner organizations' participation in the partnership's governance structure, if appropriate;
- describe the EDI plan for promoting a diverse team, inclusive working environment and equitable opportunities within the partnership (refer to [Appendix B](#) of SSHRC's [Guide to](#)

[Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#) for examples of [EDI](#) in research practice);

- describe the involvement of key partner organizations in the decision-making process, and explain the conditions, if any, under which they are participating;
- describe the involvement of the host institution/organization in supporting the partnership (e.g., infrastructure, cash and/or in-kind support, services, training);
- identify how issues will be resolved; and
- explain accountability and decision-making authority.

- **Note about the [EDI](#) plan:** Applicants must identify **concrete practices** that will be employed to ensure that [EDI](#) is being intentionally and proactively considered in composing the team and recruiting team members. It is not sufficient to say that the team is already complete and/or diverse; applicants must clearly demonstrate that [EDI](#) was taken into consideration within the team composition and will continue to be if the composition of the team changes throughout the duration of the grant. Refer to [SSHRC's Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#) and, in particular, the section [EDI in research practice](#).

Participants' involvement (mandatory) □

- **Maximum two pages**

Explain the different types of expertise needed to ensure the partnership's success. Describe the roles, responsibilities and contributions of the project director, co-directors, and key co-applicants and/or collaborators, as well as other key participants. Clearly indicate, where appropriate, whether they are from an academic or a non-academic sector (e.g., not-for-profit organization, philanthropic foundation, public or private sector organization), and how the activities and expertise of each member will support and enhance the proposed partnership.

- **Note about privacy and confidentiality:** Applicants must protect the privacy and confidentiality of all team members and trainees. How an individual self-identifies is considered personal and confidential information. If a team member's self-identification (for example, gender, Indigenous identity, disability or racial background) is relevant to the research project, you may include that self-identity information in this section **only with their consent**. Otherwise, self-identification information about any team member should not appear in the application.

Training and mentoring (mandatory)



□ Maximum one page

It is expected that students, [emerging scholars](#) (e.g., postdoctoral researchers and other scholars in similar situations) and/or other highly qualified personnel (e.g., practitioners, subject matter experts, Indigenous Elders) will meaningfully participate in the proposed initiatives. [Attach a PDF document](#) that clearly describes the specific roles and responsibilities of students, emerging scholars and/or other highly qualified personnel, indicating the work they will be undertaking.

Consult the [Guidelines for Effective Research Training](#) in preparing this section of the application. These guidelines will also be provided to reviewers.

Include:

- the nature and extent of training, mentoring and employability activities;
- the capacity of the project director and team members to provide the proposed training, mentoring and employability activities;
- the anticipated number of students, emerging scholars and/or other highly qualified personnel (where applicable, indicate the level of study—i.e., undergraduate, master’s or doctoral) to be trained and mentored;
- [EDI](#) considerations in the recruitment, training and mentoring plan for students, emerging scholars and other highly qualified personnel (refer to [Appendix B](#) of SSHRC’s [Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#) for examples of [EDI](#) in research practice);
- the nature and level of specialized skills that the students, emerging scholars and/or other highly qualified personnel will develop as a result of their participation; and
- any career development opportunities for students, emerging scholars and/or other highly qualified personnel.

If you selected “Mitacs Accelerate internships” as a “joint initiative” under Identification, provide summary information about the proposed internship(s), such as the objectives, expected deliverables, benefits to interns, percentage of time to be spent onsite with the partner organization, and planned activities.

This funding opportunity’s recipients are eligible for a streamlined application process for Mitacs Accelerate internships. Interested grant holders must submit a completed Mitacs Accelerate application form to Mitacs after [SSHRC](#) competition results have been announced. To access the Accelerate application form, [contact a Mitacs business development representative](#).

Mitacs internships cannot be the only mechanism for training included in a research project, and must be cofunded by partner contributions separate from the partner funding contributions made toward the [SSHRC](#) grant.

- For Talent proposals (i.e., those proposals focused exclusively on partnered research training initiatives), this section may be used to expand on information provided in your Goal and project description.

Evidence of formal partnership (mandatory) □

- **Maximum 20 pages**

Applicants for Partnership Grants are required to provide documentary evidence that demonstrates the quality, commitment and agreement of the [formal partnership](#). Evidence of formal partnership may include, but is not limited to:

- governance frameworks;
- agreements (e.g., intellectual property, conflict resolution);
- strategic plans; and/or
- other relevant documentation.

Do not provide letters of engagement from partner organizations in this section, as these will already be included elsewhere in your application.

- Any information you provide in this section that is not documented evidence of a formal partnership may be removed from your application prior to its evaluation.

List of potential partner organizations and other contributors (if applicable) □

- **Maximum two pages**

Attach a list of the potential partner organizations and other contributors you plan to engage during the lifetime of your grant. Include email addresses and website links, if available.

The list should be divided into the following categories:

Potential partner organizations

Indicate whether each partner listed has been invited to participate.

Other contributors

Other contributors include organizations (e.g., philanthropic foundations, private sector organizations) or individuals who are not invited partners, but who are likely to provide cash and/or [in-kind contributions](#) during the lifetime of your grant.

Funds requested from SSHRC (mandatory)

Partnership Grants are valued at a maximum of \$500,000 per year, up to \$2.5 million over four to seven years.

For each budget year, estimate the costs you are asking [SSHRC](#) to fund. All budget costs must conform to the rates and regulations of the applicant's or project director's institution or not-for-profit organization and take into account the [Tri-Agency Guide on Financial Administration's principles governing the appropriate use of funds](#). All costs must be justified in terms of the needs of the project, including costs for organizing and integrating team activities and for communicating results to audiences, stakeholders and the public. The budget will be adjudicated according to the appropriateness of the requested budget, and to the justification of other planned resources (e.g., time, human and financial), including [cash and in-kind support](#) already or to be secured from partner organizations.

- [SSHRC](#) provides the following guidelines to committee members regarding the adjudication of the budget subcriteria of the overall Feasibility score:
 - Committees may consider failing a project on the Feasibility criterion if they determine that 30% or more of the overall budget request is insufficiently justified and/or not appropriate to the proposed objectives or outcomes of the project.
 - Committees will use the principle of minimum essential funding to guide their budget discussions.
 - Committees may recommend minor budget reductions when they determine the request is inadequately justified and/or not appropriate as described above, and where they judge that savings could be achieved without jeopardizing the project objectives.

Enter amounts rounded to the nearest dollar without any spaces or commas (e.g., 2000). For blank

entries, leave in the “0” value.

Personnel costs

For each of the categories below, enter the number of students and non-students you plan to hire, whether as salaried employees or as recipients of stipends.

Student and non-student salaries and benefits

For each applicable category, enter the number of students and non-students to be hired. Specify the total amount to be paid. When students are paid by wage, the amounts should follow the institution’s collective agreement or policy.

Student stipends

You may request stipends for graduate students and postdoctoral researchers. Stipends must be justified in terms of the research, research training and/or research-related objectives. The work performed by stipend recipients should be an integral part of the project. Stipend rates are set by the institution concerned.

Other—Salary research allowances

[Salary research allowances](#) are an eligible expense. These stipends cover up to 50% of the cost of temporarily replacing an employee from a Canadian not-for-profit organization who will be devoting their time as a co-investigator on a [SSHRC-funded](#) research project. The request for a salary research allowance must be justified in the proposal.

Salary research allowances can be used only by not-for-profit organizations that have co-directors and/or co-applicants listed on their Notice of Award. Researchers holding an academic position at a postsecondary institution and government employees are not eligible for salary research allowances.

Note that a salary research allowance is not a salary for the co-director and/or co-applicant, but is paid to the Canadian not-for-profit organization to offset the costs of replacing its employee.

- For further information, see [SSHRC’s Salary Research Allowances policy](#).

Travel and subsistence costs

Enter, by budget year, the total amounts requested for travel abroad and within Canada for both the research team and student personnel. Project directors must obtain the lowest possible travel fares.

Subsistence costs must be based on rates approved by the institution or organization that will administer the funds.

Other expenses

Professional or technical services

Consulting fees for professional and technical services are eligible expenditures only if the budget justification demonstrates that expert advice is needed.

If a grant is awarded and you have planned to contract consultants for amounts in excess of \$25,000, two independent cost estimates will be required by your host institution/organization.

Supplies

You can include other supply items (e.g., software, stationery, postage and telephone calls) only if they directly relate to the research and are not provided by the administering institution to their research personnel or by the employer.

Non-disposable equipment—computer hardware

Purchase or rental of computers and associated hardware is allowable only if these are not provided by the administering institution to their research personnel or by the employer.

Other non-disposable equipment

Purchase or rental of equipment (e.g., audio or video equipment) is allowable only if these are not provided by the administering institution to their research personnel or by the employer.

Other expenses

Specify other research and/or related expenses not already included.

Tools for research and related activities

For tools for research and related activities, select “Other expenses” and specify “Tools.” You must combine all requested expenses related to tools (i.e., for software, equipment, and professional and technical services) into this category. You must then elaborate on these items in the Budget justification section. Consult SSHRC’s [Guidelines for Support of Tools for Research and Related Activities](#) for more information on social sciences and humanities tools.

Budget justification (mandatory)

Maximum four pages

Using the categories listed on the [Funds requested from SSHRC](#) page, explain how you will use the funds in each budget category to achieve the project objectives. For example, under the [Student and non-student salaries and benefits](#) categories, explain why these people need to be hired to meet the

project's objectives. Applicants are reminded of [SSHRC's](#) mandate to provide training opportunities for students, [emerging scholars](#) and other highly qualified personnel, as applicable. Justify any funds that appear in the category "Other."

For **tools for research and related activities**: Within the page limit, you must include in your Budget justification a table clearly indicating amounts by item (e.g., professional/technical services, supplies). This presentation is mandatory, as these separate amounts cannot be included individually in the Funds requested from [SSHRC](#) module. Provide clear justification for each item proposed.

Ensure that your budget requests match the level of funding that is essential to complete the proposed activities. Note that the adjudication committee may deem your application less competitive if it finds that you are requesting non-essential funding.

- In reviewing the funding you have requested, committee members, and external reviewers where applicable, take into account the quality of your overall financial planning, your justification of the proposed expenditures, and the institutional and partner organization funding that you have secured. It is also important to indicate how the budget requested from [SSHRC](#) and the partners' contributions will complement each other and benefit the objectives of the partnership.

Expenses to facilitate equitable, inclusive and accessible participation in the research should be considered. Refer to your institution's policies and the [Statement on equity, diversity and inclusion and the use of grant funds](#) in the [Tri-agency Guide on Financial Administration](#). Refer to [SSHRC's Guide to Addressing Equity, Diversity and Inclusion Considerations in Partnership Grant Applications](#), and [Appendix B](#) for examples of [EDI](#) in research practice and questions to consider for [EDI](#) in research design.

Funds from other sources

List all contributors (e.g., host institution or organization, individuals, not-for-profit organizations, philanthropic foundations and private sector organizations), apart from confirmed partners, that are providing [cash and/or in-kind contributions](#) for the proposal. Indicate whether or not these funds have been confirmed.

Contributions from partner organizations should not be included in this section.

If a funding source is not listed, select "Other" using the "List..." button. Type in the source name and amount and identify the contribution type.

If you have received more than one contribution of the same type from a single funding source (i.e., cash or in-kind) and with the same confirmation status, you must combine these into one entry (e.g., two confirmed \$20,000 cash contributions from a university become one confirmed \$40,000 cash

contribution). Enter amounts rounded off to the nearest dollar—in Canadian currency—without spaces or commas (e.g., 40000). For blank entries, leave in the “0” value.

When you save the data, five new blank entry lines will be added to the screen to allow you to enter additional funding entries, if necessary.

Total project cost

Each partner organization will complete a “Contributions from Partner Organization” page (i.e., budget) indicating whether each budget item has been confirmed. When all Contributions from partner organization pages have been submitted, the amounts from each budget item will be automatically totalled. After the data are saved, the system will automatically display these totals in a PDF version of this page of the application form.

A. Total of all partner organizations’ contributions

The system will total the values entered for “Cash” and “In-kind.”

B. Total funds from other sources

Once you complete the “Funds from other sources” screen and save the data, the system will display the totals on line B.

C. Total funds requested from SSHRC

For each year, the amounts from “Student salaries and benefits / Stipends” to “Other expenses (specify)” will be automatically totalled. After the data are saved, the system will automatically display the totals on line C.

Total cost of project (A + B + C)

The system will automatically add lines A, B and C.

Impact assessment—Appendix A

If you have selected “Yes” to at least one of the questions in the Impact assessment section on the Activity details screen, you must complete the “[Impact Assessment Form](#)” (Appendix A) and upload it to the Impact assessment page.

If none of these situations apply to your proposed research activities, then the Impact Assessment Form (Appendix A) is not needed.

Contributions plan (mandatory)

Maximum four pages

Prior to filling out this section, see the exclusions in the [Guidelines for Cash and In-Kind Contributions](#).

You are required to demonstrate that you have made progress in securing the 35% minimum additional cash and/or [in-kind contributions](#), and must indicate how you will secure the remaining resources during the lifespan of the grant (four to seven years).

Detail your plan to secure cash and/or in-kind contributions. The plan must describe:

- the confirmed contributions of the host institution/organization;
- the confirmed or proposed contributions from partner organizations and/or other sources;
- how you will continue to seek and to secure cash and/or in-kind support during the life of the grant (four to seven years); and
- how the support will benefit the partnership.

- Administering institutions or organizations will be required to submit reports documenting both the engagement of their partner organizations and their progress in meeting the requirements for partner organization contributions. By the mid-term evaluation (halfway through the grant period), the minimum contribution of 35 % over and above the budget requested from [SSHRC](#) at the time of the Stage 2 application must be confirmed for the remainder of the award period. If this amount is not secured by that time, [SSHRC](#) will withhold the remaining grant payments until it receives confirmation that the minimum additional contributions have been secured.

Exclusion of potential reviewers (if applicable)

Maximum one page

List potential reviewers who, in your opinion, would be unlikely to provide an impartial review. Provide a justification for excluding potential reviewers (e.g., experts with whom you or members of your research team have had serious disputes). While [SSHRC](#) cannot be bound by this information, it will be taken into consideration in the selection of reviewers.

This information will be held in strictest confidence and will not be provided to external reviewers or members of the adjudication committee. Any exclusion should be renewed with any subsequent applications, if still relevant.

Research contributions and relevant experience (mandatory)

□ **Maximum five pages**

Project directors must attach Research contributions and relevant experience. You have five pages in total to address the sections below, as applicable. You may choose to devote more space to certain sections depending on the nature of your past contributions and experience (for example, non-academic project directors may choose to have a larger “Relevant experience” section). The attachment should be presented in this order, as applicable:

1. [Relevant research contributions over the last six years](#)
2. [Other research contributions](#)
3. [Most significant career research contributions](#)
4. [Career interruptions and special circumstances](#)
5. [Contributions to training](#)
6. [Relevant experience](#)

1. Relevant research contributions over the last six years

Outline your research contributions within six years of the application deadline date. In the case of those candidates claiming career interruptions ([see 4. below](#)), you may include publications drawn from your most recent periods of research activity to an overall total of six years.

Provide details, as appropriate, about the contributions you listed, as follows:

- In the left margin, identify with an asterisk (*) research contributions that resulted from previous SSHRC support.
- Specify your role in co-authored publications.
- For published contributions, provide complete bibliographic notices (including co-authors, title, publisher, journal, volume, date of publication and number of pages) as they appear in the original publication.
- For publications in languages other than French or English, provide a translation of the title and the name of the publication.
- For recent graduates, list theses.

Group your contributions by category in the following order, as applicable, listing your most recent contributions first.

Refereed contributions

Examples include books (where applicable, subdivide according to those that are single-authored, co-authored and edited works), monographs, book chapters, articles in scholarly refereed journals and

conference proceedings.

Be aware that a “refereed work” involves its assessment:

- in its entirety—not merely an abstract or extract;
- before publication; and
- by independent (at arm’s length from the author), anonymous, qualified experts.

Other refereed contributions

Examples include papers presented at scholarly meetings or conferences and articles in professional or trade journals.

Non-refereed contributions

Examples include book reviews, published reviews of work, research reports, policy papers and public lectures.

Forthcoming contributions

Indicate one of the following statuses: “Submitted,” “Revised and submitted,” “Accepted” or “In press.” Provide the name of the journal or book publisher and the number of pages. Contributions not yet submitted should not be listed.

Creative outputs

Examples of creative outputs may include exhibitions, performances, publications, presentations, and film, video and audio recordings. List your most recent and significant achievements grouped by category. Creative outputs will be evaluated according to established disciplinary standards and creative and/or artistic merit.

If applicable, you can include a website link. [SSHRC](#) cannot guarantee that links will be accessed.

2. Other research contributions

Describe any other contributions to research and the advancement of knowledge within the last six years, including your research contributions to non-academic audiences (e.g., public, policy-makers, private sector and not-for-profit organizations).

3. Most significant career research contributions

List and rank up to five of your most significant contributions over your entire career. The six-year rule does not apply to this section. Therefore, contributions listed here may differ from those listed in other sections of your [CV](#). Ensure that you explain briefly the significance of the contributions listed.

4. Career interruptions and special circumstances

Career interruptions occur when researchers are taken away from their research work for an extended period of time for health, administrative, family or other reasons, or reasons related to the COVID-19 pandemic. In these cases, as explained above in the [Relevant research contributions over the last six years](#) section, explain the interruption(s) and ask that an overall total of six years of research activity be considered by the adjudicating committee.

Special circumstances involve slowdowns in research productivity created by health (and/or disability-related), administrative, family, cultural or community responsibilities, socio-economic context, COVID-19 or other reasons (i.e., the researcher was not completely taken away from research work). Applicants from small institutions may indicate their teaching load in this section if the change in workload impacted their research output.

Indigenous applicants can use the “Special circumstances” section of their application form to describe special circumstances that may have had an impact on their academic or career paths.

SSHRC asks its adjudication committees to consider career interruptions and special circumstances that may have affected candidates’ record of research achievements. In doing so, adjudication committee members will be able to more accurately estimate the productivity of each researcher, independent of any career interruptions or special circumstances in the last six years. Previous productivity is one element that may predict the success of the proposed research project.

All information provided to SSHRC is subject to the [Privacy Act](#). Applicants are reminded that the information included in this section of their application will be shared with both external assessors and adjudication committee members for consideration as part of their application. For more information, see [merit review](#). All SSHRC merit reviewers are subject to the [Tri-Agency Conflict of Interest and Confidentiality Policy](#), and are prohibited from sharing this information outside of the merit review process.

5. Contributions to training

Provide the following information on students you have helped train within the last six years.

- Indicate your role in supervising or co-supervising ongoing and/or completed theses, listing these by the student’s level of studies.
- Describe efforts you have made to involve students (e.g., doctoral, master’s or undergraduate) in your research activities.
- Specify if opportunities for such contributions have been limited because your postsecondary institution does not have graduate degree programs in your field or discipline.

6. Relevant experience

In the Relevant experience section, non-academic and academic project directors can describe their previous experience that is relevant to the topic and objectives they are investigating in the

application, including their experience in engaging in and/or leading formal partnerships and collaborative research. Justify how this experience will aid you in the proposed activity.

Examples of relevant experience include: working within or with communities and/or organizations (e.g., not-for-profit, public and private sector organizations), non-academic career information, or voluntary work. Include:

- your experience in engaging in and/or leading formal partnerships and collaborative research;
- a brief description of the nature of the work you performed;
- an explanation of how this work has prepared you for your role in the project; and
- a description of the skills you developed (e.g., training, mentoring, analysis, networking).