



Market Initiatives Program

Application Guide 2024/25

Call for Proposals:	# FII MIP 2024/25
Proposal format:	Via FII's online funding management system buildwithwood.ca
Call for Proposals issued:	November 15, 2023
Call for Proposals closes:	January 15, 2024, at 17:00 Pacific Time

Service delivery

Service delivery starts April 1, 2024, 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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Table of contents

Table of contents.....	i
General information.....	1
Section 1: Market Initiatives program guide.....	1
1.1 Background.....	1
1.2 Types of market initiatives supported.....	2
1.2.1 International marketing and promotion.....	2
1.2.2 Market access.....	3
1.2.3 Domestic market development.....	3
1.3 Program funding.....	3
1.4 Investment strategy.....	4
1.5 Market strategies and market research.....	4
1.6 FII funding requirements.....	4
1.6.1 Eligible proponents.....	4
1.6.2 Cost sharing.....	5
1.6.3 Business subsidies.....	5
1.6.4 Partnerships and coordination.....	6
1.6.5 Infrastructure.....	6
1.6.6 Eligible project costs.....	6
1.6.7 Administration costs.....	6
1.6.8 Subcontracting.....	7
1.7 Performance management and reporting.....	7
Section 2: Call for proposals.....	9
2.1 Submitting an application.....	9
2.2 Proposal format and template.....	9
2.3 Funding.....	10
2.4 Working language of the province.....	10
2.5 Notification of changes.....	10
2.6 Authorized proposals.....	10
2.7 Changes to proposal wording.....	10
2.8 Irrevocability of proposals.....	10

2.9	Evaluation process.....	10
	Mandatory criteria.....	11
	Evaluation criteria.....	11
2.10	Currency.....	13
2.11	Taxes.....	13
2.12	Proponents’ expenses.....	13
2.13	Contracting process.....	13
	Definition of contract.....	14
	Form of contract.....	14
2.14	Payment of accountable advances.....	14
2.15	Recipients with existing contracts.....	14
2.16	Liability for errors.....	14
2.17	Modification of terms.....	14
2.18	Ownership of proposals.....	15
2.19	Use of application guide.....	15
2.20	Confidentiality of information.....	15
2.21	Additional terms and conditions.....	15
2.22	Example proposal.....	15
	Appendix A: Call for Proposals terminology.....	16
	Appendix B: Markets, focus areas, activity types and deliverables.....	17
	Appendix C: Performance measurement.....	22
	Appendix D: FII results logic (strategy map).....	25
	Appendix E: Diversity, Equity, and Inclusion (DEI) Questionnaire.....	26

General information

This Application Guide provides information on Forestry Innovation Investment's (FII) Market Initiatives program (MIP). It describes the process by which eligible organizations may apply for funding for activities to be delivered in the 2024/25 fiscal year. This document is organized into two key sections and appendices:

- Section 1: Market Initiatives Program (MIP) Guide
- Section 2: 2024/25 Call for Proposals

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 published Market Initiatives *Investment Strategy* for 2024/25. The strategy has more detailed advice on FII's approach to specific markets. The Investment Strategy and other relevant information for those wishing to make a proposal for funding can be found at bcfii.ca/cfp and, for users with an existing account and password to the online funding management system buildwithwood.ca, in the Application Guidelines section of the site.

Section 1: Market Initiatives 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.

A key part of FII's mandate is to expand opportunities for B.C.'s forest products through market diversification initiatives. FII's **Market Initiatives Program** works with industry and government partners to encourage the development of export markets and new market segments. Program activities focus on:

- Researching opportunities in emerging and potential future markets, and initiating early market development activities
- Supporting industry trade associations in developing and/or expanding markets and market segments for B.C. forest products
- Supporting industry efforts to mitigate market access and plant health issues

As well as providing funding to industry to deliver market initiatives, FII maintains three overseas offices to provide direct support and promotion for the B.C. forest products industry. In early (pre-commercial) stages of market development, or where there is a need for strong government-to-government relationships, FII invests to establish in-market representation.

FII China was established in 2003 and works closely with the Canada Wood Group offices in Shanghai and Beijing, China. FII India was established in 2014 and includes staff of the Canada Wood Group. FII Vietnam was established in 2017 with a small team conducting early-stage market research and outreach.

1.2 Types of market initiatives supported

FII's Market Initiatives program is focused on several areas, the majority of which are delivered by industry associations. Funded projects delivered by industry and covered by this Call for Proposals include:

- International marketing and promotion
- Market access and phytosanitary issues
- Codes and standards development

In addition, FII directly delivers:

- Market outreach (promoting B.C.'s sustainable forest management and certification programs)
- Emerging market development initiatives (e.g., India & Vietnam)
- Government relations
- Trend analysis and research

1.2.1 International marketing and promotion

FII supports the promotion of B.C.'s wood products and species to international customers and specifiers of wood building and finishing products. This includes activities such as:

- Staffing overseas market development offices
- Participating in international wood product tradeshows
- Offering educational seminars and workshops
- Developing promotional materials, brochures, multi-media tools and new websites
- Implementing advertising and promotional campaigns

FII recognizes that a key to success in marketing is a targeted approach based on market research and market intelligence. With an increasingly competitive and evolving global forest industry, timely market research helps identify new and evolving market opportunities and maintain competitive product advantages. As such, market research is strongly encouraged and is an activity eligible for FII funding.

International marketing initiatives are cost-shared with, and delivered by, the B.C. forest industry and their various trade associations. Wherever possible, these initiatives are delivered jointly on behalf of the B.C. and Canadian forest industry—and coordinated internationally through the Canada Wood Group. Where organizations outside of B.C. are applying for funding, they must demonstrate that their activities will lead to benefits for the B.C. and/or Canadian forest industry, and they must meet eligibility criteria (section 1.6.1).

FII is seeking funding proposals through this Call for Proposals process for international marketing projects.

1.2.2 Market access

FII's support for market access work is designed to enable unrestricted market access for the B.C. industry into key forest product markets around the world. Market access initiatives may include:

- Identifying and resolving technical barriers preventing or limiting market access to B.C. forest products
- Recognizing and adopting wood products and Canadian grading or certification systems in new markets
- Securing recognition of B.C. products in foreign building codes and standards
- Staying abreast of and addressing phytosanitary regulations and restrictions
- Providing training programs to teach builders in foreign markets how to build with B.C. forest products
- Offering quality assurance services on wood construction/demonstration projects

Wherever possible, these initiatives are delivered jointly on behalf of the B.C. and Canadian forest industry—and coordinated internationally through the Canada Wood Group.

FII is seeking funding proposals through this Call for Proposals process for market access projects.

1.2.3 Domestic market development

While a large part of FII's investments are focused on international markets and developing opportunities for B.C. wood products globally, FII does recognize that as a part of a strategic portfolio of programs, developing domestic opportunities for market growth is also important.

Any market development work in the B.C. market will be managed outside this Call for Proposals through a separate Wood First Initiative. More information on Wood First Program is available in the *2024/25 Wood First Program Application Guide* at bcfii.ca/cfp, or by contacting FII.

FII is seeking funding proposals through this Call for Proposals process for market development activities in Canada.

1.3 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/when additional funds are available. All Calls for Proposals will be posted on FII's website bcfii.ca and the B.C. government's BC Bid website, bcbid.gov.bc.ca.

FII will entertain proposals that 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. Proponents will be required to identify the time frame for their projects and the measurable benefits they will achieve.

Successful proponents 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 priorities for FII funding will be providing 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, 2024, and must be complete by March 31, 2025. 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.). Proponents should summarize key past results and activities that are relevant to the projects being proposed for funding.

1.4 Investment strategy

The FII *2024/25 Market Initiatives Investment Strategy* is a key support document to the MIP Call for Proposals. The strategy outlines FII's funding priorities against which all funding projects will be assessed. Proponents must refer to this document in the application process. The MI Investment Strategy is posted on FII's website bcfii.ca/cfp.

1.5 Market strategies and market research

In addition to FII's Investment Strategy, FII has partnered with the B.C. forest products industry to publish individual market strategies for the priority markets. Proponents should refer to the strategy documents in the application process. Projects should be consistent with individual market strategies, and proponents have an opportunity to demonstrate consistency with market strategies in the *Link to Strategy* section of the online proposal template. Copies of individual market strategies are available to proponents through FII's online application system under the Information Resources section.

A library of market research is also available for reference at bcfii.ca/industry-tools-resources/research-market.

1.6 FII funding requirements

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

1.6.1 Eligible proponents

Organizations eligible to apply for 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/research institutions including universities, colleges, and trades.
- 3) First Nations regional Tribal Councils and Indigenous non-profit organizations.
- 4) B.C. Government Ministries/Agencies and Municipal non-profit organizations.

FII does not provide business loans or small business grants. Individual businesses are not eligible to receive FII funding.

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.

1.6.2 Cost sharing

FII's Market Initiatives program is built on the premise of partnerships and industry cost-sharing contributions. Industry cost sharing is based on cash contributions to the projects in the proposal and is outlined in detail in the proposal budget(s).

In-kind contributions will not be recognized in cost-sharing calculations¹. In-kind contributions over and above the base cost sharing requirement can and should be used to demonstrate additional industry/other support for a project and this will positively affect the evaluation score (Section 2.3 has more detail on the evaluation process).

For 2024/25, the following table identifies the minimum cost-sharing requirements. Projects with a higher-than-required industry contribution will be ranked higher in some aspects of the proposal evaluation process due to their strong industry support.

FII contribution to match industry contribution to a maximum of	50% (See Note 1,3)
Minimum contribution by funding recipient	50% (See Note 2,3)

Note 1. Except for the U.S. WoodWorks program, where FII's contribution will not exceed 15%.

Note 2. If one or more third parties contribute to a given eligible activity, FII would, subject to available funds, match industry's contribution.

Note 3. For value-added export readiness activities, FII would contribute up to three-quarters of the cost of eligible activities if no third-party funding is available.

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. Proponents will be notified of any changes should they occur.

1.6.3 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

¹ In-kind contributions cannot be used as a part of calculating core industry/other cost sharing requirements.

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

1.6.4 Partnerships and coordination

Proponents are encouraged and expected to communicate with each other and, where appropriate, develop partnerships and share information, resources and/or facilities to deliver work included in proposals. Where the potential for enhanced effectiveness and/or efficiency exists among organizations, FII funding preference will be given to those proponents who demonstrate that they will coordinate related market activities and show what form these collaborations will take.

Delivering projects related to market access initiatives inherently requires close collaboration between interested industry parties. The benefits of these activities are spread widely across the industry as a whole; therefore, FII expects that all market access initiatives will be coordinated by Canada Wood Group on behalf of the industry as a whole. Proposals for market access initiatives should be completed for each relevant market by Canada Wood Group.

1.6.5 Infrastructure

Given the coordinated approach to in-market representation in China, Japan, South Korea, India and Europe by the Canada Wood Group in the past, FII requires a single, coordinated proposal for all infrastructure activities in these markets. This proposal would cover all direct and indirect costs of operating offices in these markets. This also includes in-market staff and contractors and any travel associated with program delivery.

FII does not anticipate proposals for infrastructure in markets other than those noted above. Any proponent intending to make a proposal for in-market infrastructure other than as noted above should contact FII before submitting a proposal.

1.6.6 Eligible project costs

FII funding is only intended to support costs associated with the delivery of approved project activities. Proponents are expected to review and be prepared to comply with all FII funding rules shown in Schedules 4 and 5 of the *2024/25 Sample Recipient Agreement* available at bcfii.ca/cfp.

1.6.7 Administration costs

FII funding cannot be used by groups or industry associations to support domestic in-office operational costs. Proposals will exclude all in-office costs of the proponent, including salary and associated costs of program representatives not resident in foreign market, facilities, and administrative costs.

FII understands that proposed and approved projects will require administrative support to successfully deliver project activities and meet key deliverables. Proponents 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% out of 10%) 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 (five percent) with every advance paid to the funding recipient. The remaining earnable half of the administration allowance (up to five percent) will be paid after year end, if the conditions outlined in Schedule 5 of the Recipient Agreement are met by the funding recipient.

1.6.8 Subcontracting

Subcontractors may be used in the delivery of services by the successful recipients. Proponents should clearly indicate and explain in which projects subcontractors will be used, along with their role 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.

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.

1.7 Performance management and reporting

Ministry of Jobs, Economic Recovery, and Innovation is ultimately accountable for the FII program and 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 in 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 as Appendix D for your reference. Relevant performance indicators are listed in Appendix C. Proponents are encouraged to review the two appendices carefully, along with the Performance Management tabs in the online proposal template. Proponents

should use the comments box in the individual Performance Management tabs to explain how they intend to measure and report performance at year end.

Section 2: Call for proposals

2.1 Submitting an application

Applicants for FII funding are required to submit their proposals through a web-based online system, buildwithwood.ca. On entering the site, new users can request an account. FII will respond to all account requests within 2 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.

Existing recipients will receive an email indicating that the system is open for new user requests and applications. New proponents will be notified via updates to bcfii.ca/cfp and BC Bid bcbid.gov.bc.ca.

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

2.2 Proposal format and template

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 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 2024/25 Call for Proposals and contract preparation process.

Event	Anticipated date
Call for proposals opens	November 15, 2023
Call for proposals closes	January 15, 2024, 17:00 Pacific Time
Evaluation of proposals	Week of February 5, 2024
Proponents notified	Week of February 26, 2024
Service delivery starts	April 1, 2024, or upon signature of recipient agreement

2.3 Funding

For 2024/25, FII is projecting \$5.0 million in funding through the Market Initiatives Call for Proposals process to support activities proposed and delivered by industry and other eligible applicants. FII reserves the right to adjust this amount pending final confirmation of FII's overall budget for 2024/25.

The focus of this funding is on priority markets identified through FII's comprehensive research and market development strategies. Anticipated priority markets for 2024/25 are the United States, Japan, China, South Korea, India, and Vietnam.

Submission of a proposal to the CFP process will indicate acceptance of all the terms and conditions outlined in this document. Specific terminology used in the CFP is provided in Appendix A.

2.4 Working language of the province

The working language of FII is English. All responses to this Call for Proposals must be in English.

2.5 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.

2.6 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.

2.7 Changes to proposal wording

The proponent 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.

2.8 Irrevocability of proposals

By submission of a clear and detailed written notice, the proponent 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.

2.9 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 panel 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. Proponents 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, proponents 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 proponent, FII may, at its sole discretion at any time thereafter, terminate negotiations with that proponent and negotiate a Recipient Agreement with other proponent(s) or choose not to enter into a Recipient Agreement with that proponent.

Mandatory criteria

The following are mandatory requirements:

- **Eligible proponent**—Proponents must meet FII’s eligibility criteria (Section 1.6.1)
- **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 Market Initiatives programs and eligible program activities
- **Diversity, Equity, and Inclusion** – The proposal must include a completed Diversity, Equity, and Inclusion (DEI) Questionnaire via FII’s online application system.

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 *Business Case* and *Objectives of Work Plan* will be rejected without further consideration.

Business case (20%)

- Applicant presents a compelling business case with a sound rationale for investment; gives articulate description of market conditions to help assess if the requested level of funding is apt for proposed suite of projects/activities.
- Proposal focusses on the products and/or applications relevant to the applicant’s interests, or those of its key stakeholders.
- Proposal includes examples of achievements in the market to help illustrate the effectiveness of past programming and help assess the suitability of the proposed suite of activities.
- If the organization is new to market development, entering a new market or promoting a new wood application, the applicant gives a clear rationale for investment and anticipated benefit(s).

Objectives of work plan (10%)

- Selected market objective(s) suitable given assessment of market conditions.

- Applicant clearly explains link between their proposal and their/the funder’s market strategy and the expected benefit for the Canadian industry.
- Focus areas selected align with the proposed project activities; project outcome(s) expected to advance the anticipated outcome for a focus area.

Partnerships and collaboration (including experience and qualifications) (10%)

- 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.
- 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.

Project descriptions (20%)

- Project descriptions are easy to follow, provide sufficient level of detail to understand what is being proposed and assess relevance and requested levels of funding. Details include staff and material resources needed to deliver the project, dates and locations of activities and target audience.
- Applicant articulates how their project(s) supports their market objectives and/or links to their market strategy; addresses opportunities/gaps/challenges in the market.
- Project(s) focus on products and/or applications relevant to the interests of the applicant and/or their stakeholders, as well as align with chosen focus area.
- Projects are linked to and are likely to achieve anticipated results.

Value for investment (20%)

- Proposal shows good value for money for government investment; requested 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. personel 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 financial rules/standards to itemized expenses.

Performance measures (10%)

- 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.

Diversity, Equity, and Inclusion (10%)

- Organization demonstrates a solid understanding of DEI and describes their current state including future plans during the course of the project.
- The mandatory questionnaire is complete and clearly outlines the organizations DEI plans for 2024/25.

2.10 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 a proposal.

FII includes an earnable incentive as a part of its administration allowance. Recognizing that currency fluctuations could impact total spending (or under spending), proponents are asked to include clearly within their proposal (and with each of their interim reports), a statement of the exchange rate being used to calculate Canadian dollar figures. Only if this information is provided will FII take into account currency fluctuations outside of the recipient’s control in calculating final performance and any earnable incentive as a part of administration allowances to be paid.

2.11 Taxes

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

2.12 Proponents’ expenses

Proponents are solely responsible for their own expenses in preparing proposals and for subsequent negotiations with FII, if any. FII will not be liable to any proponent for any claims, whether for costs or damages incurred by the proponent in preparing the proposal, loss of anticipated revenues in connection with any final contract, or any other matter whatsoever.

FII will not be liable for any costs or damages incurred by the proponent should they make financial or other commitments for projects prior to receiving a fully executed Recipient Agreement from FII.

2.13 Contracting process

Upon completion of the evaluation and funding decision-making process, proponents will be advised of the decision relative to their specific funding requests. Unsuccessful proponents 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 proponents 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 Specimen Recipient Agreement).

Definition of contract

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

Form of contract

By submission of a proposal, the proponent agrees that, should it be identified as a successful proponent, 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 Specimen Recipient Agreement available on FII's website.

2.14 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.

2.15 Recipients with existing contracts

Any recipients who have an existing contract with FII for funding of their 2023/24 program, and have been successful in receiving a contract for 2024/25, will not receive their initial advance for 2024/25 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 recipients to FII under the existing contract must be paid in full before the initial advance for the 2024/25 year will be processed.

2.16 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 proponents. 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 proponents from forming their own opinions and conclusions with respect to the matters addressed in this Call for Proposals process.

2.17 Modification of terms

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

2.18 Ownership of proposals

All documents submitted to FII, including proposals submitted via the online application 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.

2.19 Use of application guide

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

2.20 Confidentiality of information

Information pertaining to FII obtained by the proponent as a result of participation in this Call for Proposals process is confidential and must not be disclosed without written authorization from FII. This includes individual market strategies, research reports or other market intelligence provided by 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.

2.21 Additional terms and conditions

This Call for Proposals should not be construed as an agreement to purchase goods or services or provide project funding. FII is not bound to enter into a contract with the proponent who submits the lowest priced proposal, nor with any proponent. Proposals will be assessed according to the evaluation criteria. FII will be under no obligation to receive further information, whether written or oral, from any proponent.

Neither acceptance of a proposal nor execution of a contract will constitute approval of any activity or development being contemplated in any provincial, regional district or municipal statute, regulation or bylaw.

2.22 Example proposal

An example of a fictitious sample proposal is available for review in the information resources section of the online funding management system. It 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.

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 Ltd.
- h) **Call for Proposals** and **Calls for Proposal** 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 programs are structured into geographical markets 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 to proponents the focus areas that relate to the specific market that was selected earlier in the application process.

The choices are outlined in the following table:

Markets:	Focus Area Options:
All Markets Canada (Outside of BC) Europe Other Markets Mexico	<ul style="list-style-type: none"> - Codes & Standards - Environmental Reputation - Export Readiness for Secondary Manufacturing - Infrastructure - Market Research - Marketing - Technical Research and Testing - Technology Transfer and Training
China India Japan South Korea	<ul style="list-style-type: none"> - Demonstration Projects - Codes & Standards - Infrastructure - Market Research - Marketing - Technical Research and Testing - Technology Transfer and Training
United States	<ul style="list-style-type: none"> - Codes & Standards - Environmental Reputation - Infrastructure - Market Research - Marketing - Promotional Activities for Secondary Manufactures - Technical Research and Testing - Technology Transfer and Training

Definitions of focus area

Codes and standards— encompasses activities that inform, and influence codes, standards and certification systems related to the use or trade of Canadian wood products. Activities may include but are not limited to: examining technical issues related to the use of wood in construction, research to develop technical information and knowledge about Canadian wood products to inform/meet foreign product standards and/or building code regulations. Wherever possible, international initiatives are to be coordinated through the Canada Wood Group. Within Canada, work should be coordinated with the Canadian Wood Council.

Demonstration project— a building or infrastructure that demonstrates the innovative use of wood in design and construction in an international market to spur future development, inspire and educate practitioners, and facilitate changes in building codes/policies. Supported Activities may include but are not limited to the design, engineering, testing to attain relevant construction permits, capacity building and construction of demonstration projects. In principle, financial support is for incremental costs incurred due to the use of wood. Eligible project costs include those associated with providing engineering, design, and construction support; construction materials; equipment; education and literature (case studies, etc.); and research and testing required to demonstrate the performance of wood as a construction material. Wherever possible, wood demonstration projects in should be coordinated through the Canada Wood Group and Forestry Innovation Investment.

Environmental Reputation— encompasses activities to advance the understanding of the sustainability of Canada’s forest practices and products. Activities may include but are not limited to: engaging in global initiatives that increase the adoption of Canadian approaches to forest management world-wide, market outreach about the sustainability and legality of Canada’s forest products, the development of a range of national-scale science and technical products, events and projects where Canadian approaches to SFM are promoted and developing information and analysis on Canada’s forest industry environmental performance.

Export readiness for secondary manufacturing— encompasses activities that aim to build market/export development awareness, knowledge, and skills among Canadian secondary wood product manufacturers in order to increase their exports. Activities must be broadly available to the secondary wood products manufacturing sector or sub-groups within the sector, and can include, but are not limited to, domestic workshops and seminars that provide relevant export/market information; as well as, tailored information products about exporting these wood products.

Infrastructure (staff, offices and associated expenses)— encompasses expenses related to in-market staff (full/part-time direct hires and contractors) delivering market development/market access activities on behalf of the Canadian wood products industry, as well as offices and associated costs. NRCan and FII handle requests differently to establish or expand representation in international and domestic markets. Please consult before using this focus area. Generally, in Asia and Europe in-market staff is coordinated through the Canada Wood Group. Forestry Innovation Investment coordinate in-market staff in the India and Vietnam. Within Canada, infrastructure requests should explicitly indicate province/regional coverage.

Market research—encompasses research activities that aim to increase the understanding of a market in order to maintain/gain access, increase use of Canadian wood or inform market development strategies. Activities may include but are not limited to: market opportunity studies, in-market public opinion studies, in-market stakeholder knowledge surveys, benchmarking studies, performance evaluation studies, etc.

Marketing— encompasses branding and outreach activities to promote, inform and influence the use of Canadian wood products. Activities may include but are not limited to: promotional missions, trade shows, promotional seminars, product directories, generic promotional brochures, print and social media campaigns, wood design competitions/showcases and receptions, advertising and promotional case studies.

Promotional Activities for Secondary Manufactures— encompasses promotional missions and trade shows within the United States exclusively for Canadian secondary wood manufacturers. Applicants are required to confirm that only products outside the scope of any current trade dispute will be promoted. All products within the scope of the Certain Softwood Lumber from Canada proceedings before the U.S. Department of Commerce are considered ineligible. As with other EMO program elements, adherence to this requirement may be audited to ensure eligibility and compliance.

Technical research and testing—encompasses technical research and testing activities that support the mitigation of market access issues; help grow Canada's share of the local wood market, or expand the use of Canadian wood products. Activities may include but are not limited to: research of technical issues regarding wood construction and applications of wood products; and environmental attributes of wood. Wherever

possible, international initiatives are to be coordinated through the Canada Wood Group. Within Canada, the Canadian Wood Council should be consulted to ensure coordination and avoid overlap of efforts.

Technology transfer education and training— Encompasses activities that aim to increase technical knowledge of Canadian wood/wood products, the benefits and properties of wood as a construction material or in other applications (e.g. wood in manufacturing and wood product trials), as well as, the proficiency and technical capacity in wood construction systems and the adoption of curricula, reference material/textbooks and online tools about wood construction, as well as encourage student enrollment in post-secondary learning opportunities. Activities may include but are not limited to: providing technical advice and sharing knowledge of wood construction and applications of wood products through quality assurance services; technology transfer and education-related activities; and the development and/or adoption of curricula and education materials. Related costs can include but are not limited to Professional Services, Travel and Material/Supplies/Tools. Whenever possible, international initiatives are to be coordinated through the Canada Wood Group. Within Canada, whenever appropriate, work should be coordinated with the Canadian Wood Council.

Definitions of activity type

Coaching/mentoring—refers to providing advice and assistance to secondary manufacturers to build their capacity to export. Related costs can include but are not limited to professional services and travel.

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.

Export readiness assessment—is a report that gauges a company's readiness to undertake international exporting opportunities. Related costs can include but not limited to Professional Services, Travel & 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.

Offices maintenance—Offices Maintenance refers to operating costs related to maintaining office space and equipment, as well as the oversight of staff planning/management, who are delivering market access and market development projects on behalf of the Canadian wood products sector as whole. In international markets, this activity is coordinated by the Canada Wood Group and Forestry Innovation Investment. Related costs can include but not limited to staff salary and benefits, professional development (training), Office Rental and Expenses, and Material/Supplies/Tools.

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.

Professional Development—refers to staff supported through the Infrastructure focus area participating in a seminar, workshop, credit course or related event for job-related skills development. Related costs can include but are not limited to Travel and Registration Fees.

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.

Tradeshow – hosting—refers to the planning and delivery of an exhibition for companies 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, and Exhibition Floorspace.

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 EMO, MIP and 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 EMO, MIP or 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 EMO, MIP and 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 EMO, MIP or 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.

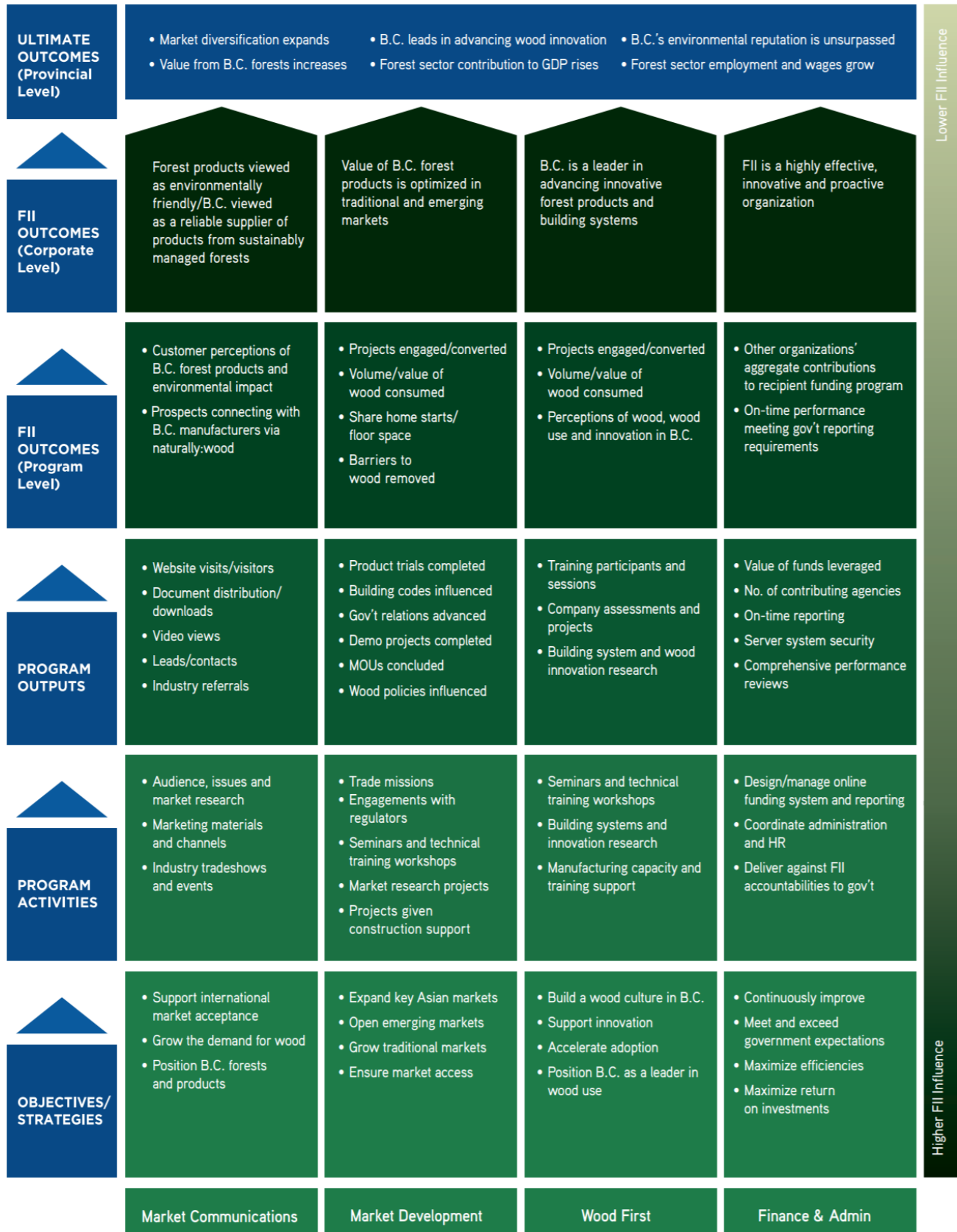
Focus area selected	Associated performance indicator to be reported
Codes & Standards	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood a market
	# of individual or organizations that are using tools and information to facilitate their acceptance of or capacity to design and build with wood.
	# of Number of codes and standards, policies or regulations along the change continuum as identified in the codes and standard matrix.
Demonstration projects	# of individuals or companies that increased their capacity to use or enable the use of Canadian wood products in non-traditional construction/design applications.
	# of new structures using wood products, wood construction systems/technologies informed by research, testing and demonstration.
Environmental Reputation	# of individuals or organizations that recall, favour or use information about the sustainability of Canada's forest practices and products.
Export readiness for secondary manufacturing	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood a market
Infrastructure	# of Canadian organizations engaged with staff delivering wood market access/development activities on their behalf.
	% change year over year of market share for a key wood product/wood construction segment
Market research	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood a market
	# of individuals or organizations that recall, favour or use information about the sustainability of Canada's forest practices and products.
Marketing	# of individual or organizations that are using tools and information to facilitate their acceptance of or capacity to design and build with wood.
	# of individuals or organizations that recall, favour or use information about the sustainability of Canada's forest practices and products.
	% change year over year of market share for a key wood product/wood construction segment
Promotional Activities for Secondary Manufacturers	% change year over year of market share for a key wood product/wood construction segment
Technical research & testing	# of Canadian organizations that received/favoured/used information to assess their readiness to enter a wood a market
	# of Number of codes and standards, policies or regulations along the change continuum as identified in the codes and standard matrix.
	# of new structures using wood products, wood construction systems/technologies informed by research, testing and demonstration.
Technology transfer & training	# of individuals or companies that increased their capacity to use or enable the use of Canadian wood products in non-traditional construction/design applications.
	# of individual or organizations that are using tools and information to facilitate their acceptance of or capacity to design and build with wood.
	# of individuals or organizations that recall, favour or use information about the sustainability of Canada's forest practices and products.

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

Activity type selected	Associated performance indicator reported
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)
	Display (promotional/technical) y/n?
	# 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 leads created
	# of Canadian companies/organizations participating
	# of attendees (event/mission/training)
	# of events
	Speaking Opportunity for your organization y/n?
	Display/Booth (promotional/technical) y/n?
	(#) Education hours delivered
Literature production	# of documents downloaded
	# total people reached
Media campaign and advertising (all media)	# of ads placed (print and digital)
	# of articles published (print and digital)
	# total people reached
	# total website visits/followers
	# total shares
	# of unique website visitors / new followers
Missions- Attending	Speaking opportunity for applicant y/n?
Missions – hosting	# of Canadian companies/organizations participating
	# of attendees (event/mission/training)
Office maintenance	# of staff
Product trials	# of projects completed
	(\$) value of wood influenced
Professional Development - attending	# of staff
Project interventions	# of project conversions
	(\$) value of wood influenced
	# Kilotonnes of CO2 equivalent avoided by using wood in construction
	# Kilotonnes of CO2 equivalent sequestered in every cubic metre of wood
Promotional Products	# total people reached

Quality assurance	# of people/organizations mentored
	# of site visits completed
	(\$ value of project(s)
Research & development	# Number of technical information materials/tools generated
Technical committees/regulatory meetings	# of events (lunch and learns, lectures training, design competition, conference etc.)
	Speaking opportunity for applicant y/n?
Tradeshow – attending	# of leads created
	# of Canadian companies/organizations participating
	# of events
	Speaking Opportunity for your organization y/n? Display/Booth (promotional/technical) y/n?
Tradeshow – hosting	# of leads created
	# of Canadian companies/organizations participating
	# of attendees (event/mission/training) # of events
Training event – hosting	# of attendees (event/mission/training)
	# of events
	# Students registered (3) and graduating from wood design courses/programs
	# Education hours delivered
Websites/social media	# of ads placed (print and digital)
	# of articles published (print and digital)
	# of documents downloaded
	# of leads created
	# total people reached
	# total website visits/followers
	# total shares
	# of unique website visitors / new followers (\$ value of wood influenced

Appendix D: FII results logic (strategy map)



Appendix E: Diversity, Equity, and Inclusion (DEI) Questionnaire

This application approach is designed to demonstrate an organizational commitment to increasing and supporting diversity, equity, and inclusion. Applicants have been provided with a DEI Overview Questionnaire and Maturity Matrix in the FMS to assist them in their application. The Questionnaire is directly aligned with the Scoring Rubric.

The DEI Questionnaires will be evaluated based on actions completed, actions in-progress, and upcoming goals.

The DEI Overview Questionnaire and Maturity Matrix provides applicants with the tools needed to:

1. Understand their current state of DEI maturity based on the key pillars;
2. Communicate their completed actions and work in progress the Evaluation Committee; and
3. Identify areas for future implementation and progress as they continue their DEI journey

The Maturity Matrix on its own is a tool for self-assessment and reflection by organizations. It has been used to develop the DEI Questionnaire by breaking down the key indicators into separate items and measures of progress. Points and scores for the DEI Questionnaire are not awarded based on the Maturity Matrix. The Maturity Matrix has been used to develop the questionnaire, and the questionnaire has its own scoring rubric aligned to it.

DEI Pillars	Description	DEI Considerations
Demographic Composition & Representation	This pillar aims to uncover the efforts in place to increase the representation of marginalized groups across your organization. This information focuses on your current understanding of representation and will demonstrate the applicant's ability to enhance diversity in a meaningful way.	<ul style="list-style-type: none"> • Focuses on: <ul style="list-style-type: none"> -Demographic diversity -Representation of historically -Underrepresented groups -Data collection -Recruitment practices
DEI Commitment, Ownership, & Leadership Accountability	This pillar asks applicants to indicate if DEI objectives, resources and measures are in place to actively apply a DEI lens across your organization. This includes identifying organizational accountability for DEI outcomes, how commitment is being demonstrated, and how DEI is promoted from the top-down to become a shared responsibility for all.	<ul style="list-style-type: none"> • Reflects leadership accountability, as well as shared responsibility and ownership for organizations with non-traditional leadership structures. • Includes tangible examples of leadership commitment, ownership, and accountability.
Community, Consultation, & Co-Creation	This pillar seeks to understand how applicants are engaging and collaborating with impacted partners and stakeholders, especially those who are marginalized, to develop plans and practices that consider diverse needs. It also looks at practices in place to disseminate knowledge with those most impacted, both internally and externally.	<ul style="list-style-type: none"> • Reflects internal and external activities that support a collaborative, co-creation process with internal and external stakeholders. • Includes internal DEI champions and external business relationships and community partnerships.
Organizational Culture & Technical Capacity	This pillar seeks to identify the applicant's commitment to creating an inclusive and equitable organization by examining how DEI is built into organizational culture, as well as learning and development opportunities. It also considers an organization's technical capacity and limitations to progress in maturity, based on the knowledge and resources offered to staff.	<ul style="list-style-type: none"> • Requires technical capabilities related to DEI learning and engagement. • Extends beyond DEI training, and can include tools, structures, frameworks, and policies that support employees to embed DEI into their systems and day-to-day practices