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## Guidelines for the McDonald Institute's Advancing EDII Fund Program

### Introduction

Aligned with the [McDonald Institute's strategy](#) for building equity, diversity, inclusion, and Indigenization (EDII) capacity within the discipline, the Advancing EDII Fund aims to financially support community building and strengthening efforts in physics training and research environments across Canada. This program is open to undergraduate, graduate, postdoc, staff, research scientists, and faculty, with some additional eligibility considerations for faculty members.\*

EDII is vital in physics, as these principles drive scientific progress, promote fairness in organizational processes, encourage innovation, and ensure that the field remains relevant and accessible to a wide range of talented individuals. Funding of up to \$1,000 CAD (Stream 1) and \$2,500 CAD (Streams 2 and 3) is currently available to offset the real costs to applicants who seek to enhance EDII in their training and research environments.

### Overview of the Fund

Preference will be given to activities that expand EDII action in HQP training and research environments in the field of astroparticle physics and related disciplines in one of the following three streams:

**Stream 1 (up to \$1,000 CAD)** – Seed funding for new initiatives that enhance EDII capacity in research labs, groups, and departments for starting novel programs, training opportunities, activities, or events.

**Stream 2 (up to \$2,500 CAD)** – Support funding for existing initiatives that advance EDII in the field for initiatives, programs, or events.

**Stream 3 (up to \$2,500 CAD)** – Support funding for faculty members\* who are actively working towards goals using the DEAP Tool for Researchers (or an equivalent equity-based assessment tool).

\*Please note that if you are a faculty member applying for any of these streams, it is expected that you are engaged with the DEAP Tool for Researchers.

Applications cannot request retroactive coverage. Purchases made prior to the start date of the award letter will not be accepted for reimbursement. The budget must be approved prior to starting the initiative. Funds will be distributed across a cost-recovery model, upon receiving compliant invoices and a post-initiative report within 30 days of the activity proposed.

## Who Can Apply?

Applicants must be enrolled or employed in a post-secondary physics department or employed or studying with an aligned research facility in Canada.

## Core Eligibility Criteria

Initiatives proposed must align with [the strategic objectives of the McDonald Institute](#).

Proposed initiatives must include a comprehensive plan, measurable indicators for success, budget justification, and follow-up action plan (see guidelines).

Applications cannot request retroactive coverage. Funds will be distributed across a cost-recovery model, upon receiving compliant invoices within 30 days of the initiative.

## Potential Ways to Use the Fund

Consider the following initiative examples, but please feel free to propose novel applications of the grant in support of EDII capacity development in your training and research environments.

- Host an EDII training event or workshop for your lab or research group, or student club. These professional development opportunities could span topics in decolonization, Indigenization, reconciliation, accessibility, inclusion, positive space, anti-racism, among other important topics. Open to Streams 1, 2, & 3.
- Start or support an existing mentorship program, inclusive of networking events, mentorship meetups, career workshops, lab tours, field trips, or similar activities. Open to Streams 1 & 2.
- Coordinate with a local STEM advocacy group on collaborative opportunities (for example, education and outreach activities supporting diversity in physics and related disciplines). Open to Streams 1, 2, & 3.
- Purchase of an EDII and physics or STEM book (hardcopy, digital, audio) for a book/journal club. Open to Streams 1, 2, & 3.
- Food and non-alcoholic beverages to enhance lab or collaboration gatherings to participate in an in-person/ hybrid/online EDII training, workshop, or speaker. Open to Streams 1, 2, & 3.
- Initiate a menstrual equity program in your building. Open to Stream 1.
- Book simultaneous ASL translation for a public education event. Open to Streams 2 & 3.
- Host a conversation with potential Indigenous partner(s), in which costs for sacred tobacco, Elder or knowledge keeper fees, etc. would be incurred. Open to Streams 2 & 3.
- Hire an accessibility consultant to do an assessment of a physical laboratory space for future upgrades and improvements. Open to Stream 3.

## Proposals Evaluation Criteria

- The proposal must align with [McDonald Institute's strategy](#).

- Proposals must establish a clear connection to advancing principles of equity, diversity, inclusion, Indigenization (EDI), which may also include principles of anti-racism, accessibility, positive space, unconscious bias, and more within the astroparticle physics community.
- Proposals must demonstrate the details of the initiative, including a budget plan and justification for expenses, and considerations for the barriers in place to equity deserving participants.
- Proposals must include a plan to measure the impact of the initiative and ideas for how this impact could be sustained post-initiative.
- Proposed Budget and Budget Justification must match, be within the indicated funding Stream maximums, and be eligible expenses as outlined by the [Canada First Research Excellence Fund guidelines](#).

### Application Process

1. Ahead of submission, applicants should contact Dr. Alexandra Pedersen ([alexandra.pedersen@mcdonaldinstitute.ca](mailto:alexandra.pedersen@mcdonaldinstitute.ca)) with any questions.
2. To submit an application, the application form and the budget form should be sent as one document to [admin@mcdonaldinstitute.ca](mailto:admin@mcdonaldinstitute.ca) with “MI Advancing EDI Fund – [Applicant’s Last name]” as the subject line.
3. Applications will be adjudicated internally at the McDonald Institute, with some assistance from the Human Rights and Equity Office as needed. Adjudication may take up to 10 business days.
4. Successful applications will be offered an award letter with terms and conditions.
5. Unsuccessful applications may be asked to resubmit with further information for consideration.
6. Thirty business (30) days after the completion of successful initiative, applicants must submit a short final report outlining their initiative's accomplishments, resubmit their budget with actuals and receipts. Projects will not be reimbursed without the completion of the post-initiative report requirements.
7. Successful applicants are responsible for all aspects of the initiative proposed.
8. Applications will be evaluated on a continuous basis until the funds for this opportunity are exhausted or until the pilot funding ends on March 15, 2024, while initiatives may occur after the grant's closure up to June 15, 2024.

### Post-Award Expectations

- Upon successful submission, the application will be adjudicated internally at the McDonald Institute with support from the Human Rights and Equity Office (Queen’s University). Successful applicants will receive an award letter with terms and conditions for fund reimbursement.
- The budget must be approved prior to starting the initiative. Purchases made prior to the start date will not be accepted for reimbursement.
- All funded initiatives must indicate the McDonald Institute’s sponsorship of all promotional material (logos will be provided upon disbursement of funds).
- Thirty business (30) days after the completion of successful initiative, applicants must submit a short final report outlining their initiative's accomplishments, resubmit their budget with actuals and receipts. Projects will not be reimbursed without the completion of the post-initiative report requirements.

- The McDonald Institute aims to highlight the initiatives of successful applicants and will work with applicants to showcase their impacts on the McDonald Institute website.

### Rubric for Evaluation

Criteria	Weight (Maximum Score)
<b>Initiative Alignment</b>	/20
- Alignment with McDonald Institute Objectives	5
- Relevance to Astroparticle Physics	5
- Demonstrated Need	5
<b>Proposal Quality</b>	/25
- Comprehensive Plan	7
- Measurable Indicators for Success	7
- Budget Justification	6
- Follow-Up Action Plan	5
<b>Applicant Eligibility and Engagement</b>	Stream 1 & 2 (/5) Stream 3 (/10)
- Use of the DEAP Tool (if applying for Stream 3)	5
- Enrollment or Employment in Physics Department	5
<b>Feasibility and Impact</b>	/20
- Feasibility of Implementation	7
- Potential Impact on EDII	8
- Potential for Departmental Support/	5
<b>Overall Impression</b>	/20
- Clarity and Coherence	7
- Innovation and Creativity	8
- Potential for Replicability	5
Total:	Potential of 95 points (Stream 1 & 2) or 100 points (Stream 3)