FULL APPLICATION GUIDANCE NOTES

These notes are for guidance in completing the Sir Henry Dale Fellowship full application form. They must be read by all those concerned with writing the application - the Applicant and Head of Department (Sponsor) in which the work will be undertaken.

Applications must be made through the Wellcome Trust’s eGrants system. You cannot submit an application for a Sir Henry Dale Fellowship through the Royal Society’s eGap system.

The application process will be administered by the Wellcome Trust on behalf of the Royal Society and Wellcome Trust - for further information please contact enquiries@shdf.ac.uk.

INTRODUCTION

The Sir Henry Dale Fellowship is a partnership between the Royal Society and the Wellcome Trust (the Funders). This partnership brings together two of the world’s most prestigious and influential scientific organisations in their shared commitment to supporting the future leaders of science.

THE FELLOWSHIP

The Sir Henry Dale Fellowships will provide support for outstanding postdoctoral scientists wishing to build their own independent research career addressing an important biomedical question whilst based in a UK academic organisation.

SCIENTIFIC REMIT

The Sir Henry Dale Fellowships will only fund researchers that are addressing a biomedical question: from molecules and cells vital to life and their role in the global spread of disease, to clinical and public health research seeking to improve the quality of healthcare.

Research can be based in the laboratory, the clinic or the field, and may involve experimental or theoretical approaches.

You may still be eligible to apply for a Royal Society University Research Fellowship if your science falls outside this remit. For further information please contact the Royal Society.

Candidates who wish to apply with a Republic of Ireland host organisation may be eligible for a Wellcome Trust Research Career Development Fellowship, with awards made in partnership with Science Foundation Ireland and the Health Research Board. Please contact the Wellcome Trust for further information.
CANDIDATE’S ELIGIBILITY

Please contact the Wellcome Trust if there have been any changes in your circumstances since consideration of your preliminary application.

If there are any ties on intellectual property rights or publications arising from the research you undertake, please contact us for advice. Restrictions on intellectual property may affect your eligibility to apply.

FUNDING

- Applicants may apply for support to meet the directly incurred costs of their research, including salary and full research costs.
- The Fellowship will not provide funding for the full economic cost of the research. The Royal Society will provide a set contribution towards the indirect and estate costs. The Wellcome Trust does not fund the full economic costs of research.
- The grant will be **cash-limited at the point of award**.
- This Fellowship cannot be used to supplement support provided by other funding bodies.
- The Funders do not normally consider support for the extension of professional education or experience, nor for the care of patients.
- The Funders will not award grants to cover expenditure already incurred.

TERMS OF THE AWARD

- A copy of the conditions under which grants are awarded can be found [here](#). These must be read in conjunction with the application form.
- Grant holders are expected to conduct research in line with the agreed [Policies and Positions Statements of the Funders](#).
- You are expected to inform us if you subsequently decide to submit this or a similar proposal to another funding body whilst this application is still under consideration. Non-compliance may lead to refusal to consider the application. If applicants request funding for the same costs on more than one application at any one time, they must make this clear in their application.
- Applicants may not apply for more than one Wellcome Trust and/or Royal Society fellowship scheme at any one time.
- Our willingness to consider the application in no way implies that support will be forthcoming.

CODE OF CONDUCT

Members of the Funders’ Advisory Committees are required to abide by a ‘Code of Conduct’, which is designed to protect and preserve the integrity of our advisors and our processes. This code of conduct dictates that members of decision-making bodies may not discuss any aspect of the deliberations or recommendations with applicants and that they must refuse any requests for information as to how a particular decision was reached.

Applicants or their colleagues must never attempt to contact any member of a decision-making body involved in the consideration of their application, Member of the Council of the Royal Society or Wellcome Trust Governor to discuss any aspect of an application or the decision reached on it. All such enquiries must be referred to the administrating Funder, the Wellcome Trust.

APPLICATION PROCEDURES

When received, this application will be subject to the stated selection procedure and will be considered in competition with other applications for this scheme.

Your application will be sent to reviewers chosen by our scientific staff and you may provide the
name and contact details (if known) of scientific reviewers whom you feel would be suitable to comment on your application.

These must not include colleagues from your current or proposed Host Organisation (if different) or those with whom you have collaborated in the last five years, e.g. co-applicants or co-authors on grants or papers.

Please note the following:

- We may or may not choose to approach some, or all, of the individuals you have selected.
- Under no circumstances should you enter into correspondence with them about your application.

It is suggested that scientific reviewers should be listed in a covering letter which can be accessed from the forms tab of your eGrants homepage.

Once peer-reviewed, applications will be considered by the relevant Expert Review Group who will shortlist applications for further consideration by the Sir Henry Dale Fellowship Interview Committee.

Additional information may be submitted at any time during the processing of the application and will be provided to individuals involved in the assessment, as appropriate.

Depending on when you submit your application, it will take between four and six months to process. You should therefore allow at least six months between submission and the proposed starting date and also take into account the meeting date of the Sir Henry Dale Fellowship Interview Committee.

NOTES ON COMPLETING THE SIR HENRY DALE FELLOWSHIP FORM

Answers are to be restricted to the text boxes provided.

Abbreviations should not be used unless fully explained.

The application must be complete in itself; up to one page of additional information will be accepted.

Applications which do not conform to this will be returned. Incorrectly completed forms may lead to a delay in consideration.

In some applications, there may be more than one sponsor. In such cases, all relevant questions of the form should be duplicated as necessary.

FEEDBACK

If you have a general question about the application procedure, please e-mail: enquiries@shdf.ac.uk.

If you are experiencing technical difficulties with the form, please call +44 (0)20 7611 2020.

DEFINITION OF TERMS

Applicant: The individual applying for the Fellowship.

Sponsor: Head of Department or equivalent (e.g. Director of a Wellcome Trust Centre or MRC Unit), who is able to guarantee that space and resources will be made available for the applicant. A sponsor should be able to reassure the Funders that the Fellow will be welcomed into the host department as an independent researcher.
**Collaborator:** An individual named in the body of the application who will supply technical advice or reagents, but will not be involved in the day-to-day execution of the project.

**ABBREVIATIONS USED IN THE FORM**

- HEFC Higher Education Funding Council
- NHS National Health Service

**NOTES RELATING TO QUESTIONS ON THE FORM**

**THIS FORM SHOULD BE USED FOR SIR HENRY DALE FELLOWSHIPS ONLY**

**APPLICANT’S DETAILS**

**Principal Applicant**
Summary of scientific career to date, including key achievements.
Please summarise what you consider to be your key scientific achievements and state which period of your career they relate to. You do not need to list all your positions.

Career breaks
Information on career breaks is sought to ensure that these are duly taken into account when considering your track record. Please state when and for what period of time you took a break, or were working on a part-time basis.

**Salary information**
Please give basic annual salary and grade. London allowance and other salary enhancements should be shown separately.

If you are currently unemployed or in temporary employment, please give details of the last appropriate annual salary that you held – with dates.

Fellows are not expected to undertake more than 8 hours of non-research activities per week.

**‘SPONSOR’**

The sponsor will need to register on the eGrants system.

The **Sponsor should be the Head of Department or equivalent** (e.g. Director of a Wellcome Trust Centre or MRC Unit), who is able to guarantee that space and resources will be made available for the applicant. A sponsor should be able to reassure the Funders that the Fellow will be welcomed into the host department as an independent researcher.

The individual must be eligible and should have a tenured post at the Host Organisation for the proposed period of the award.

**Source of personal salary support**
If source of personal salary support is indicated as ‘other’ and is commercial, please submit the following additional information with the application in order that we may verify your eligibility:

(i) copies of any agreements between the company, yourself and/or your employer;
(ii) a written statement from the commercial body indicating that there are no ties on intellectual property which arise from research you undertake, nor any restrictions on publications.

**Recommendation by Sponsor (i.e. Head of Department or equivalent)**
The applicant’s sponsor should give an assessment of the calibre of the applicant and an overview of how (s)he would complement the on-going activities of the host environment.
(S)he should be able to guarantee that the applicant will be supported in developing an independent research career and ensure that the Fellow be granted equal status to other academic staff of similar seniority.

DETAILS OF RESEARCH PROJECT

Research question
Please state what you consider to be the key question that is being addressed by your proposed set of experiments. For research that is not driven by an underlying hypothesis, please state the importance of the proposed studies.

Details of research project
If the applicant plans to work in more than one department during the Fellowship – for example, spending a period abroad – then the description of the project in these pages must make clear which parts of the project are to be carried out in each laboratory.

No more than 2,800 words should be used to describe the research proposal. If more are used the application will be returned to the applicant for resubmission.

Graphs, figures and essential quoted but unpublished information, including data, provided in support of the research proposal should be attached as an appendix for sending to referees. These additional data must not exceed the equivalent of one A4 page in length.

Applicants must provide all information pertinent to their grant proposals within the application form (it is not acceptable to refer to additional unpublished information on personal websites).

Experimental design and methods – studies involving the use of animals
Where experiments using animals are proposed, the experimental design should include the case for the number of animals required, including the sample size calculation(s). You should estimate the number of animals needed, taking into account the likely magnitude of the effect and required statistical significance and power, and the factors that might affect this.

Applicants are reminded that any research that might be carried out that leads to a reduction in numbers of animals used is encouraged and may be included as part of the project proposal.

Experimental design and methods: epidemiological, demographic, case control, cohort and related studies
For epidemiological, demographic, case control, cohort and related studies, give a full and detailed analysis of the study design, including details of any validation already undertaken or rationale for using standard protocols. Particular attention should be given to power calculations, sample size justification and, where appropriate, case definition and inclusion/exclusion criteria.

Clinical trials applications
Specific guidance on the information that must be provided for clinical trials applications can be found on the Funders' website.

References (Research project)
Please give the full citation, including the title of the paper and the name of all the authors. We do not wish to specify a format, but our preferred option is as follows: all authors’ names (surname, initials); year of publication; title of article; journal name plus volume number, then page numbers.

Applicants will be asked to resubmit their references page if the citations are not provided in full and this might result in a delay to the processing of the proposal.

Applicants may refer to papers ‘in press’; copies of these papers should be submitted.
Manuscripts that are ‘in preparation’ or ‘submitted for publication’ must not be included in the reference list but key data from these papers may be submitted as part of the allowed appendix/appendices of additional data.

**Data management and data sharing**

As set out in the administering Funder’s [Position Statement on Data Management and Sharing](#), all Fellows are expected to maximise the availability of research data with as few restrictions as possible. Where the proposed research is likely to generate datasets that will hold significant value as a resource for the wider community, applicants are required to provide a data management and sharing plan.

**All** applicants should refer to the [guidance on developing a data management and sharing plan](#) available on the administering Funder’s website. This sets out the circumstances under which a data management and sharing plan is required and the issues such plans should address.

Where they are required, data management and sharing plans should be clear, concise and proportionate. As highlighted in the guidance, applicants are free to structure their plan in the manner that best meets their needs, but should consider seven key questions and ensure these are addressed clearly within their plan:

i. What data outputs will your research generate and what data will have value to other researchers?
ii. When will you share the data?
iii. Where will you make the data available?
iv. How will other researchers be able to access the data?
v. Are any limits to data sharing required — for example, to either safeguard research participants or to gain appropriate intellectual property protection?
vi. How will you ensure that key datasets are preserved to ensure their long-term value?
vii. What resources will you require to deliver your plan?

**Outline of public engagement plans**

The Funders are committed to engaging with society about the research they support. We aim to raise awareness and understanding of biomedical science and place it within a societal, historical and cultural context. Further information is available on the Wellcome Trust website under ‘Public engagement opportunities for researchers’ and the Royal Society website ([https://royalsociety.org/training/](https://royalsociety.org/training/)).

We expect those researchers who receive our funding to help foster an informed public climate within which science can flourish.

If you do not intend to apply for a Provision for Public Engagement, please describe what plans, if any, you have for engaging with the non-academic public about your work beyond press and media activity, in no more than 250 words. Any effective engagement activity should involve two-way aspects of listening and interaction. State how the host Organisation will support these plans.

**Provision for Public Engagement**

Dedicated funding is available from the Wellcome Trust to support a programme of activities during the lifetime of the research grant, with a focus on developing the researcher’s practice in public engagement and informing, consulting and collaborating with the public with the research. Further details on the provision, including the types of costs that can be requested, are available on the Wellcome Trust [website](#).

Applicants are encouraged, but not required, to apply for a Provision for Public Engagement as part of the research proposal. If you are not applying for a Provision for Public Engagement at
this stage, there will be the opportunity to do so at a later stage, should your research grant proposal be successful.

Please note that public engagement that is essential for the ethical conduct of the research such as patient information leaflets and community advisory boards should be part of your research methodology and included within your main research costs.

It is expected that your public engagement plans will be proportionate to the scale of the research proposal. No more than 850 words should be used to describe the proposal, including an outline of your ideas for a programme of public engagement activities. A finalised project plan is not required at this stage. If your application is successful, we may seek further details from you at the award stage, including information on any public engagement staff requested and detailed costings.

When completing this question please include:

(i) the vision for your public engagement programme which articulates why what you are proposing is important and what you hope to achieve;
(ii) public engagement experience of staff including information on any external partners or other organisations you will collaborate with;
(iii) how your programme will be monitored and how you will know if you have achieved your aims;
(iv) a high-level breakdown of the budget.

You may also wish to include:
- the intended audiences and reach of your programme;
- an outline of the activities planned and potential outputs;
- a summary of any professional development activities you will undertake in public engagement;
- how the host organisation will support your programme.

**Period & proposed start date**

This is normally 60 months (FTE) in the first instance. The Fellow’s salary and all support costs will be co-terminous.

Applications should normally be submitted at least six months before the proposed starting date.

**Location**

If you plan to apply for the Fellowship in a location where you have been for two years or more, you must provide a strong justification for why you are proposing to stay and how independence will be demonstrated.

**Related applications**

We will consider a Fellowship application which is currently under consideration by another funding body, either as a fellowship or as research grant, where the applicant is a principal applicant for whom salary is being requested.

You are required to inform us of the result of any other application immediately it is known. If offered an award by another funding body whilst this application is being considered by the Funders, applicants are required to inform us of the offer and will normally be required to take a decision on that award within **one month**.

**Resubmission**

The resubmission of a full application is permitted at the discretion of the decision-making bodies and the Funders. Please contact the Wellcome Trust if you wish to discuss a resubmission.

**Recommendation by applicant’s present head of department or supervisor**
The applicant’s current Head of Department or supervisor should give an assessment of the calibre of the applicant. If (s)he feels that (s)he is not in a position to make such an assessment (for example, if the applicant has only recently joined the department), then an alternative may be used. This should be someone with whom the applicant has worked within the past twelve months.

**LICENCES AND APPROVALS**

The notes relating to ‘Research involving human participants, biological samples and personal data relating to living or dead persons’ and ‘Experiments on animals’ sections under ‘Ethics and regulatory issues’ are only intended to provide guidance and advice in completing the application form, rather than a comprehensive review of the legal and regulatory environment in which the application is made.

**Research involving human participants, biological samples and personal data relating to living or dead persons**

**Human participants, biological samples and personal data**

Ethical approval (usually from the appropriate NHS research ethics committees) is required for all Funders-funded research involving human participants, biological samples or personal data. Personal data, in the context of the 1998 Data Protection Act (Section 3.2, and Annex 3), comprise information about living people who can be identified from the data, or from combinations of the data and other information which the person in control of the data has, or is likely to have in future. Any use of personal data or biological samples, relating to living or dead persons, should conform to Human Tissue and Biological Samples for use in Research - Operational and Ethical guidelines.

Approval from other regulatory bodies such as the Human Fertilisation and Embryology Authority (HFEA) or the Gene Therapy Advisory Committee in the UK should also be sought where necessary, e.g. research involving human embryos may require a licence from the HFEA (please refer to www.hfea.gov.uk for more information). If your proposal involves research on gene therapy which requires regulatory approval, approval should be sought from your Local Research Ethics Committee, the University's Genetic Manipulation Committee, the Gene Therapy Advisory Committee and the Medicines and Healthcare products Regulatory Agency (MHRA).

The Organisation must ensure that ethical approval is in place at all relevant times during the project. For research carried out at multiple sites, ethics committee approval must cover each site.

Where the project, or part of the project, is to be performed outside the UK, independent ethics review must be obtained. For research involving people living in low- and middle-income countries see our guidelines.

**Research using NHS facilities or patients**

By agreeing to fund work which requires NHS support, the Funders are agreeing to abide by the Statement of Partnership on Non-Commercial R&D in the NHS in England (and the corresponding statements in Northern Ireland, Scotland, and Wales). Researchers must therefore meet the obligations of the Partnership and may not carry out any research until the NHS has given its consent. The full report can be downloaded from the Department of Health website.

The Research Governance Framework for Health & Social Care, published by the Department of Health in England, can be downloaded from the Department of Health website. Please note that the Funders cannot act as sponsor.
Research involving clinical trials
Guidance on the specific information that must be provided for clinical trials applications can be found on the administrating Funder’s website.

The Medicines for Human Use (Clinical Trials) Regulations 2004
Under the Medicines for Human Use (Clinical Trials) Regulations 2004, applicants must identify a sponsor (which will normally be either a university or NHS Trust), who fully understands the responsibilities and costs associated with assuming this role. Please note that the Funders cannot act as sponsor.

Experiments on animals
Applicants must refer to the Funders’ policy on the use of animals in medical and veterinary research and the guidelines on ‘Responsibility in the use of animals in bioscience research’.

Experiments on animals in the UK
The Organisation must ensure that research involving the use of animals complies at all times with UK laws and regulations.

Experiments on animals outside the UK
If experiments are to be carried out on animals outside the UK, the experiments proposed must be performed to standards which accord with the principles of UK legislation. Furthermore, the housing and care of animals must similarly accord with the principles of the UK legislation.

If you answer ‘yes’ to ‘Do your proposals involve the use of animals or animal tissue outside the UK’ all questions under ‘Experiments on animals’ must be addressed. Failure to do so will result in delay in processing your application.

In all animal experiments supported by the Funders, the principles of reduction, replacement and refinement will apply. In all experimental studies, it is the responsibility of the Applicant to actively consider:

- the complete replacement of live animals with tissues derived from either animals or humans;
- the possibilities of reducing the numbers of animals that need to be used;
- refining the experimental design in order to obtain the maximum amount of information from the minimum number of animals.

Refined methods in animal research are those which alleviate or minimise any adverse effects for the animals involved, and/or enhance animal welfare. Refinements may be applied at any stage in the life of an animal. Thus, refinement encompasses all aspects of a procedure, including:

- the source, transport, husbandry and environment of the animals involved;
- the experimental design (e.g. the choice of species and the group size employed);
- the techniques applied;
- the end points of the procedures; and
- care of the animals before, during and after a procedure.

For further information regarding the NC3Rs please see www.nc3rs.org.uk.

Monoclonal antibodies
The use of ascitic animals for monoclonal antibodies (mAb) production in vivo should only be proposed when in vitro attempts at mAb production have failed or the use of animals is considered justified for specific diagnostic or therapeutic products. If in vitro production methods are not considered to be suitable, a full explanation must be given. Details of the animals requested should be given in the ‘Animals’ section under ‘details of financial support and resources requested.’
Severity of procedures
Guidance on assessing the severity of a procedure is available from the [Home Office website](https://www.gov.uk). 

Why is animal use necessary: are there any other possible approaches?
Please specify if there are any other procedures of less severity that could be used.

All applications involving the use of primates, cats, dogs and equidae animals will be further reviewed by the NC3Rs.

All proposed research projects involving genetically altered mice are expected to consider the principles set out in the [GA mice welfare assessment report](https://www.nc3rs.org.uk/ga-mice-welfare-assessment-report).

Why is the species to be used the most appropriate?
It is particularly important to justify the species when an animal is being used as a model for a human physiological or pathological condition.

Risks of research misuse
In preparing research proposals, the Funders wish to encourage applicants and their Host Organisations to consider carefully any ethical, safety or security implications associated with the research, including any risks that the potential outcomes could be misused for harmful purposes. Such purposes would include actions which lead to harm to humans, animals or the environment - including terrorist misuse.

Where there are judged to be tangible (i.e. real and non-hypothetical) risks that the proposed research will itself generate outcomes that could be misused to cause harm, organisations should take appropriate steps to monitor the research as it proceeds and minimise these risks. The Funders recognise that most research could conceivably generate results that might hypothetically be misused at some point in the future, and is not asking applicants to appraise these kinds of remote and hypothetical risks.

Applicants should refer to the Funders’ [position statement on bioterrorism and biomedical research, and guidelines on good research practice](https://www.nc3rs.org.uk). 

Intellectual property
Full details of our policy in this area can be found in Grant Condition 9.

Disclosure of proprietary information
Applicants will both wish to, and be expected to, disclose proprietary information in their full application in order to provide the most comprehensive picture of their proposed research. **Applicants should note that their proposals (and any supplementary information provided) will be made available to staff processing the application, referees and external advisers for the purposes of peer-review and due diligence.**

The Funders operate a conflicts of interest policy and stress the importance of confidentiality to their referees and external advisers (some of whom are employed in the industrial or financial sectors). Whilst the Funders attach great importance to referees and external advisers complying with their policies and procedures, they cannot provide any warranties to applicants in this regard.

**Potential for third party claims on arising Funders-funded intellectual property**
Where the proposed research, in whole or in part, is subject to agreements with commercial, academic or other organisations, the Funders will expect a written assurance from the host Organisation that the terms of any such agreement do not conflict with the Funders’ grant conditions, particularly in relation to the publication of research and the granting of research rights. The absence of such an assurance might lead to a delay in the review of the grant application.

If there are any ties on intellectual property rights or publications arising from the research you undertake, please provide a written statement which details them.
Consultancies, equities and directorships
If this application is successful, confirmation may be sought that the researchers comply with the Funders’ policy document on the relationship between Funders-funded researchers and commercial entities, which is reproduced on the Funders’ website.

COSTING AND JUSTIFICATION

Currency requested
Applications must be costed in GBP (£).

Summary of financial supported requested
Please detail the total costs over the period of the grant; annual totals are not required. The costs requested should exclude inflation, in accordance with current Funders’ policy. Direct research costs are provided in line with the Wellcome Trust funding policies.

Allowed costs
Disallowed costs

Please note: a set contribution will be provided by the Royal Society towards the indirect and estate costs.

The Wellcome Trust does not support the full economic costs of research.

The Funders’ policy position on full economic costs of research in UK Universities can be found here.

Research expenses must be co-terminous with the Applicant’s salary.

Salaries
Please detail salaries requested for all staff, including the Applicant, to be funded on the grant.

The Host Organisation will determine the appropriate basic salary for the applicant, commensurate with the skills, responsibilities and expertise necessary to carry out the role, and the total costs of the post are to be detailed in the application form.

The total costs requested should include the applicant's basic salary, employer's contributions, incremental progression and London Allowance, as applicable. Any previous Wellcome Trust supplement paid to an individual should also be excluded. Figures for Year 1 may include known pay awards that will take place during the first year (or an assumed percentage, equivalent to our current inflation rate of 1.7 per cent where the scheduled pay award has not yet been confirmed). Inflation for Year 2 onwards will be based on our current inflation allowance rates and should not be factored into the requested salary.

Salaries for any requested research staff should be in line with the Host Organisation’s normal salary scales.

The names of individuals for posts involving the handling of and research on non-human primates should be provided. Once an application has been submitted, the Funders must be notified of any change to the individual(s) named in the application, prior to it being considered.

Definition of terms

Staff category: For example: ‘Postdoctoral research assistant’, ‘Technician’, ‘Fieldworker’.
Salary grade/scale: The national or local salary grade/scale on which the individual will be employed.

Basic starting salary: Salary to be paid to the individual upon their appointment to the post, exclusive of any allowances for which the individual is eligible. If the post is part-time, the salary should be quoted on a pro-rata basis.

Total cost on grant: Total cost of the post, inclusive of any locally-recognised allowances (e.g. London allowance), employer’s contributions and increments, over the period of the grant. This total should include known pay awards that will take place during the first year (or an assumed percentage, equivalent to the Funders’ current inflation rate, where the scheduled pay award has not yet been confirmed).

Employer’s contributions should include any statutory obligations (e.g. for the UK, National Insurance contributions) and contributions towards an Organisational pension scheme.

Work abroad
Applicants requesting support for a period of research abroad will need a sponsor both in their Host Organisation and in the overseas organisation or laboratory.

Applicants may normally spend up to 12 months of the Fellowship outside their Host Organisation during the period of the award.

The description of the research project under ‘details of research project’ should make clear which parts of the project are to be carried out in each laboratory.

Details of accompanying dependant(s)
Please provide the date of birth of all accompanying dependent children.

Recommendation by sponsor in host overseas organisation
This should include an assessment of the value of the visit for the development of the applicant’s research programme. The Funders ask that the sponsor should carefully consider the relationship of the proposed research to the abilities and career aspirations of the applicant.

Costs
If the applicant has requested to spend part of their Fellowship overseas, please detail the airfare, and any subsistence costs/overseas allowances. Please refer to Allowed costs on the website for further details. The need for the visit, and its duration, must be justified in the ‘work abroad’ section under ‘Reasons for support requested.’

Allowances should be itemised (e.g. ‘housing’, ‘freight’, etc.).

Animals
In order to ensure animal experimentation costs are accurate, applicants are advised to complete this table after consultation with their animal house or biological services manager. The Organisation is required to apply a consistent costing methodology when presenting cost details to the Funders.

Please refer to Allowed costs on the website for further details.

Source of supply
Details of intended source of supply (e.g. commercial company or in-house breeding programme) and the microbiological quality (e.g. barrier or non barrier-bred) should be provided.
Experimental procedures
State the experimental manipulations (e.g. injections, operations, blood sampling) which will be performed and the charge(s) levied for this.

Associated costs
These costs cover specific and relevant training and environmental enrichment, including training for animal husbandry, welfare and associated training for animal technicians.

Equipment
The Host Organisation’s Director of Procurement/Head of Purchasing (or equivalent) should be aware of all potential capital purchases.

Best procurement practice
The Organisation is required to use best procurement practice when purchasing equipment funded with Funders’ funds.

Equipment purchase price
The estimated price of the equipment should cover all aspects including delivery, installation, maintenance and training, where appropriate. Discounted prices should be quoted wherever possible. A copy of at least one formal quote is required for each piece of equipment with a list price of £100,000 or more. The level of discount that has been negotiated should be clearly stated in the quote.

The Funders do not normally supplement support provided by other funding bodies. However, a contribution from the host organisation, or other source, will normally be expected where the application includes a substantial equipment request. Please refer to Allowed costs on the website for further details.

Maintenance costs
It is expected that the equipment requested will be covered by the manufacturer’s warranty for the first year after it is purchased. The Funders will fund reasonable maintenance costs for four years after the initial period of warranty on all equipment (irrespective of the length of award made) where this is negotiated as part of the capital purchase cost.

Access charges
Access charges should be calculated on a cost-recovery basis and can include (i) a maintenance or service contract providing a basic level of service; (ii) running costs; (iii) materials and consumables; and (iv) staff time. Please refer to Allowed costs on the website for further details.

Value Added Tax (VAT)
For grants to be held in the UK, the costs of all equipment to be used for medical and veterinary research should be quoted exclusive of VAT. For equipment that does not fall within this definition, VAT costs should be shown.

Access to radiation sources
Synchrotron Radiation Sources
Applicants will be expected to apply directly to the synchrotron facility they wish to use (e.g. Diamond Light Source; European Synchrotron Radiation Facility) via the facility’s normal peer review system.

The facility will normally fund the travel and subsistence costs of UK users. In instances where these costs will not be met by the facility, they may be requested from the Funders, under the ‘Miscellaneous costs’ heading.

Neutron sources
Applicants should apply directly to the relevant source for such access. Costs should be detailed in the ‘Request for access charges’ in the ‘equipment’ section under details of financial
support and resources requested.’

Miscellaneous
Travel costs
The Funders will automatically provide an amount for the Applicant and any research assistant to attend scientific meetings. Please refer to the website for further details.

For UK-based Fellowships, where costs for collaborative visits within the UK are requested, please detail travel and subsistence costs. Please refer to the Allowed costs on the website for further details. The need for the visit, and its duration, must be justified in the ‘Miscellaneous cost’ section under ‘Reasons for support requested.’

If the application is successful, the Funders will consider providing a contribution (up to £1000) towards personal removal expenses necessarily incurred in taking up the award. A justification for the expenses must be provided in the application, together with an estimate of the costs.

REASONS FOR SUPPORT REQUESTED

Staff requested
Please give a justification for the type and seniority of each post sought. Applicants may normally include a request for research or technical assistance. Research assistance will normally be approved at postgraduate level only. Only in exceptional circumstances will a request for postdoctoral assistance or additional staff be considered. Additional justification will be required in these circumstances.

Animals
Please ensure that a justification is provided for both the species and the numbers requested.

Equipment
Please indicate the intended use of each piece of equipment for which funding is sought. Where a piece of equipment exceeds £50 000:

- describe the nature of the equipment and explain how the technology will enhance the scientific projects described in this application;
- details of similar equipment in the applicant’s department and adjacent departments must be given and the reasons why it cannot be used for the particular project;
- if a particular manufacturer or supplier is favoured, the reason for this should be explained;
- provide details of any other individuals likely to benefit from use of the equipment.

Equipment maintenance
Equipment maintenance may be requested for the above equipment for up to five years. Other requests for maintenance of Trust-funded equipment may be considered once the original grant period has expired. The Funders will, however, only consider providing maintenance funds for equipment more than five years old, if the applicant can demonstrate that it is cost-effective to do so.

Access charges
Access charges may be requested for the use of items of equipment or facilities, originally funded by the Funders or other sources, once the initial funding period has ended. The use of the equipment/facilities must be essential to the proposed research.

Please detail how these charges have been calculated using the following headings: (i) a maintenance or service contract providing a basic level of service; (ii) running costs; (iii) materials and consumables; and (iv) staff time. State the percentage of time and number of hours the equipment/facilities will be used for the project.
Full economic costing

This table is for information purposes only.

A ring-fenced set contribution towards the indirect and estate costs will be provided entirely by the Royal Society.

The Funders’ policy position on full economic costs of research in UK Universities can be found here.

All costs that contribute to the full economic costs of the project should be included in the table. Costs should be inflated at the recognised percentage rate currently used by the Organisation with applications to the Research Councils.

Costs should be divided into the following summary fund headings:

**Directly Incurred Costs** – 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 auditable record.

**Directly Allocated Costs** – the costs of resources used by a project that are shared by other activities. These are charged on the basis of estimates rather than actual costs and do not represent actual costs on a project-by-project basis.

**Indirect Costs** – non-specific costs charged across all projects, based on estimates, that are not otherwise included as Directly Allocated Costs.

Costs should be categorised within these fund headings in accordance with current Research Council guidance.

SUBJECT CLASSIFICATION

The Funders have devised a subject classification system to be used for all grant applications. Applicants are required to assign scientific subjects to their grant application from the Subject Classification lists which can be found on the administrating Funder’s website. If you have any problems downloading these documents, please contact the Wellcome Trust (see under ‘FEEDBACK’ on the guidance notes).

The Applicant should choose those terms from the Subject Classification lists that are applicable to their application. This information should be recorded using the Subject Classification page included in the application form.

The six areas are:

1. Systems and processes – one primary (compulsory) and three secondary (optional) terms should be chosen.
2. Disease – one primary (compulsory) and three secondary (optional) terms should be chosen.
3. Discipline – one primary (compulsory) and three secondary (optional) should be chosen.
4. Technique – up to three subjects (optional) can be chosen.
5. Other identifier – up to six subjects (optional) can be chosen.
6. Basic/Clinical/Tropical/Veterinary – tick the relevant boxes (compulsory).

You must ensure that you have assigned at least one subject from ‘Systems and processes’, one subject from ‘Disease’ (indicate ‘none’ if necessary), and one subject from ‘Discipline’.