

2026 Halifax OAE Joint Learning Opportunity: **Proposal Application** **Guidelines**

This document provides further clarifying information to respondents of the *2026 Halifax OAE Joint Learning Opportunity*. Proposals must be submitted to the Joint Learning Opportunity (JLO) Management Team at research-network@carbontosea.org by **January 9, 2026, 5:00 PM Atlantic Standard Time (AST)**.

Documents to be submitted (mandatory):

1. **Proposal (.pdf):**
 - a. **5-10 pages** maximum (including figures, tables, images, references, etc.)
 - b. Your proposal **must address all the points listed in sections 1 to 4 below** (note section 3a is only for technical teams).
2. **JLO Budget & Partners Contribution Template (.xlsx):**
 - a. **Budget Table for Research Award (1 tab):**
 - i. Indicate the funding requested (\$CAD) for the project under each of the eligible categories listed.
 - ii. Proposals that demonstrate **matching funds equal to or above the ratio of 1:0.3** from non-federal government partners (see evaluation rubric in [Terms and Conditions](#)) will be preferred during the evaluation process.
 - iii. Information about matched versus leveraged funding is [provided here](#).
 - b. **Partners' contributions (3 tabs):**
 - i. Information - Guidance and references
 - ii. Partners List - List all project partners who contribute (cash or in-kind) to the project
 - iii. Partners' contributions - Provide the information for each of your partners' contributions (\$CAD).

Additional supporting documents (optional, no more than 5 pages):

Applicants are allowed to submit additional supporting documents (e.g., CV, product specifications, organization overview, etc.) if they wish to do so.

Proposal Questions

1. Proposed activities and anticipated impact of your work:

- Indicate **which strategic objective(s)** and **knowledge gaps** your project is addressing (multiple strategic objectives may be possible).
- Define the **main research question** and/or the scope of the project. *Note: If applicable, please state how your research is feedstock dependent. For example, if the feedstock switched from magnesium-based to calcium-based, what would be the implications, if any, on your research?*
- Clearly articulate the **research methodologies and activities** that will be performed through your proposal, and how they address the research question.
- Summarize the current state of understanding related to your research question, and the **anticipated impact** of your proposed research on the scientific, technical, or social understanding of Ocean Alkalinity Enhancement's (OAE) viability.
- Include a **project timeline**, including key field research activities, key milestones, data analysis, and publication.
- Provide a brief summary **data management and dissemination plan**. This should include target parameters, methods for data collection, process, and timeline for sharing data (with other researchers, project sponsors, and/or broader public), and adherence to open data standards and practices. Please identify any data that you intend to keep proprietary, with an explanation. All data management must comply with the [OAE Data Management Protocol](#) and the Data Sharing Policy outlined in the [Terms and Conditions](#).
- Briefly summarize required **collaborations or integrations with existing field research activities**, if applicable. What data, if any, may be required from the research team, and in what timeframe? Research being conducted as a part of the JLO should not interfere with/impede upon core field research activities (see [Request for Proposals](#)).

2. Logistics and budget:

- Provide an overview of the **logistical and operational requirements** you anticipate your work will require (e.g., shipping, customs, shipboard/meeting space, etc.).
- Include a [Project Budget & Partners Template](#) and clearly indicate the amount requested as a part of this JLO. Expenses must be broken down into Personnel, Direct, and Indirect costs. Provide a brief narrative justification of the budget as part of your proposal. Proposals with an incomplete budget will not be considered.

Overhead cost justification is required - explain how the funds will be used under this category, how each expense is calculated, and why it is required. *If you require administrative support but do not charge it to the project, it may also be described as an in-kind contribution to assist with the matched funding requirement.*

- List, if any, the partnering organizations, including universities, industries, federal, provincial departments and agencies, and all other sources contributing cash or in-kind resources to the project, and the **contribution amounts** they bring to the [Project Budget & Partners Template](#).

3. Highlight your organization's unique capabilities to deliver the work:

- Identify the **point of contact for the submission**, and **contracting lead or Sponsored Research Office** (include title, role, and contact information).
- Provide a brief description of your **organization**, including focus areas, location, number of personnel, etc.
- Briefly describe how this research will **advance the goals of your organization**.
- Please provide a reference point on **typical publication timelines for analogous research or projects**. How long does it typically take your organization to finalize and share results?
- Provide a brief **overview of the project team**, their roles, relevant experience, expertise, publication references, or other qualifying criteria that demonstrate your organization's ability to successfully perform the work as described.
- Provide an overview of how your project **integrates EDIA principles**. You may specify how diverse individuals, inclusive of Indigenous peoples and members of equity-deserving groups (e.g., members of the 2SLGBTQIA+ communities, persons with a disability, racialized individuals, and women), will be involved in your project, including leadership and decision-making, programming, communication and engagement, and/or inclusive participation. More information is available in this webinar, [Exploring Inclusion & Reconciliation in Proposals](#), and on this [website](#).

3a. Demonstrate the technical readiness of your product for field research [*For teams addressing technical knowledge gaps only*]:

- Summarize the commercially available methods, techniques, or technologies on the market today and how your proposed approach will **improve the functionality or cost** of these methods.
- Provide a **statement on the technical readiness** for each major and/or custom item (e.g., sensor, vehicles, computer models, etc.), for example, age of design,

performance record, previous in-water testing, units sold, or other indicators of reliability.

- Outline the **installation, monitoring, and maintenance requirements** for the technology.

4. Potential risks or conflicts of interest:

- Identify any **potential risks** (community, permitting, environment, financial, technical, or operational risks and challenges), their probability and impact, and **plans to mitigate**.
- Disclose any potential **conflicts of interest** or **perceived conflicts of interest** that could influence the project's execution or integrity. This includes direct or indirect financial, personal, or professional interests that might affect decisions or outcomes, particularly those that could undermine the research's objectivity or credibility, or the perception of other activities related to OAE in Halifax performed by other researchers and organizations.