2017 JRS Application Instructions

Final Version: January 9, 2017

APPLICATION INSTRUCTIONS

Please read the application instructions, glossary, and proposal form before you begin. The word limits are provided to keep our proposals short and to facilitate their efficient review. All proposals must be submitted in English.

All applications are considered confidential and will not be shared beyond the foundation staff, Trustees and designated confidential reviewers.

You may wish to plan your project using the work plan table that can be found online before writing the accompanying text.

The form below is for off-line drafting of your proposals; all proposals must be submitted online.

RESTRICTIONS ON FUNDED ACTIVITIES

The JRS Biodiversity Foundation is prohibited from conducting or funding any lobbying or political campaign activities, as these terms are specifically defined under U.S. tax law. U.S. private foundations are prohibited from funding attempts "to influence legislation," anywhere they operate or from providing grant funding for such activity. Violation of this rule subjects a private foundation to a penalty tax, public disclosure, and possible loss of tax exempt status. The JRS Biodiversity Foundation cannot lobby or fund any lobbying activities carried out by its grantees. There are certain exceptions and conditions under which foundations may fund grantees that lobby such as that foundations may provide analysis and advice regarding legislation. Please enquire if you believe your project may touch upon the above restrictions.

Grant Application Form

Below is the online application form. You may save drafts by clicking the 'Save Draft' button at the bottom of the page. Text fields may be character or word limited and will truncate automatically. Please note the lower right corner of the field box allows you to stretch the box on your screen while editing. Please address any questions to JRSRFP2017@jrsbiodiversity.org.

Brief instructions are provided with each question in the online form but you should refer to the instructions document below for more details. If you wish to download a blank Microsoft Word template and instructions, click here. Reports will only be accepted online but the off-line form may be used to draft material which can then be cut and pasted into the online form. Please refer to the Glossary of Terms to use consistent language with the Foundation regarding the results of your work.

Download: Application Instructions

Download: Budget Reporting Template

Download: Results Table Template

Download: Glossary of Terms

IN-PROCESS REVIEW

JRS can access your grant application forms before they are officially submitted. Please check the box below if you wish to have brief, preliminary feedback on your application (no longer valid after February 10, 2017). Feedback is no guarantee of future funding:

❑ Yes, please email me brief suggestions to confirm my project is in scope or to strengthen my draft proposal.

APPLICATION TOPIC

Please check the option that best describes the subject of your application. Proposals may be for technical implementation projects or for small planning grants to plan projects:

❑ Freshwater Biodiversity Technical Project or Planning Project
❑ Pollinator Biodiversity Technical Project or Planning Project

A. General Information

Section A seeks general information that will be entered in our database to administer your application. Please follow formatting and content instructions in the online form. Please note these definitions:

- Organization Legal Name: This is the organization that will receive funds and is legally responsible for the project and for financial management.
- Proposal Title: This full title of the project will be used in public documents and our website. Please choose a concise descriptive title. The Short Title will be for internal JRS communications.
- Project Director: The name of the individual responsible for the daily leadership of the project and for its success.
- Institutional official authorized to submit proposals and to sign grant agreements on behalf of the organization: Please use this space to provide contact details of the relevant administrative officer.
- Total Project Budget ($USD): This is your estimate of the total costs, from all sources, for the work in the time that you propose.
- Total Request from JRS ($USD): Portion of the Total Project Budget that you are requesting from JRS.

B. Executive Summary [250 words]

Please write a concise summary that includes the approach and the measurable goals.

The Executive Summary should concisely describe your project's subject as well as your technical and institutional approach and goals. The summary should clearly communicate how the project is within the scope of the request for proposals. The description of goals should be in terms of specific, measurable, and time-bound targets that will indicate your success.

C. Problem in Conservation or Sustainable Development [350 words]

What problem for conservation or sustainable development are you seeking to address?

This section describes the significance of the work that you will do. Please describe the problem using quantitative evidence and specific terms that apply to the geographic area that your work will address.

D. Problem in Biodiversity Information and Knowledge Access [350 words]

What problem or gap in data, information, or knowledge access are you seeking to address?

This section should describe what gap in data, information, knowledge and related services is key to addressing the problem that you described in the section above. We understand that problems such as preserving freshwater and pollinator biodiversity are very complex and biodiversity informatics is only part of the solution. What is the evidence for demand for the information and who are the end-users? What will the users do with the new information and information access created by this project? Please be sure that you can "connect the dots" between solving the information problem (Part D.) and solving the conservation or development problem (Part C.).

E. Technical Solution to the Problems [400 words]

What is your technical solution to the problem described above in Sections C & D? Specifically describe any hardware, software, database, data standards, data repositories, website software, APIs, or other informatics elements essential to your success.

This section should describe the final technical solution to the information problem in specific and technical language (i.e. new data, baselines, data enhancement, data standards, databases, mobile technologies, web portals, analyses, visualization tools, etc.). Please describe the end state of your efforts and not the activities to get to that point, as activities will be addressed in the section below on the Work Plan.

F. Institutional Solution to the Problems [400 words]

What is your solution to the problems in Sections C & D that are institutional in nature?

This section should help us to understand why this project has not been done in the past and what people, organizations, and arrangements are likely to create a sustainable connection between data providers and data end users. Institutional issues are often the barriers to connecting biodiversity information to users and to action. Institutional solutions include new partnerships, capacity, partnerships, network-building, communications, cooperation, awareness, legal agreements, new incentives and awards, etc.

G. Goals and Measures of Success [350 words]

What results [specific outputs and outcomes] are you seeking to achieve, by when, and how will you know that you are successful?

This sections should describe specific quantitative and qualitative indicators of progress and success and the project month in which any specific milestones and targets will be achieved (e.g. Month 3, Month 18). Please see the Glossary of Terms for definitions. Indicators may be for activities, outputs, or outcomes and the method for their assessment should also be described here.

H. Work Plan [500 words]

What is your plan of work?

Use this section to break your work into a set of Objectives that logically organize activities and their results (outputs and outcomes) so that you can effectively manage the project, allocate resources, and report on progress. For start and end dates of activities and dates of key milestones, please indicate by project month (e.g. by month 12, end of month 18, etc.) Please refer to the Glossary of Terms and read the instructions in the Work Plan Table template. Provide the level of detail that you feel is appropriate for the foundation to understand your work and to connect your plan to your results and your budget.

I.   Open Access to Data and Knowledge

(a) Confirmation of JRS' Open Data Policy

The JRS Biodiversity Foundation believes that open access to biodiversity information and knowledge by all stakeholders is essential to the conservation and sustainable use of biodiversity. The foundation requires that the biodiversity informatics output of its grants such as datasets, decision tools, and software is openly and freely available in formats that promote maximum re-use. We further require that grant outputs are made available under the least restrictive licensing possible, and per creative commons license definitions. The Foundation recognizes that different data outputs are subject to different types of licensing and policies. Our grant application forms require that our grantees disclose their data sharing plans and any relevant licenses or agreements to which the grantee organization or the principle investigator is a party that may affect data sharing. JRS grantees may be asked at any time to report on the progress of data sharing plans and are expected to apply appropriate evaluation methodology and analytic tools to provide evidence of successful data sharing. The primary grantee is expected to use good faith efforts to ensure that any subcontractors and sub-grantees also comply with this policy. We recommend that you confirm compliance with this policy with any named partners in this proposal. The foundation recognizes that circumstances may obligate the grantee or may benefit the project if data sharing is restricted in some way. Any exceptions to restrict the use of, access to, or delayed access to the data must be specifically requested and approved by the foundation. All progress and final reports should include live URLs as well as access methods for databases. The foundation will evaluate and base payments upon evidence of fulfilling data sharing plans.

Any exceptions to our Open Data Policy must be justified in this application.

❑   I have read and understood the JRS Open Data Policy.
❑   This project's approach or our institutional policies may not comply with the above JRS policy.
❑   This project's approach or our institutional policies appear to comply with the above JRS policy.

(b) Open Data and Knowledge Access Plans [400 words]

Please list and describe how you will specifically comply with each of the five terms of the JRS Open Data Policy regarding (1) access, (2) timeliness, (3) licenses, (4) standards and (5) compliance?

Open access to the data and information products of your project is a requirement of JRS funding. Please refer to the statement of policy on the JRS Biodiversity Foundation website at http://jrsbiodiversity.org/our-approach/open-data-policy/. Please use this section to describe the data and information products and their access including specific technical details such as standards,

data repositories, requested access limits or restrictions, data formats, and software specific to creating access. Note: Additional details on Data Access plans may be attached to the application.

J. Capacity Development [350 words]

How will your project increase the long-term capacity for biodiversity informatics in sub-Saharan Africa?

One of the foundation's most important goals is supporting capacity development for the sustainable supply of and use of biodiversity data, information, and knowledge. Use this section to describe training, educational resources, physical infrastructure, and other elements of human and technical capacity that are outputs or outcomes of your work. How will you know that capacity development is meeting needs and is successful? What percent of the requested funds do you consider as contributing to capacity building outcomes? Note: Additional details on capacity building may be attached to the application.

K. Sustainability [350 words]

What will be the evidence of your success 3 or 5 years after the end of your project?

Imagine that your project achieves everything you hope. What ongoing activities, outcomes, and capacity will still be creating measurable benefits? How will funding be secured to continue salaried positons created by this project? Will additional financial resources be needed? Where will they come from?

L. Project Director and Principal Staff Experience [400 words]

What prior experience of the director and staff will support your success and what % time will each devote to this project?

Please name specific individuals and their contributions. If key staff are to be hired, please describe their required credentials, % effort on the project, their month of hiring, and source of salary support.

M. Organizational Background [350 words]

What are the qualifications of your organization that will support the success of this project?

Please provide a brief description of the organizational unit that is most relevant to the project including its annual budget, physical assets, and staff. Please note if there is in-kind or direct financial support from your organization that will contribute to this project.

N. Project Partners [400 words]

(a) Have the partners described below reviewed this complete proposal?
- ❑ **Yes**
- ❑ **No**

(b) Who are the project partners and what are their roles? Who are the data and information users?

Use this section to describe the partnerships, both individual and institutional, that support the project's success. Which of the partners represent users of the data and information services? If

users are not directly involved in the project, please justify why JRS should make this exception to our approach. If you checked "No" in the question above, please explain why the partners have not yet directly reviewed the project plan. JRS may accept proposals that have not been reviewed by your partners but may require review, revision, or a specific partnership formation stage as a planning grant or as an initial project activity. Please ensure that any individual specifically mentioned in your proposal has consented to the use of their name and potential engagement.

O.   Budget and Co-Funding Narrative [no word limit]

How does the project's budget support the activities described above? What are your assumptions, key unit costs, and allocation of resources among objectives, partners, and types of activities?

Describe whether and how the partners will be funded by the project budget here or in the budget narrative below.

This section is one of the most important of the proposal – we are funders and it is vital for us to understand the requested grant award and how the component amounts are sufficient to achieve your stated goals. Please provide explanations of any cost category where you plan expenses and indicate the assumptions that are the basis of the cost calculations. Additional worksheets of calculations may be included in the budget spreadsheet.

P.   Required Forms and Supporting Documents

Please use the upload function below to attach the required Project Budget Template and the Project Results Template. Proposals will not be accepted without these completed forms. Additional detail may be provided on your Data Sharing plans and Capacity Building plans. Please do not attach any other additional materials beyond the required forms or additional detail on data sharing and capacity building. Letters of partnership and collaboration may be attached but are not strictly required.

To upload supporting documents, click on "Return to Menu" and select "Upload Additional Documents." You may upload multiple files and return to editing the application. Please be sure to rename your attached file to include the project director or organization name before you upload.

- Budget Template (Required)
- Work Planning Table (Required)
- Data Sharing Plan detail (Optional)
- Capacity Development Plan detail (Optional)