

## Ontario-Jiangsu Industrial Research and Development Program (OJIRDP)

### Expression of Interest (EOI) Instructions

#### GENERAL INSTRUCTIONS FOR COMPLETING THE ONLINE APPLICATION FORM

1. On receiving access to the application, please ensure that the application status is listed as "EOI in Development". Appendix 1 provides a detailed description of the requirements for each section.
2. Click on each of the tabs, beginning with "Application Information", and complete all of the mandatory fields in each section.
3. During the process of completing your application, if you wish to submit the application at a later time, click on the "Save Draft" button.
  - You may log back into AccessOCE with your username and password to continue with your application.
4. When you are ready to submit the application, click on the "Submit EOI" button.
  - Any mandatory fields that are incomplete will be listed.
  - Once you have submitted your application please check that the status of your application has moved to the next stage ("EOI submitted – Under Review"). The status is visible at the top of your screen below the application title (the current status will be highlighted in green) OR in the Home page of your AccessOCE account.

#### REVIEW AND ASSESSMENT OF EOIs

1. EOIs are internally reviewed by OCE and JSTD for completeness, eligibility and use of funds prior to evaluation. As part of the internal review process of your application, OCE or JSTD may request additional information, clarifications or provision of missing items. You will be notified of any deficiencies via e-mail. Please correct all deficiencies and resubmit the EOI within the requested timeframe. Once the EOI has been deemed complete, it will proceed to review.

## **APPENDIX 1: DETAILED EOI INSTRUCTIONS**

### **APPLICATION INFORMATION TAB**

1. Application Title
  - Provide a descriptive title outlining the focus of the application/project. Please ensure that the spelling and grammar are correct, since titles of approved projects will be posted on OCE's website.
2. Applicant Type
  - Select the type of your organization from the drop-down list.
3. Academic Institution
  - Select the name of your institution. In case of a company, select "Not Applicable".
4. Applicant
  - Enter the name of your organization. In case of an academic institution, enter the institution name here again.
5. Duration
  - Provide the duration for completion of the proposed activities. Ensure that the duration is realistic and within the program guidelines (minimum 12 months and maximum 36 months).

### **TEAM INFORMATION TAB**

1. Applicant Information
  - The applicant is typically the recipient of the OCE funding.
  - For all project contacts, provide the full first name (no short versions or nicknames), full institution name and email address.
2. Co-Applicant
  - Enter the name and contact for the Jiangsu applicant.
3. Project Contributors
  - Project Contributors are organizations providing cash and/or in-kind contributions to the project.
  - Select the total number of Project Contributors associated with the project to add the appropriate number of contact sections. For this program, there must be at least one Project Contributor in Ontario (the applicant and/or industry partner(s)). Also include the applicant and/or partners in Jiangsu providing cash and/or in-kind contributions to the project.
  - For all project contacts, provide the full first name (no short versions or nicknames), full legal company name and email address.
  - Each Project Contributor company in Ontario must complete a mandatory Company Profile survey. The applicant must click on the button "Click here for Survey URL", copy the link provided and send it to the contact person at the Project Contributor organization. The contact must complete and submit the survey before the application may be submitted. Completed surveys are visible in the Company Profile-Response Summary section.

### **EOI TAB**

1. EOI
  - Click on the button "Download Word Template" to open a fillable word document containing the EOI questions.
  - Complete all questions in the template, in partnership with the Project Contributor(s).
  - Save the completed file as a pdf document.
  - Click on the button "Upload/Edit EOI" to upload the pdf file to the application.

## USE OF FUNDS TAB

### 1. Sources of Funds

- Review the list of Funding Contributors to ensure that all sources of cash and/or in-kind contributions are included in the budget. OCE, JSTD, Jiangsu applicant, Jiangsu partners and all other Project Contributors (industry partners) must be listed. If you are missing a Project Contributor in the list, add the additional names under the "Team Information" Tab, in the "Project Contributors" section.

### 2. Budget

- Click on the button "Add/Update Budget Item" to enter the project budget.
- Click on the + button to enter new budget line items. Ensure that expenses are separated by source of funds (OCE and Project Contributor(s)).
- Enter a brief description of the activities related to the budget line
- Enter who is going to receive the funds (Payee) and where the funds will be spent (Location)
- Select one of the available expenditure types (Category) from the drop down list
- Select the appropriate Source of Funds from the drop down list
- Select the Type of Funds (cash or in-kind) from the drop down list
- Enter the Quantity, Unit and Rate (see the example calculation below)

Description	Budget Category	Quantity	Unit	Rate	Total	Calculation
Dr. A working 65 hours on Milestone 1 for one month. To be paid \$3,500 for this task.	Salary & Benefits	0.43	Month	\$8,139.50	\$3,500	@150hrs work month (37.5 per week, official work week in Canada), 65 hrs = 65/150 = 0.43 months; Rate = Total/Quantity: 3500/0.43 = 8,139.5

- At the EOI stage, the budget may be high-level (i.e. one budget line item per project funder/contributor). The budget may be updated with more detail upon preparation of the full application.
- Please ensure that the totals in the budget table reflect at a minimum the required matching contributions for the program. For this program, the maximum funding request from OCE is \$125,000 (for academic applicant) or \$150,000 (for industry applicant) for the Ontario portion of the project, with a minimum 1:1 match in cash/in-kind from the Ontario applicant and/or Project Contributor(s).
- Institutional overhead is not an eligible OJIRDP project expense and should not be included on either the OCE or industry funded portions of the OCE application budget. For applications from post-secondary institutions only, the overhead that is to be attributed as part of the OCE contribution will be calculated directly by OCE and paid annually to Ontario post-secondary institutions, at a rate of 20 per cent x direct costs of OCE-funded research. Therefore for example, a post-secondary institution should include up to \$125,000CAD direct project costs in the application (excluding the \$25,000 overhead) and an industry applicant should include up to \$150,000CAD direct project costs in the application. For academic applicants if applicable, the overhead on the industry funded portion of the project must be discussed with your institution's research administration office at the time of application to ensure it is correctly accounted for.
- Also enter the amount to be requested from JSTD and contribution in cash and in-kind by the Chinese applicant. The Jiangsu applicant must also provide minimum 1:1 match of cash and in-kind to the amount of JSTD funds requested. Overhead is not eligible for funds to be requested from JSTD.
  - For a list of eligible expenses, please see the following link: <http://www.ontario.org/docs/default-source/default-document-library/ojirdp-schedule-c-eligible-expenses.pdf?sfvrsn=2>
- Enter any Other Contributions if applicable. "Other Contributions" are cash or in-kind support received from other funding sources currently held by the applicant that is conceptually or financially related to the current application to OCE. These funding sources are not party to the OCE funding agreement.
- Once all items are completed, click the "Save Budget" button and close the budget.

### **SUPPORTING DOCUMENTS TAB**

Attach the following documents in the associated upload section:

1. Resume, Curriculum Vitae, NSERC Form 100CV or NSERC Form 103CV and/or LinkedIn Profile(s) of applicant and co-applicant (mandatory), and other key team members associated with the application (recommended).
2. Any additional supporting documents that are relevant to your application (that are not included in the mandatory attachments)

