



**Forestry Innovation  
Investment®**

# Wood First Program Application Guide 2023/24

<b>Call for Proposals:</b>	# FII WF 2023/24
<b>Proposal format:</b>	Via FII's online funding management system <a href="https://buildwithwood.ca">buildwithwood.ca</a>
Call for Proposals issued:	November 1, 2022
Call for Proposals closes:	December 14, 2022, at 17:00 Pacific Time

## **Service delivery**

Service delivery starts April 1, 2023, or upon signature of Recipient Agreement.

## **Enquiries**

All enquiries to the Call for Proposals should be directed to the contact below. Information obtained from any other source is not official and should not be relied upon. Questions received within five days of closing will be answered only if time permits. Written enquiries will be accepted by mail, courier, email and fax or hand delivery.

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## General information

This Application Guide provides information on Forestry Innovation Investment's (FII) Wood First (WF) General program and the Wood First Research & Innovation program. It describes the process by which eligible organizations may apply for funding for activities to be delivered in the 2023/24 fiscal year. This document is organized into two key sections and appendices:

- Section 1: FII Wood First Program Guide
- Section 2: Application Process

Proponents are required to review and comply with the information contained in this Application Guide and to consult the additional information as outlined in this document.

Proponents are strongly encouraged to review this Application Guide in the context of FII's Wood First Investment Plan for 2023/24 and Wood First three-year Strategic Plan 2023-2026. The Investment Plan, Strategic Plan and other relevant information for those wishing to make a proposal for funding can be found at [bcfii.ca/cfp](https://bcfii.ca/cfp), and for users with passwords to the online funding system [buildwithwood.ca](https://buildwithwood.ca), in the Application Guidelines section of the site.

## Section 1: FII Wood First program guide

### 1.1 Background

Established in April 2003, Forestry Innovation Investment (FII) is British Columbia's market development agency for forest products. As a Crown Corporation, FII helps to maintain, create and diversify markets for B.C. Forest products to ensure the forest sector continues to be a key contributor to the provincial economy.

FII works in collaboration with the forest industry, research institutions, the federal government, B.C. government and other stakeholders to deliver innovative, forward-looking programming. FII achieves this by delivering and co-funding a mix of research and capacity building, as well as market development and promotional activities. For full details on FII programs and activities, please visit [bcfii.ca](http://bcfii.ca).

The Wood First program aims to establish British Columbia as a showcase for B.C.'s forest products by promoting wood for construction, interior design and daily living. Activities are delivered primarily by organizations under a cost sharing framework.

FII is seeking funding proposals through this Call for Proposals for activities undertaken in British Columbia only. Any work outside of the B.C. market, including any activities in other parts of Canada, will be managed outside of this Call for Proposals through FII's Market Initiatives Program. More information on the Market Initiative program is available at [bcfii.ca/cfp](http://bcfii.ca/cfp) or by contacting FII.

### 1.2 Program funding

FII Program funding decisions will be based on the completion of a structured and competitive Call for Proposals process. Additional Calls for Proposals may be issued if and when additional funds are available. All Calls for Proposals will be posted on FII's website [bcfii.ca](http://bcfii.ca), and the B.C. government's BC Bid website [bcbid.gov.bc.ca/open.dll/welcome](http://bcbid.gov.bc.ca/open.dll/welcome).

FII will entertain proposals that will develop and capitalize on short-, medium- and long-term opportunities for B.C. Forest products. Projects must be focused on achieving a positive return on investment/impact for the industry. Recipients will be required to identify the time horizon for their projects and the measurable benefits they will achieve.

Successful recipients will be required to follow FII's program criteria and reporting requirements. This information, along with performance measures, will be used to assess the results of investments and develop future program strategies to accommodate changing international market demand and issues.

The priority for FII funding will be to provide a positive return on investments in the year the project is funded (and beyond), as well as making strategic investments to develop longer-term opportunities.

Core project funding is allocated on an annual funding basis. Funded projects will commence after April 1, 2023, and must be complete by March 31, 2024. Proponents are encouraged to identify future years' activities and plans in their proposals (to provide strategic context, identify longer-term objectives, anticipated future budget requirements etc.). Recipients should summarize key past results and activities that are relevant to the projects being proposed for funding.

## 1.3 Investment Plan

FII presents the priorities for investment in an annual investment plan. Investments in the Wood First program reflect market research and input from a range of B.C. building, industry and government stakeholders, the Wood First three-year Strategic Plan, and recommendations of FII's Wood First Advisory Committee. The FII Wood First program Investment Plan for 2023/24 is available for download from [bcfii.ca/cfp](https://bcfii.ca/cfp). It describes available funding for four investment categories of activities that organizations deliver to achieve the objectives of the Wood First program.

The Wood First focus areas are:

- Research and innovation – *For 2023/24, the Wood First research and innovation investment category will have a separate application tab in the funding management system from the other investment categories.*
- Strengthening manufacturing and business capability
- Education and skills development
- Marketing, promotion, and outreach

Details about these focus areas are given in the investment plan.

FII intends to maintain the budget allocations given in the investment plan. Funding applicants are expected to align programs and funding proposals with the priorities identified in this Investment Plan if they wish to secure cost-shared funding from FII. If proposed activities do not address the priorities or priority activities outlined in the investment plan, FII reserves the right to allocate more investments to activities delivered by FII or other commissioned third parties.

## 1.4 FII funding requirements

All FII funded projects shall meet the following funding criteria. FII reserves the right to reject any proposals that do not fulfill each of the following requirements.

### 1.4.1 Eligible proponents

Organizations eligible to apply for Wood First funding are:

- 1) Groups or associations representing multi-company interests and serving the objectives of a large geographic area or the majority of producers of a specific species or product category
- 2) Academic institutions
- 3) Not-for-profit research institutions
- 4) First Nations regional Tribal Councils and Indigenous non-profit organizations
- 5) B.C. Government Ministries

FII does not provide business loans or small business grants. Individual businesses are not eligible to apply for Wood First funding.

The FII Wood First funding is to result in benefits that can be accrued to, or be accessible to, multi-company interests and other industry stakeholders, and not be limited to the proprietary interests of any one organization/company.

### 1.4.2 Cost sharing

FII funded work is built on the premise of partnerships and industry cost-sharing contributions. Most of the projects are required to be cost shared with contributions from industry and/or other sources. It is the recipient’s responsibility to seek out, obtain and confirm these contributions by the time of the submission of the application. Industry cost sharing must be based on cash contributions. In-kind contributions cannot be used as a part of calculating the industry cost-sharing contributions. Projects with a higher-than-required industry contribution, which indicates strong industry support for the project, will be ranked higher in some aspects of the evaluation of proposals.

For 2023/24, the following table identifies the **minimum** required cost-sharing requirements.

	Percent contribution	
	Funding recipient (at least)	FII <sup>1</sup> (up to)
1. Research and innovation	n/a	100
2. Education and skills development	20	80
3. Marketing, promotion, and outreach	50	50
4. Strengthening manufacturing and business capability		
- Company-specific needs assessments	n/a	100
- Company-specific site visits, plant tours or consultations	20	80
- Company-specific projects	50	50

<sup>1</sup>If the funding recipient receives other government funding for a given activity, FII may reduce its share accordingly.

FII reserves the right to adjust these cost-sharing ratios up until the time that a final contract has been signed by FII. If FII receives less than the anticipated program funding from the Province, available funding in the Call for Proposals will be adjusted on a pro-rata basis. Recipients will be notified of any changes, should any occur.

### 1.4.3 Business subsidies

Under no circumstances may FII funding be used as a business subsidy, as defined by the B.C. Ministry of Jobs, Economic Recovery and Innovation. Subsidy is defined as a government program or activity that transfers a benefit to an individual, for-profit business, or selected group of businesses. The marketplace would not normally provide these benefits.

Two elements are needed for a subsidy to be present:

- An economic advantage—there is a benefit being provided at less than commercial terms
- Selectivity—the government is exercising some discretion in selecting which firms will receive the benefit

FII will ensure the following principles are maintained:

- There is no apparent direct financial benefit to an individual, for-profit business
- The outputs generated or services provided are generally available sector-wide
- FII is not exercising discretion in selecting one firm (business) over another

#### **1.4.4 Partnerships and coordination**

Recipients are expected to communicate with each other and, where appropriate, develop partnerships and sharing of information, resources and/or facilities. Where the potential for enhanced effectiveness and/or efficiency exists among organizations, FII funding preference will be given to those recipients who plan to work with other parties toward a consolidated and integrated approach.

#### **1.4.5 Eligible project costs**

FII funding is only intended to support costs associated with the delivery of approved project activities. Recipients are expected to review and be prepared to comply with all FII funding rules shown in Schedules 4 and 5 of the Sample Recipient Agreement available at [bcfii.ca/cfp](http://bcfii.ca/cfp).

FII understands that proposed and approved projects will require administrative support in order to successfully deliver project activities and meet key deliverables. Recipients may request an allowance for administration costs of up to 10 percent of FII's share of total project costs. This allowance can be used to defray costs of program delivery, administrative expenses, financial record keeping etc. This includes the cost of domestic head office staff and consultants engaged in program management.

FII will not pay for administrative expenses exceeding its share of 10 percent of total project costs.

Half of the 10 percent administration allowance (5 percent out of 10 percent) is earnable, based on:

- **timeliness** of reporting to FII
- the recipient only requesting and accepting the funds required to successfully deliver their program—measured by the amount of **unused funds returned** to FII at the end of the fiscal year (turnback)

FII will pay half of the administration allowance (5 percent) with every advance paid to the funding recipient. The remaining earnable half of the administration allowance (up to 5 percent) will be paid after year end if the conditions outlined in Schedule 5 of the Recipient Agreement are met by the funding recipient.

#### **1.4.6 Subcontracting**

Subcontractors may be used in the delivery of services by the successful recipients. Recipients should clearly indicate and explain in which projects subcontractors will be used, along with their roles and a detailed summary of their experience and qualifications.

How subcontractors are selected must be indicated in the applications. The selection and retention of subcontractors shall comply with FII's Subcontracting Rules which are given in Section 8 of FII's Sample Recipient Agreement posted on FII's website [bcfii.ca/cfp](http://bcfii.ca/cfp).

Of note is that competitive tendering is required on all subcontracts exceeding \$25,000, including cumulative awards to the same individual or organization.

FII approval is required on all subcontracts over \$25,000 not fully identified in the original proposal. Any changes to or the addition of new subcontractors must be approved in writing by FII in advance of any participation in a project.

## **1.5 Performance management and reporting**

The Ministry of Jobs, Economic Recovery and Innovation is ultimately accountable for all FII's programs. As a provincial Ministry, it is required by the Budget Transparency and Accountability Act (BTAA) to report on Service Plan outcomes. In support of this requirement, government organizations and their partners have adopted performance-based management approaches that not only allow a focus on outcomes, but are also capable of managing factors, systems and processes viewed as critical contributors to those outcomes.

To create an integrated performance management framework, FII, in consultation with funding recipients, has developed direct linkages between desired program outcomes, specific targets and the individual funded projects. FII's investments are distributed to funding recipients who carry out project activities and outputs intended to achieve certain outcomes—such as the engagement of key target groups and improvements in their access to information/knowledge that would lead to the expansion and diversification of markets.

The framework for FII is designed to strengthen accountability and standardize performance management. It is intended to provide FII with the information necessary to evaluate and continuously improve performance over time. Better coordination of tracking project progress and measuring results is expected to enhance the project planning, efficiency and effectiveness of funded projects and programs.

A copy of FII's Results Logic (Strategy Map) is attached in Appendix D for reference. Recipients are encouraged to review the strategy map carefully, along with the Performance Management tabs in the proposal template. Recipients should use the comments box in the individual Performance Management tabs to explain how they intend to measure and report performance at year end.

All funding recipients are required to conduct evaluations of their activities to assess effectiveness and impact in relation to meeting the Wood First objectives. The evaluations are required to contain standard questions and/or information-gathering procedures that would allow generation of useful data and meaningful compilation or analysis of results. It is recommended that funding recipients develop their evaluations in coordination with FII. All evaluation results, in an agreed-upon format, shall be submitted to FII.

### **1.5.1 Activity impact tracking**

FII requires funding recipients to assess and report on deliverables and outcomes of their funded activities. One core measurement tactic is exit surveys, a category of project deliverables to evaluate activity effectiveness and impact. To improve and streamline data collection and analysis, FII will manage the administration of online exit surveys using technologies that facilitate an efficient and economical workflow.

As part of the proposals, applicants will indicate the events for which an exit survey is required, or at the time of agreement finalization, FII will indicate the events. The administration of the exit surveys is a collaborative process between FII and funding recipients. FII will be creating the exit surveys. Funding recipients will review the exit surveys and may suggest additional questions or aesthetic changes. Following the activity, funding recipients will be sharing the exit surveys with participants and will be sharing the participant list with FII. Funding recipients will have access to their organization's exit survey data. For interim reporting, funding recipients do not need to attach exit survey results.

## Section 2: Application process

### 2.1 Submitting an application

Applicants for FII funding are required to submit their proposals through an online funding management system, [buildwithwood.ca](http://buildwithwood.ca). On entering the site, new users can request an account. FII will respond to all account requests within two business days.

Once FII assesses whether the applicant meets the eligibility criteria, a link to establish a personalized password will be emailed to the address provided in the account request. This will enable the applicant to access the system.

The online system will open to receive proposals on November 1, 2022. Existing recipients will receive an email indicating the system is open for applications and new proponents will be notified via updates to [bcfii.ca/cfp](http://bcfii.ca/cfp) and BC Bid [bcbid.gov.bc.ca/open.dll/welcome](http://bcbid.gov.bc.ca/open.dll/welcome).

All subsequent information regarding the Call for Proposals will be directed only to those recipients who have a user ID and password. Subsequent information will be distributed by email, to the email address provided by recipients.

### 2.2 Proposal format

The online application system has been designed to help proponents provide FII with the requisite information needed for the review, evaluation, and project funding process. The system is intended to help proponents establish a solid basis for planning and enable efficient and effective monitoring and reporting over the course of the project.

Proponents must complete all steps of the online application process before submitting proposals to FII. A comprehensive user guide and proposal templates on how to submit and manage proposals in the online funding management system is available on FII's online application system under the Information Resources section.

#### Key dates

The following timetable outlines the schedule for the 2023/24 Call for Proposals and contract preparation process.

Event	Anticipated date
Call for Proposals opens	November 1, 2022
Call for Proposals closes	December 14, 2022, 17:00 Pacific Time
Evaluation of proposals	Week of January 23, 2023
Proponents notified	Week of February 6, 2023
Service delivery starts	April 1, 2023, or upon signature of Recipient Agreement

## 2.3 Knowledge mobilization plan

Proposals submitted for the **Research and innovation investment category**, must include a knowledge mobilization plan. Knowledge mobilization is the flow and uptake of research knowledge between researchers, knowledge brokers and knowledge users—both within and beyond academia—in such a way that may benefit users and create positive impacts for wood use, technology, and sustainability.

The knowledge mobilization activities may be part of the proposal and/or occur after and outside of FII project funding. All knowledge mobilization activities and potential partners should be included in the plan. Recipients should explain or highlight which activities will be carried out as part of the FII project funding.

The plan can be brief, but recipients should address the following questions in the plan:

1. What is the purpose of the knowledge mobilization?
2. To whom should the knowledge be mobilized? Who stands to benefit from this research?
3. By whom should knowledge be mobilized?
4. How should knowledge be mobilized?

An example of a fictitious sample of a Knowledge Mobilization Plan is available for review in the Information Resources section of the online funding management system.

## 2.4 Funding allocation by investment category

For 2023/24, FII's budget will be \$2.0 million for eligible organizations to deliver Wood First activities through the annual Call for Proposals. The allocations for Wood First investment in the four investment categories through this Call for Proposals are:

Investment Category	2023/24 allocations Call for Proposals	
	Amount	Percent of subtotal
Research and innovation	\$840,000	42%
Strengthening manufacturing and business capability	\$520,000	26%
Education and skills development	\$475,000	24%
Marketing, promotion, and outreach	\$165,000	8%
<b>TOTAL</b>	<b>\$2,000,000</b>	

*\* Allocations reflect the recommendations of the Wood First Advisory Committee*

FII's investments in each investment category will be limited to the levels of the respective allocations. If proposed activities do not respond to the priorities given in this Investment Plan, FII reserves the right to allocate investments to activities delivered by FII (or others) for that same focus area. Recipients must clearly identify in their proposals to which focus area each of their proposed activities relates. Beginning in 2023/24, the Wood First research and innovation investment category will have its own online application program separate from the other investment categories.

## **2.5 Working language of the province**

The working language of FII is English. All responses to this Funding Application must be in English.

## **2.6 Notification of changes**

All recipients of this Call for Proposals who have applied for and been issued a user ID and password to the online application system will be notified of any changes made to this document.

## **2.7 Authorized proposals**

The affirmation provided with the proposal submission must be that of an individual who is authorized to legally bind the proponent organization to statements made in response to the Call for Proposals.

## **2.8 Changes to submission wording**

The recipient may not change the wording of its proposal after closing, and no words or comments may be added to the proposal unless requested by FII for purposes of clarification.

## **2.9 Irrevocability of submissions**

By submission of a clear and detailed written notice, the recipient may amend or withdraw its proposal prior to the closing date and time. All proposals submitted by the closing date and time will be subject to evaluation by FII as submitted and without further changes. After closing, a proponent may withdraw its proposal by providing written notice.

## **2.10 Evaluation process**

Proposals will be checked against mandatory criteria (see below). Proposals that do not meet all the mandatory criteria will be rejected without further consideration. Proposals that meet all mandatory criteria will be assessed against the evaluation criteria by an evaluation team comprised of representatives from the funding organizations and independent experts.

Based on the evaluation panel recommendations, final funding decisions will be made by FII's President and CEO. The evaluation process will be monitored by the B.C. Citizens Services Branch to ensure fairness and transparency.

It is anticipated that more applications may be received than there are funds available. In this event, proposals may be ranked against each other to determine funding priorities. Recipients must prioritize projects within their proposal in the online system by giving them a ranking. FII is under no obligation to fund any proposal submitted under this CFP or to fund the entire scope or duration of any proposed project. FII reserves the right to consider and make funding decisions based on alignment with FII priorities and strategies, market allocations, regional/local circumstances, and gaps and/or duplication in existing or planned projects.

Following final approval, recipients will be advised of the results of the evaluation. FII staff will work with successful proponents to draw up Recipient Agreements and initiate projects.

If written agreements cannot be negotiated within 30 days of notification of a successful recipient, FII may, at its sole discretion at any time, thereafter, terminate negotiations with that proponent and negotiate a Recipient Agreement with other recipient(s) or choose not to enter into a Recipient Agreement with that recipient.

### 2.10.1 Mandatory criteria

The following are mandatory requirements:

- **Eligible recipient**—Recipients must meet FII’s eligibility criteria (Section 1.4.1)
- **Receipt**—Proposals must be submitted, via FII’s online application system by the closing date and time
- **Language**—Proposals must be submitted in English
- **Format**—Proposals must be submitted in the approved format via the FII online application system
- **Program guidelines**—Proposals must fall within the structure of the FII Wood First program and eligible program activities
- **Diversity, Equity, & Inclusion** – The proposal must include a completed Diversity, Equity, and Inclusion questionnaire via FII’s online application system

### 2.10.2 Evaluation criteria

For proposals that meet the mandatory requirements, FII’s Evaluation Committee will review proposals and projects based on the following evaluation criteria. Each criteria has a percentage weighting which will influence the final score. Two criteria have a minimum upset score. Proposals that do not achieve a minimum of 5 out of 10 for \*Alignment with Wood First Investment Strategy and Completeness of Proposal and \*Business Case and Likely Future Benefits will be rejected without further consideration.

#### **Alignment with Wood First Investment Plan and completeness of proposal\* (20%)**

- Objectives of the proposal are in line with the Wood First program strategic objectives and the priorities outlined in the Wood First program Investment Plan 2023/24.
- Individual projects are clearly presented and linked to the proposal’s objectives and the priority activities outlined in the Wood First program Investment Plan 2023/24.
- The proposal is complete with all required information.

#### **Business case and likely future benefits\* (20%)**

- A compelling business case with sound rationale is presented. Linkages between projects or to past projects are clear and logical.
- Projects are placed in appropriate focus areas.
- Projects are likely to achieve the anticipated results.
- There is a strong likelihood that the projects will result in desired outcomes and provide tangible and meaningful benefits for the investment made. Long-term and downstream impacts and benefits are likely.

#### **Cost effectiveness and in-kind contributions (15%)**

- Proposal shows good value for money for government investment; level of funding requested is appropriate and sufficient to complete the proposed project(s) and related activities.
- Proposal notes contributions by industry or partners at no or reduced cost to the applicant (in-kind):

- Time/resources (e.g. other government funders; in-market partners); product donations; supply of materials
- Contributions are trackable and quantifiable (i.e. personnel time (hrs) x salary (\$\$\$) = in-kind total)

**Not** deemed in-kind contributions:

- Time of the applicant’s staff/board to develop strategies, prepare/manage proposals
- Expenses or time of companies participating in activities (this is deemed a “cost of doing business”)
- Standard industry contribution to project costs
- Applicant correctly applies cost share and, when applicable, is investing own funding and/or is leveraging funding from other sources; declares potential or received funding from other sources.
- Applied FII’s financial rules/standards to itemized expenses.

**Partnerships and collaboration (including experience and qualifications) (20%)**

- Organization has formed partnerships with relevant organizations/individuals, who have the necessary qualifications/experiences to help ensure the success of the proposed suite of projects/activities.
- Additionally for focus area “Research and innovation”: research organization has formed partnership with knowledge users in B.C., such as wood product manufacturers or design and construction companies.
- Where other organizations/in-market partners are working on similar activities, proposal shows evidence of mutual consideration/cooperation, integrated planning and collaboration is clearly outlined.
- Proposal includes letter(s)/testimonial(s) from partners and clients.

**Performance measures (15%)**

- Proposal clearly outlines realistic/complete targets and has explained how measures were established and will be tracked.
- A strong commitment to performance tracking and reporting is shown where additional targets or deliverables have been added manually by the proponent.
- Any “N/A” or “no answer” has been clearly explained in the text of the proposal.
- Additionally for focus area “Research and innovation”: Knowledge mobilization plan demonstrates past experience in knowledge mobilization activities within and beyond academia, identifies appropriate research users and ways of reaching the research users.

**Diversity, Equity, and Inclusion (10%)**

- Organization demonstrates a solid understanding of DEI and describe their DEI journey including achievements to date as well as future plans during the course of the project.
- The mandatory questionnaire is complete and clearly outlines the organizations current DEI level.
- Any “N/A” or “no answer” in any of the DEI considerations in the Plan template must be clearly explained.

## **2.11 Currency**

Prices/costs are to be quoted in Canadian dollars. Proponents who wish to plan budgets and costs in U.S. dollars are required to obtain pre-approval from FII prior to submitting an application.

## **2.12 Taxes**

FII will pay GST where applicable. If GST is applicable, the funding recipient must provide an invoice including the recipient's GST registration number to support the amount of GST being charged to FII.

## **2.13 Recipients' expenses**

Recipients are solely responsible for their own expenses in preparing applications, including all necessary preparatory work, and for subsequent negotiations with FII, if any. FII will not be liable to any recipient for any claims, whether for costs or damages incurred by the recipient in preparing the application, loss of anticipated revenues in connection with any final contract, or any other matter whatsoever.

Should recipients make financial or other commitments for projects prior to receiving a formal approval and written contract from FII, FII will not be liable for any costs or damages incurred by the recipient.

## **2.14 Contracting process**

Upon completion of the evaluation and funding decision-making process, recipients will be advised of the decision relative to their specific funding requests. Unsuccessful recipients will have the opportunity (should they request it) to discuss the outcome of the evaluation. FII funding decisions are final—there is no process to appeal funding decisions.

Successful recipients will be advised of the outcome of the evaluation and provided feedback on any areas of the proposal that need to be amended before a contract can be initiated. Contracts will be signed once proposals have been resubmitted in line with the recommendations of the evaluation panel. (Please visit FII's website to see a Sample Recipient Agreement at [bcfii.ca/investment-funding/calls-proposals/applicant-resources](https://bcfii.ca/investment-funding/calls-proposals/applicant-resources).)

### **2.14.1 Definition of contract**

Notice in writing to a recipient that it has been selected as a successful recipient and the subsequent full execution of a written contract will constitute a contract for the project funding, and no recipient will acquire any legal or equitable rights or privileges relative to the project funding until the occurrence of both such events.

### **2.14.2 Form of contract**

By submission of a proposal, the recipient agrees that, should it be identified as a successful recipient, it is willing to enter into a contract with FII which may include, but will not be limited to, the contract terms as set out in the Sample Recipient Agreement available on FII's website.

## **2.15 Payment of accountable advances**

All funding recipients will be required to account for the use of funds against eligible program expenditures. The first advance will be paid upon contract signature. Advance payments for the remaining contract periods will only be made when FII is satisfied that the recipient has made good progress in the work and met all the terms and conditions of the contract, including financial and operational reporting.

FII reserves the right to reduce the amount of payments to more accurately reflect the completion of approved project expenditures. Monitoring and auditing project deliverables and performance measures will also be an important element in reviewing project progress and continued funding. Projects will be subject to financial and operational audits, as determined by FII.

Throughout the fiscal year recipients can contact FII to request modifications to budgets as projects need change. More information on the modification process can be obtained by contacting FII and by reviewing the Proponent Guide for the online funding system.

## **2.16 Recipients with existing contracts**

Any recipient that has an existing contract with FII for funding of their 2022/23 program and has been successful in receiving a contract for 2023/24 will not receive their initial advance for 2023/24 funding until such time that all of the existing contract terms and conditions have been met. This includes completion of annual reporting for the current year and year-end reconciliation of expenditures and administration allowance. Any funds owing from the recipient to FII under the existing contract must be paid in full before the initial advance for the 2023/24 fiscal year will be processed.

## **2.17 Liability for errors**

While FII has used considerable efforts to ensure an accurate representation of information in this Application Guide, the information contained in this document is supplied solely as a guideline for recipients. The information is neither guaranteed nor warranted to be accurate by FII, nor comprehensive or exhaustive. Nothing in this Application Guide is intended to relieve recipients from forming their own opinions and conclusions with respect to the matters addressed in this funding application process.

## **2.18 Modification of terms**

FII reserves the right to modify the terms of this funding process any time at its sole discretion. This includes the right to cancel this funding process at any time prior to entering into a contract with successful recipients. Notwithstanding any other provision of this funding process, FII may cancel, modify, or amend this funding process, or any of the information provided as part of the funding process.

## **2.19 Ownership of proposals**

All documents submitted to FII, including proposals submitted via the online funding management system, become the property of FII. They will be received and held in confidence by FII, subject to the provisions of the Freedom of Information and Protection of Privacy Act.

## **2.20 Use of Application Guide**

Neither the Application Guide, nor any portion thereof, may be used for any purpose other than the submission of applications.

## **2.21 Confidentiality of information**

Information pertaining to FII obtained by the proponent as a result of participation in this application process is confidential and must not be disclosed without written authorization from FII. The template forms in the online proposal and reporting management system are designed NOT to collect personal information from funding applicants (personal information as defined in the Canada Privacy Act). Please make sure that you do not include any personal information, such as a resume, private telephone (including cellular phone) numbers, or salary details in your submission. Please contact FII if there is a need to provide any personal information as part of your proposal.

## **2.22 Additional terms and conditions**

This application process should not be construed as an agreement to purchase goods or services or provide project funding. FII is not bound to enter into a Recipient Agreement with the recipient who submits the lowest priced proposal, nor with any recipient. Applications will be assessed in light of the evaluation criteria. FII will be under no obligation to receive further information, whether written or oral, from any recipient.

Neither acceptance of an application for funding nor execution of a Recipient Agreement will constitute approval of any activity or development being contemplated in any provincial, regional district or municipal statute, regulation, or by-law.

## **2.23 Example proposals**

An example of a fictitious sample proposal is available for review in the Information Resources section of the online funding management system. For proposals in the “Research and innovation” focus area, a proposal template is available. The proposal template should be reviewed for context and general guidance. The amount and type of information included in proposals to FII is expected to differ from the example, depending on the size and complexity of proposed projects. FII is under no obligation to fund a proposal modelled after the example proposal or the proposal template

## Appendix A: Call for Proposals terminology

- a) **Contract** means the written Recipient Agreement resulting from this Call for Proposals executed by Forestry Innovation Investment and the recipient
- b) **Ministry** means Ministry of Jobs, Economic Recovery, and Innovation
- c) **Must** or **mandatory** means a requirement that must be met in order for a proposal to receive consideration
- d) **Applicant/Proponent** means an eligible association, organization, society, academic institution, First Nation or B.C. Government ministry, that submits, or intends to submit, a proposal in response to this Call for Proposals
- e) **Province** means Her Majesty the Queen in Right of the Province of British Columbia and includes Forestry Innovation Investment and the Ministry
- f) **Should** or **desirable** means a requirement having a significant degree of importance to the objectives of the Call for Proposals and proposal evaluation
- g) **FII** means Forestry Innovation Investment
- h) **Call for Proposals** and **CFP** are interchangeable terms as they relate to this document
- i) **Recipient** refers to a proponent who is successful in receiving FII funding, and who enters into a contract
- j) **Diversity** is the presence of “difference” within a given setting. It refers to the differences in the identities and lived experiences of people including gender identity or expression, sexual identity, race, ethnicity, ancestry, place of origin, political beliefs, religion, marital status, family status, physical disability, mental disability, age, and socio-economic conditions, as examples
- k) **Equity** is an approach that ensures everyone is fairly supported in their personal and professional development. Equity recognizes that advantages and barriers exist, and that, as a result, we don’t all start from the same place. Equity is a process that begins by acknowledging the unequal starting place and making a commitment to correct and address the imbalance through action/activities/initiatives
- l) **Inclusion** is the act of creating environments in which people feel like they can bring their authentic selves to work and participate fully. It means everyone feels valued and respected for their unique identities. Inclusion relates to the quality of the human experience

## Appendix B: Markets, focus areas, activity types and deliverables

FII's Wood First program is structured into the British Columbia market and focus areas under which one or multiple related projects can be organized. Please review focus areas carefully to ensure you are making the appropriate selection for your proposal.

The online system is designed to only show proponents the focus areas that relate to the Wood First funding program.

### Definitions of focus area

**Research and innovation**— focuses on developing solutions, through applied research, to overcome barriers in advancing the applications of wood-based products and building systems. Research projects should improve target audience understanding and enhance the performance of wood in applications that offer significant market potential in B.C. Projects may include technical research in engineering and material sciences, development of guides, case studies, reviews, market research and other non-technical research.

**Education and skills development**—focuses on increasing knowledge and experience related to designing and building with wood, including products, and building systems. It covers a range of species, products, design applications and construction techniques.

**Marketing, promotion, and outreach**—focuses on promoting the benefits of and extending the latest developments in wood building design and construction, including excellence and innovation in B.C. businesses and workforce.

**Strengthening manufacturing and business capability**—focuses on strengthening the supply chain and improving the competitiveness of the manufacturing sectors by developing sustainable approaches to manufacturing wood-based products and building systems. In particular, there is a need to seek immediate solutions to current supply challenges in B.C. that will improve competitiveness, address gaps, and strengthen the supply chain.

### Definitions of activity type

**BI-site visits**—organizations are able to conduct assessments via site visits to identify gaps, challenges, and barriers to growth.

**Business assessments**—aim to provide all participants in the process with an authorised assessment of new products, processes, procedures, skills, and equipment for a defined use. Related costs can include, but are not limited to, professional services, travel, and printing.

**Business development projects**—refers to the activities an organization undertakes to obtain new knowledge to create and showcase new technology, products, services, or systems. Related costs can include, but are not limited to, professional services, travel, and material/supplies/tools.

**Conference – attending**—refers to the costs for an organization to have a presence at a conference (can include exhibition space or presentation), or to send a guest speaker on their behalf. Related costs can include but are not limited to Professional Services, Travel, Printing and Registration Fees.

**Conference – hosting**—refers to the planning and delivery of an event aimed at stakeholders interested in wood-based construction/design/manufacturing. Programming can include panel discussions, information sessions and/or networking opportunities. Related costs can include but are not limited to Professional Services, Travel, Catering, and Venue/Audio visual Equipment Rental.

**Demonstration of wood construction/design**—refers to work that showcases the use of wood systems and material in a novel way for a given market. Can include structural, exterior and interior applications. Eligible costs for this activity differ for NRCan and FII. Please consult programs to confirm if eligible costs could include wood products and other building materials, construction documentation, engineering and testing costs. Related costs can include but are not limited to Professional Services, Travel, Material/Supplies/Tools, Printing.

**Hosting events**—refers to the planning and delivery of design competitions, networking events, site visits and meetings. Conferences, tradeshow, and technical meetings are separate activities not included in this activity type. Related costs can include but not limited to Professional Services, Travel, Material/Supplies/Tools, Catering, Printing, Shipping/Storage, Transportation Rental, Venue/Audio visual Equipment Rental, and Gifts/Awards.

**Literature production**—refers to the research, writing, design and publication of all print and digital documents such as annual reports, design award catalogues, information pamphlets, training workbooks, case studies, market studies, technical reports, and technical publications. Related costs can include but are not limited to Professional Services, Printing, Shipping/Storage and Material/Supplies/Tools.

**Media campaign/advertising**—Media Campaign/Advertising includes refers to the development and/or placement of content across digital and print media platforms such as newspaper, magazine, advertorials, videos, web banners, television, radio. Related costs can include but are not limited to Professional Services, Printing, Shipping/Storage & Material/Supplies/Tools.

**Missions – attending**—refers to being a member of a delegation of stakeholders attending a mission for the purpose of intelligence gathering, education or outreach. Related costs can include but not limited to Travel and Registration Fees.

**Missions – hosting**—refers to the planning and delivery of a mission for the purpose of education, research, outreach or technology transfer. Related costs can include but are not limited to Professional Services, Travel and Venue Rental.

**Product development and design projects**—work that showcases the use of wood systems and material in a novel way for a given end use or process. Can include structural, exterior and interior applications. Related costs include permit fees, wood products and other building materials, construction documentation, engineering and testing costs, and activities for featuring new and innovative concepts. Related costs can include, but are not limited to, professional services, travel, material/supplies/tools and printing.

**Product trials**—refers to providing international manufacturers with technical assistance and a sample of Canadian wood, to educate and encourage them to use the species in their commercial production line. Related costs can include but are not limited to Material/Supplies/Tools, and Shipping/Storage.

**Project interventions**—Project Interventions refers to face to face meeting(s), conference call(s) or extensive electronic communication exchange(s) with a decision maker(s) or influencer(s) to discuss the specifics of a project that is considering using wood or can be influenced to use wood. Project intervention can consist of, but is not limited to providing general information or specific technical details about wood products, construction solutions and systems to individuals or firms. Several interventions with the same firm/individual(s) regarding the same project can be had to support their use of wood in a project. Related costs can include but are not limited to Travel.

**Promotional products**— refers to material used at promotional events that are not literature, like booth backdrops and roll-ups, as well as complementary items that are given out at events. Promotional items can include: wood samples and branded packaging (folders), calendars, pens, note pads, memory sticks, bags.

Related costs include the design and production of promotional items, but are not limited to Professional Services, Shipping/Storage, and Printing.

**Quality assurance**—refers to providing technical advice/oversight of a project to ensure the quality requirement of a wood-based product or building system. Related costs can include but are not limited to Professional Services and Travel.

**Research and development**—refers to the activities an organization undertakes to obtain new knowledge to create, analyse and /or validate technology, products, or systems. Related costs can include but are not limited to Professional Services, Travel and Material/Supplies/Tools.

**Technical committees/regulatory meetings**—refers to contributing to a formal regulatory process to ensure that the point of view of Canada's wood products industry is represented through participation in meetings between technical experts and government leaders, or as a member of a working group developing or revising codes, standards and regulations. Related costs can include but are not limited to Professional Services, Travel and Registration Fees.

**Tradeshow – attending**—refers to the costs for an organization to send staff to attend an industry tradeshow in order to display, demonstrate, and discuss their latest products and services. Related costs can include but are not limited to Professional Services, Travel, Material/Supplies/Tools, Printing, Shipping/Storage, Exhibition Floorspace and Registration Fees.

**Training event—hosting**—refers to the planning and delivery of an education activity aimed at students and/or professionals in the form of a seminar, workshop, credit course or symposium. The activity goals can include knowledge transfer, gaining hands-on experience, or improved technical expertise of Canadian wood/wood products, and/or wood construction systems. Related costs can include, but are not limited to, professional services, travel, catering, and venue/audio visual equipment rental.

**Websites/social media**—refers to the creation of and updates to content or functionality for market development websites and social media platforms. Related costs could include, but are not limited to, professional services and material/supplies/tools.

## Definitions of deliverables

**Activity report**—A report used to describe the outcome of training, tradeshows, missions, website/social media or any other event type supported by WF. A checklist of suggested details to include in an activity report is available under Information Resources. Activity report may be included either in the FMS or as an attachment.

**Copy of product**—Output of a project funded by WF. Examples include a publication, report, mock-up of a product or architectural drawings. Digital attachments in medium or low resolution are acceptable as long as they clearly display the output.

**Event survey results**—Summary of event surveys for hosted events supported by WF. Can include graphs/charts of survey results to illustrate feedback.

**List of committee members/regulatory meetings**—List of members, including name, title and organization (in English and/or French) for technical committees and regulatory meetings attended during the fiscal year. Approved regulatory changes to date for the target market(s) must be tracked in the Market Access Matrix. Available under Information Resources.

**Milestones achieved against market access matrix**—Work to revise/update wood-related codes, standards and regulations must be tracked in the market access matrix. Available under the Information Resources.

**Organization chart**—A diagram showing the reporting relationship within an organization. Should include the names, titles, locations (if relevant) and indicate if the individual is a direct employee, a contractor or if a position is vacant.

**Visual documentation**—Photograph for an activity funded by WF, or link to a digital product (website or video). Examples include image of a trade booth at a conference, or speaker presenting before an audience.

## Appendix C: Performance measurement

Each proposal must include targets for the performance indicators automatically populated by the online funding system. If successful the recipient must ensure it has mechanisms in place to track achievement of the measures and report these at year end.

There are performance indicators associated to specific focus areas in the proposal. When the following focus areas are selected, the proposal needs to indicate a target for the associated intermediate performance indicators.

Focus area selected	Associated performance indicator to be reported
WF - Education and Skills	# of continuing education opportunities for educators
	# of different types of technology transfer methods used
	# of seminars, workshops, company presentations conducted
	# of stakeholders trained
	# of tools made available to users
	Qualitative assessment of improvements in learning tools and learning environment
WF - Marketing, Promotion & Outreach	Qualitative assessments of value via exit surveys
	# of presentations to end-user companies
	# of project profiles, articles or case studies published
WF - Research & Innovation	# of stakeholders that received training, information or tools
	# of knowledge user collaborators in research project
	# of research organization collaborators in research project
	# of conference paper(s) prepared, submitted or accepted
	# of scholarly journal article(s) prepared for submission
	# of information documents prepared for knowledge users (e.g., practice guidelines, research summary, recommendations, design details, tool)
	# of presentations to knowledge users in B.C. (e.g., through webinars, workshops, seminars)
WF - SMBC - Company Specific Needs Assessments	Qualitative assessment of codes & standards progress using Wood First Codes & Standards Matrix
	# of B.C. companies participating in seminars/workshops designed to build skills in the areas of business, marketing, design and technology.
WF - SMBC - Company Specific Projects	Qualitative assessments of value via exit surveys
	# of B.C. companies adopting diversified applications of manufacturing technologies, species and or processes
	# of B.C. companies undertaking specific projects to enhance capabilities
	Value gain in raw material recovery
	Value of capital investments in capacity improvement
	Value of gains in production outputs
	Value of savings in manufacturing processes
Increase in sales due to better quality/lower cost	
WF - SMBC - Company Specific Site Visits, Plant Tours, Consultations	# of B.C. companies aware of technical and business development support available under Wood First
	# of new participants accessing technical and business development support
	Qualitative assessments of participating B.C. companies

When the following activity types are selected to build the budget in a proposal, the recipient must set a target for the associated performance indicators. This must be tracked and reported at year end.

<b>Activity type selected</b>	<b>Associated performance indicator reported</b>
BI-site visits	# of projects (tech transfer, bus. devt, PD & design) generated
	# site visits completed
Business assessments	# assessments completed
Coaching/mentoring	# of companies mentored
Conference—attending	# of events (lunch and learns, lectures training, design competition, conference etc.)
	Speaking opportunity for applicant y/n?
	Display (promotional/technical) y/n?
Conference—hosting	# of attendees (event/mission/training)
	# of events (lunch and learns, lectures training, design competition, conference etc.)
Demonstration of wood construction/design	# of projects completed
	(\$ value of project(s)
Export readiness assessment	# of assessments completed
Hosting events	# of Canadian companies/organizations participating
	# of attendees (event/mission/training)
	# of events (lunch and learns, lectures training, design competition, conference etc.)
	Speaking opportunity for applicant y/n?
Literature production	# of articles published
	# of documents downloaded
	# total people reached
Media campaign and advertising (all media)	# of ads placed (print and digital)
	# of articles published
	# total people reached
	# total website visits/followers
	# of unique website visitors/new followers
Missions—attending	# of Canadian companies/organizations participating
	Speaking opportunity for applicant y/n?
Missions—hosting	# of Canadian companies/organizations participating
	# of attendees (event/mission/training)
Office maintenance	# of staff
Product development and design projects	# projects completed
	(\$ value of projects
Product trials	# of projects completed
	(\$ value of wood influenced
Project interventions	# of project conversions
	Exit survey results
Promotional products	# of documents downloaded

	# total people reached
Quality assurance	# of end users/specifiers seeking guidance
	# of site visits completed
	(\$ value of project(s)
Research and development	# of projects completed
Technical committees/regulatory meetings	# of events (lunch and learns, lectures training, design competition, conference etc.)
	Speaking opportunity for applicant y/n?
Tradeshow—attending	# of follow up targets identified
	# of Canadian companies/organizations participating
	# of events (lunch and learns, lectures training, design competition, conference etc.)
	Speaking opportunity for applicant y/n?
Tradeshow—hosting	# of follow up targets identified
	# of Canadian companies/organizations participating
	# of attendees (event/mission/training)
	# of events (lunch and learns, lectures training, design competition, conference etc.)
Training event—attending	# of attendees (event/mission/training)
	# of events (lunch and learns, lectures training, design competition, conference etc.)
Training event—hosting	# of staff
Websites/social media	# of documents downloaded
	# total website visits/followers
	# of unique website visitors/new followers



## Appendix E: Diversity, Equity, and Inclusion (DEI) Plan

A DEI Plan demonstrates an organizational commitment and approach to increasing and supporting diversity, equity, and inclusion within an organization. Applicants have been provided a DEI Overview Questionnaire and Maturity Matrix in the FMS to assist them in their application. The questionnaire is directly aligned with the evaluation criteria.

The DEI Plans will be evaluated according to five key pillars of DEI. The DEI Overview Questionnaire and Maturity Matrix provides applicants with the tools needed to 1) assess their current state of DEI maturity on the five key pillars, 2) communicate their current state with the evaluation committee, and 3) identify areas for future implementation and progress as they continue their DEI journey.

Applicants are asked to review the DEI Maturity Matrix and assess where along the maturity continuum their organization currently sits. They are then asked to complete the mandatory DEI Overview Questionnaire for submission to the evaluation committee. If the applicant’s organization has a pre-existing DEI plan or strategy, it may be attached to the application, but this is not mandatory.

Applicants are expected to include their DEI achievements/progress to date as well as their DEI plans over the course of the funding agreement for each DEI pillar.

5 Pillars of DEI	Description	DEI Considerations and Indicators
Team Composition & Organizational Culture	DEI is being mainstreamed across the organization.	<ul style="list-style-type: none"> <li>• DEI is viewed as an organizational priority and there is a plan to integrate DEI into organizational policies and practices and the organization’s strategic plan.</li> <li>• Efforts are made to build an inclusive team culture (e.g., mentorship opportunities, team building activities, pay equity across the team, etc.)</li> </ul>
Organizational Leadership Commitment	Leadership is bought-in and have demonstrated commitment to DEI principles and goals.	<ul style="list-style-type: none"> <li>• The organization has a clear and publicly available DEI statement of commitment and policy for the organization.</li> <li>• Leadership performance evaluations incorporate DEI goals and progress.</li> </ul>
Ownership & Accountability	There are clear DEI objectives, activities, indicators as well as a monitoring and evaluation plan with clear ownership/accountabilities.	<ul style="list-style-type: none"> <li>• DEI has sufficient resource allocations (budget, FTE, in-kind resources, DEI Committee, etc.)</li> <li>• The organization has clear and transparent DEI activities and indicators. A clear monitoring and evaluation plan is included for DEI activities.</li> </ul>
Community Consultation & Co-Creation	There is a clear link to the broader community and those most impacted.	<ul style="list-style-type: none"> <li>• The organization has a plan on how to disseminate knowledge with those impacted and the broader forestry sector.</li> </ul>
Technical Capacity	Organizations have the technical capacity to advance DEI principles and actions across the organization.	<ul style="list-style-type: none"> <li>• DEI learning and/or professional development opportunities are available.</li> <li>• Efforts are undertaken to improve the diversity of the team through inclusive recruitment practices to ensure diversity in the pool of candidates and/or contractors.</li> <li>• Diversity disaggregated data is collected in the organization.</li> </ul>