



Natural Resources  
Canada

Ressources naturelles  
Canada

*Please PRINT, SIGN, and SCAN these two cover pages and include them as a pdf in your application submission.*

## **IFIT Proposal Form**

**Applicant name:**

**Project title:**

**Date submitted (MM/DD/YY):**

**Attestations:**

By submitting this proposal, the project applicant:

1. Is legally registered or incorporated in Canada.
2. Has read and understands all the terms and conditions of the IFIT program set out in this Proposal Form and the Applicant's Guide.
3. Understands that any proprietary or confidential information provided as part of the submission, by any party, is provided with the approval of that party. Federal reviewers are bound by the requirements of the Access to Information Act and the Privacy Act regarding the treatment of confidential information.
4. Understands and acknowledges that, should the project be accepted under IFIT, no liability and no commitment or obligation exists on the part of Natural Resources Canada (NRCan) to make a financial contribution to the project until a written contribution agreement is signed by both parties.
5. Understands that project costs presented in this application **MUST BE** estimated at least at the accuracy level of feasibility studies, with a degree of accuracy range of plus or minus 20%.
6. Understands that funding that may be obtained under the IFIT program will not be used for the production or export of softwood lumber products.
7. Understands that the individual signing below attests that he/she has provided all necessary documentation to constitute a completed application and has the necessary authority to apply to the IFIT program in the name of his/her company.
8. Agrees, by checking below, that NRCan can share non-confidential information provided with other funding agencies in cases where this may be of benefit to the project or applicant. NRCan will safeguard personal information according to federal information protection standards under the Privacy Act and other applicable provincial or territorial privacy legislation of relevance.

Yes, information can be shared

No, information cannot be shared

**Please sign below to confirm these attestations:**

Signature:

Date:

Name of Duly Authorized Officer for Applicant:

Title:

## Application Package Checklist

Please complete the following checklist to confirm that your application package is complete.

All items below are required to complete the application package, except the Technical Supporting Documents, which are not required for Applicants applying to the Small Enterprise Stream.

### 1. Completed all 4 sections of the Proposal Form:

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 2. Appendix A: Technical Questionnaire:

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 3. Appendix B: Financial Analysis Template, Part 1 (Pro Forma) and Part 2 (Performance Indicators):

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 4. Appendix C: Key Equipment:

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 5. Business Plan:

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 6. Articles of Incorporation (or equivalent)

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

### 7. Legal Partnership Documentation (e.g. Partnership Agreement)

Small Enterprise Stream \_\_\_\_ (if applicable)

General Stream \_\_\_\_ (if applicable)

## 8. Process Flow Diagram

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

## 9. Project Schedule

Small Enterprise Stream \_\_\_\_

General Stream \_\_\_\_

## 10. Attached Technical Supporting Documents (preliminary engineering study, +/-20 cost estimates, site layout) (optional for applicants under Small Enterprise Stream)

Small Enterprise Stream N/A

General Stream \_\_\_\_

### Notes:

1. It is the responsibility of the applicant to ensure the word limits are respected for each question. The box sizes in this form do not reflect the word limit so please use the “Word Count” tool under the “Tools” menu.
2. Unless otherwise specified, the “proposed project” or the “project” or the “proposal” in this application form refers to the proposed project submitted to the Investments in Forest Industry Transformation Program (IFIT).
3. Completion and submission of this application to IFIT does not imply that the proposed project will be approved by IFIT.
4. Applicants must submit all information specified in this Application Form. Failure to provide the necessary information within the Application Form itself may lead to rejection of the proposal. It is the responsibility of the applicant to ensure that the Proposal Form clearly and thoroughly demonstrates how each mandatory and rated criteria is met. The attached technical information is required to substantiate and support the information in the Application Form.
5. The applicant should provide information in the most concise format possible, while still providing sufficient details to ensure complete comprehension by reviewers.
6. This Application Form is confidential when completed, with the exception of the Executive Summary (Q1-Q4).
7. Many questions ask Applicants to provide additional information in attachments (e.g., business plan, process flow diagram, project schedule). These attachments should be included in the email submission of the Application Form.
8. When you have completed the Application Form, please send all documents to NRCAN by email at [nrcan.ifit-itif.rncan@canada.ca](mailto:nrcan.ifit-itif.rncan@canada.ca).

Please refer to Section 3 of the IFIT Applicant’s Guide for project evaluation details.

## SECTION 1: EXECUTIVE SUMMARY

(Information in the Executive Summary Q1-Q4 may be shared publicly)

This section, as a whole, should provide reviewers with a clear overview of the applicant, the project and the alignment of the project with the core objectives and requirements of the IFIT program (see Section 2.1 of the Guide). The manner in which the project constitutes an advancement of forest sector technology in Canada must be apparent.

1. Project applicant (legal name of company):

2. Project title:

3. Project location

Facility:

City:

Province:

4. Briefly describe the objectives, outputs and outcomes of the proposed project and indicate how it constitutes an advancement of forest sector technology in Canada (300 words maximum):

5. Expected project start date (YYYY/MM):

6. Expected project completion date (YYYY/MM):

7. Expected project budget:

Funding requested from IFIT

Dollar amount: \$ \_\_\_\_\_

% of total project: \_\_\_% (maximum of 50%)

Applicant’s own funding

Dollar amount: \$ \_\_\_\_\_

Committed: \_\_\_ Yes \_\_\_ No

Funding from other sources (please add rows for each organization)

Dollar amount: \$ \_\_\_\_\_

Committed: \_\_\_ Yes \_\_\_ No

% of total project: \_\_\_%

Total project cost

Dollar amount: \$ \_\_\_\_\_

Committed: \_\_\_ Yes \_\_\_ No

% of total project: 100%

**Total Estimated project cost by Fiscal Year (FY) and Funding Source:**

IFIT Program

FY 2017-2018:

FY 2018-2019:

FY 2019-2020:

FY 2020-2021 and FY 2021-2022: N/A – IFIT eligible cost period ended

Applicant

FY 2017-2018:

FY 2018-2019:

FY 2019-2020:

FY 2020-2021 and FY 2021-2022:

Other

FY 2017-2018:

FY 2018-2019:

FY 2019-2020:

FY 2020-2021 and FY 2021-2022:

TOTAL PROJECT

FY 2017-2018:

FY 2018-2019:

FY 2019-2020:

FY 2020-2021 and FY 2021-2022:

**8. Contact information:**

The applicant should list the full contact information for the key project contact.

Name:

Title:

Company:

Facility:

Address:

Telephone:

Fax:

Email:

Project responsibilities (if applicable):

**9. Company information:**

List the forest products your company commercially produces (if your company does not produce forest products, please describe your core business and identify the forest product(s) that will be produced as a result of this proposed project):

Indicate the number of years your company has been in operation:

Company website:

Number of full-time and part-time employees in your company:

Provide a short description of the facility at which the project will take place (50 word maximum):

### 10. Previous collaboration with Natural Resources Canada:

3. Has your company (or your partner organization(s)) received funding from NRCan in the last 5 years?  
 Yes  No

If yes, specify the name of the NRCan program(s) :

If yes, specify the NRCan contact person who administered the past funding:

**Note: ALL MANDATORY CRITERIA MUST BE MET FOR PROJECTS TO BE EVALUATED  
Please refer to Section 3.4.1 of the IFIT Applicant's Guide for mandatory criteria details.**

## SECTION 2: MANDATORY CRITERIA

### 1. Eligible recipients

*Eligible recipients are for-profit companies located in Canada, that either produce forest products in an existing forest product manufacturing facility (for example, pulp, paper, or lumber mills) located in Canada, or that are, or will be, new entrants in the Canadian forest sector for the purpose of the proposed project.*

Do you meet the above criteria?  Yes  No

Is your company classified under NAICS codes 321XXX or 322XXX?

Yes  No  Unsure

Please list your NAICS code and/or clearly describe how you meet the above criteria. (100 words maximum):

### 2. Technology advancement

*The proposed project must constitute an advancement of forest sector technology in Canada. Once implemented, the advancement will employ new technologies that produce (or will lead to the future production of) bio-products or next-generation building products. The proposed project is at a pilot to commercial scale, and the technology does not yet exist, at the proposed scale and specifications, in a forest sector industrial facility in Canada.*

Do you meet the above criteria?  Yes  No

Will the project, at the proposed scale, be the first of its kind in a forest sector industrial facility in Canada?  Yes  No  Unsure

Is the proposed project at a pilot or commercial scale?<sup>1</sup>  Pilot<sup>2</sup>  Comm.  Unsure

Clearly describe how you meet the above criteria (200 words maximum):

### 3. Location

*Project site is located in Canada and the project is integrated within the forest sector value chain, for example connected to existing forest sector industrial processes or facilities (open or closed), or stand-alone projects integrated within the supply chain, for example new biofuels production facility using forest residues.*

Do you meet the above criteria?  Yes  No

Clearly describe how you meet the above criteria (100 words maximum):

### 4. Wood fibre

*Project is primarily derived from wood fibre. This includes projects involving the industrial processing of wood fibre and projects directly related to or reliant on by-products generated by wood fibre industrial processing activities.*

Do you meet the above criteria?  Yes  No

Clearly describe how you meet the above criteria (100 words maximum):

**Please refer to Section 3.4.2 of the IFIT Applicant's Guide for rated criteria details.**

## SECTION 3: RATED CRITERIA

### CRITERION 1: TECHNICAL FEASIBILITY

**ALL Applicants must complete the attached Technical Questionnaire (Appendix A).**

This section should provide documentation to substantiate the claims that the products and processes can be implemented, are likely to perform as expected, and will generate the quantity and quality of product identified by the applicant.

- a) Describe the project objectives, expected new products, and the expected quantity that you will produce (200 words maximum):
  
- b) Clearly describe the innovative technology or process proposed and the major activities involved in the project. Project descriptions should also include a short description of the facility where the project will be integrated. For all proposed innovative technologies/processes, applicants are

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<sup>1</sup> The IFIT program will not provide funding to projects dealing with technologies at the research or experimentation stages.

<sup>2</sup> Pilot scale technology is technology employed at an industrial scale designed to produce a small quantity of a product for technical and market analysis, i.e., not directly for profit.



strongly encouraged to reference and/or attach an appropriate technical report which provides information as to the likelihood of successful implementation. (800 words maximum):

- c) Specify any product standards that need to be met by your product. What parameters will be monitored to achieve a quality product? (200 words maximum):
- d) Briefly describe the level of technical expertise and past experience of your company and project team in completing similar large scale innovative industrial capital projects. (200 words maximum):
- e) Briefly describe how you will measure the performance of your projects, including meeting your intended objectives and outputs. (200 words maximum):
- f) Summarize the key technical and intellectual property risks associated with the project. For each risk, indicate the relative probability of occurrence, the estimated risk impact, and provide a summary of the risk mitigation & risk response strategies to reduce the probability and/or impact of the risk. (please add rows for each additional risk)

#### Key Risks

##### Technical Risks:

Probability (Low-Med-High): \_\_\_\_

Impact (Low-Med-High): \_\_\_\_

Risk Mitigation and Risk Response Strategies:

##### Intellectual Property Risks:

Probability (Low-Med-High): \_\_\_\_

Impact (Low-Med-High): \_\_\_\_

Risk Mitigation and Risk Response Strategies:

- g) Applicants applying under the Small Enterprise Stream MUST attach the Technical Questionnaire (Appendix A) and process flow diagram (#2) but do not require #3, #4 and #5. Applicants applying under the General Stream MUST attach the five items below.

Please confirm you have attached these by checking the boxes.

- 1. Technical Questionnaire \_\_\_\_
- 2. Process flow diagram \_\_\_\_
- 3. Preliminary engineering study \_\_\_\_
- 4. +/- 20% engineering cost estimates \_\_\_\_
- 5. Site layout \_\_\_\_

You may wish to attach other documentation, including but not limited to a site map, process/piping and instrumentation diagram, detailed engineering, pilot plant results, sensitivity analysis, or a risk mitigation strategy.

If you have attached non-mandatory documents, please specify:

Please indicate the file name(s) of the attached documents as per Note 7 at the beginning of this document.

File name:

## CRITERION 2: INNOVATION

- a) Describe why the project should be considered a truly innovative proposition for the Canadian forest products industry. (i.e., new product or technology to the forest sector, or new to Canada). (400 words maximum):
  
- b) Briefly indicate if the project is expected to generate any intellectual property (IP), including, but not limited to copyrights, trademarks, patents, industrial design rights and/or trade secrets. The applicant should also briefly discuss their intent regarding this IP, specifically, whether an IP Management Plan has been created which lays out the proposed management of IP rights between project collaborators. (200 words maximum):
  
- c) Describe any Canadian technology content of the innovative technology employed by the project (100 words maximum):

## CRITERION 3: PROJECT PARTNERSHIPS

In this section the Applicant should provide detailed information about their partner(s) involved in the implementation of the project. This section is not necessarily meant to capture corporate partnerships (e.g. joint ventures). Questions a) and b) must be completed separately for each project partner. **If you have more than one partner, please repeat sections a) and b) for each.**

- a) Provide the partner information:

Legal name of partner organization A:

Business sector of organization A:

Website:

List the full contact information for the key project contact in partner A.

Name:

Title:

Facility (if applicable):

Organization:

Address:

Telephone:

Fax:

Email:

For funding partners, please specify the contribution \$\_\_\_\_\_

**Documentation MUST be attached to validate the partnership claim.**

b) Describe why this partnership exists in relation to the project and include benefits generated by this partnership. (300 words maximum):

#### CRITERION 4: BUSINESS PLAN

ALL Applicants must complete the attached Excel Financial Analysis Template (Appendix B). Applicants **must also attach a complete business plan including a basic sensitivity analyses on key influential parameters affecting the project.**

- a) Provide an executive summary of the project business plan (300 words maximum):
- b) Have you attached a business plan? \_\_\_ Yes \_\_\_ No
- c) Summarize the key business, market, regulatory and financing risks associated with the project. For each risk, indicate the relative probability of occurrence, the estimated risk impact, and provide a summary of the risk mitigation & risk response strategies to reduce the probability and/or impact of the risk: (please add rows for each additional risk)

##### Key Risks

##### Commercial Implementation Pathway and Market Entry Risks:

Probability (Low-Med-High): \_\_\_

Impact (Low-Med-High): \_\_\_

Risk Mitigation and Risk Response Strategies:

##### Business model and Business Plan Risks:

Probability (Low-Med-High): \_\_\_

Impact (Low-Med-High): \_\_\_

Risk Mitigation and Risk Response Strategies:

##### Regulatory and Permitting Risks:

Probability (Low-Med-High): \_\_\_

Impact (Low-Med-High): \_\_\_

Risk Mitigation and Risk Response Strategies:

##### Budget and Financing Uncertainty Risks:

Probability (Low-Med-High): \_\_\_

Impact (Low-Med-High): \_\_\_

Risk Mitigation and Risk Response Strategies:

#### CRITERION 5: FIBRE SUPPLY

- a) Describe the nature of the fibre or feedstock supply including its source, security and term (200 word maximum):

Does your project use a waste stream or underutilized wood fibre? \_\_\_ Yes \_\_\_ No

#### CRITERION 6: TIMING

- a) Provide the timeline and milestones for the project including necessary Board approval steps and details of any permitting processes, if applicable (200 word maximum):

**All applications must have an attached project schedule. Please indicate the file name(s) of the attached documents as per Note 7 at the beginning of this document.**

Permit/Approval Name:

Expected date to obtain:

Short Description and Impact on Project :

Issuing Body

Key Risks

Project Plan and Timeline Risks:

Probability (Low-Med-High): \_\_\_\_

Impact (Low-Med-High): \_\_\_\_

Risk Mitigation and Risk Response Strategies:

### **Part 7: BENEFITS TO CANADIANS**

- a) Describe and quantify the environmental impacts that would result from implementation of the proposed technology in Canada.
  
- b) Describe and quantify any benefits the proposed project and subsequent commercial implementation may generate for local communities and/or Canada, including creation of temporary and permanent jobs:
  
- c) Describe and quantify the expected economic benefits that would result from commercial implementation and market adoption of the proposed technology. Specific elements to consider may include economic activity and economic diversification:

## APPENDIX A: TECHNICAL QUESTIONNAIRE

Please answer all questions completely, with as much detail as possible. For all questions, please explain clearly the current status of the proposed project. This information will help the program to adapt the technical due diligence requirements for your project should you proceed to Phase 2 – Part 2. Please provide supporting documents when possible.

Q1. How have capital and project cost estimates been established? Are they within a  $\pm 20\%$  degree of accuracy?

Q2. What remaining engineering design and/or technical studies are required to initiate the project? Have engineering firm(s) been identified or retained to perform these studies? Please provide details.

Q3. Has the process/technology been demonstrated or verified by a third party? If so, who?

Q4. Has the Project Team been established and in a state of readiness to initiate and execute the project as per the provided timelines? What is the earliest date by which the project timeline could commence?

Q5. What other sources of funding are planned for this project. Has all funding required to complete the project been secured? If not, when/how will it be secured?

APPENDIX B: FINANCIAL ANALYSIS TEMPLATE – PART 1 PRO FORMA

Please fill out and attach excel version

**Part 1: Pro Forma Company Balance Sheet**

**Company XYZ**  
 For Previous to Yr 3 FY  
 (all numbers in \$000)

**Please fill out & attach excel version**

ASSETS	Previous Yr	Current Yr	Yr 1	Yr 2	Yr 3
<b>Current Assets</b>					
Cash	\$0	\$0	\$0	\$0	\$0
Accounts receivable	\$0	\$0	\$0	\$0	\$0
Prepaid expenses	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
<b>Total Current Assets</b>					
<b>Fixed Assets</b>					
Land	\$0	\$0	\$0	\$0	\$0
Buildings (net of depreciation)	\$0	\$0	\$0	\$0	\$0
Plant & equipment (net)	\$0	\$0	\$0	\$0	\$0
Furniture & fixtures (net)	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
<b>Total Net Fixed Assets</b>					
<b>TOTAL ASSETS</b>					
<b>LIABILITIES</b>					
<b>Current Liabilities</b>					
Accounts payable	\$0	\$0	\$0	\$0	\$0
Bank Loans	\$0	\$0	\$0	\$0	\$0
Current portion of long-term debts	\$0	\$0	\$0	\$0	\$0
Accruals & other payables	\$0	\$0	\$0	\$0	\$0
Income Taxes Payable	\$0	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0	\$0
<b>Total Current Liabilities</b>					
<b>Long-term Liabilities</b>					
Shareholder Advances	\$0	\$0	\$0	\$0	\$0
Other long-term liabilities	\$0	\$0	\$0	\$0	\$0
<b>Total Long-term Liabilities</b>					
<b>SHAREHOLDERS' EQUITY</b>					
Common/Preferred Shares	\$0	\$0	\$0	\$0	\$0
Retained earnings	\$0	\$0	\$0	\$0	\$0
<b>Total Shareholders' Equity</b>					
<b>TOTAL LIABILITIES &amp; EQUITY</b>					

**APPENDIX B: FINANCIAL ANALYSIS TEMPLATE – PART 2 PERFORMANCE INDICATORS**

Please fill out and attach excel version

**Project Budget & Performance Indicators**

**Company XYZ**

For FY 14/15 to 17/18  
(all numbers in \$000)

Anticipated Project Revenue	FY 17/18	FY 18/19	FY 19/20	FY 20/21
New Product #1	\$0	\$0	\$0	\$0
Increased Volume of Product abc	\$0	\$0	\$0	\$0
Steam Savings	\$0	\$0	\$0	\$0
Energy Savings	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0
<b>Total Expected Revenues</b>				

Operating Costs & Expenses	FY 17/18	FY 18/19	FY 19/20	FY 20/21
Cost of Goods Sold	\$0	\$0	\$0	\$0
Maintenance	\$0	\$0	\$0	\$0
Overhead	\$0	\$0	\$0	\$0
Interest	\$0	\$0	\$0	\$0
Taxes	\$0	\$0	\$0	\$0
Depreciation of Building and Equipment	\$0	\$0	\$0	\$0
Amortization	\$0	\$0	\$0	\$0
Other	\$0	\$0	\$0	\$0
<b>Total Operating Costs</b>				
<b>Operating Profit</b>				

Project Budget Breakdown	FY 17/18	FY 18/19	FY 19/20	FY 20/21	Total Cost
Capital Expenses	\$0	\$0	\$0	\$0	\$0
Materials and Supplies	\$0	\$0	\$0	\$0	\$0
Salaries and benefits	\$0	\$0	\$0	\$0	\$0
Sub-contractors and consultants	\$0	\$0	\$0	\$0	\$0
Overhead expenses	\$0	\$0	\$0	\$0	\$0
Travel, including meals and accommodations	\$0	\$0	\$0	\$0	\$0
Printing services	\$0	\$0	\$0	\$0	\$0
License fees and permits	\$0	\$0	\$0	\$0	\$0
Training costs associated with the project	\$0	\$0	\$0	\$0	\$0
<b>Total Budgeted Expenses</b>					\$0

**Please fill out & attach excel version**



