

Canada First Research Excellence Fund (CFREF)

Updates from TIPS

May 26-27, 2025

Tri-agency Institutional Programs
Secretariat (TIPS)



**CANADA
FIRST**
RESEARCH
EXCELLENCE
FUND

**APOGÉE
CANADA**
FONDS
D'EXCELLENCE
EN RECHERCHE

Introductions & TIPS staff

- Valérie Laflamme, Associate Vice-President, Tri-agency Institutional Programs Secretariat
- Christian Chouinard, Director, CFREF, CERC and C150 programs
- Guillaume Beaulieu-Houle, Manager, CFREF, CERC and C150 programs

Table of content

- New CFREF Administration Guide
- Annual reports
- Midterm review

New CFREF Administration Guide

- An updated guide was published in December
 - Principles-based, to provide institutions more flexibility and to better align with TAGFA.
 - We have heard some concerns around the policy on transfer of funds (Competition 3). We are working with the three agencies to refine the approach regarding the inclusion of non-postsecondary institutions such as research hospitals.
 - Reminder: invoices, contracts and accountable advances are an acceptable mechanism to pay expenses incurred by other organizations.

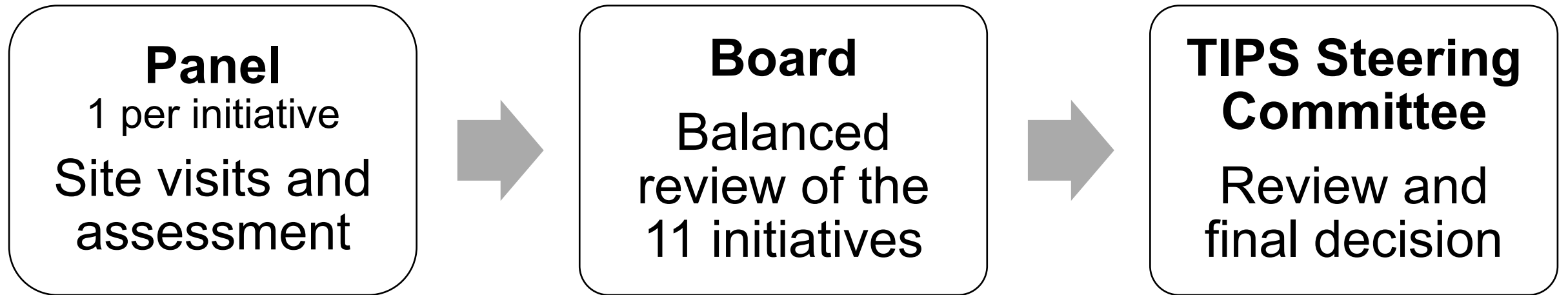
Annual reports – TIPS review

Data tables	Evaluate CFREF program's performance and report to government.
Narrative questions	Provide feedback to support the initiatives' progress and prepare for midterm review. Not used to evaluate progress or compare initiatives.
Budget projections table	Ensure alignment with program's financial policies and to demonstrate a continuous need for funds.

Annual report vs Midterm review

Annual report	Midterm review
Results of CFREF program & support to the initiatives	Evaluation of the initiatives' progress

Midterm CFREF 2022 – Review process



Midterm – Content of the report

- Part 1 - Description of the initiative
- Parts 2 to 4 – Progress on the criteria
 - Based on the three review criteria and their elements
 - Progress on the PMP outcomes and EDI action plan
- Appendices
 - PMP
 - Budget and governance structure
 - Progress on actions taken to address systemic barriers

Midterm – Other documents

We will share existing documents with the Panel and Board as reference:

- Original application
- Application evaluation documents
 - External review reports, Board application review and Panel results
- EDI Action plan submitted to the program
- Other EDI Action plan review documents
 - EDI Action plan evaluation results, institutional response to the committee's concerns, final committee findings

Midterm – Performance Measurement Plan (PMP)

1) Area of Institutional Strategy	2) Targeted Outcomes	3) Indicator / Metrics	4) Baseline	5) Reported Outcomes	6) Date to Achieve Targeted Outcome (Month/Year)
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Annual report (Sept. 2025)

Refine targeted outcomes, indicators and baselines to align with review criteria
Include progress on targeted outcomes

Midterm report (March 2026)

Include reported outcomes for midterm and end-of-grant targeted outcomes (will be used to evaluate the initiative’s performance)

Upcoming & other news

- Scheduling of site visit dates – Ongoing (CFREF 2022)
 - Limited dates to minimize travel costs
- Suggested reviewers (due June 6th)
- List of leaders and faculty (preliminary COI)
- Language of report and site visit
- Annual report in Convergence – Sept 30th (CFREF 2022)

Thank you

Q&A

Jointly
administered
by

