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### Description of the competition

The [SSHRC Partnership grant](#) (PG) provides up to \$2.5 million over a minimum of four and a maximum of seven years to support projects that require formal partnerships to advance research, training and/or knowledge mobilization in the social sciences, humanities, and fine arts.

The Partnership competition runs annually, and is adjudicated in two stages, both highly competitive. Stage 1 (PG1) of the application is due February 10 (or the subsequent business day if it falls on a weekend). Successful applicants may request up to \$20,000, to fund preparation of the Stage 2 application, due on the following October 2. Stage 2 (PG2) applications are by invitation only. By the second stage, applications must confirm a minimum of 35% contributions over the budget requested from SSHRC. Contributions may be cash and/or in-kind, from any sector partner (community, industry, not-for-profit, other universities, etc.). Institutional costs of research (ICR) are not allowed.

The PG is intended for large teams of postsecondary institutions and organizations of various types that work in formal collaboration. Partnerships may be new or existing, and partner organizations may be Canadian or international institutions or organizations of any type (public, private, not-for-profit). The project is led by a *Project Director* affiliated with an eligible postsecondary host institution. The PD leads a team consisting of co-directors, co-applicants, collaborators and partner organizations. Postdoctoral fellows and PhD Candidates are eligible, with special provisions.

### Preparation for a PG application

Planning for a PG often begins many years prior to actually submitting the PG1 proposal. Prior U of A Experience from previous successful Partnership grants at both PG1 and PG2 stages shows the importance of communication and relationship building, especially with communities and partner organizations. Establishing trust among team members, communities and partners should not be rushed; ability to show authenticity of partner involvement is equal in importance to research design, project team and budget.

The Partnership grant requires a [SSHRC Web CV](#). Team members and partners may need assistance with creating or updating their SSHRC Web CV, or responding to the invitations sent from the portal. This is especially true for project members outside of Canada.

Finally, we recommend writing the PG1 to meet the criteria mandatory for the PG2 application. Although not a formal requirement at stage 1, feedback from competition adjudicators indicates that most successful PG1s were written as if they were the PG2. Given the competitive nature of the PG1 competition (22 out of 81 {27%} successful nationally, in 2023), applicants are encouraged to discuss, plan and develop with their team and partners a governance plan, a student training plan, a data management plan, a knowledge mobilization plan, and a provisional budget for the length of the entire project (4-7 years). While there is leeway for improvement based on the merit review feedback, with the PG1 results arriving in June, there are generally only four months to revise the submission of the second stage. If successful with the PG1, the applicant's success rate greatly increases for the PG2 (15 out of 22 {68%} successful nationally, in 2023).

Given the challenge in marshaling the multiple aspects of the proposal, teams are strongly recommended to *request support from the Research Partner*, connect to their faculty Associate/Vice-Dean, Research and their college Office of Research. Where possible, faculties or colleges should consider dedicating resources such as a project manager or, at least, a graduate assistant to support the Project Director. For these reasons, research teams are advised to start drafting the proposal *at least one year* prior to the PG1 submission in February.

**Table 1: SSHRC PG UofA support**

Research Partner Support to all Faculties:	College of Social Sciences & Humanities specific support:
<ul style="list-style-type: none"> <li>• <a href="#">Research Partner</a> including for: <ul style="list-style-type: none"> <li>○ individual coaching,</li> <li>○ pre-submission review,</li> <li>○ submission process,</li> <li>○ community engagement consultation,</li> <li>○ post application Forensic Review</li> </ul> </li> <li>• <a href="#">GrEx</a> 'Grant Excellence' Documents: resource documents targeting the various sections of the SSHRC PG application (<i>PG particular sections in development</i>)</li> <li>• <a href="#">Successful Grants library</a> - 3 new applications added</li> <li>• <a href="#">sshrcUofA</a> Researchers' Forum (listserv)</li> <li>• Noon-hour overview of Partnership Grants</li> <li>• <a href="#">Research Whisperer Hour</a></li> <li>• <a href="#">In-Kind Contributions</a> example sheet</li> <li>• <a href="#">Monthly Bulletin</a> (funding specific info re: upcoming opportunities, how to register,</li> </ul>	<ul style="list-style-type: none"> <li>• <a href="#">Peer Review</a> by College of SSH Reviewers (open to all SSH researchers)</li> <li>• CSSH <a href="#">website</a></li> <li>• CSSH <a href="#">supports list</a></li> <li>• College Grant Assistant <ul style="list-style-type: none"> <li>○ help with budget,</li> <li>○ literature scoping,</li> <li>○ CCV or SSHRC Web CV</li> </ul> </li> <li>• Professional Grant Editor</li> <li>• College Budget Template (open to all SSH researchers) - Contact <a href="#">Craig Taylor</a> for this</li> <li>• <a href="#">College video library</a></li> </ul>
	OVRP (Research Development & Services):
	<ul style="list-style-type: none"> <li>• Matching support (Faculty ADR needs to contact)</li> </ul>

<ul style="list-style-type: none"> <li>etc.)</li> <li>• EDI in Research Design and Training information session - x2 in Fall 2023 - 25 registered (9 early career &amp; 16 established) <ul style="list-style-type: none"> <li>◦ <a href="#">SSHRC Guidelines</a></li> <li>◦ UofA <a href="#">Recording</a></li> <li>◦ UofA <a href="#">PPT</a></li> <li>◦ UofA <a href="#">Resources &amp; Contacts</a></li> </ul> </li> <li>• Research Security <ul style="list-style-type: none"> <li>◦ Tri-Agency Policy <a href="#">1</a> &amp; <a href="#">2</a></li> <li>◦ <a href="#">Risk Assessment Form</a></li> <li>◦ <a href="#">UofA Safeguarding Research Office</a> - to help with the policy and the Risk Assessment form</li> </ul> </li> <li>• <i>Forthcoming</i> - SSHRC PG application procedure checklist</li> <li>• <i>Forthcoming</i> - SSHRC PG timeline</li> </ul>	<ul style="list-style-type: none"> <li>• GRA support (<i>in development</i>)</li> <li>• Project Management support (<i>in development</i>)</li> <li>• Leadership retreat (<i>in development</i>)</li> </ul> <div data-bbox="841 363 1412 432" style="background-color: #e1f5fe; padding: 5px;"><b>Faculty Specific Support:</b></div> <ul style="list-style-type: none"> <li>• Arts Research Coordinators</li> <li>• Arts Research Symposium</li> <li>• Business Research Coordinator</li> </ul> <div data-bbox="841 590 1412 659" style="background-color: #e1f5fe; padding: 5px;"><b>SSHRC:</b></div> <ul style="list-style-type: none"> <li>• <a href="#">PG1</a> Homepage &amp; <a href="#">PG2</a> Homepage</li> <li>• <a href="#">PG1</a> Instructions &amp; <a href="#">PG2</a> Instructions</li> <li>• <a href="#">SSHRC Cash &amp; In-Kind Guidelines</a></li> </ul>
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### Elements of application success

As leads of the grant application process, ideal Project Directors will show capacity to coordinate complex, multi-sectoral teams, to synthesize partners' and team members' ideas, and commit time to the project design, team and trust-building, intra-project communications, and building the budget.

Authenticity of formal partnerships is a key aspect of the merit review criteria, and is best demonstrated through the project design and governance structure. MOUs are acceptable but not required, and may be inappropriate for certain partnering communities or organizations.

Optimal team size depends on the project design. SSHRC's PG statistics indicate that between 2019 -2022, 65-70% of funded PG2s have teams ranging between 11-40 members (excluding the partner organizations), with the modal size being 21.

Likewise, [SSHRC data](#) indicates that most successful PG applications manage to obtain 50% or more in matching funding, far in excess of the 35% minimum.

The amount of time and effort required for a success in the Partnership competition requires careful planning and major human resources commitment. The PG1 application is not a simple Letter of Intent, but rather a full application with sections detailing overall project challenge and goals, team roles, EDI in research practice and design, partners' and host organization's

involvement, as well as a budget justification for the \$20,000. A competitive PG1 application is frequently 60 pages or more, and up to 150 pages with CVs, partner organization profiles, and support letters. Each section, most especially project design, roles and governance, contributions and expected outputs, should be planned with team members and partners from day one. There is insufficient time for such planning between the PG1 deadline and PG2 invitation. The PG2 application, which mostly responds to adjudicators' feedback, is frequently in the range of 200 pages. Finding the 35% in-kind or cash matching contribution can be challenging for some disciplines. Your partners, co-directors and co-applicants should assist with this. Your ADR/vice-Dean of Research may have advice. Please also consult the In-Kind Contributions Examples (above).

#### SSHRC PG Summary Report:

The following report is for the 2023 PG grant application competition, comparing UofA to national and U15 successes. Details include dollar amounts requested and received, success rates by stage, as well as support provided by the Research Partner Network, and the support committed for future PG applicants.

**Table 2: SSHRC 2023 PG UofA vs National Statistics**

Competition year	University of Alberta			Nationally		
	# submitted & request amount	# funded & amount awarded	% success	# submitted & requested amount	# funded & amount awarded	% success
2023 PG1	2 \$40,000	1 \$20,000	50%	81 \$1,589,730	22 \$431,459	27.2%
2023 PG2	1 \$2,500,000	1 \$2,500,000	100%	22 \$57,463,245	15 \$37,470,850	68.2%

#### Summary of Results for PG 2023 competitions (UofA):

- UofA Stage 1 Applications submitted: 2 (First Nations Studies, Business)
- UofA Stage 2 Application submitted: 1(FNS)
  - Applicant: Dr. Shalene Jobin
  - Title: *Critical Approaches to Indigenous Relationality*
  - Project: \$2,500,000 for 6 years
  - 90% confirmed matching funding
  - 4 co-directors
  - 11 academic co-applicants
  - 14 co-applicant academic participants
  - 1 co-applicant non-academic participant (Indigenous)
  - 17 academic collaborators
  - 15 partner organizations (5 Indigenous partners)

#### Research Partner support available for 2023 PG competition:

Below were the supports offered to UofA Researchers for the SSHRC PG 2023 competition.

- Proposal/Pre-submission Review - 1 application (FNS)
- SSHRC Information Session with Experts - *November 15, 2022* - 17 attendees
- SSHRC Information Session - *December 18, 2022* - 13 attendees
- Process and submission support
- Research Whisperer Hour
- Individual Coaching
- Successful Grants Library
- sshrcUofA listserv and RpNet Monthly
- GrEx Resource Materials
- OVPRI matching contributions
- OVPRI SSHRC Leadership Retreat - *February 2023* - 11 attendees

#### Supports Committed to Partnership Grant Applicants, 2024/25:

There were no applicants for the 2024 PG Stage 1 application round and thus there will be 0 for the Stage 2. In preparation for the 2025 application deadlines, all of the support from the Research Partner Network will be available to researchers including Dr. Jobin's application to the successful grants library, a new in-kind contributions example document, and an EDI in Research Design and Training session. The Research Partner Network is also offering to help organize discussions between researchers and communities wanting to move forward and apply for a PG. The RPs, in partnering with the CSSH faculties, created a SSHRC budgeting locally-relevant space costing and who-to-contact info sheet, which will work in conjunction with the in-kind contributions example document.

On top of this current support, the Research Partner Network is also developing the following supports:

- a PG timeline recommendation sheet. This will provide a one year timeline, outlining tasks such when to talk to partners, devote time for writing, when to request funds from the OVPRI, when to begin the internal approval process, etc.;
- a PG application procedure checklist. A checklist concerning the steps needed to be done when submitting the application through the UofA internal approval process. This will include steps for UofA researchers who are SSHRC PG co-applicants that belong to a PG led outside of the UofA;
- GrEX materials for PG specific sections. Although some of the GrEx documents currently in ERA can be used to develop some PG sections, such as knowledge mobilization, outcomes, etc., there are other PG sections that are still needed and so these will be developed, such as Governance, Evidence of Formal Partnerships, etc.;
- discussion with the OVPRI to create project management support, GRA support and a Leadership retreat. It is believed that these types of support will encourage researchers to apply for the PG, so the application doesn't appear so daunting.

#### SSHRC PG Competition Analysis over the past 7 years:

The next section provides information from the previous 7 years of PG competitions in order to compare the UofA to the national success rates, as well as between the UofA and the U15 institutions. Also provided is a breakdown of UofA successful applications, by faculty, from 2018-2023. The data outlined in this report will be analyzed in order to recommend strategies for improving application pressure and success in the SSHRC PG at the U of A. These are provided in the summary and recommendations below.

**Table 3: SSHRC 2018-2022 PG UofA vs National Statistics**

Competition year	University of Alberta			Nationally		
	# submitted & request amount	# funded & amount awarded	% success	# submitted & requested amount	# funded & amount awarded	% success
2022 PG1	0 \$0	0 \$0	0%	65 \$1,273,639	25 \$497,033	38.5%
2022 PG2	0 \$0	0 \$0	0%	25 \$64,178,826	19 \$45,703,883	76.0%

2021 PG1	4 \$79,870	2 \$39,879	50%	69 \$1,354,887	25 \$484,416	36.2%
2021 PG 2	2 \$4,981,710	2 \$4,981,710	100%	25 \$62,143,029	21 \$52,147,443	84%
2020 PG1	1 \$20,000	0 \$0	0%	75 \$1,493,675	25 \$496,471	33.3%
2020 PG2	0 \$0	0 \$0	0%	25 \$62,150,620	19 \$47,468,400	76%
2019 PG1	0 \$0	0 \$0	0%	67 \$1,337,139	23 \$459,130	34.3%
2019 PG2	0 \$0	0 \$0	0%	23 \$55,895,685	19 \$45,988,994	82.6%
2018 PG1	4 \$80,000	3 \$60,000	75%	64 \$1,264,987	26 \$518,238	40.6%
2018 PG2	3 \$7,499,999	3 \$7,499,999	100%	26 \$64,116,532	17 \$41,855,594	65.4%

**Table 4: U15 SSHRC PG statistics (2018-2023)**

Rank	Institution	SSHRC PGs submitted	SSHRC PGs Awarded (#)	Success rate %	Amount awarded
1	University of Alberta	11	6	55%	\$14,981,709
2	McMaster University	4	2	50%	\$4,999,895
3	McGill University	10	4	40%	\$9,999,654
4	Dalhousie University	5	2	40%	\$4,995,299
5	Université de Montréal	23	9	39%	\$19,330,206
6	University of Calgary	11	4	36%	\$9,476,675
7	Université Laval	12	4	33%	\$9,972,985
8	University of British Columbia	25	8	32%	\$18,337,110

9	University of Saskatchewan	10	3	30%	\$7,499,863
10	Western University	10	3	30%	\$7,420,732
11	University of Toronto	38	9	24%	\$22,496,507
12	Queen's University	13	3	23%	\$6,661,735
13	University of Waterloo	14	2	14%	\$4,996,128
14	University of Manitoba	7	1	14%	\$2,500,000
15	University of Ottawa	16	1	6%	\$2,500,000

**Table 5: Breakdown of UofA applicants by Faculty (2018-2023)**

Faculty	Stage 1 submitted	Stage 2 submitted (by invitation only)	# Awarded	Total Funding
Arts	4	3	3	\$7,481,710
Business	1	0	0	\$0
Education	2	1	1	\$2,500,000
Extension*	1	1	1	\$2,499,999
Native Studies	1	1	1	\$2,500,000
Nursing	1	0	0	\$0
Public Health	1	0	0	\$0
Science**	1	1	1	\$1,371,200

\* The applicant is now with the School of Public Health.

\*\* Awarded a SSHRC PG Canada Mortgage and Housing Corporation Joint Initiative. This SSHRC PG is not included in any of the statistics above.



**Table 5: SSHRC 2018-2022 PG UofA vs National Statistics**

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### Summary and Recommendations:

At present, the University of Alberta ranks 1st overall among the U15 institutions with regards to success rates over the past six years, bringing in \$14,981,709.00. A closer look at the institutional data from 2018-2023 indicates that the UofA has been 57% successful at Stage 1, and 100% successful at Stage 2, in comparison to an average national success rate (2018 - 2022) of 76.5% for the PG2, indicating an extremely high percentage for success once passing Stage 1. But this is based on results prior to 2022, when U of A had a targeted program of support that included a Grant Assist Program Director, an annual PG1 Prep Grant envelope of up to \$50K, and budget for professional editing. The data above also demonstrates a trend at the UofA where there are two year gaps between application submissions. The reasons for this are unclear, but some possibilities include 1) the research does not align with the PG program, 2) an indication of the necessary amount of time required to pull large teams and partner organizations together in order to submit a strong application and 3) a lack of managerial support required to put a large application together.

Moving forward, the Research Partner Network will continue to provide the regular support for all SSHRC competitions, as well as create new, SSHRC PG-specific resources, mentioned above, for researchers as they pull together teams and partner organizations. We have also identified a list of potential researchers whose research areas and trajectory could align with the Partnership program. We will proactively contact these faculty members to discuss the potential of the PG.

Recommendations for future PG support include 1) project management support, 2) GRA support, 3) provide community engagement support sessions, 4) the return of an internal incentive comparable to the "PG1 Prep Grant", with a proposed value of \$20,000, 5) dedicated professional editing for Stage 1 and Stage 2 applications, and 6) a Project Directors' Leadership Retreat aimed at building large team and scaled-up project skills for researchers interested in leading large projects. Together these types of support would enable researchers to more easily and effectively build teams and converse with partner organizations so they can prepare and submit stronger applications. The RP Network is also beginning to collect data to enable long-term reporting on the contribution of RP supports to applicants' success, and participants' satisfaction with the supports provided, which will be included in future reports.