APPLICATION FORM OVERVIEW

Applicants are encouraged to review the Investments in Forest Industry Transformation (IFIT) Applicant Handbook Stream 2: Studies prior to completing the Study Proposal form. The Handbook was developed to assist applicants in preparing their submissions to the IFIT Program. It provides guidance on the type of information to be included in the application and describes the additional documents that are required as part of the submission. It also explains how the IFIT Program will review proposals in a consistent, fair, and transparent manner and how the program will communicate with applicants at different stages of the process.

This form is broken down into six (6) major parts followed by annexes and attestations:

Part 1: Executive Summary
Part 2: Applicant Information
Part 3: Project Information
Part 4: Mandatory Criteria
Part 5: Rated Criteria
Part 6: Supporting Material
Annexes
   A – Rated Criteria Checklist
   B – Statement of Work
   C – Budget
   D – Risks and Mitigation Measures
Attestations

Notes To Applicants

1. To select a checkbox - right click in the box, select “properties”, select “checked”.
2. Unless otherwise specified, the “Study”, “Proposed Project”, the “Project”, or the “Proposal” in this application form refers to the proposed project submitted to the Investments in Forest Industry Transformation (IFIT) Program.
3. Completion and submission of this application to IFIT does not imply that the proposed project will be approved by IFIT.
4. Applicants must submit all information specified in this form. Failure to provide the necessary information may lead to rejection of the proposal. It is the responsibility of the applicant to ensure that the proposal clearly and thoroughly demonstrates how each criteria is met.
5. The applicant should provide information concisely while still providing sufficient details to ensure complete understanding by reviewers.
6. This form is confidential when completed, with the exception of marked fields.
7. When you have completed the form, please send all documents to NRCan via the NRCan Funding Portal - INTEGRO.
1. EXECUTIVE SUMMARY (NOTE: INFORMATION IN THE EXECUTIVE SUMMARY MAY BE SHARED PUBLICLY)

Legal name of applicant company:

If operating name is different, please provide it or enter NA:

Study Title:

Location (facility linked to the study or applicant’s head office if not applicable)

- Facility:
- City:
- Province:
- Latitude/Longitude coordinates:

Briefly describe the proposed study (1,400 characters maximum):
2. APPLICANT INFORMATION

Head office address:
  Street Address:
  City/Town:
  Province:
  Postal Code:
Company GST Number:
Annual sales in Canadian dollars:
Company Website:
Number of full-time employees:
Number of part-time employees:
Number of years company has been in operation:

a) Primary Contact
Name:
Title:
Company:
Telephone:
Email:
Project responsibilities:
Preferred language: ___ English ___ French

b) Secondary Contact
Name:
Title:
Company:
Telephone:
Email:
Project responsibilities:
c) Workforce Diversity and Inclusion

Does your company have a Workforce Diversity and Inclusion Plan in place?

__ Yes

__ No

If you answered yes, you may include the plan as an attachment.

Please note that a Workforce Diversity and Inclusion Plan is a Program requirement for all funded projects. If your study is selected for funding, the plan will be required prior to receiving funding. A template is available on the IFIT website, however, applicants may use the format of their choice.
3. PROJECT INFORMATION

a) General Project Information:

Provide a short description of the facility at which the project will take place or that is the subject of the study (350 characters maximum):

Expected study start date (YYYY/MM):

Expected study completion date (YYYY/MM):

b) Project Funding:

Estimated total project cost:

IFIT funding request (maximum 50% of total project cost):

How have capital and project cost estimates been established? Please note that it is mandatory that the estimate is within a +/-20% degree of accuracy:

Funding Source

IFIT Program

Cash contribution:

In-Kind Contribution: NA

Total Amount:

Applicant

Cash contribution:

In-Kind Contribution:

Total Amount:
Partners

Cash contribution:

In-Kind Contribution:

Total Amount:

Total Project

Cash contribution:

In-Kind Contribution:

Total Amount:

c) Project Team (including consultants):

Name:
Role:
Organization:
Relevant Experience/Expertise:

Name:
Role:
Organization:
Relevant Experience/Expertise:

Name:
Role:
Organization:
Relevant Experience/Expertise:

Name:
Role:
Organization:
Relevant Experience/Expertise:

Name:
Role:
Organization:
Relevant Experience/Expertise:

d) Project Partnerships

If you have more than one partner, please repeat sections for each. Documentation MUST be attached to validate the partnership claim. For partners making a financial contribution, please provide a signed letter of agreement.

Partner 1

Legal Name of Partner:
Business Sector of Organization:
Website:
Primary Contact:
  Title (e.g. Senior Engineer):
  Email:
  Phone Number:
  Address:
Partner’s role in project?:
Is the partner providing funding?  __ Yes  __ No
If yes, what is the amount?:
Is funding confirmed?  __ Yes  __ No
Is supporting documentation attached?  __ Yes  __ No

Partner 2

Legal Name of Partner:
Business Sector of Organization:
Website:
Primary Contact:

  Title:

  Email:

  Phone Number:

  Address:

Partner’s role in project?:

Is the partner providing funding? __ Yes __ No

If yes, what is the amount?:

Is funding confirmed? __ Yes __ No

Is supporting documentation attached? __ Yes __ No
4. Mandatory Criteria

a) Eligible Recipient

Are you a for-profit corporation (including a for-profit company acting as the lead applicant for a joint venture, consortium, or other similar) located in Canada either producing forest products in a new or existing (open or closed) forest product facility now or may produce forest products based on results of this study.

Do you meet the above criteria?  __ Yes  __ No

List the forest product(s) your organization commercially produces. If your organization does not produce forest products, please describe your core business:

b) Does the proposed study address at least one of the following criteria?

__ Supports the initial investment for technologies, processes, product trials, or market assessments with strong potential for advancement towards full commercialization.

__ Supports the eventual demonstration or commercialization of an innovative technology, process, or development of a new product.

__ Advances innovation to full commercialisation. For example, research and trials related to market acceptance of new bioproducts.

Supporting Rationale:

c) Incremental Activities

The ITIF Program is not intended to fund activities that would be considered “business as usual” or that would not otherwise require funding from the program. Does the proposed study consist of an incremental initiative?

Do you meet the above criteria?  __ Yes  __ No

Supporting Rationale:
5. Rated Criteria

The following section will be used by the IFIT Program as a basis for the evaluation of the study. To ensure a thorough explanation of your project has been provided, please see Annex A: Rated Criteria Checklist.

Please note that Annex B: Statement of Work is also a rated component of the application.

a) Please provide a detailed description of the scope, objective(s), activities, and the expected outcome(s) of the study, including how the study is supporting advancement of innovation related to a product, process, or technology in the forest sector.

b) Please provide a detailed explanation of how the study addressed a strategic opportunity for your company that could lead to diversification or transformation in the forest industry.

c) Briefly describe the level of technical expertise and experience of your organization, partners, or contractors in completing similar work.

d) What are the expected benefits of the study? Benefits assessment can include but are not limited to:

Direct benefits to the applicant

Future benefits of an investment resulting from the study
Spillover benefits (social, environmental, economic)

Benefits to overall Canadian forest sector (lessons learned, replication potential)

e) Is the study expected to generate any intellectual property (IP), including, but not limited to copyrights, trademarks, patents, industrial design rights, and/or trade secrets? Please include a brief description of the IP management plan for studies that have more than one participant.

f) Describe your plan to disseminate the non-commercially sensitive knowledge and benefits of the study to the Canadian forest sector.
6. **Supporting Material**\(^1\)

Applicants may wish to submit additional documentation that directly supports this proposal (e.g. trial results, market assessment for new product, etc.). If you have included non-mandatory documents, please identify them in the following table:

<table>
<thead>
<tr>
<th>Document Included:</th>
<th></th>
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<tbody>
<tr>
<td>File Name:</td>
<td></td>
</tr>
<tr>
<td>Brief Description and Relevance to the Application:</td>
<td></td>
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</tbody>
</table>

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\(^1\) Add columns/rows for extra supporting material
Annex A: Rated Criteria Checklist

The following list is intended to help applicants ensure that all relevant information regarding their project has been submitted to the Program. It is not mandatory to complete or submit as part of the application process.

___ Information in the project description fully demonstrates that the study addresses a significant diversification opportunity.

You may consider questions such as:

- Does the proposed study lead to a diversification or transformation that will make the forest industry more commercially viable?
- What is the challenge or market opportunity that the study is targeting?
- Is the area of study supported by a government policy objective (e.g. changes to regulations)?
- Is the area of study supported by a strategic objective (e.g. changing consumer preference)?
- Could the study lead to the future production of a higher value forest product?

___ Information has been provided to show how the proposed study aligns with a diversification opportunity to support my organization’s competitiveness.

___ Sufficient detail has been provided to show that my study will support the future development of a new product, process, or technology that has the potential to lead to a commercial or near-commercial level project integrated within the forest sector supply chain.

___ I have demonstrated that the study will investigate an advancement of innovation in the forest sector. Advancements can include but are not limited to:

- Development of new innovative bioproducts or new application of an existing bioproduct.
- Technology or process feasibility studies undertaken to support a future investment in a demonstration or commercial implementation.
- Assessment of potential markets for bioproducts that will lead to a capital investment projects.
Annex B: Statement of Work

Please complete a Statement of Work for the study, including major tasks and key activities required to complete those tasks. Describe deliverables and timelines.

<table>
<thead>
<tr>
<th>Task name</th>
<th>Description</th>
<th>Task Activities</th>
<th>Completion Date</th>
<th>Outputs</th>
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2. Task name:
Description:
Task Activities:
Completion Date:
Outputs:

3. Task name:
Description:
Task Activities:
Completion Date:
Outputs:

4. Task name:
Description:
Task Activities:
Completion Date:
Outputs:

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2 Add columns/rows for extra statements of work as necessary
Annex C: Budget

Please provide a high-level budget ensuring costs follow eligible expenses as outline in the Applicant’s Handbook. Note that subcontractors must be identified by name for any work valued at greater than or equal to 20% of project cost (if subcontractors are not yet selected, this information can be submitted at a later time if the study is selected for funding).

**Eligible Expenditure**

Salaries and benefits

Total cost ($):

IFIT Contribution ($):

Notes (e.g. subcontractor name):

Overhead (max 1.5% of total cost of the study)

Total cost ($):

IFIT Contribution ($):

Notes (e.g. subcontractor name):

Contracting services

Total cost ($):

IFIT Contribution ($):

Notes (e.g. subcontractor name):

Travel

Total cost ($):

IFIT Contribution ($):

Notes (e.g. subcontractor name):

Printing

Total cost ($):

IFIT Contribution ($):

Notes (e.g. subcontractor name):
Data collection
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):

License fees and permits
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):

Capital expenses
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):

Materials and supplies
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):

Technical audits
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):

TOTAL
Total cost ($):
IFIT Contribution ($):
Notes (e.g. subcontractor name):
Annex D: Risks and Mitigation Measures:

Using the table below, summarize the risks associated with the study. For each risk, indicate the relative probability of occurrence, the estimated risk impact, and provide a summary of the risk mitigation and risk response strategies to reduce the probability and/or impact of the risk: (please add rows for each additional risk).

Risks can include, but are not limited to contractor availability, testing and certification delays, intellectual property, budget and financing.

<table>
<thead>
<tr>
<th>Key Risks</th>
<th>Probability (Low-Med-High)</th>
<th>Impact (Low-Med-High)</th>
<th>Risk Mitigation</th>
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3 Add columns/rows for extra risks and mitigation measures as necessary
Attestations:

Please PRINT, SIGN, and SCAN this section and include it as a pdf in your application submission.

1. Understands that any proprietary or confidential information provided as part of the submission, by any party, is provided with the approval of that party. Federal reviewers are bound by the requirements of the Access to Information Act and the Privacy Act regarding the treatment of confidential information.

2. Understands and acknowledges that, should the project be accepted under IFIT, no liability and no commitment or obligation exists on the part of Natural Resources Canada (NRCan) to make a financial contribution to the project until a written contribution agreement is signed by both parties.

3. Understands that funding that may be obtained under the IFIT Program will not be used for the production or export of softwood lumber products.

4. Understands that the individual signing below attests that he/she has provided all necessary documentation to constitute a completed application and has the necessary authority to apply to the IFIT Program in the name of his/her organization.

5. Attest that the information provided is accurate to the best of their knowledge.

Please sign below to confirm these attestations:

Signature:

Date:

Name of duly authorized officer for applicant:

Title: