UBC Okanagan & City of Kelowna:
Partnership Fund Special Call

Call for Proposals	LOI Deadline	LOI Results	Full Application Deadline	Funding Announcement
June 2, 2022	July 4, 2022 (4PM)	Mid-July	Aug 22, 2022 (4PM)	Early Sept

Program Terms

Introduction

The City of Kelowna is the municipality's local government, responsible for providing a wide range of important services to meet the current and future needs of Kelowna's growing, dynamic community. The University of British Columbia Okanagan (UBCO) is the Kelowna-based campus of the province's largest post-secondary institution, responsible for conducting research in several fields, and for educating students at the undergraduate, graduate, and post-graduate levels. The two organizations share a commitment to innovation and excellence in all that they do, and a vision of the Central Okanagan as a vibrant, progressive, and sustainable region. UBCO and the City of Kelowna have a long history of working together on a wide variety of initiatives aimed at addressing the service- and growth-related needs of the community.

The City of Kelowna and UBCO established the Partnership Fund in 2022. In its pilot year, the Partnership Fund is launching a **Special Call** for projects that will mobilize research efforts around two challenge statements.

Funding for this Special Call will provide **up to $30,000 a year**, for two (2) to three (3) pilot projects. Additional projects may be selected for other levels of partnership funding and support. Projects will be funded for a one- (1) or two- (2) year term.

Strategic Intent of the Partnership Fund

The intent of this Partnership Fund is to support projects that leverage the University's demonstrated excellence in research and knowledge creation and to maximize the City's strengths in the areas of service delivery, planning, and infrastructure development.

Successful pilot projects will demonstrate:
- measurable, scalable, and meaningful impact in response to one of the City's applied challenge statements (see below);
- outcomes that are relevant to the community and can be applied to the community's real-world challenges and opportunities;
- the potential to transform services, facilities, and the community; and
- the potential to attract attention and support from other funding agencies, specialists from other organizations and Indigenous communities, the private sector, and other government agencies.

Special Call Challenge Statements

For this Special Call, proposals must respond to one of the following applied research challenges (click on links for more detailed information on each challenge):

Challenge #1 – Solid Waste Management and Recycling: The City of Kelowna is seeking innovative solutions for how the Region can manage and recycle large volumes of construction and demolition waste and how that could translate into City policy to ensure that all construction and demolition waste is effectively and efficiently recycled. The primary focus would be on the re-use of clean or painted/treated wood, drywall, and durable hard plastics.

Challenge #2 – Climate Resilience at the Parcel Level: The City of Kelowna is seeking out innovative design and policy solutions to encourage greenhouse gas emissions reduction and climate change adaptation on private property at the parcel level (e.g., green/blue infrastructure, green/white/blue roofs, renewable energy).

Eligibility

In the pilot year, the intent is to support existing collaborations. As such, the Project Leads must include **one UBC faculty member** (the Faculty Lead) and **one City of Kelowna staff member** (the Operational Staff Lead). The Operational Staff Lead must be a Manager working in an Operational Unit at the City of Kelowna in an area that is relevant to the project. The Faculty Lead will be responsible for the administration of the funds. The Project Team may include up to 4 additional City of Kelowna staff members, or faculty members from UBCO with full-time academic appointments in the tenured or tenure-track research stream.

Project Leads cannot submit more than one application per competition, either as the primary applicant or as a team member. A team member may be involved in up to two (2) proposals.

Existing project leads holding active funding from this Partnership Fund are ineligible to apply. Existing team members can only be involved in one application in this Special Call.

Project Period

Projects will be funded for a one- (1) or two- (2) year term. All project activities, including securing additional external funding, must begin within six (6) months of award notification. For example, projects awarded in September 2022 should have additional funding, if applicable, secured by the end of March 2023. All eligible expenditures must be incurred prior to the end of the award term after which time any unspent funds will be returned to the Fund. With justification, a one-time six-month no-cost extension may be granted at the discretion of the Office of the Vice-Principal, Research and Innovation (VPRI), UBCO.

Project Funding

Funding for this Special Call will provide up to $30,000 a year. Funding is comprised of matching contributions from UBCO and the City. Only the City's portion (50% of the Partnership Fund grant) can be leveraged with Tri-Agency and other federal funding (e.g., Mitacs, NSERC, SSHRC, and CIHR). Where applicable, project teams should leverage the City's funds.

Application Instructions

Phase 1 - Letter of Intent (LOI)

The LOI Application Form is available for download on the VPRI Internal Funding webpage. The LOI Application Form includes the following sections (note character limits and weighting):

A. *Project Overview (50%)*

Project title and a high-level description of the project plan including objectives, methodological approach, intended impact, knowledge generation, and outputs. Must clearly demonstrate how the project responds to a challenge statement. (3000-character limit, or 1 page)

B. *Qualifications of the Team (35%)*

Information about the UBCO Faculty Lead, City of Kelowna Operational Staff Lead, and up to four (4) additional Project Team members. Provide a brief explanation of the roles, responsibilities, and contributions of all team members. (1500-character limit, or 1/2 page)

C. *Budget Ask and Plan to Leverage Funding (15%)*

Provide the anticipated funding request and a brief explanation of how you intend to leverage the City of Kelowna portion of the Partnership Fund (50% of the total ask). Proposals that do not plan to leverage the funding must provide an explanation. For this Special Call, projects with high leveraging potential will be prioritized for funding. Applicants who intend to leverage funds should reach out to their relevant UBCO Research Development Officer for additional guidance. (750-character limit, or 1/4 page)

LOI Submission

LOI Application Forms must be emailed to vprawards.ubco@ubc.ca by **July 4, 2022 (4:00 PM)**. An RPIF is <u>not</u> required at the LOI stage. The UBC Faculty Lead must copy the City of Kelowna Operational Staff Lead <u>and</u> the City of Kelowna Operational Staff Lead's Manager. UBCO will reach out to the City of Kelowna Staff Lead's Manager to confirm the approval of the project. Applicants will receive a response to confirm receipt of the submission.

Applications will consist of a single PDF document that includes the following (in order):
- Application Cover Page – template provided
- LOI Application Form – template provided

Upon completion of the LOI review, successful applicants will be invited to submit a full application.

Phase 2 - Full Application (if invited)

The Application Cover Page, Application Form, Budget Template, and Project Activity Template are available for download on the VPRI Internal Funding webpage. The full application includes the following sections:

A. *Applicant Details*

Information about the Faculty Lead, Operational Staff Lead, and up to 4 additional Project Team Members.

B. Project Details

Project title, the challenge the proposal will respond to, keywords, and a 100-word lay summary.

C. Project Proposal - Assessment Criteria

There are six (6) criteria that will be used to evaluate the full application (note character limits and weighting):

1. **Response to Challenge Statement (30%):** Use this section to describe your project outline, objectives, and methodological approach. Applications must clearly demonstrate how they respond to one of the challenge statements identified above. (6000-character limit, or 2 pages)

2. **Research and Knowledge Creation Excellence (20%):** Explain how your project advances an important area of academic research and knowledge creation, contributing new insight to the body of knowledge. (3000-character limit, or 1 page)

3. **Qualifications of the Team (20%):** Explain the different types of expertise needed to ensure the success of the project. Describe the roles, responsibilities, and contributions of all team members and provide evidence of individual and collective expertise and experience in the subject matter. Note that CVs are not required for this submission; therefore, applicants' expertise and experience relevant to the project should be provided in this section. (3000-character limit, or 1 page)

4. **Equity, Diversity, and Inclusion (EDI), and Indigenous engagement (10%)**: Describe how your project integrates equity, diversity, and inclusion in its execution (research design, project team, student engagement, collaborative partners, stakeholder engagement) and in its outcomes (intended beneficiaries). Where applicable, describe your team's approach to Indigenous engagement. (1500-character limit, or ½ page)

5. **Student Training (10%):** Describe the role of trainees and how their involvement in the project adds value to their training. (1500-character limit, or ½ page)

6. **Leveraging opportunities (10%):** Provide details on leveraging opportunities of City funds, where applicable. Proposals that do not plan to leverage the funding must provide an explanation. For this Special Call, projects with high leveraging potential will be prioritized for funding. Applicants who intend to leverage funds should reach out to their relevant UBCO Research Development Officer for additional guidance. (1500-character limit, or ½ page)

D. Activity List

Use this section to list project activities, with timelines, following the template provided.

E. Budget

Use this section to upload your budget, following the template provided. The maximum amount that can be requested from the Partnership Fund is **$30,000 a year for up to two (2) years**. The intended value of the full project, assuming leveraged funds are secured, should be presented.

F. Appendix (optional)

Applicants may use this section to include a reference list, images, tables, graphs, or other materials that are relevant to their proposal (2 pages maximum), as well as letters of support, if applicable (2 maximum, 2 pages per letter). The total number of pages for this section should thus not exceed six (6) pages.

Full Application Submission

Full Applications must be emailed to vprawards.ubco@ubc.ca by **August 22, 2022 (4:00 pm).** Applicants will receive a response to confirm receipt of the submission. An RPIF is not required at this stage.

Applications will consist of a single PDF document that includes the following (in order):
- Cover Page (you may reuse the LOI cover page if no changes) – template provided
- Application Proposal – template provided
- Activity List – template provided (save as PDF, select "Fit worksheet to fit a single page")
- Appendix (optional)
- Budget – template provided (save as PDF, select "Fit worksheet to fit a single page")

Templates can also be downloaded from the UBCO VPRI Internal Funding website.

Eligible Activities and Expenses

Use of Partnership Funds must adhere to the Tri-Agency Guide on Financial Administration, with exceptions and limitations noted below.

The following expenses are **eligible but limited**:
- Purchase or rental of equipment, software, licenses, and materials relevant to the project, up to a maximum of $25,000
- Reasonable and well-justified hospitality and entertainment costs (subject to UBC's business expense rules)

The following list of expenses are **not eligible**:
- Payment towards the salary/time of regular UBC or City staff or faculty, or release time for faculty
- Renovation costs
- Equipment or tools used for teaching and/or non-research use
- General-purpose (personal) computer equipment or software
- Retroactive expenses

Evaluation Process

LOI and Full Applications will be reviewed by an evaluation team made up of senior personnel from the City's Partnerships and Investments Division, UBCO's VPRI Office, Infrastructure Development offices, and members of the VPRI Standing Review Committee. Depending on the nature of the proposal, additional subject matter experts from other departments at the City of Kelowna and expert/peer academic reviewers may be invited to participate in the evaluation.

Grant Administration

Reporting: A final report on project activities is required at the end of the funding term. If the project is longer than one (1) year, an interim report is also required at the halfway point. A template for the report will be provided to the Project Leads.

Equipment Ownership & Location: Equipment purchased through this fund is owned by UBC and must be located on UBC Okanagan property. If the Project Lead leaves the University, the equipment will remain at UBC Okanagan; in these circumstances, a new UBCO Project Lead will be identified, subject to VPRI approval.

Program Contact

For any questions regarding this Special Call or issues with the templates/forms, please contact:

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