

A Guide to Grants at Cambridge

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

Anyone involved in the preparation and submission of an outline proposal must familiarise themselves with the terms and conditions for fEC grants and the relevant Council's regulations. Details of all the requirements and the terms and conditions under the full economic costing model can be found in the following:

- [AHRC](#)
- [BBSRC](#)
- [EPSRC](#)
- [NERC](#)
- [STFC](#)

General Guidance

Anyone involved in the preparation and submission of a proposal should familiarise themselves with the terms and conditions for fEC grants and the relevant Council's regulations. Details of all the requirements and the terms and conditions for research proposals can be found in the following:

- AHRC: <http://www.ahrc.ac.uk/funding/research/researchfundingguide/>
- BBSRC: <http://www.bbsrc.ac.uk/funding/apply/>
- EPSRC: <https://www.epsrc.ac.uk/funding/howtoapply/fundingguide/>
- ESRC: <http://www.esrc.ac.uk/funding/guidance-for-applicants/research-funding-guide/>
- MRC: <http://www.mrc.ac.uk/funding/guidance-for-applicants/>
- NERC: <http://www.nerc.ac.uk/funding/application/howtoapply/forms/grantshandbook/>
- NC3Rs: <http://www.nc3rs.org.uk/funding>
- STFC: <http://www.stfc.ac.uk/research-grants-handbook/>

When the proposal is completed it is initially submitted to the host organisation's administration to undertake quality control including checking the completeness, validity and accuracy of the costs sought.

If the proposal is being submitted against a Call for Proposals then sufficient time should be allowed for the organisation to process the proposal and submit it to the Council before 4pm on the specified closing date.

Costings

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.
- **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.
- **Social Surveys:** this is available for ESRC proposals only. Only subcontracted social survey costs should be entered under this heading and will be shown under the Exceptions Heading in the Resource summary and funded at the 100% rate (for the amount sought from the council). Surveys that are not subcontracted should be entered under the Other Directly Incurred Costs section of the proposal and will be funded at the 80% rate and shown under the Directly Incurred Heading in the Resource summary. The exception option should not be selected.
- **Other Costs:** costs of other items dedicated to the project, including consumables, books, survey fees, purchase/hire of vehicles, publication costs 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.

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 item. 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); and
- Some other Directly Allocated costs where no alternative resource is available, e.g. general technical services, shared laboratory equipment.

Project Details

You will need to complete all the sections on this page before you can save.

This form is to be used only for an Outline application to a specific activity. Please read the scheme specific guidance notes on the relevant Council's website prior to completing this form.

Organisation where the Grant would be held

Organisation is the research organisation where the grant 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 from the Council. Generally, research grants are open to UK Universities and similar organisations but eligibility can vary depending on the scheme. See the **Investigators** section and check the relevant Council's funding guide for further details and contacts concerning eligibility.

- <http://www.ahrc.ac.uk/>
- <http://www.bbsrc.ac.uk/>
- <https://www.epsrc.ac.uk/>
- <http://www.esrc.ac.uk/>
- <http://www.mrc.ac.uk/>
- <https://www.nc3rs.org.uk/>
- <http://www.nerc.ac.uk/>
- <http://www.stfc.ac.uk/>

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.

Accessing Je-S

Please use the following link to access the Je-S login page <https://je-s.rcuk.ac.uk/Jes2WebLoginSite/login.aspx>

Previously had a Je-S Account at a different research organisation?- Don't create a new account, your Je-S account is linked to you as an individual, not your organisation, so if you move to another organisation you should not set up another account but use instead to amend your contact details

If you are a new user to Je-S and would like to create an account please select the link, '**Create an account**'.

Users will be presented with the Terms and Condition of Je-S which must be accepted to proceed any further. To accept the Terms and Conditions of Je-S please select '**Accept**' at the bottom of the screen.

Existing Account Check

ORCID Identifier

Selecting the link "Create or connect your ORCID Identifier from the ORCID web site" will direct you to the ORCID website where you can either 'Sign In' if you already have an ORCID ID or 'Set Up' an ORCID Identifier, and grant permissions for RCUK systems to access your account and write grants data to ORCID, before being automatically returned back to Je-S.

Note The Open Researcher and Contributor ID (ORCID) provides a free registry to obtain a unique digital identifier for researchers and scholars, which allows them to manage a record of their research activities.

For researchers, an ORCID identifier supports automated linkages between them and their professional activities to ensure their work is properly recognised. ORCID records hold information such as name, email, organisation and

research activities. Individuals control how their data is shared through managing data privacy settings within their ORCID account.

The Research Councils collect ORCID identifiers in the Je-S System to allow Research Councils to link and share information across systems more easily

It is possible to “Skip” the ORCID identifier stage at this point but you will be given another prompt when you finish the account set up.

In order to check that users do not already have a Je-S account, users will be required to enter their email address in the text box and then select 'Account Check'.

If the e-mail address entered is not already in the Je-S database users will be taken to the next stage in the Create Account process.

However should the e-mail address entered already be in the Je-S database users will be given the following guidance:

To retrieve your login details enter your user name if it is known or enter your email address.

The details will be emailed to you and should prompt you to remember the details to enable you to log in. If you experience any difficulty retrieving your login details eg the password hint doesn't remind you of your password then contact the Je-S Helpdesk: Tel 01793 444614 or Email: jeshelp@rcuk.ac.uk

Account Type

In the Account Type screen users are required to indicate what type of Je-S account they wish to apply for.

Please note the following:

Users will only need to select the following account type "**An Applicant on a Standard or Outline Proposal**" if they intend to be named as a Principal Investigator, Co-Investigator or a Researcher Co-Investigator on an application form. If this account type is selected, the account will require verification from the nominated organisation, users will receive an e-mail from Je-S saying the account is being verified and a further e-mail to confirm if the account has been accepted or declined when your organisation has verified your details.

For all other purposes an unverified account will suffice by selecting one or more of the other account types.

Personal Information:

Fields marked with an * are mandatory:

Title, Forename, Surname, Phone number, Date of Birth

Current Post: The title of your current job must be entered.

Current Post Start Date: The date on which you started your current post must be entered.

Equal Opportunities Data (Equality and Diversity)

Why do we ask for this information and what do we use it for?

In line with good practice and legal requirements, the Research Councils collect data on equality and diversity from applicants for grants and other awards. These data help in assessing how effective our policies and procedures are in eliminating unlawful discrimination and promoting equal opportunities. This information may be used anonymously for statistical purposes. It will be treated in confidence and in line with the Councils data protection procedures. It will not be used in the assessment of your application.

Under each heading, except for Date of Birth for Verified level of account, you can choose not to disclose the information but it will help us to monitor equality of opportunity if you do provide it.

The information we ask for is as follows:

- Date of birth (Mandatory if requiring a Verified level of account)
- Ethnic origin
- Country of nationality
- Gender
- Disability

To learn more about the Equality Act 2010 click visit the Gov.uk site at <https://www.gov.uk/definition-of-disability-under-equality-act-2010>

Qualifications

Users can use the **Add Qualification** button to open a page to record their qualifications as below. Please note that this section is optional and users who do not wish to record their qualifications at this stage can use the "**Next Step**" button to proceed to the next page.

If you do wish to record your qualifications, please click 'Add Qualification'.

When you have finished, please save the qualification page and please click 'Next Step' to take you to the next page in the create account process.

Organisation & Department

Users can use this section to select their Organisation and Department. Please note that this section is not mandatory for student or fellowship account types, for these account types you can bypass this page using the "**Next Step**" option.

Users must use the select options on this page and search for their Organisation in the free text box that will appear, once users have selected the organisation, use the select department option to select a department from the list given.

If you are unable to find your organisation in the displayed list please contact the Je-S Helpdesk with the full name and address details of the organisation so that it can be added. All organisations that have registered with Je-S have confirmed their current department structure with the Je-S helpdesk, therefore the list of departments reflects the structure requested by the organisation. If a department needs to be added, removed or renamed then please contact your Je-S contacts at your organisation. The Helpdesk may only make changes if the request is received through the recognised organisation representative(s).

User Account Details

Users will need to create a user name and password for their Je-S account as indicated below.

Preferred User Name

This field allows you to enter the User Id of your choice. When you submit your details the system will check your entry against existing User Ids. If your chosen User Id is already being used, a message will be displayed to inform you. Click on OK to return to the form, and enter a different User Id. The User name will not be case sensitive.

Password constraints

Your password must be at least 6 characters in length. The password will be case sensitive.

Password Hint

In the Password Hint box, enter a word or phrase that will prompt you to remember the password. If you forget your password in future you will use this information to retrieve your User Name / Password in the link on the Je-S log in page.

Users can request their password hint to be e-mailed to them by entering their user ID into the required field, or by entering their e-mail address to request their user ID and password hint to be e-mailed to them. In both circumstances the password hint e-mail will contain a link that will enable the user to select a new password.

Create Account – Confirm Details

If you chose to Skip ORCID identifier earlier in the process you will receive a reminder that this can be done before finally creating an account. If you opt to skip it again then you will be taken to Confirm Details:

Select Create Account.

You will shortly receive an email that includes a link which you must click on to activate your account and complete this process. Please note that this link will remain active for 1 month from the date of issue. Please also note that this link can only be used once, once you have activated the account please log into your account by accessing the Je-S log in page.

Please note: If you selected the option to be an Applicant on a Standard or Outline proposal (Principal/Co/Researcher Co-Investigator) your request will then be verified with your nominated organisation's central administration. In the meantime you may continue to use the Je-S system to prepare proposals but will not be able to submit the proposal until you receive an e-mail confirming that the verification process has been completed.

continue to use the Je-S system to prepare proposals but will not be able to submit the proposal until you receive an e-mail confirming that the verification process has been completed.

Je-S is used by [AHRC](#), [BBSRC](#), [EPSRC](#), [ESRC](#), [MRC](#), [NERC](#) and [STFC](#) as well as the [Technology Strategy Board \(TSB\)](#) and [Energy Technologies Institute \(ETI\)](#), to provide their communities with electronic research grant services. It is designed to comply with the **Je-S Framework**.

Je-S can be used to:

- Create proposals to be sent to the Councils
- Peer review proposals submitted to the Councils
- Submit reports for ongoing grants made by the Councils

Funding Organisations using Je-S

The following organisations use the Je-S system³

Research Councils

- AHRC
- BBSRC
- EPSRC
- ESRC
- NERC
- MRC
- STFC (formerly CCLRC and PPARC)

Funding Councils that have used Je-S

- HEFCE
- SHEFCE

- HEFCEW
- NIHEC

Other Funding Organisations that have or currently use Je-S

- DTI
- Technology Strategy Board (TSB)
- Energy Technologies Institute (ETI)
- The Royal Academy of Engineering (in association with EPSRC)

A proposal may be sent to the Approver Pool (two-stage approval) or Submitter Pool (single-stage) by the Owner or an Editor.

An Approver or Submitter is required to:

- review (prior to submission) and then forward a document to the next stage (Submitter or Research Council)

or

- reject and return the proposal to the previous stage (Owner / Editor or Approver)

Amendments may also be made by the Approver or Submitter in which case the system will require the document to be revalidated before final submission.

The system generates the **Research Council's reference number** for the document on successful submission.

Research Organisation Responsibility

Organisations should ensure that those staff who act as approvers and submitters for research applications should undertake quality control over the application to be submitted. This should include responsibility for checking the completeness, validity and accuracy of the costs sought.

Research Organisations should take steps to ensure that those appointed to submitter/ approver roles should be made aware of these responsibilities.

It is also the Research Organisation's responsibility to manage internal deadlines to ensure applications are processed and submitted within the set Je-S Research Council call deadline.

Please ensure that applicants are eligible and comply with Research Council eligibility rules. If there is any doubt due to the diversity of councils rules, then please check individual councils handbooks;

- [AHRC Research Funding Guide](#)
- [BBSRC Research Grants Guide](#)
- [EPSRC Funding Guide](#)
- [ESRC Research Funding Guide](#)
- [NERC Research Grants Handbook](#)
- [STFC Research Grants Handbook](#)
- [TSB Competition for Funding Documents](#)

Guidance on Completing a Standard Grant Proposal

Specific Funder Information on Standard Grants

- [BBSRC](#)
- [ESRC](#)
- [ETI](#)
- [NERC](#)
- [STFC](#)
- [TSB](#)

Anyone involved in the preparation and submission of a proposal should familiarise themselves with the terms and conditions for fEC grants and the relevant Council's regulations. Details of all the requirements and the terms and conditions for research proposals can be found in the following:

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- EPSRC: <https://www.epsrc.ac.uk/funding/howtoapply/fundingguide/>
- ESRC: <http://www.esrc.ac.uk/funding/guidance-for-applicants/research-funding-guide/>
- MRC: <http://www.mrc.ac.uk/funding/guidance-for-applicants/>
- NERC: <http://www.nerc.ac.uk/funding/application/howtoapply/forms/grantshandbook/>
- NC3Rs: <http://www.nc3rs.org.uk/funding>
- STFC: <http://www.stfc.ac.uk/research-grants-handbook/>

When the proposal is completed it is initially submitted to the host organisation's administration to undertake quality control including checking the completeness, validity and accuracy of the costs sought.

If the proposal is being submitted against a Call for Proposals then sufficient time should be allowed for the organisation to process the proposal and submit it to the Council before 4pm on the specified closing date.

Project Details

Organisation where the Grant would be held

Organisation is the research organisation where the grant 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 from the Council. Generally, research grants are open to UK Universities and similar organisations but eligibility can vary depending on the scheme. See the **Investigators** section and check the relevant Council's funding guide for further details and contacts concerning eligibility.

- AHRC: <http://www.ahrc.ac.uk/funding/research/researchfundingguide/>
- BBSRC: <http://www.bbsrc.ac.uk/funding/apply/>
- EPSRC: <https://www.epsrc.ac.uk/funding/howtoapply/fundingguide/>
- ESRC: <http://www.esrc.ac.uk/funding/guidance-for-applicants/research-funding-guide/>
- MRC: <http://www.mrc.ac.uk/funding/guidance-for-applicants/>
- NC3Rs: <http://www.nc3rs.org.uk/funding>
- NERC: <http://www.nerc.ac.uk/funding/application/howtoapply/forms/grantshandbook/>
- STFC: <http://www.stfc.ac.uk/research-grants-handbook/>

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.

Title of Research Project

The **title** should be as informative as possible, capturing the essence of the research.

It **should not exceed 150 characters** and must be completed using:

Standard ASCII characters and a limited set of accented characters may be used ([Je-S character set](#)). Avoid using specialist characters and symbols outside of the Je-S character set make this a link (e.g. mathematical symbols) because they may not transfer successfully to other computer systems.

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**

grant in months, checking (with the relevant Council's funding booklet) that it complies with the terms of the selected type of proposal.

- The costs of a Principal Investigator's time in writing up of the final report may be included in the proposal, but the duration of the grant should not be extended to include final report writing up time.

Ethical Information

- [AHRC](#)
- [BBSRC](#)
- [ESRC](#)
- [EPSRC](#)
- [MRC & NC3Rs](#)
- [TSB](#)

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 (mandatory for EPSRC schemes) 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 *

EPSRC:

ARCHER

EPSRC National Service for iii-v Technologies

EPSRC National Service for AC-STEM

EPSRC National Service for Solid State NMR

EPSRC national Wave Testing Service

EPSRC National Service for X-ray Photoelectron Spectroscopy

Ion Beam Centre at University of Surrey

National Wind Tunnel Facility

850MHz Solid State NMR Facility at Warwick

MRC:

Ion Beam Centre at University of Surrey

NERC:

Airborne Research and Survey Facility (ARSF)

Argon Isotope Facility (AIF)

British Ocean Sediment Core Research Facility (BOSCORG)

Chilbolton Facility for Atmospheric and Radio Research (CFARR)

Field Spectroscopy Facility

Experimental Geoscience Facility

Geophysical Equipment Facility (GEF) - Edinburgh

Ion Microprobe Facility (IMF)

Isotope Community Support Facility (ICSF)

Life Sciences Mass Spectrometry Facility, Bristol

Luminescence Laboratory, Aberystwyth

Mesosphere, Stratosphere And Troposphere Radar (MSTRF)

Molecular Spectroscopy Facility (MSF)

NERC Radiocarbon Facility (Archaeology), Oxford

NERC Radiocarbon Facility (Environment), East Kilbride

Open University U-Series Facility OUUSF

Facility for Airborne Atmospheric Measurements (FAAM)

ICP-MS Facility, Kingston University

British Isles GNSS archive Facility (BIGF)

Cosmogenic Isotope Analysis Facility (CIAF)

Life Sciences Mass Spectrometry Facility, East Kilbride

Life Sciences Mass Spectrometry Facility, Lancaster

NERC Facility for Environmental Nanoscience Analysis & Characterisation (FENAC)

NERC Facility for Scientific Diving

NERC Isotope Geosciences Laboratory

Sorby Environmental Fluid Dynamics Laboratory

Space Geodesy Facility

Accelerator Mass Spectrometry (AMS) Laboratory

Geophysical Equipment Facility (GEF) - Leicester

Geophysical Equipment Facility (GEF) - (Ocean Bottom Instruments) Durham/Soton

NERC Earth Observation Data Acquisition and Analysis Service, Dundee (NEODAAS)

NERC Earth Observation Data Acquisition and Analysis Service, Plymouth (NEODAAS)

North East Amino Acid Racemization (NEAAR)

NERC Biomolecular Analysis Facility (NBAF)

European Incoherent Scatter Radar Facility (EISCAT)

Airborne GeoSciences, University of Edinburgh

STFC:

ARCHER

Research Data Facility (RDF)

Before submitting your proposal, please check with the facility/service provider that the resource is available and to ascertain the costs of the service.

* 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:

Project Partners

Details should be given of **project partners** and their contributions. An organisation should only be named as a project partner if it is providing specific contributions (either direct or indirect) to the research project.

Research Councils will pay Research Councils' % contribution of the total costs of the project excluding the project partner contribution. Project partner contributions in cash or in-kind should be seen as additional to the Research Councils' % contribution and are not considered part of the fEC of the project. BBSRC operates an exception for Industrial Partnership Awards (see BBSRC Research Grants Guide for details).

Attach a letter to the proposal from each partner.

These letters are added within the project partner screen, not within the attachments section. Having added the details for your item press "Save" which will then provide a link to add the attachments.

The content of the letter should:

- Confirm commitment to the proposed project;
- Clearly explain the value, relevance and possible benefits of the work to the project partner;
- Give the nature and equivalent value of any in-kind contribution, and/or declare the value of a cash contribution, and period of support; and
- Describe the added value to the project of the project partner's involvement.

The letter should be dated and should be written when the proposal is being prepared. The letter should be targeted specifically to the project. A standard letter declaring support for the proposed work is not helpful.

If the proposal is part of a **joint proposal**, only provide details of project partners if the organisation is the **lead organisation**.

(Please note that joint proposals are not applicable to AHRC.)

Name of partner organisation: if the organisation is a wholly owned subsidiary, enter the parent company.

Division/Department: enter if applicable.

Address Details: these will be automatically entered after selecting an organisation.

Note: If the partner organisation is not in the searchable list, use **Add New Organisation** - found at the bottom of the search window after performing the search.

Title/Forenames of Contact: enter the title and forenames (maximum of 3) of the person acting as the primary contact for the partner organisation.

Surname of Contact: enter the surname of the primary contact.

Contact's Address: enter details only if the primary contact's address is different from that given previously for the partner organisation. Full contact details must be given, including one of telephone or e-mail (the Council prefers to correspond by e-mail whenever possible).

Note: If the partner organisation is not in the searchable list, use **Add New Organisation** found at the bottom of the search window after performing the search.

Direct contribution to the project: provide a brief description and the value of each of the direct contributions to be made by the project partner. These may consist of cash or other resources which are specifically to be used directly in the pursuit of the research, including, for example:

- Materials and equipment donated to the project
- Costs of any staff to be seconded to the work

Indirect contribution to project: provide a description and, if appropriate, a value for each contribution to the project to be expended indirectly - for example:

- Costs related to the use of facilities or equipment on the project partner's own premises
- The costs to the collaborating body of providing staff time in project liaison, management and evaluation

The Project Partner's involvement should be fully explained in the Case for Support.

Case for Support and Attachments

For council specific guidance please see the links below:

- [AHRC](#)
- [BBSRC](#)
- [ESRC](#)
- [EPSRC](#)
- [ETI TP](#)
- [MRC](#)
- [NC3Rs](#)
- [NERC](#)
- [STFC](#)
- [TSB](#)

The specific requirements for each Council can be found by clicking on the appropriate left hand link.

You can upload attachments files that are related to a document, such as the or , in the following formats:

- PDF versions 1.3, 1.4, 1.5 and 1.6 (*.pdf)
- Postscript level 2 (*.ps)
- Microsoft Word ('97 and later including Word 2007)

All attachments will be stored in Je-S as PDF.

Individual attachments are restricted to 10MB for Case for support and 5MB for other types of attachment.

Councils operate a 'page' restriction policy on attachment length. To ensure no one is disadvantaged by this restriction, the margin size of submitted document attachments should not be reduced from a standard margin (i.e. top/bottom and left/right - 2cm). 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.

In addition, where non standard fonts are present, and even though the converted PDF document may look unaffected in the Je-S System, when it is imported into the Research Councils Grants System some information may be removed. We therefore recommend that where a document contains any non standard fonts (scientific notation, diagrams etc), the document is converted to PDF prior to attaching it to the proposal.

Unless specified otherwise in Council-specific guidance, a standard 'Arial' or 'other San Serif' font is used, restricted to size 11 or higher.

You do not need to number the pages of the attachments as this will be done when the documents are submitted to the Research Council.

Justification of Resources

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. The JoR should explain 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. Whether the grant is a large programme grant or a small travel grant, all items requested in the JeS form must be justified in the JoR. Costings should be justified on the basis of full economic costs (fEC) of the project, **not** on the costs expected from the Research Councils.

So that you don't miss any costings from the JeS 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		
Principal Investigator (PI) Co-Investigator (Co-I) and Researcher Co-Investigator time	- The time that the PI and Co-I spend on the grant has to be justified. - A PI or Co-I can not 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? Will you be doing all the research yourself? What work packages are the PI and Co-Is 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 breakdown of the costs in the JeS form for example how many people are travelling and 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 grant, 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 the 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 University will provide computers and laptops for the PIs and Co-Is 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	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

	and subsistence, consultancy fees, publication costs, and public communication training.	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. Animal costs	You need to explain what these are and why you need to use them. 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 University. 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 University. 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		
PhD student	- need to justify why a PhD student is needed for the proposed work	Will a student be skilled enough to tackle the research problems, and will they in all likelihood get a thesis out of it?
Equipment	please see the latest guidance on equipment by selecting the link.	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. Applicant 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 JeS 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 JeS form do not match those in the JoR.
- costs in the JoR which are not in the JeS form and vice versa.
- justifications of why an item is needed are not clear or are poor e.g. listing the items on the JeS form without any description of why it is needed.
- if the PI time includes supervision of PhD students - this is not allowed see: [Estimating Investigators Time](#)

Costings

All costs that contribute to the full economic costs (fEC) of the proposal should be included.

All costs should fall under one of the following cost headings:

- **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:
 - o **Staff:** payroll costs requested for staff, full or part-time, who will work on the project and whose time can be supported by a full audit trail during the life of the project.
 - o **Travel and Subsistence:** funds for travel and subsistence for use by staff who work on the project where these are required by the nature of the work.
 - o **Equipment:** The cost of individual items of equipment dedicated to the project and individually 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.
 - o **Social Surveys.** This is available for ESRC proposals only. Only subcontracted social survey costs should be entered under this heading and will be shown under the Exceptions Heading in the Resource summary and funded at the 100% rate (for the amount sought from the council). Surveys that are not subcontracted should be entered under the Other Directly Incurred Costs section of the proposal and will be funded at the 80% rate and shown under the Directly Incurred Heading in the Resource summary. The exception option should not be selected.
 - o **Other Costs** of other items dedicated to the project, including consumables, books, survey fees, purchase/hire of vehicles, publication costs 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: For grants awarded with an announced start date after 1 April 2013 the Research Councils will 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:
 - o **Investigators:** Proposals will need to show the costs of Principal Investigator and any Co-Investigators (but not Researcher Co-Investigators, who should be included as a Directly Incurred cost) if their time charged to the project is based on estimates rather than actual costs.
 - o **Estates:** These costs may include building and premises costs, basic services and utilities, and any clerical staff and equipment maintenance or operational costs not already included under other cost headings.
 - o **Other Directly Allocated:** These costs may include, for example, the costs of shared Pool staff or access to institutional research facilities such as equipment, 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.

Resources to be provided by project partners, whether cash or in-kind contributions, should be clearly identified in the proposal. These contributions are not considered to be part of the fEC of the project.

All **costs** associated with the research project must be justified.

- AHRC, BBSRC, EPSRC, ESRC, MRC, NC3Rs, NERC and TSB require an attachment to the proposal entitled "Justification of Resources". This statement should be used to justify the resources required to undertake the research project and is a mandatory addition. Applicants should:
 - Explain why the indicated resources are needed, taking account of the nature and complexity of the research proposed. Note that it is not sufficient merely to list what is required.
 - Have regard for the breakdown of resources into the summary fund headings Directly Incurred, Directly Allocated and (where appropriate) Exceptions.
 - In some cases, such as investigator time, use of internal facilities and shared staff costs (all likely to be Directly Allocated costs), the basis of the costing need not be justified, but the need for the resources does need justification.
 - Try to be explicit about the need for the level of investigator time sought, bearing in mind the complexity of the research, the need to manage the project and supervise staff and any wider considerations such as collaboration or facilities usage.
 - Estates and indirect costs do not need to be justified.
 - **Queries Regarding FEC Proposals:** The Councils have asked each RO to identify an individual at the RO as the first point of reference for queries from applicants regarding FEC proposals. The Je-S Helpdesk should be used **as the first contact point for the Councils**. 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.

The document should be attached as type Justification of Resources.

For STFC applications the justification of resources should be included within the Case for Support.

Expenditure Non FEC (STFC only)

Any award we make will be the maximum amount payable, and will include VAT payable

The costs of the elements of the projects should be clearly defined and costed at best value for money.

These Awards are not Research Grants, and do not currently fall under the Full Economic Costs framework.

- Staff - select search to see if the person is in the system. If they are not in the list click the 'add new person' button to add them to the database. Fill in all the fields ensuring that the total cost is complete.
- Equipment - leave blank for small awards as equipment items have to be above £10k
- Travel - select 'add new travel item' then enter description and cost
- Other - enter all other costs here using the same method as above

Outline Proposals

Outline proposals allow applicants to develop initial plans for projects and help with the process of identifying the highest quality proposals for development into full proposals. The outline proposal helps to ensure that all aspects of the initiative specification are addressed during the shortlisting procedure.

Anyone involved in the preparation and submission of an outline proposal must familiarise themselves with the terms and conditions for fEC grants and the relevant Council's regulations. Details of all the requirements and the terms and conditions under the full economic costing model can be found in the following:

- [AHRC](#)
- [BBSRC](#)
- [EPSRC](#)
- [NC3Rs](#)
- [NERC](#)
- [STFC](#)

Resource Summary

Funding from all sources should be included in this section; however, it is not expected that financial details will be precise at this stage. All prices and salaries should be calculated at current prices. Total estimated costs for each of the sub-headings described below should be recorded; a detailed breakdown of costs in each sub-heading is not required.

Enter a numeric value only e.g:

- **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 staff, full or part-time, who will work on the project and whose time can be supported by a full audit trail during the life of the project.
- **Travel and Subsistence:** Funds for travel and subsistence for use by staff who work on the project where these are required by the nature of the work.
- **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.
- **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:
 - **Investigators:** Proposals will need to show the costs of Principal Investigator and any Co-Investigators (but not Researcher Co-Investigators, who should be included as a Directly Incurred cost).
 - **Estates:** These costs may include building and premises costs, basic services and utilities, and any clerical staff and equipment maintenance or operational costs not already included under other cost headings.
 - **Other Directly Allocated:** These costs may include, for example, the costs of technical staff or access to institutional research facilities such as equipment, 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. Costs relating to PhD studentships should be entered here for those Councils that have project students. Please include **Equipment** costing over £10,000 within this section; the cost of individual items of equipment dedicated to the project and costing more than £10,000 (including VAT) not including the Research Council contribution. Please only enter the amount sought from the Research Council.

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 will include an allowance for inflation if a grant is awarded.

Resources to be provided by project partners, whether cash or in-kind contributions, should be clearly identified in the proposal – this should include in-kind contributions from the host institution. These contributions are not considered to be part of the fEC of the project.

Grants will no longer include provision for Open Access publication or other publication charges in respect of peer review journal articles and peer reviewed conference papers. It remains permissible for proposals to request publication costs associated with the production of other types of research outputs that are not covered currently by the RCUK policy on Open Access. So publication costs for outputs such as monographs, critical editions, volumes and catalogues can be requested but, as with any cost, will still need to be fully justified within the application.

Summary

The Research Councils have a responsibility to promote the public awareness and understanding of their research areas. The purpose of this Summary is to help publicise the Councils' research to:

- Opinion-formers and policy makers
- The general public
- The wider research community
- Provide a plain English summary of the proposed work, explaining:
- The context of the research

- Its aims and objectives
- Its potential applications and benefits

The summary should be written in a style that is accessible to a variety of readers, including the general public. In the event of a grant subsequently being awarded, the funding Council may use this summary for general publicity purposes and as a basis for answering enquiries from the media and others about the purpose of the research.

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 should be used.
- No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer **successfully to other computer systems**.

Project Partners

Details should be given of project partners and their contributions. An organisation should only be named as a project partner if it is providing specific contributions (either direct or indirect) to the research project.

Research Councils will pay Research Councils' % contribution of the total costs of the project excluding the project partner contribution. Project partner contributions in cash or in-kind should be seen as additional to the Research Councils' % contribution and are not considered part of the fEC of the project. BBSRC operates an exception for Industrial Partnership Awards (see BBSRC Research Grants Guide for details).

Attach a letter to the proposal from each partner.

These letters are added within the project partner screen, not within the attachments section. Having added the details for your item press "Save" which will then provide a link to add the attachments.

The content of the letter should:

- Confirm commitment to the proposed project;
- Clearly explain the value, relevance and possible benefits of the work to the project partner;
- Give the nature and equivalent value of any in-kind contribution, and/or declare the value of a cash contribution, and period of support; and
- Describe the added value to the project of the project partner's involvement.

The letter should be dated and should be written when the proposal is being prepared. The letter should be targeted specifically to the project. A standard letter declaring support for the proposed work is not helpful.

If the proposal is part of a **joint proposal**, only provide details of project partners if the organisation is the **lead organisation**.

(Please note that joint proposals are not applicable to AHRC.)

Name of partner organisation: if the organisation is a wholly owned subsidiary, enter the parent company.

Division/Department: enter if applicable.

Address Details: these will be automatically entered after selecting an organisation.

Note: If the partner organisation is not in the searchable list, use **Add New Organisation** - found at the bottom of the search window after performing the search.

Title/Forenames of Contact: enter the title and forenames (maximum of 3) of the person acting as the **primary contact** for the partner organisation.

Surname of Contact: enter the surname of the primary contact.

Contact's Address: enter details only if the primary contact's address is different from that given previously for the partner organisation. Full contact details must be given, including one of telephone or e-mail (the Council prefers to correspond by e-mail whenever possible).

Note: If the partner organisation is not in the searchable list, use **Add New Organisation** - found at the bottom of the search window after performing the search.

Direct contribution to the project: provide a brief description and the value of each of the direct contributions to be made by the project partner. These may consist of cash or other resources which are specifically to be used directly in the pursuit of the research, including, for example:

- Materials and equipment donated to the project
- Costs of any staff to be seconded to the work

Indirect contribution to project: provide a description and, if appropriate, a value for each contribution to the project to be expended indirectly - for example:

- Costs related to the use of facilities or equipment on the project partner's own premises
- The costs to the collaborating body of providing staff time in project liaison, management and evaluation

Attachments

- [AHRC specific](#)
- [BBSRC specific](#)
- [ESRC specific](#)
- [NC3Rs specific](#)
- [STFC specific](#)

One of the documents attached to the outline proposal form must be classified as type **Case for Support**. An outline proposal without a Case for Support will not be accepted.

Additional document files may also be attached (as separate attachments and classified appropriately). Mandatory Council attachment guidance can be found in subsequent Council specific helptext. Please also consult initiative specific guidance notes located on the appropriate Council's website.

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. Please see [here](#) for cross council guidance on attachments.

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' is used, restricted to size 11 or higher. Please note that, except where stated otherwise in the guidance on the

Impact Summary

Note: If the proposed research is funded the Impact Summary will be published on publicly available sites to demonstrate potential impact of Research Council funded research. Please ensure confidential information is not included in this Summary.

The Summary text box must be completed:

- Maximum of 4000 characters (including spaces and returns)
- Only the standard Je-S character set should be used. See [Je-S standard Character Set](#)
- No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems.

The Impact Summary should answer the two questions:

- Who might benefit from this research?
- How might they benefit from this research?

Further information on Impact policies and expectations is available on the RCUK website at: <http://www.rcuk.ac.uk/innovation/policies/>

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.

Select Save from the top of the screen

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

Nominated Reviewers

Provide details of referees whom the Council may approach for review of the research proposal. If your proposal is part of a **joint proposal**, only provide details of nominated reviewers if your organisation is the **lead organisation**.

- Nominated reviewers should be experts in the research field and/or be able to provide an expert view on the value and benefits to users of the research proposal.
- Investigators **should not provide reviewers from their own organisation** or from **current or proposed project partners**, or where any **possible conflict of interest** may arise. International reviewers might be included.
- Investigators should avoid nominating more than one reviewer from the same organisation.
- Full contact details must be given for each reviewer, including at least one of telephone or e-mail (the Councils prefer to correspond by e-mail whenever possible).

Note: If the person you require is not in the searchable list, use the Add New Person button - found at the top of the search results, underneath the search and cancel buttons.

Technical Summary

Please see individual Council requirements for the Technical Summary

Joint Proposals

A joint proposal is one in which two or more organisations are cooperating in a project and are separately seeking funding from the Council. Joint proposals can only be submitted to BBSRC and STFC.

Multi organisation applications to ESRC and AHRC should be submitted on one application form.

- Each organisation should submit **separate proposal forms**. Applicants should identify a **lead organisation** for the purposes of submitting the joint proposals.

The **lead organisation**:

- Select **Edit Joint Proposals**.
- Select yes to "is this a joint proposal" Select yes to "are you the lead RO" The Joint reference number is generated. The following information will appear under the heading of Joint documents:
 - Lead Document (detailing Principal Investigator, RO and Department).
 - Non Lead (same details as Lead document displayed at this stage) with the option to Assign Owner or Delete.
 - Select Assign Owner to add the details of the Principal Investigator to the Non-Lead. An email alert will be generated to the PI of the Non-Lead that the document is available in their Je-S account.

The non-lead proposal will not include all the sections which are available in the Lead e.g. Objectives, Summary, Beneficiaries etc. The non-lead part can view the Attachments on the Lead part.

Other Support

Enter details of any support sought or received from any other source for this or other research in the same field in the past three years.

Complete all fields for support either received or pending a decision.

Contributions from project partners should not be entered here. They should be detailed in the project partners section.

General Fellowship Information and Guidance

Following the Government's announcement of reforms to the Dual Support system, the Research Councils have introduced new arrangements for the submission of research proposals under full economic costing (fEC) principles, for applications from September 2005.

Anyone involved in the preparation and submission of a proposal should familiarise themselves with the Council's fellowship regulations before completing a proposal. These are detailed at the following links:

- AHRC: <http://www.ahrc.ac.uk/funding/research/researchfundingguide/>
- BBSRC: <http://www.bbsrc.ac.uk/funding/apply/>
- EPSRC: <https://www.epsrc.ac.uk/skills/fellows/>
- ESRC: <http://www.esrc.ac.uk/funding/guidance-for-applicants/research-funding-guide/>
- MRC: <http://www.mrc.ac.uk/funding/guidance-for-applicants/>
- NC3Rs: <http://www.nc3rs.org.uk/funding>
- NERC: <http://www.nerc.ac.uk/funding/application/howtoapply/forms/grantshandbook/>
- STFC: <http://www.stfc.ac.uk/funding/fellowships/ernest-rutherford-fellowship/>

Costings

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.
- **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.
- **Social Surveys:** this is available for ESRC proposals only. Only subcontracted social survey costs should be entered under this heading and will be shown under the Exceptions Heading in the Resource summary and funded at the 100% rate (for the amount sought from the council). Surveys that are not subcontracted should be entered under the Other Directly Incurred Costs section of the proposal and will be funded at the 80% rate and shown under the Directly Incurred Heading in the Resource summary. The exception option should not be selected.
- **Other Costs:** costs of other items dedicated to the project, including consumables, books, survey fees, purchase/hire of vehicles, publication costs 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.

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 item. 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); and
- Some other Directly Allocated costs where no alternative resource is available, e.g. general technical services, shared laboratory equipment.

Attachments

Please refer to individual Council 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.

For some fellowship schemes a head of Department Statement (HoD) and/or Personal References are required, depending on the scheme these are either attached by the applicant themselves or the Research Council has deemed it the responsibility of the Research Organisation to provide this document. In the latter case the ability to add attachment type "Head of Department Statement" or "Reference" will only be available to an approver or submitter, and in some cases may also be confidential, i.e. not viewable by the applicant. For details on the content please see sections on Head of Department Statement and Reference.

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. 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.

The next sections provide a table detailing the attachments that should be included with each Fellowship.

- [AHRC](#)
- [EPSRC](#)
- [ESRC](#)
- [MRC](#)
- [NC3Rs](#)
- [NERC](#)
- [RAEng](#)
- [STFC](#)

Justification of Resources (Cross Council Guidance)

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. This statement should be used to justify the resources required to undertake the research project and is mandatory. 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. Whether the grant is a large programme grant or a small travel grant, all items requested in the JeS form must be justified in the JoR. Costings should be justified on the basis of full economic costs (fEC) of the project, **not** on the costs expected from the Research Councils.

The JoR is a free text document. So that you don't miss any costings from the JeS 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		
Principal Investigator (PI) Co-Investigator (Co-I) and Researcher Co-Investigator time	- The time that the PI and Co-I spend on the grant has to be justified. - A PI or Co-I can not 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? Will you be doing all the research yourself? What work packages are the PI and Co-Is 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	If you are planning to visit people to discuss your research, you should

	JeS form for example how many people are travelling and where are they going and why?	<p>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 grant, who will attend these and the type you want to go to – national/ international/ general/subject specific etc.</p> <p>Travel costs incurred when using facilities should be included where necessary.</p>
Other Directly Incurred Costs	<p>- Need to give a description of what has been requested and why?</p> <p>- Every item requested must be justified</p>	<p>You must justify the need for any equipment requested</p> <p>You need to explain what the 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.</p> <p>It is expected that the University will provide computers and laptops for the PIs and Co-Is and other research staff on continuing contracts.</p> <p>You must provide a breakdown of any costs which are included for bulk items</p>
Impact	<p>- 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.</p>	<p>Full justification (what it is and why you need it) of each item requested.</p> <p>Please note: Patent costs and other IP costs are NOT eligible; Universities already receive funding for these from HEIF.</p> <p>Also estates and indirect costs should NOT be requested for Technology Transfer Officers (TTOs). These are project specific resources.</p>
Other Directly Allocated Costs	<p>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.</p> <p>Animal costs</p>	<p>You need to explain what these are and why you need to use them.</p> <p>Have the appropriate permits and approvals been obtained if animals are to be used?</p>
Estates and indirect costs	<p>- Do not need to be justified</p>	
Research Facilities (at Research organisations)	<p>- Only time needs to be justified</p>	<p>You need to explain what you are using the facility for and why you need to use this particular facility.</p>
Pooled Technicians	<p>- For example workshop or laboratory technicians based at the University. Usually not</p>	<p>You need to explain why you are using a pooled technician and justify the amount of resource requested.</p>

	named	
Infrastructure Technicians	- For example Health and Safety Officer at University. 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		
PhD student	- Need to justify why a PhD student is needed for the proposed work	Will a student be skilled enough to tackle the research problems, and will they in all likelihood get a thesis out of it?
Equipment over 50k	- Need to justify all equipment over and under £50k. Research Councils will fund the first £50k of the cost of the equipment at 80% and the remaining amount at 100% FEC.	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. Applicant 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 JeS 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 JeS form do not match those in the JoR.
- Costs in the JoR which are not in the JeS form and vice versa.
- Justifications of why an item is needed are not clear or are poor e.g. listing the items from the JeS form without any description of why it is needed.
- If the PI time includes supervision of PhD students - this is not allowed see [here](#)

• **Justification of Resources (Cross Council Guidance)**

• **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. This statement should be used to justify the resources required to undertake the research project and is mandatory. 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. Whether the grant is a large programme grant or a small travel grant, all items requested in the JeS form must be justified in the JoR. Costings should be justified on the basis of full economic costs (fEC) of the project, **not** on the costs expected from the Research Councils.

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Principal Investigator (PI) Co-Investigator (Co-I) and Researcher Co-Investigator time	- The time that the PI and Co-I spend on the grant has to be justified. - A PI or Co-I can not 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? Will you be doing all the research yourself? What work packages are the PI and Co-Is 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 breakdown of the costs in the JeS form for example how many people are travelling and 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 grant, 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.
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Impact	- Need to justify any resources requested to support the Pathways to Impact.. For example:	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

	including staff time, travel and subsistence, consultancy fees, publication costs, and public communication training.	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.
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Infrastructure Technicians	- For example Health and Safety Officer at University. 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		
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see: [../..../pages/GuidanceonCompletingaStandardG/Applicants/EstimatingInvestigatorsTime.htm](https://www.rcuk.ac.uk/innovation/pages/GuidanceonCompletingaStandardG/Applicants/EstimatingInvestigatorsTime.htm)

Impact Summary

Note: If the proposed research is funded the Impact Summary will be published on publicly available sites to demonstrate potential impact of Research Council funded research. Please ensure confidential information is not included in this Summary.

The Summary text box must be completed:

- Maximum of 4000 characters (including spaces and returns)
- Only the standard Je-S character set should be used.
See <https://jes.rcuk.ac.uk/Handbook/pages/Generaldocumentactions/JeSstandardCharacterSet.htm>.
- No specialist characters and symbols (e.g. mathematical symbols) because these may not transfer successfully to other computer systems.

The Impact Summary should answer the two questions:

- Who might benefit from this research?
- How might they benefit from this research?

Further information on Impact policies and expectations is available on the RCUK website at: <http://www.rcuk.ac.uk/innovation/policies/>

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.

Select Save from the top of the screen

If there are any validation errors address these before retrying the

Project Details

All fields must be completed

Organisation is the research organisation where the grant or 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.

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.

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.

Title of Proposed Work

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

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).
- Enter the proposed **duration of the Fellowship in months**, checking (with the relevant Council's funding booklet) that it complies with the terms of the selected type of proposal.

The costs of the applicant's time in writing up the final report may be included in the proposal, but the duration of the fellowship should not be extended to include final report writing up time.

Public Engagement Fellowships

These may start at any date within one year from the closing date for applications.

Applicant Details

- AHRC specific

- EPSRC specific

- ESRC specific

- MRC specific

- NERC specific

- STFC specific

See [Searching for Data](#) for guidance on adding an applicant.

The **applicant** 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 relevant Council's funding booklet for further details and contacts concerning eligibility.

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 report** on a research grant previously awarded by the Council. If an overdue report 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](#).

Technical 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.

Choice of Host Institution

Applicants for STFC Ernest Rutherford Fellowships and for all NERC Fellowships must justify their choice of proposed host institution in a clear statement not exceeding 4000 characters.

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; and
- 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.**

NERC - Specific Guidance

NERC believes it is often beneficial for candidates to undertake a fellowship at a different institution to where they received postgraduate training or are currently employed. Fellowships offer a degree of flexibility and autonomy beyond a standard postdoctoral position and fellows should be able to show independence and have the personality and skills to be able to exploit this freedom to establish links and collaborations. However, NERC recognises that there may be circumstances where moving institutions is not appropriate due to the institution providing unique facilities or opportunities or for domestic arrangements. The choice of host institution must be justified in the

application. If a candidate has been at the same institution both as an undergraduate and a postgraduate and does not intend to move on, the reason should be clearly stated.

Non-Staff Resources

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.
- Publication costs - include publication costs if they are expected to fall within the period of the grant; costs likely to fall after the end of the grant period should be recovered through indirect costs.
- Specialist publications (not expected in institutional libraries).
- Consultancy fees.
- Field work fees/subjects/informants.
- 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
 - Sub-contracting

MRC Predoctoral fellowships only: Costs for predoctoral fellowships are limited to the Fellow's salary and a total of £15,000 per annum (pro rata). This may be used for consumables, travel costs, PhD fees, equipment, etc. Costs incurred from training at an Overseas Centre/2nd Centre/Industry Placement and the cost of animals (including costs of obtaining animals and their maintenance but excluding additional experimental costs) may be requested in addition to the £15k pa limit, and they should be clearly noted in both the Application form and Justification of Resources attachment. Costs incurred by animals should be added to the 'Animal Costs' section.

All costs for predoctoral proposals would usually be listed as Directly Incurred costs. Estates costs and Indirect costs are not payable for predoctoral fellowships and these sections should be entered as £0.

Predoctoral fellowships are not awarded under the FEC framework and will be awarded at 100% of costs; however while the Je-S Fellowship configuration is still ongoing, all applicants should apply to the 'Fellowships FEC' Scheme

and complete as normal, ignoring any automatic profiling to 80% in the form. Predoctoral fellowships will be re-profiled post-award.

Travel and Subsistence

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

- 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. Conferences should, as far as possible, be individually identified in the proposal.

Resource Summary

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 (fEC), excluding contributions from any project partners. The % fEC to be paid by the Research Councils will be shown and the Research Council's contribution automatically calculated.

Directly Incurred: Staff, including Researcher Co-Investigators (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.

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.

Staff Effort Summary: 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 and co-investigators (directly incurred or directly allocated)
- Research: research staff and researcher co-investigators
- 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 – does not include NERC tied studentships)

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.

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 grant awarded.

This field must be completed using:

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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.

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; and
- 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; and

This field must be completed using:

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The Impact Summary should answer the two questions:

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Select Save from the top of the screen

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

Academic Beneficiaries

Please summarise how your proposed research will contribute to knowledge, both within the UK and globally.

Academic Beneficiaries (4000 characters max) should address the following questions

- How the research will benefit other researchers in the field
- Identify whether there are any academic beneficiaries in other disciplines and, if so, how they will benefit and what will be done to ensure that they benefit

What other researchers, both within the UK and elsewhere are likely to be interested in or to benefit from the proposed research.

Please look broadly beyond narrow research field. RCUK recognises that in generating new knowledge, a cross-disciplinary or single-disciplinary approach may be the most appropriate. Applicants are asked to clearly state their chosen approach and provide justification for that choice.

List any academic beneficiaries from the research and give details of how they will benefit and how the results of the proposed research will be disseminated. Specific beneficiaries might be:

- Researchers in the investigator's immediate professional circle, carrying out similar or related research
- Researchers in other disciplines
- Researchers in other academic institutions (in the UK and/or international)

Also describe the relevance of the research to beneficiaries:

- Identify the potential academic impact of the proposed work
- Show how the research will benefit other researchers (this might include methodological or theoretical advances)
- Identify whether the research will produce data or materials of benefit to other researchers, and explain how these will be stored, maintained and made available
- Explain any collaboration with other researchers and their role in the project

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.