DAVID PHILLIPS FELLOWSHIPS

Je-S Guidance and Summary of Information to be submitted

This document provides information on the completion of the Je-S form and other documentation which is required.

Je-S form

- Council: BBSRC
- Document Type: Fellowship Proposal
- Scheme: Fellowships
- Select Call: David Phillips Fellowships – 9 May 2019

The Je-S form used with the David Phillips Fellowship competitions will be available on 4 February 2019, together with the associated Help Text.

Applicants are also advised to refer to the Top Tips for Applicants download.

Je-S Form for Fellowship Proposals

The table below lists the different sections of the Je-S application form and the associated Je-S Help Text. You are strongly advised to read the Help Text in full before completing details in the Je-S application form.

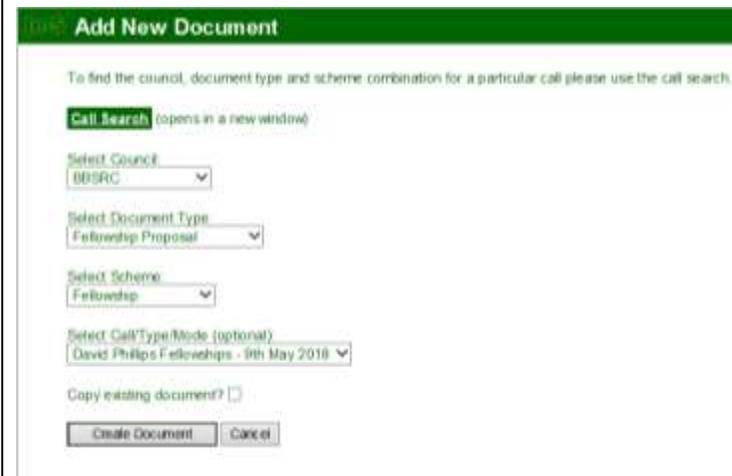|		
General Information		Before completing a BBSRC fellowship proposal applicants must read the Je-S help text associated with the scheme to which they are applying. In addition applicants must read all information at https://bbsrc.ukri.org/funding/filter/david-phillips/ which includes information on the calls and the following documents: • Fellowship handbook • Grants guide Value for money Applicants and host organisations should note that value for money is an essential criterion against which fellowship applications will be assessed, alongside excellence and other key criteria. For this competition the reviewers and Committee E will be looking for written evidence that the host organisation will contribute significant support, either financially or in-kind support if an award is made. Proposals that do not provide clear evidence that the research programme is highly competitive in terms of value for money, and in providing additional funding commitments, are unlikely to be successful. Applicants must ensure that the Partnership Details section of the Je-S proforma contains details of all institutional support that will be made available if the applicant is successful in obtaining a BBSRC award. In addition, the justification of resources attachment must clearly show why the resources requested are good value for money and why it is in BBSRC's interests to provide investment. Also letters of support from all parties contributing financial or other support should be uploaded to the proposal under the Letters of Support attachment giving full and accurate details of the commitments being made.
		The steps below show how to create the Je-S application form for the 2019 David Phillips Fellowship call:

Creating the Je-S application form		• Log into Je-S
		• Select Add New Document
		• Using the drop down options:
		     ○ Select **Council**: BBSRC
		     ○ Select **Document Type**: Fellowship Proposal
		     ○ Select **Scheme**: Fellowship
		     ○ Select **Call/Type/Mode**: David Phillips Fellowship – 9 May 2019
		     ○ Click **Create Document**
		
		Select the options shown above from the relevant drop down menus then select the 'Create Document' button and the application form will be created ready for you to complete each section.
		
		Alternatively, selecting the Call Search option and entering the name of the call will automatically populate the fields shown above with the details required to create the Je-S form:
		
		Enter the call name into the search bar then select the David Phillips Fellowship – 9th May 2019 hyperlink in the Call Name box. The relevant fields are automatically populated with the required details:
		
		Select the 'Create Document' button and the application form will be created ready for you to complete each section.

Project Details	Organisation	**Organisation** is the research organisation where the fellowship would be held. Only those organisations that have registered to submit proposals through Je-S are available for selection. If the required organisation does not appear in the list, please consult that organisation's research grant administration department regarding plans for Je-S registration. The organisation list is maintained by the Je-S Helpdesk. If an organisation appears in the list, it does **not necessarily mean that it is eligible** to apply for research grants or fellowships from the Council. Generally, research grants and fellowships are open to UK Universities and similar organisations, but eligibility can vary depending on the scheme. Check the relevant Council's funding booklet for further details and contacts concerning eligibility.
	Department	The **department** list for the organisation is centrally maintained. If the required department is not listed or is named incorrectly, **consult the organisation's research grant administration department**, who should then contact the Je-S Helpdesk.
	Your Reference	Use **Your Reference** to help distinguish easily between proposals in users' Current Documents lists. The reference is intended to be a unique identifier for the proposal and is **unrelated** to the reference that the organisation would be asked to provide if a grant were awarded. If an organisation does not have a system for referencing grant proposals, users should create their own.

	Explain your choice of host organisation	Applicants must justify their choice of proposed host institution in a clear statement not exceeding 4000 characters. This should include why the institution is the best location for the Fellow's research and personal development, and detail the commitment and support offered to the Fellow by the research organisation (e.g. in terms of access to facilities and equipment, training, research costs, mentoring etc.). This field must be completed using: • No more than 4000 characters, including spaces, tabs and character returns (2 characters) • Only the standard Je-S character set • No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly.**
Project Title		The title should be as informative as possible, capturing the essence of the research or project. It should not exceed 150 characters and must be completed. Only standard ASCII characters and a limited set of accented characters may be used (Je-S character set). Avoid using specialist characters and symbols outside the Je-S character set (e.g. mathematical symbols), because these may not transfer successfully to other computer systems.
Mode		Mode defines the type of Fellowship proposal. Further information about the various types of Fellowship supported by each Council may be found in the relevant Council's funding booklet and website. If this field is not automatically populated, please select the correct type from the drop down menu.

Start Date and Duration		The **proposed start date** and **duration** must be entered.

Ensure that the proposed **start date is realistic,** taking account of the period required by the Council to process the proposal (as published by the Council) and that required to recruit staff. Enter the proposed **duration of the Fellowship in months**, (60 months for David Phillips Fellowships).

Please note: applicants will be required to commence their fellowship, if awarded, on, or near to, the start date stipulated in their proposal, therefore applicants must ensure that they are in a position to do so. Requests to significantly alter the stated start date will be considered only in exceptional circumstances. All fellowships must commence by July at the latest following notification of an award.

The cost of a fellow's time in writing up of the final progress update may be included in the proposal, but the duration of the fellowship should not be extended to include final progress update writing up time. |
| **Fellow Details** | | The **fellow** is the individual who is applying for the Fellowship Post. Give applicant's details at the time of applying for the fellowship.

All applicants must meet the Council's eligibility requirements for the Fellowship scheme to which they are applying - check the BBSRC's Fellowship Handbook for further details and contacts concerning eligibility

Information for Non-European Economic Area Applicants – All successful applicants who require a visa to work in the UK will be eligible to be considered under the Tier 1 (Exceptional Talent) visa route (www.gov.uk/tier-1-exceptional-talent).

In line with the highly prestigious nature of the award, this visa route is designed for people who are internationally recognized as world leaders or potential world-leading talent in the fields of science and the arts and enables the holder to be both adaptable and flexible during their research in the UK.

The grant of any visa is always subject to the standard Home Office general grounds for refusal of a visa. UK Research and Innovation is able to provide additional guidance regarding the appropriate evidence required to complete the visa application process under the Exceptional Talent visa.
Please contact fellowtier1info@rcuk.ac.uk for further details |

		Other requirements are that: • only Je-S users may be selected from the searchable list • the applicant must also be the **Owner** of the document • no applicant should have an **overdue final update** on a research grant previously awarded by the Council (where applicable). If an overdue update exists, the Council will not consider further proposals from the individual • applicants must have completed and confirmed their details on Je-S in the last 12 months (see My Details for guidance) **Salary cost for Fellows may only be directly incurred; for details on entering Salary Costs see the section:** Costing Applicants: Directly Allocated and Directly Incurred
Objectives		The objectives of the proposed project should be listed in order of priority and should be those that the applicant would wish the Council to use as the basis for evaluation of work upon completion of any Fellowship awarded. Identify clear targets and timescales by which the objectives will be achieved, throughout the period of the Fellowship. This field must be completed using: • no more than 4000 characters, including spaces, tabs and character returns (2 characters) • only the standard Je-S character set • no specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems In addition, give a brief statement of your career plans and the benefits that a BBSRC fellowship will offer you and the area of science in which you propose to work. **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly**

Summary		**Note:** This Summary will be published on publicly available sites should the project be funded. Please ensure confidential information is not included in this Summary.

It is essential that the Summary is written in such a way that the aims and fit of the proposed research to BBSRC remit are clear. Failure to clearly demonstrate how the proposal meets BBSRC remit requirements may lead to the proposal being withdrawn from the round.

The Council has a responsibility to promote the public awareness and understanding of its research areas. The purpose of the Summary is to help publicise the Council's research programme to:

- Opinion-formers and policy makers;
- The general public
- The wider research community.

The summary should be written in a style that is accessible to a variety of readers, including the general public.

The summary may cover, for example:

- The principal subject of the research
- The key aims
- Where and how the research would be undertaken
- Who else would be involved

Select 'Save' from the top of the screen

If there are any validation errors address these before retrying the Save option

In the event that a Fellowship is awarded, this summary may be used for dissemination to the general public, or for press releases, and may be published on the Council's web site and other publicly available sites.

This field must be completed using:

		• No more than 4000 characters, including spaces, tabs and character returns (2 characters) • Only the standard Je-S character set • No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly.**
Technical Summary		Provide a brief technical summary of the work proposed (including the main objectives of the work and the main methods to be adopted). Summarise the proposed research in a manner suitable for a specialist reader. **Note:** This Summary will be published on publicly available sites should the project be funded. Please ensure confidential information is not included in this Summary. It is essential that the Techical Summary is written in such a way that the aims and fit of the proposed research to BBSRC remit are clear. Failure to clearly demonstrate how the proposal meets BBSRC remit requirements may lead to the proposal being withdrawn from the round. This field must be completed using: • No more than 2000 characters, including spaces, tabs and character returns (2 characters) • Only the standard Je-S character set • No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly.**
Academic Beneficiaries		Please summarise how your proposed research will contribute to knowledge, both within the UK and globally. Beneficiaries are those who are likely to be interested in or to benefit from the proposed research. List any beneficiaries from the research and give details of how the results of the proposed research would be disseminated. Please state whether the research is likely to lead to patentable or otherwise commercially exploitable results. Wherever possible, the beneficiaries **should consist of a wider group** than that of the fellows immediate professional circle carrying out similar research. Specific beneficiaries might be:

		- Researchers in other disciplines - Academic organisations - Companies, public sector bodies and others who may use the results to their advantage - Policy makers **Note:** The Academic Beneficiaries section may be published to demonstrate the impact of Research Council funded research. Please ensure confidential information is not included in this section. This field must be completed using: - No more than 4000 characters, including spaces, tabs and character returns (2 characters) - Only the standard Je-S character set - No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer Successfully to other computer systems **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly**
Exploitation		Summarise any potential for commercial exploitation or application. If it is not applicable to the application please leave blank or indicate a nil response
Partnership Details		Applicants should provide details of new or existing collaborations on which their fellowship is dependent. For each partner, a statement as to their willingness to be involved should be submitted with the application as an attachment type 'Letter of Support'. Value for money Applicants must ensure that the Partnership Details section of the Je-S proforma contains details of all institutional support that will be made available if the applicant is successful in obtaining a BBSRC award. In addition, the Justification of Resources attachment must clearly show why the resources requested are good value for money and why it is in BBSRC's interests to provide investment. Also letters of support from all parties contributing

		financial or other support should be uploaded to the proposal under the Letters of Support attachment giving full and accurate details of the commitments being made. This field must be completed using: • No more than 4000 characters • Only the standard Je-S character set • No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems
Impact Summary		The Impact Summary (4000 characters maximum) should address the following two questions: • Who might benefit from this research? • How might they benefit from this research? **Who might benefit from this research?** List any beneficiaries from the research, for example those who are likely to be interested in or to benefit from the proposed research – both directly or indirectly. It may be useful to think of beneficiaries as 'users' of the research outputs, both immediately, and in the longer term. Beneficiaries **must consist of a wider group** than that of the fellow's immediate professional circle carrying out similar research. For example: • Are there any beneficiaries within the commercial private sector who will benefit from the research? • Is there anyone, including policy-makers, within international, national, local or devolved government and government agencies or regulators who would benefit from this research? • Are there any beneficiaries within the public sector, third sector or any others who might use the results to their advantage? Examples include museums, galleries and charities • Are there any beneficiaries within the wider public? **How might they benefit from this research?**

		Describe the relevance of the research to these beneficiaries, identifying the potential for impacts arising from the proposed work. Please consider the following when framing your response: • Explain how the research has the potential to contribute to the nation's health, wealth or culture. For example: • Fostering global economic performance, and specifically the economic competitiveness of the United Kingdom? • Increasing the effectiveness of public services and policy? • Enhancing quality of life, health and creative output? • What are the potential impacts likely to be, and what is their importance? • What are the realistic timescales for the benefits to be realised, and how will this research contribute? • What research and professional skills will staff working on the project develop which they could apply in all employment sectors? Further information on Impact policies and expectations is available on the UK Research and Innovation website at: https://www.ukri.org/innovation/ The UK Research and Innovation Pathways to impact webpage and Impact policies and expectations webpage provide an indication of the potential range of impacts that can be generated from research and an indication of the potential wider beneficiaries of research. **Note:** The Impact Summary may be published to demonstrate potential impact of Research Council funded research. Please ensure confidential information is not included in this Summary.
Resource Summary		If a fellowship is awarded, the Research Councils will pay a proportion, up to £1M, of the full economic cost (fEC). The Research Organisation must ensure that any part of the full economic cost of the project not funded by the Research Council is committed to the project before it starts. This section is populated automatically, based on data input under one or more of the fund headings. The total will be the full economic cost, excluding any contributions from project partners (if applicable). The percentage of fEC to be paid by the Research Councils will be shown and the Research Council's contribution will be automatically calculated.

Costs will be rounded to the nearest pound and staff effort to the nearest quarter decimal (i.e. .00, .25, .50, .75).

Following the removal of the £50,000 equipment threshold all equipment costs will be shown under DI equipment. The fEC column will display the total cost of the equipment items requested and the RC contribution column will display the total amount being requested. Based on these amounts the system will calculate a single value showing percentage contribution being requested. An example is shown below: if the following equipment items are entered

Equipment Item	Total Costs	Amount requested from RC
Equipment Item A	100,000	100,000
Equipment Item B	75,000	50,000
Equipment Item C	25,000	12,500

Then this would be displayed on the summary screen as follows:

Fund Summary	FeC Amount	RC Contribution	%
Equipment	200,000	162,500	81%

Estates costs will be shown as a single figure (£ total for the project).
Universities that have implemented the TRAC costing methodology and have passed the Quality Assurance (QA) process should apply their own estate and indirect costs. Non-HEIs that are not required to implement TRAC must have a robust costing methodology in place that has been validated in order to apply their own estates and indirect cost rates. The standard default rates should be used where Research Organisations have not yet developed their own rates.

Directly Incurred: Staff (will include Investigators if they are Directly Incurred), Travel & Subsistence, Equipment and Other Costs.
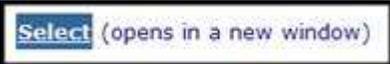
Directly Allocated: Investigators (if Directly Allocated), Estates Costs and Other Directly allocated (will include named researcher/technician posts if selected as DA).

Indirect Costs: Non- specific costs charged across all projects based on estimates that are not otherwise included as Directly Allocated costs and will be shown as a single figure (£ total for the project)

Exceptions: Items either automatically calculated at 100% fEC (Staff -Project Student) or Other Costs indicated as an Exception within the Other Directly Incurred section of the document.

Animal costs will be included in the totals of either Directly Allocated Costs Other or Directly Incurred Other depending on how these have been chosen to be attributed. **Important:** applicants proposing the use of animals in their fellowship **MUST** refer to the BBSRC Grants Guide and the Animal Use in Research webpage for details of the information they are required to provide in their proposal.

Signed statement requirement: All proposals involving animal research conducted overseas are required to submit a signed statement. This is to confirm that this research would be conducted in accordance with regulatory systems in the UK (and applicable regulation in the host country). Guidance on the details to include in the statement can be found on the Animal Use in Research webpage.

Overseas animal use: If the research involves the use of specific animals (rodents; rabbits; sheep; goats; pigs; cattle; *Xenopus*) overseas rather than in the UK, please also complete the Additional questions that can be found at NC3RS: Use of animals overseas. The completed forms are required to be attached as a letter of support in Je-S.

Please note, these additional documents are **not** required for proposals that only involve animal research being carried out in the UK.

The **Staff Effort Summary** is calculated from the specific post details and comprises the following components:

This table is populated automatically from the directly incurred and directly allocated staff details entered. The months of effort requested are displayed for the following categories of staff:

- Investigators: principal investigators (directly incurred or directly allocated)
- Research: research staff
- Technician: named and unnamed directly incurred technician posts
- Other Staff: named and unnamed directly incurred other staff posts

		• Visiting Researchers: visiting researchers where salary costs have been requested (some Research Councils only) • Students: project studentships (some research councils only) **NOTE: Students may not be requested as part of a David Phillips Fellowship application.** **However, please note that although all of these categories will be displayed, not all staff types are applicable to all schemes** **Research Council Facilities**: The cost of all Research Council facilities requested will be displayed as a Total cost below the Staff Effort Summary Table.
Other Support		Enter details of any support sought or received from any other source for this or other research in the same field. Complete all fields for support either received or pending a decision. BBSRC fellowships may not be used to supplement or be supplemented by any other fellowship. Give details of any other award expected during the period of the fellowship. Also give details of any award you have currently applied for, or are intending to apply for. **Note:** DPF applicants are not eligible to apply to any additional BBSRC fellowship competitions in the same year. **Additionally, applicants for a BBSRC David Phillips Fellowship are not permitted to simultaneously apply to the UK Research and Innovation Future Leaders Fellowship call.** If a similar research programme has been submitted or is about to be submitted to any other research grant or fellowship funding organisation by you or by any other researcher, full details should be provided in a covering letter and submitted with the application form. **Note:** Contributions from project partners should not be entered here. They should be detailed in the Project Partners section.
Costings	**General Guidance**	All costs that contribute to the full economic cost (fEC) of the proposal should be included for allowable cost categories (these are scheme-specific). The cost headings are:

Directly Incurred: these are costs that are explicitly identifiable as arising from the conduct of a project, are charged as the cash value actually spent and are supported by an audit record. They include:

- **Staff:** payroll costs requested for the fellow and, if applicable, for any staff (full or part-time) who will work on the project, whose time can be supported by a full audit trail during the life of the project. **Note: Students may not be requested as part of a David Phillips fellowship application**

- **Travel and Subsistence:** funds for travel and subsistence for the fellow (and, if applicable, other staff who work on the project), where these are required by the nature of the work

- **Equipment:** the cost of individual items of equipment dedicated to the project costing more than £10,000 (including VAT). Against each equipment item the applicant can specify the total cost of the equipment and the amount being requested from the Council. All equipment costs will now be shown under the Directly Incurred heading

- **Other Costs:** costs of other items dedicated to the project, including consumables, books, survey fees, purchase/hire of vehicles or recruitment and advertising costs for staff directly employed on the project. Items of equipment costing less than £10,000 should also be included under this heading. **Note:** Any Earlham Institute facility sequencing costs should be entered into this heading. **Important:** Applicants must include the costs of attendance at a suitable course in scientific leadership and laboratory management under this heading, please see the [Fellowships Handbook](#) for details.

Note: The Research Councils do not include provision for publication costs.

Directly Allocated: these are the costs of resources used by a project that are shared by other activities. They are charged to projects on the basis of estimates rather than actual costs and do not represent actual costs on a project-by-project basis. They include:

- **Applicants:** the cost of applicants other than fellows whose time charged to the project will be based on estimates rather than actual costs

- **Estates:** these costs may include building and premises costs, basic services and utilities and any clerical staff, equipment maintenance or operational costs not already included under other cost headings

- **Other Directly Allocated Costs:** these may include, for example, the costs of shared technical staff or institutional research facilities, such as equipment or IT systems

Indirect Costs: these include non-specific costs charged across all projects based on estimates that are not otherwise included as Directly Allocated costs. They include the costs of the Research Organisation's administration, such as personnel, finance, library and some departmental services.

Exceptions: these are Directly Incurred costs that Research Councils will fund in full (i.e. at 100%), subject to actual expenditure incurred, or items that are outside fEC.

All costings should be at current prices, inclusive of VAT and other taxes where applicable, with no allowance for inflation. Any allowance for inflation that has been included in the full economic costing of the proposal by the Research Organisation must be excluded. The Research Councils may include an allowance for inflation if a grant is awarded.

All resources must be justified. The justification of resources should be completed as a separate document attached to the proposal, please refer to the Attachments section for details of the information that should be included in the document. All costs associated with the project must be justified, with the following exceptions:

- Estates costs
- Indirect costs
- Costs of any Directly Allocated applicants' salaries (not time, which must be justified)
- Some other Directly Allocated costs where no alternative resource is available, e.g. general technical services, shared laboratory equipment

Queries Regarding fEC Proposals

The Je-S Helpdesk should be used **as the first contact point for the Councils**.

Tel: 01793 444164 E-mail: JeSHelp@rcuk.ac.uk

Queries regarding the details of costing a project will have to be referred back to the RO contact since these will be specific to each RO. Otherwise, the Je-S Helpdesk will use its contacts within the Councils to obtain a response.

Staff	Directly Allocated	Input costs for Researchers and Technicians who will be working directly on the project, if their time charged to the grant will be based on estimates rather than actual costs. Where costs are actual, auditable and verifiable, they should be costed under the Directly Incurred heading.
	Directly Incurred	This section is relevant for the following Directly Incurred rules
	Researcher	A researcher will be dedicated to the project or whose time working on the project can be fully supported by an auditable record for its duration. Researchers may be named or unnamed, but should be requested at a salary level commensurate with the skills, responsibilities, expertise and experience necessary to carry out the proposed research activity. This level will need to be fully justified within the case for support. - The total salary costs for any individual on all Research Council grants must not exceed 100% FTE - Where it is expected that individuals will be promoted during the lifetime of the grant provision may be made in the cost sought - Only include details of the payroll costs requested from the Council for staff, full or part-time, whose time can be supported by a full audit trail during the life of the project - Include only the salary costs for the time to be spent working on this project - Salaries should be entered at current rates. Salary increments over the period of the project should be taken into account, but possible future pay awards should **not** be anticipated - All Directly Incurred staff must be justified in the Case for Support **Completing the section on the Je-S System** Select the **Add New Researcher Item** A new screen will open **Specify by name or Post identifier? :**

If a person has not been identified for the post please select Post Identifier and then provide the identifier in the Text box which now appears

If specified by name then choose the option [Select (opens in a new window)]

A new screen will open.

To the right of the Name box click on **Select.**

- **A new screen will open.** Enter the **Surname** and **Initials.** The search will default to only search for people at the same organisation as the organisation selected within the Project Details. The search can be widened to include people at other organisations by deselecting the **tick box**

- Only Je-S account holders may be selected from the searchable list

The system may display several names. To select the correct person click on the highlighted detail on the left hand side of the screen. The Name field will now be populated

- If they do not have an account then the message "No Person Found" will be displayed. In which case select the Post Identifier option and type the name details directly into the box (Max 40 characters)

Cost Type: Select either Directly Incurred or Directly Allocated

Directly Incurred should only be selected if time spent working on the project will be supported by an auditable record for its duration. When a person is contracted to work 100% of their time on a single project (whether they are working full-time or part-time) timesheets are not necessary. In all other cases, timesheets or project records are required.

Directly allocated should be selected if the Researcher's time charged to the grant will be based on **estimates**rather than actual costs.

Start Date: the date of starting on the project.

		The Date will default to the proposed project date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format. **Duration Months:** The period, in whole months (or system will round down) to be spent on the Project. **FTE%:** This is the percentage of time that the post holder will spend working on the project based on a full time post. This does not relate to the contracted working hours of the post holder. For example, someone that is contracted to work at the organisation for 50% of full time and will be spending the whole of this time devoted to this project should put 50% as the FTE%. **Scale:** Use the Research Organisation's pay scale. This can be alpha or numeric. **Effective Date of Scale:** The date on which the Scale came into use. The Date will default to the proposed project start date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format. **Increment Date:** The Date will default to the proposed project start date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format. **Starting Salary:** Salary when starting on the project (numeric). **London Allowance**: If in receipt of London Allowance include the £ Value (numeric). **Super Ann & NI:** Superannuation and National Insurance costs over the duration of the project. (numeric). **Total Cost:** Enter the total cost of the Post over the period of the Project (numeric).

Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted
| Document Actions | Cancel | Prev | Save | Next |

If any section is not completed then the relevant validation warning will be displayed.

Please enter the correct information and **Save. When the section has been completed then the** ✅ icon against Researcher on the **Document Menu** indicates that the section has been successfully completed and passes validation.

If any section is not completed then the relevant validation warning will be displayed:

Please enter the correct information and Save. When the section has been completed then the ✅ icon against Researcher on the Document Menu indicates that the section has been successfully completed and passes validation.

	Technician	This is for funding only for technicians who will be dedicated to the research project, or whose time working on the project can be fully supported by an auditable record for its duration. Funding for pool technicians or for technicians whose time will be shared with other projects/activities and will not be supported by an auditable record should be requested under the Other Directly Allocated Costs heading.

- The total salary costs for any individual on all Research Council grants must not exceed 100% FTE.
- Where it is expected that individuals will be promoted during the lifetime of the grant provision may be made in the cost sought
- Only include details of the payroll costs requested from the Council for staff, full or part-time, whose time can be supported by a full audit trail during the life of the project
- Include only the salary costs for the time to be spent working on this project
- Salaries should be entered at current rates. Salary increments over the period of the project should be taken into account, but possible future pay awards should **not** be anticipated
- All Directly Incurred staff must be justified in the Case for Support

Completing the section on the Je-S System

Select the **Add New Technician Item**

A new screen will open

Specify by name or Post identifier? :

If a person has not been identified for the post please select Post Identifier and then provide the identifier in the Text box which now appears

If specified by name then choose the option **Select** (opens in a new window)

A new screen will open.

To the right of the Name box click on **Select.**

- **A new screen will open.** Enter the **Surname** and **Initials.** The search will default to only search for people at the same organisation as the organisation selected within the Project Details. The search can be widened to include people at other organisations by deselecting the **tick box.**

Only Je-S account holders may be selected from the searchable list

- The system may display several names. To select the correct person click on the highlighted detail on the left hand side of the screen. The Name field will now be populated

- If they do not have an account then the message "No Person Found" will be displayed. In which case select the **Post Identifier** option and type the name details directly into the box (Max 40 characters)

Cost Type: Select either Directly Incurred or Directly Allocated

Directly Incurred should only be selected if time spent working on the project will be supported by an auditable record for its duration. When a person is contracted to work 100% of their time on a single project (whether they are working full-time or part-time) timesheets are not necessary. In all other cases, timesheets or project records are required.

Directly allocated should be selected if the Technician's time charged to the grant will be based on **estimates**rather than actual costs.

Start Date: the date of starting on the project.

The Date will default to the proposed project date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.

Duration Months: The period, in whole months (or system will round down) to be spent on the Project.

FTE%: This is the percentage of time that the post holder will spend working on the project based on a full time post. This does not relate to the contracted working hours of the post holder. For example, someone that is

contracted to work at the organisation for 50% of full time and will be spending the whole of this time devoted to this project should put 50% as the FTE%.

Scale: Use the Research Organisation's pay scale. This can be alpha or numeric.

Effective Date of Scale: The date on which the Scale came into use.

The Date will default to the proposed project start date. To amend this click on the calendar icon ▦Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.

Increment Date:

The Date will default to the proposed project start date. To amend this click on the calendar icon ▦Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.

Starting Salary: Salary when starting on the project (numeric).

London Allowance: If in receipt of London Allowance include the £ Value (numeric).
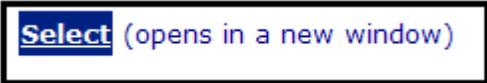
Super Ann & NI: Superannuation and National Insurance costs over the duration of the project. (numeric).

Total Cost: Enter the total cost of the Post over the period of the Project (numeric).

Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted
Document Actions | Cancel | Prev | Save | Next

If any section is not completed then the relevant validation warning will be displayed.

		Please enter the correct information and **Save. When the section has been completed then the** ✅ icon against Technician on the **Document Menu** indicates that the section has been successfully completed and passes validation. **If any section is not completed then the relevant validation warning will be displayed:** Please enter the correct information and Save. When the section has been completed then the ✅ icon against Technician on the Document Menu indicates that the section has been successfully completed and passes validation.
	Other Staff	Funding only for staff who will be dedicated to the research project, or whose time working on the project can be fully supported by an auditable record for its duration. Funding for pool staff or for staff whose time will be shared with other projects/activities and will not be supported by an auditable record should be requested under the Other Directly Allocated Costs heading. **Completing the section on the Je-S System** Select the **Add New Other Staff Item** A new screen will open **Specify by name or Post identifier? :** If a person has not been identified for the post please select Post Identifier and then provide the identifier in the Text box which now appears If specified by name then choose the option **Select** (opens in a new window) **A new screen will open.** To the right of the Name box click on **Select.**

- **A new screen will open.** Enter the **Surname** and **Initials.** The search will default to only search for people at the same organisation as the organisation selected within the Project Details. The search can be widened to include people at other organisations by deselecting the **tick box.**

- Only Je-S account holders may be selected from the searchable list

  - The system may display several names. To select the correct person click on the highlighted detail on the left hand side of the screen. The Name field will now be populated.

  - If they do not have an account then the message "No Person Found" will be displayed. In which case select the **Post Identifier** option and type the name details directly into the box (Max 40 characters)

Start Date: the date of starting on the project.

The Date will default to the proposed project date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.

Duration Months: The period, in whole months (or system will round down) to be spent on the Project.

FTE%: This is the percentage of time that the post holder will spend working on the project based on a full time post. This does not relate to the contracted working hours of the post holder. For example, someone that is contracted to work at the organisation for 50% of full time and will be spending the whole of this time devoted to this project should put 50% as the FTE%.

Scale: Use the Research Organisation's pay scale. This can be alpha or numeric.

Effective Date of Scale: The date on which the Scale came into use.

The Date will default to the proposed project start date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.

		Increment Date:
		The Date will default to the proposed project start date. To amend this click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.
		Starting Salary: Salary when starting on the project (numeric).
		London Allowance: If in receipt of London Allowance include the £ Value (numeric).
		Super Ann & NI: Superannuation and National Insurance costs over the duration of the project (numeric).
		Total Cost: Enter the total cost of the Post over the period of the Project (numeric).
		Select "Save" from the top of the screen
		If any section is not completed then the relevant validation warning will be displayed.
		Please enter the correct information and **Save. When the section has been completed then the** icon against Other Staff on the **Document Menu** indicates that the section has been successfully completed and passes validation.
		If any section is not completed then the relevant validation warning will be displayed: Please enter the correct information and Save. When the section has been completed then the icon against Other Staff on the Document Menu indicates that the section has been successfully completed and passes validation.
		All Directly Incurred staff must be justified in the Case for Support

Resources	Equipment	**Background Information**
		Single capital items of equipment costing less than £10,000 (inclusive of VAT) should NOT be included in this section. Please include in Other Directly Incurred costs.
		Instrument Development Costs should be applied for in the same way as other equipment items with the actual costs and the amount requested from the Council being provided.
		Completing the section on the Je-S System:
		Select **Add New Equipment Item**
		A new screen will open.
		Description: (max of 255 characters including spaces and returns) The Description should identify the item of equipment. This Description will appear in lists within the proposal so should aid identification of the equipment item.
		Country of Manufacture: This will default to United Kingdom, if you need to change this use the drop down list to select another country.
		Delivery Date: To add the date click on the calendar icon Clicking on the Month at the top or the arrows to change the year and month as appropriate. Alternatively enter the date in the DD/MM/YYYY format.
		Charge: The total Item cost.
		Import Duty: Provide cost of duty applied (can include pence e.g. £10.50)
		VAT: Provide cost of duty applied (can include pence e.g. £10.50)

Amount Sought: This is the amount of funding requested from the Research Council for this item of Equipment.

Instrument Development: Select the box only if the Equipment item is Instrument Development. Further information about Instrument Development can be found in the UK Research and Innovation Equipment Guidance https://www.ukri.org/files/funding/tcs/equipment-guidance-pdf/

Having completed the screen:

Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted
Document Actions | Cancel | Prev | Save | Next

If there are any validation errors address these before retrying the Save option.

You will now be returned to the Equipment summary screen. Additional Items of Equipment should be added via **Add New Item**. You can Edit or Delete items from this screen.

The summary page will indicate whether Equipment Quotes and a Business Case are required.

Quotations are mandatory for equipment items above a threshold of £115k (net VAT and Import Duty (£138k inc VAT)). Where the actual cost of the equipment item exceeds £115k three quotations must be provided. For items where the actual cost is between £25k (including VAT and Import Duty) and £115k it is optional to provide up to three quotations.

A Business case is required for all items of equipment above £115k (net of VAT and Import Duty) All requests for single capital items of equipment should be accompanied by a **2 page business case** outlining the strategic need for the equipment. UK Research and Innovation will decide the strategic location for these items and will potentially fund them at 100%. Each Council will have flexibility in relation to the funding of equipment, to negotiate with potential grant recipients to achieve best value from the limited funds at its disposal.

The Equipment Quotes and Business Case should be added within the Equipment section.

There is a "Template" of the information to be provided in the Business Case which is available on the UK Research and Innovation website (search for Equipment Guidance https://www.ukri.org/files/funding/tcs/equipment-guidance-pdf/)

To upload the **Quotes** select the link Quotes:

Quotes
Required: 3
Attached: 0

A new screen will open.

Then select the **Upload quotation** option. Browse to the file location and provide a Description in the box. Please use a File name which will enable identification as a quote from a company. Select **Save**. Add the remaining quotations using the **Upload quotation** option. When the Quotes have been added you will be returned to the Equipment summary screen and the attachments will be indicated:

Quotes
Required: 3
Attached: 3

If a Business case is required select the Business case link:

Business
Case
Required:
Yes
Attached: No

A new screen will open.

| | | Select **Upload business case** option. Browse to file location and provide a Description. Select **Save**.

When the section has been completed and all the mandatory attachments have been uploaded then the ✅ **icon against Equipment on the Document Menu** indicates that the section has been successfully completed and passes validation.

Justification required for all items of equipment costing between £10k and £115k (net of VAT and Import Duty) The research organisation will need to provide extra justification (in the Justification of Resources (or for STFC in the Case for Support) for these items, providing evidence of an evaluation of the use of existing relevant capital assets at their organisation, others in their locality or whom they have strong links with. They will be expected to make a contribution towards the cost of the equipment. Given that capital provision across councils has been reduced by about 50%, contributions of this order will be expected.

*Please note that the above limits apply to the total value of the equipment, not to the value of the equipment once the research organisation contribution has been taken off (i.e. an item of equipment costing £12k in total with a £6k research organisation contribution would not fall under the £10k to £115k threshold). All costings should be at current prices including VAT and Import Duty with no allowance for inflation.

For further guidance on the UK RI Efficiency 2011-15: Ensuring Excellence with Impact: https://www.ukri.org/ |

| | **Travel and Subsistence** | A proposal may include **funds for travel and subsistence** for use where these are required by the nature of the work.

Identify separately those journeys that will be taken within the UK and those that will be take outside the UK.

- **All journeys** should be costed by the most suitable and economical means and should be at **current prices** with no allowance for inflation
- Separately identify journeys to be made within and outside the UK.
- Identify the purpose and destination for each journey for which funds are sought
- All journeys should be fully justified in the Justification of Resources.
- Subsistence rates, both UK and overseas, should be those **applicable within the host organisation** for staff travel and subsistence |

		- Where there are multiple journeys to the same destination for the same purpose please annotate as e.g. **London - Paris x 2** - Costs for attendance at conferences may be included where such attendance will be of direct benefit to the research or the personal development of the Fellow . Conferences should, as far as possible, be individually identified in the proposal In addition the costs of attending BBSRC's biennial fellows' conference and progress update meetings, where applicable, should be included.
	Other directly incurred costs	List any other directly incurred costs in this section, with a brief description of each item, or group of items. Items should be **specified** as far as possible in the attachments '**Case for Support' and 'Justification of resources'** and **justified** in terms of requirement for the research proposed. Examples of items that may be included under this heading are: - Consumables - please specify - Consultancy fees - Field work fees/subjects/informants - Training course fees - Computing - include recurrent costs of computing dedicated to each project only, e.g. software licences. Do not include any costs associated with the use of the host organisation's central computing facilities. - Equipment - only items costing less than £10,000 (including VAT) - Equipment-related items (if not included as part of the Research Organisation's estates costs), e.g. - maintenance (external contracts/agreements) - relocation - rental charges (specify equipment or service being used and basis of charging) **access charges for medium or small research facilities (specify the nature of the facility and the basis of charging). In accordance with TRAC, the total FEC of a grant containing charges for use by the project of existing research facilities must not include any net depreciation costs if the facility was purchased with Research Council funding** - Glass house consumables - Recruitment and advertising costs for staff directly employed on the project - Purchase/hire/running costs of vehicles if necessary for the project

- Publication costs for outputs such as monographs, critical editions, volumes and catalogues. These will need to be fully justified within the application

Note : publication costs for peer review journal articles and peer reviewed conference papers will not be eligible.

- Childcare costs beyond that required to meet the normal contracted requirements of the job, and that are directly related to the project, may be requested as a directly incurred cost if the institutional policy is to reimburse them. However, childcare costs associated with normal working patterns may not be sought
- Insurance costs are expected to be included as part of indirect costs, but may be requested as directly incurred costs where it can be shown that the cost arises specifically as a result of the project funded by the grant, is not covered by existing institutional policies, and is separately identifiable and audited
- Research Council Facilities. **Note: Earlham Facility usage costs should be entered under this heading, see the Research Council Facilities section below for details.**

Overseas Centre Costs

If the fellow plans to spend six months or more at an overseas centre a contribution to the centre's estates and indirect costs can be requested as other directly incurred costs. These can be requested at 100%.

Costs that are not admissable under directly incurred

There are some costs that should not be requested under directly incurred on the grounds that Councils expect them to be covered by the indirect costs of the institution. These include employment-related costs of investigators (excluding fellows), such as maternity, paternity and sick pay; redundancy costs; the costs of minor items of office consumables and any costs falling outside the period of the grant (such as proposal preparation costs and dissemination costs – although recruitment costs may be requested). Otherwise, costs may be requested under directly incurred if they meet the general requirement that they are project- specific, auditable costs.
Councils recognise that some Research Organisations may have costing arrangements that enable them to put costs under directly incurred that in other institutions would be within indirect costs.

Further information is available on the UK Research and Innovation website at
https://www.ukri.org/files/legacy/documents/fecfaq-pdf/

Completing the section on the Je-S System:

Select Add New Other Directly Incurred Costs Item

A new screen will open.

Description: (max of 255 characters including spaces and returns). The description should identify the item (s). The Description will appear in lists within the proposal so should aid identification of the Directly Incurred item.

Is Exception?: Indicate if the item is exempt from the 80% fEC funding rule. Please note that the majority of schemes (except from ESRC and MRC) do not permit this therefore you should only select the 'Is Exception' option if it is specifically mentioned in the scheme guidance document.

Amount: Provide the cost of the item(s) (numeric)

Items should be **specified** as far as possible in the attachments '**Case for Support**' and '**Justification of Resources**'and justified in terms of requirement for the research proposed.

Having completed all the fields Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted

Document Actions   Cancel   Prev   Save   Next

If any section is not completed then the relevant validation warning will be displayed:

Please enter the correct information and Save. When the section has been completed then the ✔ icon against the Other Directly Incurred Costs heading on the Document Menu indicates that the section has been successfully completed and passes validation

	Other directly allocated costs	This section may include, for example,

This section may include, for example,

- The salary costs of support staff working on the project, full or part-time, whose activity is not supported by an auditable record
- A share of the costs of departmental support staff whose work supports a range of projects and activities, including infrastructure technicians
- The costs of access to major or small research facilities attributed on the basis of charge-out rates. In accordance with TRAC, the total FEC of a grant containing charges for use by the project of existing research facilities must not include any net depreciation costs if the facility was purchased with Research Council funding

Please note that input is restricted to one item per category below with the exception of Research Facilities/Existing Equipment. Select from the list of items given.

List item	Guidance
Pool staff costs	Costs for research, technical, administrative and other support staff, whose costs are not included in the estates or indirect costs and whose time is shared across several projects or activities and will not be supported by an auditable record. The need for these resources (but not the basis of costing) must be justified in the Case for Support/Justification of Resources.
Research facilities/existing equipment	Charge out costs for use of major or small research facilities. The need for the requested amount of access to the facility/must be justified in the Case for Support/ Justification of Resources, but you do not need to justify the charge out rates. **Multiple entries are allowed for this category.**
Infrastructure technicians	Infrastructure technicians do not require justification in the Case for Support
Animal costs	The animal costs section of the form must be completed. This section will then be populated automatically. The need for animal costs must be justified in the Case for Support/Justification of Resources. **Important:** applicants proposing the use of animals in their fellowship **MUST** refer to the BBSRC Grants Guide and the Animal Use in Research

	webpage for details of the information they are required to provide in their proposal.
Other	Any other resources that will be used by the project but will be shared by other projects/activities and will be charged to the project on the basis of estimates rather than actual costs. A description should be provided and the need for these resources (but not the basis of costing) must be justified in the attachments Case for Support/Justification of Resources

Completing the section on the Je-S System:

Select **Add New Other Directly Allocated Costs Item**

A new screen will open.

Select from the drop down list on the right hand side of the Description Box.

Amount: Enter the total cost (numeric)

The need for these resources (but not the basis of costing) must be justified in the attachment "Justification of Resources"

Having completed all the fields Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted
| Document Actions | Cancel | Prev | Save | Next |

If any section is not completed then the relevant validation warning will be displayed:

Please enter the correct information and Save. When the section has been completed then the ✅ icon against the Other Directly Allocated Costs heading on the Document Menu indicates that the section has been successfully completed and passes validation.

	Research Facilities/Existing Equipment	Charge out costs for use of major or small research facilities. The need for the requested amount of access to the facility must be justified in the Case of Support/Justification of Resources, but you do not need to justify the charge out rates. **Multiple entries are allowed for this category.** Please see the BBSRC Grants Guide for details. To complete the section on the Je-S System Select **Add New Research Facilities/Existing Equipment Item** **A new screen will open.** **Description: (maximum of 100 characters including spaces and returns)** The Description should identify the Facility/item of equipment. This Description will appear in lists within the proposal so should aid identification of the items. **Amount:** This is the amount of funding requested from the Research Council for this item. Numeric value which can include pence e.g. £10.50 Having completed the screen: **Select "Save" from the top of the screen** Home: Documents: Document List: Not Submitted Document Actions Cancel Prev Save Next If there are any validation errors address these before retrying the Save option. You will now be returned to the Research Facilities/Existing Equipment summary screen. Additional Items should be added via **Add New Research Facilities/Existing Equipment Item** You can Edit or Delete items from this screen.

| | **Animal Costs (if applicable)** | Completing the Animal Costs Section on the Je-S System.

Signed statement requirement: All proposals involving animal research conducted overseas are required to submit a signed statement. This is to confirm that this research would be conducted in accordance with regulatory systems in the UK (and applicable regulation in the host country). Guidance on the details to include in the statement can be found on the [Animal Use in Research](#) webpage.

In addition, the National Centre for the Replacement, Refinement and Reduction of Animal in Research (NC3Rs) has produced checklists for specific species. These checklists have been developed to assist in the evaluation of welfare standards so that applicants can more easily determine the UK standards for a given species (rodents; rabbits; sheep; goats; pigs; cattle, *Xenopus*), please see the specific guidance here: https://www.nc3rs.org.uk/use-animals-overseas. If the research will use these species then please complete the relevant checklist/s and attach to the application as a Letter of Support. Compliance will be assessed during peer review and implementation of the principles in the guidance will be a condition of funding.

Please note, these additional documents are **not** required for proposals that only involve animal research being carried out in the UK.

Applicants are strongly advised to refer to the BBSRC [Animal use in research](#) webpage for additional guidance regarding animal use.

Select **Add New Animal Costs Item**

A new screen will open.

To the right of the **Species** box select the drop down menu
Select the required Species by clicking on to it to highlight it. The options available are: |

		Fish Rabbit Amphibian Cow Reptile Pig Bird Sheep Rat Poultry Mouse Guinea Pig Other Rodent Other Animal **Type & Microbiological Quality:** Please provide details **Is Genetically Altered?:** If the animal species has been genetically altered then click in the box to indicate a Tick **Costs:** **Number Purchased:** Enter the Amount in the box. The value should be numeric. **Average Cost per Animal Purchased:** The costs of the animal levied by the suppliers including where appropriate transport and handling charges. Enter the averaged amount in the box. The value should be numeric and may include pence in the format e.g. £100.50 **Purchased Cost Type:** Click in either the Directly Incurred (the actual costs) or Directly Allocated Cost box (estimated costs). **Sub Total: £** This will be entered by the System once the screen has been completed. **Number Bred:** Enter the Amount in the box. The value should be numeric. **Average Cost per Animal bred (£):** The cost of the animal and associated costs **Bred-Cost Type:** Click in either the Directly Incurred (the actual costs) or Directly Allocated Cost box (estimated costs)

Sub Total: £ This will be entered by the System once the screen has been completed.

Maintenance Duration: This should be the average length of time the animals are being used and is added as a numeric Value (Number of weeks).

Weekly Maintenance Costs (£): This is the **total** weekly maintenance cost of **all** the animals of this **species** on this proposal. It should be added as a numeric Value.

Weekly maintenance costs should include feed, bedding, cage/pen/equipment maintenance and including a proportionate share of animal house staff (Staff specific to aspects of the research project should be added to the appropriate staff resources section).

Maintenance - Cost Type: Click in either the Directly Incurred (the actual costs supportable by an auditable record) or Directly Allocated Cost box (estimated Costs).

Sub Total: £ This will be entered by the system once the screen has been completed.

Calculate: When all the fields have been completed select the Calculate option.

Total Cost: The System will populate the Sub-total and Total Cost sections.

Having completed the screen:

Select "Save" from the top of the screen

Home: Documents: Document List: Not Submitted

Document Actions | Cancel | Prev | Save | Next

If there are any validation errors address these before retrying the Save option.

You will now be returned to the Animal Costs summary screen. Additional Items should be added via **Add New Animal Costs Item**

You can Edit or Delete items from this screen.

When the section has been completed the ✅ icon against Animal Costs on the Document Menu indicates that the section has been successfully completed and passes validation.

		Important: applicants proposing the use of animals in their fellowship **MUST** refer to the BBSRC Grants Guide and the Animal Use in Research webpage for details of the information they are required to provide in their proposal. Failure to provide the information requested above and in the Grants Guide may hinder the assessment of an application.
Animal Species		If the research involves the use of non-human primates, dogs, cats, pigs and/or equidae, additional information must be given in the **supporting information** section. For species other than non-human primates, dogs, cats, pigs and/or equidae, you must fully justify the choice of species and numbers of all animals required, including power calculations where appropriate. **Important:** applicants whose proposed research includes the use of pigs should refer to the NC3Rs 'Standardised questions on the use of pigs' download on the NC3RS: Use of animals overseas webpage. The answers to any questions relevant to the proposed research must be provided within the proposal. These may be provided within the Animal Species section of the Je-S form, within the Case for Support and/or within other relevant sections of the form. **Note:** NC3Rs is currently reviewing the use of pigs on BBSRC grant proposals only. Estimates of the number of animals needed should, where possible, take into account the likely magnitude of the effect, the required statistical significance and power, and the factors that might affect this. Other points that must be addressed include: • Why is animal use necessary - are there any other possible approaches? • Why is this species most appropriate?

		• What humane endpoints have been identified? Please note that this requirement applies whether or not the animals are to be purchased with funds requested within the proposal itself. **Signed statement requirement:** All proposals involving animal research conducted overseas are required to submit a signed statement. This is to confirm that this research would be conducted in accordance with regulatory systems in the UK (and applicable regulation in the host country). Guidance on the details to include in the statement can be found on the <u>Animal Use in Research</u> webpage. **Overseas animal use:** If the research involves the use of specific animals (rodents; rabbits; sheep; goats; pigs; cattle; *Xenopus*) overseas rather than in the UK, please also complete the Additional questions that can be found at <u>NC3RS: Use of animals overseas</u>. The completed forms are required to be attached as a letter of support in Je-S. These checklists have been developed to assist in the evaluation of welfare standards so that applicants can more easily determine the UK standards for a given species. Compliance will be assessed during peer review and implementation of the principles in the guidance will be a condition of funding. Please note, these additional documents are **not** required for proposals that only involve animal research being carried out in the UK. Applicants are strongly advised to refer to the BBSRC <u>Animal use in research</u> webpage for additional guidance regarding animal use.
Research Council Facilities		All schemes which include the Research Council Facilities section require the applicant to either tick the box to confirm that facilities are not relevant to the proposal or else complete the section. Each relevant facility should be selected from the drop down list and costs/units and proposed usage (mandatory for BBSRC, NERC and STFC schemes) as appropriate. For the STFC large-scale facilities i.e CLF, Diamond, ESRF, ILL and ISIS, which are free at the point of access, enter "0" for cost, units and proposed usage. There is an "other" option available for all but NERC and this should be used where a relevant facility does not currently exist in the drop down list. Where "other" is selected as an option it is then mandatory for the full name of the facility to be provided in the proposed usage field. Some facilities require a mandatory attachment type of "Technical Assessment" to be uploaded when selected from the list as follows:

			BBSRC:
			ARCHER
			National Wind Tunnel Facility
			Research Data Facility (RDF)
			Earlham Institute*
			Ensure that the requirements can be met before the fellowship proposal is submitted.
			When requesting beam time on the SRS at Daresbury Laboratory or at Diamond, please indicate in your case for support.
			a) Which facility
			b) Which beam line
			c) Which station is required
			This will facilitate the technical assessment of your proposal by STFC staff.
			Applying for High performance computing (HPC) facilities
			Applicants intending to apply for time on the HECTor/ARCHER high performance supercomputing facilities should contact BBSRC (postdoc.fellowships@bbsrc.ac.uk) in the first instance for information on how to apply and how access should be incorporated into your proposal.
			For further information visit www.archer.ac.uk
			* Earlham facility usage costs should be entered under The Genome Analysis Centre (TGAC). Complete the Units and Proposed usage section but include the costs under the Other Directly Incurred Costs section:

Estates and Indirect Costs		Estates and Indirect Costs are a single value and do not require justification in the case for support. The principle behind FEC funding is that the Research Organisations should indicate in their grant proposals the full economic cost of a project. Research Councils then pay a percentage (80% for most fund headings) of this sum, which includes an attribution of the cost of academic staff time and the institutions facilities, estates & indirect costs. **Estates** Estates costs cover those costs related to buildings and premises, including capital (depreciation), maintenance, utilities costs, cleaning, security and safety. Applicants should obtain these costs from their Research Organisation (RO). They will be calculated by institutions using their own cost rates and these will vary across institutions. Where an individual will be working away from the Research Organisation on long-term secondment for a period in excess of six months during the project, estates costs should not be charged for the period of secondment. Estates costs may be included for overseas visitors, regardless of whether the support being requested includes a salary contribution or is only travel and subsistence. Estates costs may not be included where the visiting researcher is from another UK Research Organisation. Estates Costs FAQ can be found at https://www.ukri.org/files/legacy/documents/fecfaq-pdf/ To complete the Section on the Je-S System: Enter the Amount in the box. The value should be numeric and may include pence in the format e.g. £100.50. The amount should be 100% FEC value, the 80% value will be displayed automatically in the Resource Summary table. **Select "Save" from the top of the screen**

If any section is not completed then a validation warning will be displayed.

Please enter the correct information and **Save. When the section has been completed then the** ⊘ icon against the Estates Costs on the **Document Menu** indicates that the section has been successfully completed and passes validation

Non-university organisations are not expected to use the Transparent Approach to Costing (TRAC) methodology, but Research Councils require a validation process to ensure that non-university costing methodologies are robust. For Research Council Institutes, validation will be by the host Research Council. Default rates are available for use if non-university research organisations are unable to demonstrate that their costing methodologies are robust.

The standard default rates should be used where Research Organisations have not developed their own rates; these are publicised at:https://www.ukri.org/about-us/policies-and-standards/funding-assurance-programme/

Indirect Costs
Indirect costs cover the costs of the Research Organisation's management and administrative services, including the personnel and finance departments, library, central computing and some departmental services; plus elements of academic research support time.

Applicants should obtain these costs from their Research Organisation (RO). They will be calculated by institutions using their own cost rates and these will vary across institutions.

Indirect costs may be included for overseas visitors, regardless of whether the support being requested includes a salary contribution or is only travel and subsistence. Indirect costs may not be included where the visiting researcher is from another UK Research Organisation.

Indirect Costs FAQ can be found at: https://www.ukri.org/files/legacy/documents/fecfaq-pdf/

To complete the Section on the Je-S System:

		Enter the Amount in the box. The value should be numeric and may include pence in the format e.g. £100.50. The amount should be 100% FEC value, the 80% value will be displayed automatically in the Resource Summary table. **Select "Save" from the top of the screen** Home: Documents: Document List: Not Submitted Document Actions Cancel Prev Save Next **If any section is not completed then a validation warning will be displayed:** Please enter the correct information and **Save. When the section has been completed then the** ⊘ icon against the Visiting Researcher on the **Document Menu** indicates that the section has been successfully completed and passes validation.
Classifications	**Research Committee**	Committees' remits are available here: https://bbsrc.ukri.org/about/governance-structure/committees/. **Currently Committee E is not available for selection. Please select the Committee most relevant to your research area.**
	Strategic Priorities	These are available here: https://bbsrc.ukri.org/news/planning/. BBSRC Remit Guidance: https://bbsrc.ukri.org/research/science-remit/.
	Keywords	Enter between 5 and 8 keywords that summarise the fellowship proposal as follows: **Overview** The keywords that are selected will be used to assist BBSRC Scientific Peer Review staff in matching your proposal with suitable referees who have provided their keywords using the same classification system. The form comprises a number of different screens, as described below. You must select between one and eight keywords. **Classifications**

This screen presents a table listing the Keyword/Research Topic/Science Area combinations that will be held in your application when you submit your form. The first time you open this screen, the table will be empty.

The list may be edited as follows:

1. to *add* an entry to the list, select on the appropriate command labelled 'Add new keyword(s)', and this will take you to the 'Add new keywords' screen (see below).

2. to *remove* an entry from the list, select the tick box to the left to select it, and then select the command labelled 'Remove selected keywords'. Multiple selections from the list are possible.

The maximum number of entries allowed in the table is eight. If your list contains more than eight entries a warning message will appear alerting you to this, and you will need to remove some entries before you will be able to submit your Form:

Warning: You have 10 keyword research topic combinations. You are limited to a maximum of 8 to cover the science contained within your research proposal.

It is essential that the keyword data held in your record are as accurate as possible; these data will play an important role in our referee selection process.

Add new keywords screen

This is the screen in which you may search for and select any of our standard Keyword/Research Topic/Science Area combinations and add them to your application's list.

1. You may search our standard list either by **Keyword**, by **Research Topic** or by **'Science Area'**. If you choose the third option, two boxes with drop down arrows will appear. Firstly you should choose the **Science Area** within which you would like to search. All the **Research Topics** for the selected **Science Area** will be displayed. By selecting one of these **Research Topics** the associated **Keywords** will then be made available for selection.

2. If searching by **Keyword** or **Research Topic**, select the text entry box above the 'Search' button, and type in at least two consecutive characters from the word that you wish to search for (these need not be the first two letters).

When you have finished entering your search term, select the 'Search' button.

		3. The results of the search will appear in Keyword / Research Topic / Science Area table. If there is an entry that you wish to add to your list you should select the adjacent tick box and then the 'Add selected' button located under the search results table: multiple selections from the search results are possible, select the tick boxes for each of the keywords you require. You may need to scroll down to reach the 'Add selected' button, depending on your screen resolution and browser settings. Selecting it will return you to the previous screen, which will have been updated to include your choice(s). **Note:** If adding the number of search results that you select would make your personal list exceed the limit of eight entries then a warning message will appear.
Ethical Information		Each section of the ethical classification must be completed. **Human participation:** state whether the proposed research will involve human participation and answer the questions as appropriate. **Animal research:** The provisions of the Animals (Scientific Procedures) Act 1986 must be observed. Institutions and award-holders are responsible for ensuring that all appropriate personal and project licences required under the Act have been granted by the Home Office. All BBSRC awards are made on the absolute condition that no work which is controlled by the Act will begin until the necessary licences have been obtained. If the proposed research will involve the use of animals covered by the Act, indicate the severity of the procedure; if 'moderate' or 'substantial', provide details of the experiments in the space provided. **Important:** applicants proposing the use of animals in their fellowship project **MUST** refer to the guidance provided regarding animal use in the BBSRC Grants Guide. Failure to provide the information requested above and in the Grants Guide may hinder the assessment of an application. **Signed statement requirement:** All proposals involving animal research conducted overseas are required to submit a signed statement. This is to confirm that this research would be conducted in accordance with regulatory systems in the UK (and applicable regulation in the host country). Guidance on the details to include in the statement can be found on the Animal Use in Research webpage. **Overseas animal use:** If the research involves the use of specific animals (rodents; rabbits; sheep; goats; pigs; cattle; *Xenopus*) overseas rather than in the UK, please also complete the Additional questions that can

		be found at <u>NC3RS: Use of animals overseas</u>. The completed forms are required to be attached as a letter of support in Je-S. Please note, these additional documents are **not** required for proposals that only involve animal research being carried out in the UK. **Genetic and biological risk:** If the research will involve the use of genetically modified organisms, answer the questions as appropriate. **Approvals:** If approval is required for the research, this must be sought and given prior to the research commencing. Provide details of the approval(s) sought and/or received in relation to this proposal. **Other issues:** Applicants should consider the social context of the proposed research and indicate any issues that might arouse specific public interest or concern about the motivation for the research, its conduct or potential outcomes, which might not be fully covered in the other sections.
Implications		Provide a summary of any social and/or ethical implications of the work proposed. The summary must follow the heading structure detailed below. All areas must be included, even if the response is 'not applicable'. If the response is 'not applicable; please provide an explanation for this: 1. **Use of animals or humans** If your research involves the use of animals or human participants, please detail the potential for public concern relating to the research and what you will do during the course of the project to address these concerns. 2. **Societal impact** Do you think the value/usefulness or your research might be questioned by any sectors of society? Please explain your answer. The impact your research outcomes may have on individuals in society, both in the UK and globally. Consider for example: • Are the risks and benefits likely to be shared evenly across society, or might these disproportionately affect certain communities? • Could existing disadvantages or discriminations for socially marginalised or excluded groups be increased or decreased?

		• Is there the opportunity for specific groups, including industry, Government or charity sponsors, to have a large influence on the work? • Could your work lead to impacts on human dignity or consumer choice? **3. Environmental impact** Could your research give rise to reasonable concerns about likely impacts on the environment? For example: • Could your research lead to significant changes in land use, habitats or biodiversity, or impact upon pollution or water conservation? • Might there be indirect as well as direct effects on the environment and might these impacts occur abroad as well as in the UK? **4. Unintended outcomes** Could your research lead to unintended outcomes that were not originally the primary objective? Consider whether any of these outcomes might reasonably be seen to represent a misuse or abuse of science in the service of society. **5. Other social or ethical questions** Please detail any other ethical or social questions that are relevant and have not been addressed in the sections above and what you will do during the course of the project to monitor the social/ethical issues above and identify new issues as they arise. This field must be completed using: • No more than 4000 characters, including spaces, tabs and character returns (2 characters). • Only standard ASCII characters. • No specialist characters/symbols (e.g. mathematical symbols, accents) as they will not transfer successfully to other systems **Please note that typing into a text box is not detectable by the system and is regarded as system inactivity. Please remember to save text regularly.**
Reviewers		Provide details of reviewers whom the Council may approach for review of the research proposal.

		- Nominate six reviewers (including a minimum of one overseas reviewer) who are experts in the research field whom BBSRC may choose to approach for an independent review of the fellowship application - Nominees should not be collaborators, neither should they come from your current institution or from the proposed host institution or where any possible conflict of interest may arise - Applicants should avoid nominating more than one reviewer from the same organisation - Provide key words for each reviewer to indicate their area of expertise. Please note if this information is not provided in full for each reviewer, the application will be rejected - Full contact details must be given for each reviewer, including an up to date e-mail address (the Councils prefer to correspond by e-mail whenever possible) You may indicate in the covering letter attachment (with reasons) if there are any potential reviewers (UK or international) that BBSRC should not approach in conjunction with the assessment of your application. In all instances, BBSRC reserves the right to make the final selection of reviewers. **Note:** If the person you require is not in the searchable list, use the Add New Person button - found at the bottom of the search window.
Proposal Classifications		The Research Councils have adopted a harmonised classifications structure. This has resulted in changes in the data that the Councils collect via Je-S. There are two parts to this classification: **1. Research Areas** These should be used to indicate the subject area(s) or disciplines relevant to the proposal or programme of study. Research Areas are structured on three levels. For some subject areas all three levels have been defined, for others only two levels. The top-level – Research Area – should be used to navigate to the relevant subject areas. Select the subject area(s) at the second level and/or third level where this is available. Please try to select terms at the lowest appropriate level to describe the subject area.

To find the appropriate subject areas either **search** the list of Research Areas, **browse** through it by expanding higher levels to identify those areas of most relevance or **enter** a search term and Select Filter.

Select up to five second-level Research Areas. Within the second-level Research Areas make as many selections at the third level as required. To add Research Areas, click in the corresponding check boxes then select Save

Having completed the selection, indicate the relevant importance of the research areas by **either** selecting one as a Primary area **or** by using Percentage Relevancies against each.

The primary classification must reflect one of the core disciplines/subject areas aligned to the Research Council to which they are applying.

Select "Save" from the top of the screen

		2. Free-text Keywords
		Please note: This section may not be available for all schemes.
		Free-text keywords may be used to describe the subject area of the proposal in more detail.
		Pre-defined terms should be used where available from the Research Area selection. Keywords should only be used where it is necessary to refine these further. You should first search for possible matches in Research Areas for your proposed keyword. If no match is found, you should add the keyword as free-text by selecting the Add New button
		You may add as many keywords in the free-text as appropriate. Once completed select "Save" from the top of the screen.
Attachments		The attachments required to be submitted with a David Phillips Fellowship application are:
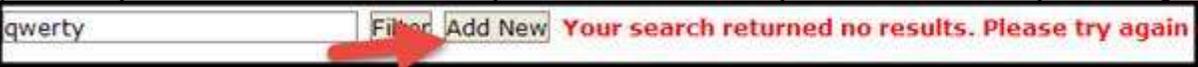
Cover Letter	Required	Exactly 1
Case for Support and Track Record	Required	Exactly 1, maximum of 8 sides of A4 (this includes 2 page track record)
Pathways to Impact Plan	Required	Exactly 1, maximum of 2 sides of A4
C.V. (note the standard template on the BBSRC website must be used)	Required	Exactly 1 (only the applicant's CV is required)
Letters of Support	Required if project partnership details given	Equal to number of project partners
Letter of Support	Required if equipment is requested	Exactly 1 – (see guidance below)
Facility Form	Required if facility item added	Equal to number of facilities

If facility access is being requested, specifically for the Earlham Institute |

				and ARCHER, a technical assessment form is required. Failure to include the required forms will result in withdrawal of the proposal. **Note: Any Earlham Institute facility sequencing costs should be entered into the 'Other Directly Incurred' Costs field in the Je-S application form.**
		Diagrammatic Workplan	Required	Exactly 1, maximum of 1 side A4
		HoD Statement	Required	Exactly 1, to be attached by Approver or Submitter. This attachment will be confidential, i.e. will not be viewable to the applicant
		Data Management Plan	Required	Exactly 1, maximum of 1 side A4
		Justification of Resources	Required	Exactly 1, maximum of 2 sides of A4
		List of publications	Required	Exactly 1, no limitation on page length
		Equipment Quotation	Required for items costing £100K or over	Equal to number of items of equipment
		Signed Animal Usage Declaration https://bbsrc.ukri.org/funding/apply/application-guidance/animal-use-in-research/	Required if overseas animal research is involved	To be attached as type 'Letter of Support', no limitation on page length
		NC3Rs - Additional questions on the use of specific animal species (rodents; rabbits; sheep; goats; pigs; cattle) overseas form https://bbsrc.ukri.org/funding/apply/appli	Required for proposals involving the use of these species overseas	To be attached as type 'Letter of Support', no limitation on page length

		cation-guidance/animal-use-in-research/		

BBSRC recommend that you use typefaces Arial, Helvetica or Verdana and a strict minimum font size of 11 must be used for the entire Case for Support, Justification of Resources and C.V. (excluding text on diagrams and the use of mathematical symbols). A minimum of single line spacing and standard character spacing must be used. Margins must not be less than 2cm. Applications will be checked for faults by BBSRC Administrative staff soon after the closing date to ensure that relevant aspects of the application are legible and comply with the formatting rules. Any component(s) of an application which do not meet these rules will be returned for amendment before being validated for peer review. A late response in amending returned elements of the application will result in the application being withdrawn.

Further information on BBSRC requirements can be found at BBSRC Grants Guide. Please see below for cross Council guidance on attachments.

General Guidance

Please refer to the BBSRC Fellowship guidance or handbooks for advice on the content of the accompanying documentation. One of the PDF files attached to the proposal form must be classified as type **Case for Support**. A proposal without a Case for Support will not be accepted. The Case for Support should be a self-contained description of the proposed research.

Councils operate a 'page' restriction policy on attachment length. To ensure no one is disadvantaged by this restriction, minimum margins in all directions of 2cm must be used for **all** councils/funders when attaching documents.

Also, please note that on submission to council ALL non PDF documents are converted to PDF, the use of non-standard fonts may result in errors or font conversion, which could affect the overall length of the document. Unless specified otherwise in Council-specific guidance, it is recommended that a standard 'Arial' or 'Times New Roman' font is used, restricted to size 11 or higher.

Please note that, except where stated otherwise in the guidance on the following pages, Research Councils cannot guarantee that documents will be reproduced in colour.

Use of animals in research:

If your application involves the use of animals you should familiarise yourself with the funders' expectations as set out in the 'Responsibility in the use of animals in bioscience research' document which can be accessed at www.bbsrc.ac.uk/documents/animals-in-bioscience-research-pdf/

Important: applicants proposing the use of animals in their fellowship **MUST** refer to the BBSRC Grants Guide and the Animal Use in Research webpage for details of the information they are required to provide in their proposal.

Failure to provide the information requested in the Grants Guide may hinder the assessment of an application.

Animal Usage Declaration

Signed statement requirement: All proposals involving animal research conducted overseas are required to submit a signed statement. This is to confirm that this research would be conducted in accordance with regulatory systems in the UK (and applicable regulation in the host country). Guidance on the details to include in the statement can be found on the Animal Use in Research webpage.

Overseas animal use: If the research involves the use of specific animals (rodents; rabbits; sheep; goats; pigs; cattle; *Xenopus*) overseas rather than in the UK, please also complete the Additional questions that can be found at NC3RS: Use of animals overseas. The completed forms are required to be attached as a letter of support in Je-S.

Please note, these additional documents are **not** required for proposals that only involve animal research being carried out in the UK.

BBSRC funded research that involves the use of animals overseas (for example, through international collaborative research), researchers and the local AWERB in the UK should satisfy themselves that welfare standards are consistent with those required under UK legislation (e.g. ASPA) and the expectations set out in the Responsibility in the Use of Animals in Bioscience Research (https://bbsrc.ukri.org/research/briefings/animals-in-bioscience-research/) are in force and maintained. For overseas rodent use, please see the specific guidance on the Animal Use in Research webpage.

Compliance will be assessed during peer review and implementation of the principles in the guidance will be a condition of funding.

Head of Department Statement

For the David Phillips Fellowship scheme a Head of Department Statement (HoD) is required. Statements should be submitted as attachment type 'Head of Department Statement' with no limitation of page length.

The ability to add attachment type "Head of Department Statement" is only available to an approver or submitter, and is confidential, i.e. not viewable by the applicant. The statement should be attached on a dated, letterheaded document and should clearly state that the host institution is in support of the application. The level of institution support and added value that will be provided to a successful fellowship application should also be clearly demonstrated. See the 'Value for Money' statement at the beginning of this document.

Case For Support and Track Record

The page limit for the combined track record and case for support is maximum 8 sides of A4.

Proposals exceeding the 8 page limit, or not adhering to the specified format, will not be considered.

Previous research track record (suggested one to two pages within the overall eight page limit) should:

- Provide a summary of the results and conclusions of your recent work in the technological/scientific area which is covered by the research proposal. Include reference to both BBSRC funded and non-BBSRC funded work. Details of past collaborative work with industry and/or with other beneficiaries should be given
- Indicate where your previous work has contributed to the UK's economic competitiveness or to improving the quality of life

Outline the specific expertise available for the research at the host organisation and that of any associated organisations.

The Case for Support (suggested up to seven pages within the overall eight page limit) should provide a description of the proposed research and its content. Lists of references and illustrations should be included in the page limit and should not be submitted as additional documents or as an annex. The description should include the following sections:

Background

- Introduce the topic of research and explain its academic and wider context
- Demonstrate a knowledge and understanding of past and current work in the subject area both in the UK and abroad

Programme and methodology

- Identify the overall aims of the project and the individual measurable objectives against which you would wish the outcome of the work to be assessed. This should refer to the objectives set out in the proposal form (Objectives section)
- Detail the methodology to be used in pursuit of the research and justify this choice
- Explain why the proposed project is of sufficient timeliness and novelty to warrant consideration for funding
- Describe the programme of work, indicating the research to be undertaken and the milestones that can be used to measure its progress. The detail should be sufficient to indicate the programme of work for each member of the research team. Explain how the project will be managed

References should appear in a list at the end of the case for support and be linked to relevant text by, for example, sequential numbering and superscript reference numbers embedded in the body of the document. Only one publication should be listed for each number. Within the list of references, URL links to relevant publications or online resources are permissible. The Case for Support should be a self-contained description of the proposed work with relevant background, and should not depend on additional information. Applicants **must not include URLs to web resources** in order to extend their Case for Support. The inclusion of such URLs will result in your application being withdrawn for correction. Peer reviewers are advised to base their assessment solely on the information contained within the application, and instructed not to access external links.

Note: Justification of Resources should be completed as a separate item. See below:

Pathways to Impact Plan:

BBSRC require up to 2 sides of A4 attachment to the proposal for "Pathways to Impact". Guidance entitled 'what do I need to write within my Pathways to Impact' can be found below.

Pathways to Impact

The attachment should be a maximum of **2 sides of A4,** minimum sans serif font size 11 and entitled "Pathways to Impact".

The Pathways to Impact attachment should:

- be project-specific and not generalised
- be flexible and focus on potential outcomes

Researchers should be/are encouraged to:

- identify and actively engage relevant users of research and stakeholders at appropriate stages
- articulate a clear understanding of the context and needs of users and consider ways for the proposed research to meet these needs or impact upon understandings of these needs
- outline the planning and management of associated activities including timing, personnel, skills, budget, deliverables and feasibility
- include evidence of any existing engagement with relevant end users

The Proposal must include a Pathways to Impact attachment. If you are unable to provide one, the attachment document Type should be used to fully justify why this is not possible.

The UK Research and Innovation position and expectations document on the UK Research and Innovation website outlines considerations that funding recipients would be expected to undertake https://www.ukri.org/innovation/

Further background information on Pathways to Impact is available on the UK Research and Innovation website:https://www.ukri.org/innovation/excellence-with-impact/pathways-to-impact/

C.V.

Complete the standard BBSRC C.V. template available on the BBSRC website. BBSRC will not accept a stand alone C.V.

Ensure that your CV is accurate and that start and end dates are clearly stated. There should be no gaps,

therefore, if you have had periods away from active research (such as maternity/paternity leave for instance), these should be included. Employment titles should be clear and the type of appointment specified, i.e. permanent or fixed-term etc. This will avoid BBSRC Office needing to contact applicants for clarification where the details provided are not clear, which may lead to the proposal being rejected or a delay in assessment.

Letters of Support:

Letters of support should be submitted as attachment type Letter of Support with no limitation on page length. Letters of support must be included to confirm an active collaboration or contribution to a project in terms of resources or expertise, and may be included where a statement from a third party is necessary to enable the informed assessment of a proposal. Applicants are asked to note that members of an institution which has provided a letter of support will not in general be used as referees for that proposal. Therefore, including more than a few carefully chosen letters can be detrimental to the peer review process.

Letter of Support:

Proposals must include a letter of support from the appropriate institution authority detailing the proposed contribution to the cost of the equipment. Single capital items of equipment over £138,000 (incl VAT) will normally be funded at 50% of total cost and the institution will be expected to provide the remaining 50%. This contribution must not be conditional e.g. on the success of other applications for support, and must not be from other BBSRC grants. BBSRC may agree a contribution of up to 100% where the application and business case demonstrates that the instrument(s) will enhance national capability in meeting a strategically important need by the BBSRC research community, and the case shows a clear ongoing commitment to maintain and operate it for this purpose. Final funding decisions will need to take into account the capital allocation available to the BBSRC, and may require negotiation with the institution.

Proposal Cover Letter

Inclusion of a cover letter is **mandatory**. Letters should be submitted as attachment type 'Proposal Cover Letter' with no limitation on page length.

Applicants Declaration of Interests are now required to be added to the Proposal Cover Letter – please see the guidance provided at https://www.ukri.org/files/legacy/documents/declarationofinterests-applicants-pdf/ for further details.

Applicants may use the cover letter to list reviewers that they would prefer BBSRC do not approach, but BBSRC reserves the right to make the final selection.

Facility Form

Required if facility access is being requested (primarily Earlham Institute and HECToR). Failure to include the required forms will result in withdrawal of the proposal.

Diagrammatic workplan

The workplan is mandatory with a maximum one side of A4. Submit as 'Workplan'.

Data Management Plan

Please include a statement on data sharing as attachment type 'Data Management Plan'. A maximum of one side of A4 is allowed for this and must not be used for any other purpose. This statement must clearly detail how you will comply with BBSRC's published Data Sharing Policy, including concise plans for data management and sharing as part of research grant proposal, or provide explicit reasons why data sharing is not possible or appropriate.

The policy, and detailed guidance notes, can be viewed at: bbsrc.ukri.org/documents/data-sharing-policy-pdf/

Comprehensive data sharing plans will be expected, in particular, in the "data sharing areas" highlighted in the policy. More succinct plans may be appropriate for applications outside of these areas.

Data sharing plans may include details of:

- Data areas and data types - the volume, type and content of data that will be generated e.g. experimental measurements, records and images
- Standards and metadata - the standards and methodologies that will be adopted for data collection and management, and why these have been selected
- Relationship to other data available in public repositories

- Secondary use - further intended and/or foreseeable research uses for the completed dataset(s)
- Methods for data sharing - planned mechanisms for making these data available, e.g. through deposition in existing public databases or on request, including access mechanisms where appropriate
- Proprietary data - any restrictions on data sharing due to the need to protect proprietary or patentable data
- Timeframes - timescales for public release of data
- Format of the final dataset
- Applicants may claim justifiable costs associated with data sharing activities, which should be captured in the application proforma and in Justification of Resources statement

Important - This page should be used only for the statement on data sharing. Any information included other than that relating to data sharing statement requirements, as prescribed above, will result in your application being rejected. Only one statement is required per project.

Please note that preliminary data and descriptions of the proposed work belong in the Case for Support and should not be included in the data sharing statement.

Justification of Resources:

The Research Councils have agreed revised guidance notes for the completion of the Justification of Resources attachment in Je-S. Details are available below.

How to write a good Justification of Resources (JoR)

The role of the JoR is to aid reviewers when assessing proposals so that they can make an informed judgement on whether the resources requested are appropriate for the research posed.

The JoR should be no more than 2 sides of A4 which is an attachment to the proposal. The JoR should explain **why** the resources requested are appropriate for the research proposed taking into account the nature and complexity of the research proposal. It should not be simply a list of the resources required as this is already given in the Je-S form. All items requested in the JeS form must be justified in the JoR.

The JoR is a free text document. So that you don't miss any costings from the Je-S form or any justifications for the items requested, we recommend that you match the costs to the proposal headings below (where appropriate).

Cost to the proposal	Justification needed	Questions to consider and answer in the justification
Staff – Directly Incurred Posts		
Researcher/Technician	• Need to justify why a researcher is needed for the proposed work and why the proposed time input is appropriate.	Is the work of appropriate scientific content or technical difficulty to warrant employing a Research Assistant (RA)? Why has the level requested for the RA been asked for?
Staff – Directly Allocated Posts		
Applicant (Fellow)	• The time that the Fellow spends on the grant must be justified. • A Fellow cannot request time for supervising postgraduate research students, writing publications after the end of the project, writing grant applications or peer review.	How much time do you intend to dedicate to the project? (Note: Fellows are expected to devote 100% of their time to the fellowship). Will you be doing all the research yourself? What work packages are you involved with and why? Have you factored in enough time to work with project partners, visiting researchers and other collaborators? Are you only managing the staff on the project?

| | | | Travel and Subsistence | • Need to give a full break down of the costs in the JeS form, for example how many people are travelling, where are they going and why? | If you are planning to visit people to discuss your research, you should explain why those are the right people to talk to and how they can contribute to you meeting your objectives. If you plan to attend conferences, you should comment on the advantages of conference attendance and give an indication of the number you want to attend during the fellowship, who will attend these and the type you want to go to – national/ international/ general/subject specific etc.

Travel costs incurred when using facilities should be included where necessary. | |
| | | | Other Directly Incurred Costs | • Need to give a description of what has been requested and why?

• Every item requested must be justified | You must justify the need for any equipment requested

You need to explain what any computers will be needed for and also justify the cost. If you are asking for a desktop and a laptop, then justify why both are needed.

It is expected that the host institution will provide computers and laptops for the Fellow and other research staff on continuing contracts.

You must provide a breakdown of any costs which are included for bulk items | |

		Impact	• Need to justify any resources requested to support the Pathways to Impact. For example: including staff time, travel and subsistence, consultancy fees, publication costs, and public communication training.	Full justification (what it is and why you need it) of each item requested. Please note: Patent costs and other IP costs are NOT eligible; Universities already receive funding for these from HEIF. Also estates and indirect costs should NOT be requested for Technology Transfer Officers (TTOs). These are project specific resources.	
		Other Directly Allocated Costs	• In some cases, such as use of internal facilities and shared staff costs, the basis of the costing doesn't need to be justified, but the need for the resources does.	You need to explain what these are and why you need to use them.	
			• Animal costs	Have the appropriate permits and approvals been obtained if animals are to be used?	
		Estates and indirect costs	• Do not need to be justified		
		Research Facilities (at Research organisations)	• Only time needs to be justified	You need to explain what you are using the facility for and why you need to use this particular facility.	
		Pooled Technicians	• For example workshop or laboratory technicians based at the host institution. Usually not named	You need to explain why you are using a pooled technician and justify the amount of resource requested.	

		Infrastructure Technicians	• For example Health and Safety Officer at host institution. Cost should be displayed separately to Estate and Indirect costs in the other Directly Allocated costs box. This cost does not need to be justified.	
		Exceptions		
		Equipment over 50k	• Please see the latest guidance on equipment in the relevant section above.	Why do you need this equipment for this proposed research? What will it be used for and who will be using it?

For large surveys to be treated on the same basis as equipment, the applicant will need to confirm that the survey outputs will provide an ongoing resource for use by the research community and therefore contribute to the national science base. Applicants should also note for surveys that 100% funding only applies when survey work is sub-contracted to a third party following competitive purchasing processes and in compliance with EU tendering rules. |

The main reasons for returning JoRs to PIs for amendments or for not funding proposals are:

- costs stated in the Je-S form are not fully justified in the JoR e.g. the investigator time that has been asked for has not been justified (please note: the investigator salary cost does not need to be justified, only the time asked for)

		- costs / descriptions stated in the Je-S form do not match those in the JoR - costs in the JoR which are not in the Je-S form and vice versa - justifications of why an item is needed are not clear or are poor e.g. listing the items from the Je-S form without any description of why it is needed - if the PI time includes supervision of PhD students - this is not allowed, see above **List of Publications:** List publications in refereed journals in reverse chronological order (most recent first) and indicate with an asterisk (*) those relevant to this application. For those publications deemed most relevant to the application, please provide a brief description of your role and contribution to the work, this is particularly important for publications with a large number of authors. Details of papers in press or accepted for publication may be included, but not papers submitted or abstracts. Do not attach or submit published papers. Publications should be listed in the following format: - author(s) - title of article - journal title - date of publication - details (chapters, pages etc).