

## Volt-Age Living Labs Evaluation Criteria and Merit Indicators

During the review process, the review committee assigns a rating to each application. These ratings are used to create a ranked list of applications, which the Volt-Age CFREF uses to allocate funding. Funding is awarded in order of ranking until all available funds are exhausted or no additional applications meet the funding criteria.

The priority-driven peer review mechanism will use a scale of 0.0 to 5.0 to rate applications, with 5.0 being the highest possible rating. Scores are assigned in increments of 0.1 to ensure precision in the evaluation process. Reviewers are encouraged to use the full range of rating scores to accurately reflect the quality and competitiveness of each application. Ratings are assigned qualitative descriptors (see Tables below) to help guide reviewers in their rating of applications. For an application to be eligible for funding, it must receive a score of 3.0 or higher.

### 1. Living Lab

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
1.1 There is a well-established, long-term existing relationship between the community that will host the Living Lab and at least one member of the research team	There is a <b>well-documented, long-term relationship</b> (5+ years) with consistent collaboration and tangible outcomes benefiting both parties.	A <b>strong, long-term relationship</b> (3-5 years) is evident, with regular collaboration and mutual benefits.	A <b>moderate relationship</b> (1-3 years) exists, with periodic collaboration but limited outcomes or engagement.	The relationship is <b>developing</b> , with minimal collaboration or interaction over less than one year.
1.2 There have been past and/or are ongoing partnership activities between the core research team and the community that will host the Living Lab.	There is clear evidence of <b>significant past and ongoing partnership activities</b> , including joint projects with measurable outcomes and sustained collaboration.	There is evidence of <b>regular partnership activities</b> , with ongoing or recent collaboration leading to meaningful engagement.	There is evidence of <b>some partnership activities</b> , but they are limited in scope, frequency, or impact.	There is <b>minimal or no evidence</b> of partnership activities, with sporadic or informal interactions between the research team and community.
1.3 The Living Lab host's goals, needs, and priorities relate to the theme of electrification	The Living Lab host's goals, needs, and priorities <b>fully align</b> with the electrification theme, demonstrating clear, direct, and tangible connections.	The host's goals, needs, and priorities show <b>strong alignment</b> with electrification, with several relevant and concrete connections.	The host's goals, needs, and priorities exhibit <b>moderate alignment</b> with electrification, with some relevant but less direct connections.	The host's goals, needs, and priorities display <b>limited alignment</b> with electrification, with only minor or vague connections.
1.4 The Living Lab host is open to including multiple	The host demonstrates <b>exceptional openness</b> , actively seeking and	The host shows <b>strong openness</b> , engaging multiple stakeholders and	The host exhibits <b>moderate openness</b> , including some	The host shows <b>minimal or no openness</b> , with only a few stakeholders

and diverse stakeholders and partners	including diverse stakeholders and partners in all stages of the project.	partners with a clear intention to foster diversity.	stakeholders and partners, but diversity efforts are limited.	considered and limited diversity in representation.
1.5 The Living Lab host is prepared to establish a Living Lab, including supporting the engagement of stakeholders and the development of infrastructure	The host demonstrates <b>full preparedness</b> , with clear plans, resources, and commitments to engage stakeholders and develop necessary infrastructure.	The host shows <b>strong preparedness</b> , with most plans and resources in place, and a clear strategy for stakeholder engagement and infrastructure.	The host exhibits <b>moderate preparedness</b> , with partial plans and some resources identified but lacking full clarity or commitment.	The host shows <b>minimal or no preparedness</b> , with limited plans, resources, or strategies for stakeholder engagement and infrastructure development.

## 2. Alignment

	<b>Exceptional (4.4 to 5.0)</b>	<b>Exceeds (3.7 to 4.3)</b>	<b>Meets (3.0 to 3.6)</b>	<b>Does not satisfy (&lt;2.9)</b>
2.1 Alignment with Volt-Age Themes and Platforms.	The proposed project connects with <b>three or more</b> Volt-Age themes and/or platforms.	The proposed project connects with <b>two</b> Volt-Age themes and/or platforms.	The proposed project connects with only <b>one</b> Volt-Age theme or platform.	The proposed project does not align any Volt-Age themes or platforms.
2.2 Breadth of the research areas involved in the proposed research project.	The proposed project involves <b>three or more</b> research areas and includes <b>at least one</b> Social Sciences/ Humanities field.	The proposed project involves <b>three or more</b> research areas but does not include any Social Sciences/ Humanities fields.	The proposed project involves <b>two to three</b> research areas.	The proposed project only involves one research area.

### 3. Background and Outcomes

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
3.1 Significance of the impacts of the intended outcomes on decarbonization and electrification initiatives as well as on social, economic, and/or environmental well-being in Canada.	The proposed outcomes are of <b>exceptional importance</b> to Canada and may also be important <b>internationally</b> . This research will <b>overcome</b> knowledge gaps to develop new and innovative policies, standards, products, services, processes, or technologies in Canada. The expected outcomes and impacts will be of the <b>highest impact</b> for Canadians.	The proposed outcomes are <b>very important</b> to Canada. This research will <b>address</b> knowledge gaps to develop new and innovative policies, standards, products, services, processes, or technologies in Canada. The expected outcomes will have <b>high impact</b> for Canadians.	The proposed outcomes are <b>important</b> to Canada. This research will <b>contribute to</b> addressing knowledge gaps to develop new and innovative policies, standards, products, services, processes, or technologies in Canada. The expected outcomes will have <b>impact</b> for Canadians.	The proposal does not adequately establish why the topic is important to Canada. It does not sufficiently identify how the research will address knowledge gaps related to developing new and innovative policies, standards, products, services, processes, or technologies. It does not adequately identify how outcomes will have impact for Canadians.
3.2 Originality of the research to address the topic and the potential for generating new scientific knowledge.	The proposal demonstrates that the topic will be addressed through <b>exceptionally innovative</b> research. The research has <b>potential to contribute to a scientific breakthrough</b> .	The proposal demonstrates that the topic will be addressed through <b>highly original</b> research. The research has <b>potential for a significant advance in the field</b> .	The proposal demonstrates that the topic will be addressed through <b>original research</b> . The research includes <b>some concepts or directions that may lead to an advance in the field</b> .	The proposal does not sufficiently demonstrate that the topic will be addressed through original research or is not well positioned within the state-of-the-art. It is not clear how the research will lead to new concepts or directions.
3.3 Contextualization of proposed project within other initiatives led by researchers and partners.	The proposed project has <b>significant</b> connections to other initiatives led by researchers, partner organizations, and relevant research efforts in Canada. The proposed outcomes have <b>exceptional</b> complementarity with the	The proposed project has <b>highly important</b> connections to other initiatives led by researchers, partner organizations, and relevant research efforts in Canada. The proposed outcomes have <b>significant</b>	The proposed project has <b>important</b> connections to other initiatives led by researchers, partner organizations, and relevant research efforts in Canada. The proposed outcomes have <b>some</b> complementarity with the	The proposed project does not adequately establish connections to other initiatives led by researchers, partner organizations, and relevant research efforts in Canada. The complementarity with

	other existing research support.	complementarity with the other existing research support.	other existing research support.	the other existing research support is unclear.
3.4 Extent to which the strategy to apply the research outcomes is likely to achieve the intended outcomes.	A <b>comprehensive</b> strategy indicates how the partners will translate the research results into application, such that the outcomes and impacts are <b>very likely</b> to happen.	A <b>clearly defined</b> strategy indicates how the partners will translate the research results into application, such that the outcomes and impacts are <b>likely</b> to happen.	A strategy <b>may lead</b> the partners to translating the research results into application, such that the outcomes and impacts <b>may happen</b> .	The strategy to translate the research results into application is not convincingly presented, such that the outcomes and impacts are unlikely to happen.

#### 4. Partnerships

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
4.1 Appropriateness of the partnerships to achieve the intended outcomes.	The proposed outcomes are <b>highly relevant</b> to the partners' activities, and it is <b>very likely</b> that partnerships will contribute to planned outcomes being achieved.	The proposed outcomes are <b>relevant</b> to the partners' activities, and it is <b>likely</b> that partnerships will contribute to planned outcomes being achieved.	The proposed outcomes are <b>related</b> to the partners' activities, and partnerships <b>may</b> contribute to planned outcomes being achieved.	The outcomes are not sufficiently related to the partners' activities, and it is not clearly established that partnerships will contribute to planned outcomes being achieved.
4.2 Leveraging and inclusion of different types of partnerships and the integration of their unique perspectives and knowledge in the project.	The proposal demonstrates a <b>strong synergy</b> among the participants and includes a <b>comprehensive combination</b> of perspectives and knowledge.	The proposal demonstrates <b>synergy</b> among the participants and includes a <b>combination</b> of perspectives and knowledge.	The proposal demonstrates <b>complementarity</b> among the participants and includes a <b>variety</b> of perspectives and knowledge.	Not all participants needed to achieve the planned outcomes are present. The proposal does not demonstrate synergy or complementarity.
4.3 Clarity of partners' roles in defining the research challenge, co-designing and implementing the research and using results to achieve the outcomes.	Each partner plays an <b>essential role</b> in the research effort and demonstrates a <b>high level of capacity</b> to achieve the desired outcomes.	Each partner plays a <b>valuable role</b> in the research effort and demonstrates <b>the capacity</b> required to achieve the desired outcomes.	Each partner plays an <b>active role</b> in the research effort and demonstrates <b>some level of capacity</b> to achieve the desired outcomes.	Not all partners play an active role in the research effort or demonstrate the capacity to achieve the desired outcomes.
4.4 Appropriateness of the level of cash and in-kind contributions from each partner.	The contributions <b>enrich</b> the scope of the project and are <b>highly commensurate</b> with the partner's role and with their anticipated benefits.	The contributions <b>increase</b> the scope of the project and are <b>commensurate</b> with the partner's role with their anticipated benefits.	The contributions are <b>suitable</b> for the scope of the project and are <b>somewhat commensurate</b> with the partner's role and with their anticipated benefits.	The contributions are not suitable for the scope of the project or are not sufficiently commensurate with the partner's role and with their anticipated benefits.

## 5. Research Plan

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
5.1 Clarity of the objectives and deliverables; appropriateness of the scope and size of planned activities to achieve the expected outcomes; justification for the planned expenditures.	The objectives and the deliverables are <b>clear and comprehensive</b> . The planned activities are <b>highly likely</b> to achieve the objectives and expected outcomes. The expenditures are <b>clearly aligned</b> with the activities and are <b>justified</b> .	The objectives and the deliverables are <b>clearly defined</b> . The planned activities are <b>likely</b> to achieve the objectives and expected outcomes. The expenditures are <b>aligned</b> with the activities and are <b>justified</b> .	The objectives and the deliverables are <b>defined</b> . The planned activities are <b>somewhat likely</b> to achieve the objectives and the expected outcomes. The expenditures are <b>reasonably aligned</b> with the activities and are justified.	The objectives and deliverables are not adequately defined or the planned activities are not appropriate to achieve the objectives and expected outcomes. The expenditures are not adequately aligned with the activities and/or are not adequately justified.
5.2 Appropriateness of the identified indicators and methods for monitoring progress during the project and for assessing outcomes after the project.	Indicators and methods are <b>clearly defined</b> and <b>highly effective</b> for monitoring progress and assessing outcomes.	Indicators and methods are <b>well-defined</b> and <b>effective</b> for monitoring progress and assessing outcomes.	<b>Some</b> indicators and methods for monitoring progress and assessing outcomes are <b>proposed and appropriate</b> .	Indicators and methods for monitoring progress and assessing outcomes are not adequately defined or are not appropriate.
5.3 Application of Equity, Diversity, and Inclusion principles and values in the research design.	The proposal demonstrates a <b>clearly defined and comprehensive</b> plan for the inclusion of EDI principles and values throughout the research process.	The proposal demonstrates a <b>well-defined</b> plan for the inclusion of EDI principles and values throughout the research process.	The proposal demonstrates a <b>partial</b> plan for the inclusion of EDI principles and values in some aspects of the research process.	The proposal does not adequately establish a plan to include EDI principles and values in the research process.
5.4 Completeness of the data management plan throughout the data life cycle; appropriateness of the scope and inclusion of data sharing policies and ethical issues relating to partners.	An <b>extensive</b> data management plan is included in the proposal that addresses <b>all stages of the data life cycle</b> . The proposal includes <b>strong</b> data sharing policies and addresses <b>all essential</b>	A <b>clear</b> data management plan is included in the proposal that addresses <b>all stages of the data life cycle</b> . The proposal includes well-defined data sharing policies and addresses <b>most essential</b>	A <b>suitable</b> data management plan is included in the proposal that addresses <b>some stages of the data life cycle</b> . The proposal includes data sharing policies and addresses	The data management plan is not adequately defined. The proposal does not address necessary ethical issues and does not include data sharing policies.

	ethical issues relating to partners.	ethical issues relating to partners.	<b>some essential</b> ethical issues relating to partners.	
5.5 Extent and breath of the knowledge mobilization plan to contribute to public and institutional bodies of knowledge.	The proposal includes <b>comprehensive</b> knowledge mobilization activities targeted at <b>highly diverse</b> audiences, which make it <b>very likely</b> that the outcomes will contribute to the public and institutional bodies of knowledge.	The proposal includes a <b>combination</b> of knowledge mobilization activities targeted at <b>diverse</b> audiences, which make it <b>likely</b> that the outcomes will contribute to the public and institutional bodies of knowledge.	The proposal includes a <b>variety</b> of knowledge mobilization activities targeted at <b>relevant</b> audiences, which make it <b>possible</b> that the outcomes will contribute to the public and institutional bodies of knowledge.	The knowledge mobilization plan does not reach a diverse set of audiences and does not adequately demonstrate that the outcomes will contribute to public and institutional bodies of knowledge.

## 6. Team & Project Management

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
6.1 Appropriateness of the contributions and roles of the research team to achieve the intended outcomes.	The proposed outcomes are <b>highly relevant</b> to the applicants' activities and the proposed contributions and roles <b>strongly support the achievement</b> of the intended outcomes.	The proposed outcomes are <b>relevant</b> to the applicants' activities and the proposed contributions and roles <b>support</b> the achievement of the intended outcomes.	The proposed outcomes are <b>somewhat relevant</b> to the applicants' activities and the proposed contributions and roles <b>may lead to the achievement</b> of the intended outcomes.	The outcomes are not sufficiently related to the applicants' activities, and it is not clearly established that the proposed contributions and roles will lead to the outcomes being achieved.
6.2 Diversity of the research team; interdisciplinarity in the project; inclusion of Equity, Diversity, and Inclusion principles and values.	The proposal demonstrates a <b>strong synergy</b> among the applicants and includes a <b>comprehensive combination</b> of fields of study and career stages that makes it <b>very likely</b> that planned outcomes will be achieved. The inclusion of EDI principles and values are an <b>essential part</b> of the composition of the research team.	The proposal demonstrates <b>synergy</b> among the applicants and includes a <b>varied combination</b> of fields of study and career stages that makes it <b>likely</b> that planned outcomes will be achieved. The inclusion of EDI principles and values are an <b>important part</b> of the composition of the research team.	The proposal demonstrates <b>complementarity</b> among the applicants and includes a <b>combination</b> of fields of study and career stages that <b>may lead</b> to the planned outcomes being achieved. The inclusion of EDI principles and values are a <b>part</b> of the composition of the research team.	Not all applicants and fields of study are needed to achieve the planned outcomes are present. The proposal does not demonstrate a synergy or complementarity that will lead to the outcomes being achieved. The composition of the research team does not adequately include EDI principles and values.
6.3 Clarity of applicants' roles and responsibilities in decision-making and implementing the research.	Each applicant plays an <b>essential role</b> in the research effort and demonstrates a <b>high level of capacity</b> to contribute to the decision-making and implementation of the research.	Each applicant plays a <b>valuable role</b> in the research effort and demonstrates <b>the capacity</b> required to contribute to the decision-making and implementation of the research.	Each applicant plays an <b>active role</b> in the research effort and demonstrates <b>some level of capacity</b> to contribute to the decision-making and implementation of the research.	Not all applicants play an active role in the research effort or demonstrate the capacity to contribute to the decision-making and implementation of the research.
6.4 Appropriateness of academic researcher's expertise, and that found with the partners, both for	The collective expertise of the participants is <b>highly appropriate</b> to successfully carry out the	The collective expertise of the participants is <b>appropriate</b> to carry out the activities. The principal	The collective expertise of the participants is <b>sufficient</b> to carry out the activities. The principal	The application does not adequately demonstrate that the participants have the collective expertise



<p>carrying out the planned research activities and in mentoring trainees.</p>	<p>activities. The principal investigator has <b>exceptional capabilities</b> to manage the project, having <b>successfully managed similar projects</b> in the past or has <b>clearly demonstrated the potential</b> to do so.</p>	<p>investigator has the <b>capabilities</b> to manage the project, having <b>managed similar projects</b> in the past or has demonstrated the <b>potential</b> to do so.</p>	<p>investigator has <b>largely demonstrated the capabilities</b> to manage the project.</p>	<p>needed to carry out the research and/or the capacity to manage the project.</p>
<p>6.5 Transparent and ethical management of project initiatives and goals; involvement of partners in project management.</p>	<p>The proposal demonstrates a <b>comprehensive</b> strategy to ensure that the research initiatives and goals are managed transparently and ethically. Partners play an <b>essential role</b> in the management and direction of the project.</p>	<p>The proposal demonstrates a <b>clear</b> strategy to ensure that the research initiatives and goals are managed transparently and ethically. Partners play a <b>valuable role</b> in the management and direction of the project.</p>	<p>The proposal demonstrates a <b>suitable</b> strategy to ensure that the research initiatives and goals are managed transparently and ethically. Partners play an <b>active role</b> in the management and direction of the project.</p>	<p>The proposal does not adequately demonstrate that the research initiatives and goals will be managed transparently and ethically. The role of partners in the management and direction of the project is not clear.</p>

## 7. Research Trainees

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
7.1 Opportunities for enriched learning experiences for research trainees (students and postdoctoral fellows) to develop relevant research skills as well as professional skills such as leadership, communication, collaboration, and entrepreneurship.	Through an <b>exemplary environment</b> or <b>cutting-edge approach</b> , the project will provide an enriched training experience that leads to <b>innovative and valuable</b> skills appropriate to all levels of trainees.	Through a <b>high-quality environment</b> or <b>approach</b> , the project will provide a training experience that leads to <b>valuable</b> skills appropriate to all levels of trainees.	The project will provide a training experience that leads to <b>relevant</b> skills appropriate to all levels of trainees.	The proposal does not adequately establish that the project will provide an enriched experience for research trainees. The opportunity to develop relevant skills is not sufficiently described.
7.2 Consideration of Equity, Diversity, and Inclusion principles and values in the opportunities for research trainees.	The proposal outlines learning and enrichment opportunities for research trainees with <b>innovative practices</b> that support EDI principles and values.	The proposal outlines learning and enrichment opportunities for research trainees with <b>advanced practices</b> that support EDI principles and values.	The proposal outlines learning and enrichment opportunities for research trainees with <b>practices that consider</b> EDI principles and values.	The application does not adequately outline that EDI principles and values have been taken into consideration within the learning and enrichment opportunities for research trainees.

## 8. Impacts

	Exceptional (4.4 to 5.0)	Exceeds (3.7 to 4.3)	Meets (3.0 to 3.6)	Does not satisfy (<2.9)
8.1 Sustainability	Through an <b>exemplary environment</b> or <b>cutting-edge approach</b> , the project will provide an enriched training experience that leads to <b>innovative and valuable</b> skills appropriate to all levels of trainees.	Through a <b>high-quality environment</b> or <b>approach</b> , the project will provide a training experience that leads to <b>valuable</b> skills appropriate to all levels of trainees.	The project will provide a training experience that leads to <b>relevant</b> skills appropriate to all levels of trainees.	The proposal does not adequately establish that the project will provide an enriched experience for research trainees. The opportunity to develop relevant skills is not sufficiently described.

<p>8.2 Resilience</p>	<p>The proposal outlines learning and enrichment opportunities for research trainees with <b>innovative practices</b> that support EDI principles and values.</p>	<p>The proposal outlines learning and enrichment opportunities for research trainees with <b>advanced practices</b> that support EDI principles and values.</p>	<p>The proposal outlines learning and enrichment opportunities for research trainees with <b>practices that consider</b> EDI principles and values.</p>	<p>The application does not adequately outline that EDI principles and values have been taken into consideration within the learning and enrichment opportunities for research trainees.</p>
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