

A GLOSSARY FOR RESEARCH DEVELOPMENT

Exploring core language for
tracking and qualification

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EXECUTIVE SUMMARY

This booklet presents a glossary of pre-award terminology. These are terms that are core for research development functions and can be used for tracking and qualifying for research funding.

Language is a foundation for effective communication in all cases, but particularly when navigating the prescribed terminology of research development (pre-award activities). The language we use in research development, be it funder specific budget terms, or terms for ethics in grant writing, can be inclusive or isolating. Even within the same country, universities of differing origins may use different language for similar or synonymous activities e.g. for finance (net contribution, income, allocated, incurred) or career development (recognition, reward, incentives). This can therefore help or hinder applications and relationships within them. An institution that can clearly communicate costing methods, previous impact history, success rates and staff capacity, will have a much smoother entry into a new collaboration, than one that must spend time understanding a request and then gathering information from disparate systems and across offices. Having the relevant vocabulary to negotiate this process and to demonstrate eligibility for funding in this complex system is necessary for research development managers to grow professionally and will help them add greater value to their institutions.

The aim of this glossary is therefore to provide individuals with the foundations in language, tracking and qualification of research development to better engage other research offices for ongoing research applications and encourage stronger relationships amongst Research Managers and Administrators (RMAs). These foundations will allow RMAs to make connections between potential collaborators and communicate them easily with partners, funders and in statutory reports.

We conducted a desk review of critical pre-award processes and identified five categories for this glossary:

- Costing and Pricing: with consideration of both funder terms, as well as internal costing and price recovery terms where practical;
- Ethics: activities related to compliance with funder and institutional ethical, data management and data protection approvals and processes;
- Knowledge Exchange and Impact: activities related to proposal development, and therefore planning, especially with a view to monitoring and evaluation, and with a highlight around the impositions of building impact models;

- Personnel Categories: staff in research applications, including the terms that reflect the different levels of experience expected for a role; and
- Forms of Engagement: different partnership models, and the ways in which they are demonstrated via letters and statements.

Tracking research proposals is important to understand the pipeline of activity (and income) to the university, but also in recognising strengths and synergies of institutions and their departments. The ability to monitor the pipeline of research proposals has many benefits, including better understanding of income sources over time, submission and success rates, and the return on investment of research support resources. Tracked applications, where unsuccessful, can be flagged for follow-up with Principal Investigators and collaborators, or successes shared with senior management. In this glossary we present some basic tracking metrics that could be used for a term as if it were a field in a tracking table. We have not delved into bespoke reporting but would recommend that the suggested tracking ideas are also broken down temporally and by an institution's departments and disciplines, to make the most of data for a rich reporting environment.

We have considered how these tracking metrics could be used to provide evidence in proposals, qualification questionnaires, and due diligence forms. The evidence required can often take time to gather if not stored in a central system. These evidence suggestions are therefore useful for building a system based on funder requirements, mandatory reports, and aspirations. Selecting an evidence criterion based around staff capacity and track record might be a good starting place for an institution that often receives pre-qualification questionnaires asking for proof of experience. Using the glossary, several terms can be identified to support this information gathering if added to a system and data entered on proposals over time, this includes: Buyout, Direct Costs, Full Economic Costs, Programme Income, Principal Investigator and Consultancy Agreement. These would be considered some essential fields for a system at an institution requiring evidence to demonstrate staff capacity and track record.

When our team first came together, we recounted our own experiences in research development and discussed difficulties in understanding funder terminology, including qualification criteria. We tripped over our own words trying to describe these challenges amongst the group, further cementing the worth of our project. We have gained significant understanding and experience as a team and are glad we can share this project with RMAs and researchers across the UK and Africa.

TEAM MEMBERS



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Grace is an experienced research manager and team leader, having worked in the private, public and Higher Education sectors. She joined LSE as Head of Research Development following roles as Research Development Team Manager (University of Westminster) and Tender Support Team Leader (UK-CEH). She has supported research strategy development for projects and policy and is interested in the impact of policy and process to improve research management practice, and the wider research environment. Grace has leads research development colleagues and supports development research across LSE; in particular at the Firoz Laji Centre for Africa, and the International Growth Centre.



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In his role as Africa Engagement Programme Manager, Ikenna works to develop strategic partnerships with African centres of academic excellence, as well as public and private institutions in Africa, in order to strengthen LSE's connection to the continent. By communicating with African academics across disciplines, he works to promote research collaborations with the Firoz Lalji Institute for Africa at LSE. At LSE he also worked on the Programme for African Leadership as the Programme Officer, providing leadership training and workshops to African students in post-graduate programmes. Prior to joining LSE, Ikenna worked for five years on programmes that provided scholarships to African university students. He supported over 130 students from 28 different African nations as they transitioned into university. His research interests are in higher education and African development, and the role that tertiary institutions play in reproducing racial and ethnic hierarchies globally.

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Paul Makoni is the Chief Research Officer in the Research and Internationalisation Office at the National University of Science and Technology (Zimbabwe). His responsibilities include identifying and exploiting alternative sources of funding for NUST researchers, assisting in proposal development, submission, implementation and management. Has coordinated the development of a research policy at NUST and runs courses on research methodology for Tertiary institutions academics. He researches on tropical diseases, kinanthropometry and health status of Zimbabwean school children. He holds a PhD in Zoology from the University of Copenhagen.



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Mandla Tirivavi is the Research Programmes Coordinator/Grants Administrator at Africa University Clinical Research Centre: College of Health, Agriculture and Natural Sciences. She successfully coordinated several Clinical Trials, led a team of research committee members to review the institution's research policy and dissemination. She is the Grants Administrator of a 5 Year National Institute of Health (NIH) funded project that facilitated the setting up of the Research Management and Administration Services at Africa University, has been assigned to serve in the Office of Research and Innovation (ORI) offering Pre-Award and Post-Award Research Administration Services to the wider Institution. Her grant-writing support resulted in improved research uptake by early career researchers, improved research governance, management and administration of externally funded grants. She is mentoring other new staff assigned to ORI. Mandla holds Master of Arts in Social Behaviour Studies from University of South Africa.



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Ying Chen is the Head of Research and Knowledge Exchange Delivery at SOAS. She is leading the research office which include pre and post award, research ethics and contracts, research systems and contracts functions. She is skilled at research staff development and grant income generation and project management strategies and she is passionate about decolonising research and creating equitable international partnerships. She was trained a neuroscientist and worked as a pharmaceutical scientist and a lecturer before becoming a research development manager.

HOW TO USE GLOSSARY RECORDS

These icons indicate the organisation type and location of the original definition, for which sources are provided at the end of this glossary.

Definitions have been copyedited to standardise the grammar and tone, but retaining the content and as such the definitions may differ from their source material.

Term: This is the word that will be defined

Below the Term are the synonymous and similar terms

This is what tracked or reported on using this term in your pre-award systems

APPROVED BUDGET

Price; Budget

Financial plan (income and expenditure) for proposed work

The anticipated financial plan for a project or programme, authorised for a budgetary period, including anticipated income (receipts) and expenditure (payments).

















Can be used to provide evidence to support: a financial plan



Definition. This will take up a few lines and will explain the above Term. It will be clear and concise and not include any lengthy or hard to comprehend phrases or words

Icons indicate the source of the term by location, and the type of organisation

This is what the tracking can be used to provide evidence for in qualifying for funding and compliance with Funder rules

Icons Key	Funder	Research Organisation	Non-Government Organisation	Central Government
Africa				
European Union				
North America				
United Kingdom				

COST AND PRICING

Costing and pricing is a key process in proposal development. Some would argue it is the core service that RMAs provide, to get proposals submitted to the funder. This category was chosen due to both the aforementioned necessity, as well as the nuanced use of different language drawn from national accounting practices, funder and scheme regulations, and organisational (primarily University) norms. A particular case is the terminology of Overheads; perhaps the most important area of costing and pricing for new and emerging institutions to ensure the full costs of research are covered. Funders are divided not only on the term, but also the formula and definition. In such cases, we hope that this glossary provides a starting point for institutions interpreting call for proposals, and in particular allowable overheads costs. In narrowing the remit for these terms, we have balanced the glossary between detailed budget categories, such as travel and subsistence, and high-level finance practice, whilst maintaining that the terms should be broadly confined to research development budgeting. For example, the term overheads is included as it is core to cost recovery and its disparities in research funder language, whereas daily subsistence allowance, whilst relevant, is at an acute level of detail and universally understood in most sectors.

As part of tracking these terms, almost all associated with costing and pricing could be reported as “cost associated with” said term across the portfolio and within projects, but we have not included these repetitive and simple tracking ideas. As part of our review of qualification criteria we noted that the key concerns fell in two areas: capacity to undertake work through a demonstrable research track record of comparably valued projects and programmes; and how research finances at the project and programme level are monitored and reported.

ADMINISTRATION COSTS

Costs directly assigned to the administration of actions taken within a project or programme. May include but are not limited to: costs relating to any bank guarantee; rental of meeting rooms (including coffee breaks); rental of interpretation booths; costs for external audits required by the call or grant agreement; consumables and supplies.



ALLOWABLE COST

Costs that are reasonable and allocable to the proposed work

A cost incurred by a recipient that is: reasonable for the performance of the award; allocable; in conformance with Funder costing principles; consistent with regulations, policies and procedures of the recipient as applied across funded and other activities of the organisation; determined in accordance with generally accepted accounting principles; and not included as a cost in any other award (unless specifically authorised).

Can be used to provide evidence to support: compliance with accounting standards



APPROVED BUDGET

Price; Budget

Financial plan (income and expenditure) for proposed work

The anticipated financial plan for a project or programme, authorised for a budgetary period, including anticipated income (receipts) and expenditure (payments).

Can be used to provide evidence to support: a financial plan



BUDGET

Approved Budget; Price

Budget of proposed work

The financial plan for a project or programme that the Funder approves during the initial award process or in subsequent amendments to the award. The budget may cover just the awarded portion of the finances or the entire financial plan, as determined by the Funder and according to the terms of any specific call or grant agreement.



BUYOUT

Teaching replacement

Workload (hours, days, %) allocated to proposals

Forecast workload (hours, days, %) allocated to proposed work

Funds to buy an academic staff member out of their normal teaching and administrative (service/citizenship) duties.

Can be used to provide evidence to support: staff capacity to undertake proposed work



CAPITAL EXPENDITURE

Equipment; Capital assets

Costs incurred to purchase project-related equipment, under the terms of a specific call or grant agreement and purchased according to procurement rules. May include: specialist equipment; office furniture and equipment; standard and off-road motor vehicles; and any other project-related equipment purchases.

Can be used to provide evidence to support: investment in research infrastructure



CENTRAL FUNCTION COSTS

Indirect costs; Facilities and administrative (F&A) costs

Costs associated with the organisation's Board of Directors. May include: basic salary; maternity and sick pay; other paid leave (sabbatical, vacation, home leave, and paid holidays); overtime; allowances; payroll taxes; pensions; travel and subsistence; and telephone. The term also relates to all salary and on-costs associated with the organisation's central functions, for example human resources; finance; information technology; secretarial; internal audit; policy, research and evidence departments; marketing; office management; travel and subsistence; bank charges; recruitment costs; and any other central support functions.

*Can be used to provide evidence to support: costing and pricing approach to overheads;
Negotiated Indirect Cost Rate Agreement (NICRA)*



CONSULTING FEES

Costs incurred to procure expert services or advice. Fees paid by an institution to a salaried member of its faculty are allowable only in unusual cases and only if both of the following conditions exist: (1) the consultation crosses departmental lines or involves a separate operation; and (2) the work performed by the consultant is in addition to their regular workload.

Can be used to provide evidence to support: consultant (sub-contractor) costs for supply-chain transparency



COSTS OF SERVICES

Costs incurred for services procured to carry out specialised tasks that beneficiaries cannot do themselves. May include: translation, production of documents, studies, website creation, technical/informatics support, accountancy, catering.

Can be used to provide evidence to support: service provider (sub-contractor) costs for supply-chain transparency



DIRECT CONTRIBUTION

Direct contribution to proposed work

Forecast direct contribution vs. income

Cash or other resources provided specifically to a project or programme and used directly in the pursuit of the research.

Can be used to provide evidence to support: commitment to proposed work



DIRECT COSTS

Directly incurred; Directly allocated

Direct costs of proposed work

Recovery of direct costs against income

Costs that are explicitly identifiable as arising from the conduct of a project, programme, or activity with a high degree of accuracy. These costs are charged as the cash value spent and are supported by an audit record.

Can be used to provide evidence to support: top projects by value; project value track record (e.g., must have undertaken X projects worth over X currency in the last three years); financial stability by recovery of costs



DIRECTLY ALLOCATED

Directly attributable project costs

Directly allocated costs of proposed work

Leverage of existing resources vs. new spend

Costs of resources incurred by a project, programme, or activity but that are shared by other activities. These costs are charged to projects based on estimates rather than actual costs; they do not represent actual costs on a project-by-project basis.



DISALLOWED COSTS

Ineligible costs

Costs associated with project non-reimbursable by the Funder

Costs made to an award that the awarding agency or pass-through organisation determines to be unallowable, in accordance with applicable statutes, regulations, or the terms and conditions of the specific funding call or grant agreement.



EQUIPMENT

Capital equipment;

New equipment purchases required for a project. Associated costs of purchasing (e.g., installation and testing) may be included in the price, dependent on a funder's terms and conditions and procurement rules.

Can be used to provide evidence to support: investment in research infrastructure



ESTATE COSTS

Overheads; Institutional overheads; Facilities and administrative (F&A) costs

Project income coverage of estates

Costs incurred from running facilities, premises and associated administrative duties 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. Typically assigned as a proportion of overall overheads.

Can be used to provide evidence to support: costing and pricing approach to overheads; Negotiated Indirect Cost Rate Agreement (NICRA); financial stability by recovery of estates costs



FACILITIES AND ADMINISTRATIVE (F&A) COSTS

Indirect costs

Costs associated with F&A

Project income coverage of F&A costs

Necessary overhead costs incurred by a recipient organisation for the common management and delivery of more than one cost objective. These costs are not readily assignable to specific cost objectives without effort disproportionate to the results achieved.

Can be used to provide evidence to support: costing and pricing approach to overheads; Negotiated Indirect Cost Rate Agreement (NICRA); financial stability by recovery of Facilities and administrative costs



FRINGE BENEFITS

On-costs

Allowances and services provided by employers to their employees as compensation in addition to regular salaries and wages. May include, but are not limited to, the costs of: leave (vacation, family-related, sick, or military); employee insurance; pensions; and unemployment benefit plans. Unless provided elsewhere, these costs are allowable provided that the benefits are reasonable and are required by law, employer-employee agreements, or as established policy of the employer.

Can be used to provide evidence to support: compliance with labour laws



FULL ECONOMIC COST (FEC)

Total cost; Total project cost; Total programme cost

FEC of proposed work

Recovery of FEC against income

A government-directed standard costing methodology used across the UK higher education sector to provide consistent and transparent project or programme costs. The underlying principle is to establish the true cost of research and hence inform the amount requested from funders.

Can be used to provide evidence to support: costing and pricing approach to FEC; top projects by value; project value track record (e.g., must have undertaken X projects worth over X currency in the last three years); financial stability by recovery of FEC



FULL-TIME EQUIVALENT (FTE)*Full-time appointment (FTA); Full-time effort***FTE allocated to proposals****Forecast FTE allocated to proposed work**

The percentage of a full-time post that the post holder will spend working on a project or programme.

Can be used to provide evidence to support: staff capacity to undertake proposed work

**FULL-TIME APPOINTMENT (FTA)***Full-time equivalent (FTE); Full-time effort***FTA allocated to proposals****Forecast FTA allocated to proposed work**

The number of days per week and/or months per year representing full-time effort at the applicant/recipient organisation, as specified in organisational policy. The organisation's policy must be applied consistently regardless of the source of any financial support.

Can be used to provide evidence to support: staff capacity to undertake proposed work

**INDIRECT CONTRIBUTION***In-kind contribution***Indirect contribution to proposed work****Forecast indirect contribution vs. income**

Contribution to a project or programme expended indirectly. May include: costs related to the use of facilities or equipment on the project partner's own premises; and costs to provide staff time for project liaison, management and/or evaluation.

Can be used to provide evidence to support: commitment to proposed work

**INDIRECT COSTS***Overhead costs; Institutional overheads; Facilities and administrative (F&A) costs;**Non-project attributable costs***Indirect costs of proposed work****Project income coverage of indirect costs**

Non-specific costs incurred by an organisation as overhead expenses or ongoing operational costs for the management and delivery of its activities and projects, but which are not easily identified with any specific project. They are charged across all projects based on estimates that are not otherwise included as directly allocated costs. May include but are not limited to, the costs of a research organisation's administration such as: personnel; existing facilities costs; accounting and finance; grants management; legal expenses; utilities; and technology support.

Can be used to provide evidence to support: costing and pricing approach to overheads;

Negotiated Indirect Cost Rate Agreement (NICRA); financial stability by recovery of indirect costs



INFLATION ALLOWANCE

The allowed rate of inflation added to project direct costs, according to the funder's terms and conditions.



IN-KIND CONTRIBUTION

In-kind contribution to proposed work

Forecast in-kind contribution vs. income

Non-cash contributions from non-academic collaborators as described in a project's collaboration agreement. May include: staff time; use of equipment and other resources; materials; provision of data, etc.

Can be used to provide evidence to support: commitment to proposed work



INSTITUTIONAL BASE SALARY

Basic salary

The annual compensation paid by an organisation for an employee's appointment, whether that individual's time is spent on research, teaching, patient care or other activities. Excludes any income that an individual may be permitted to earn outside of contractual duties for their organisation. A base salary may not be increased by replacing organisational salary funds with grant funds.



MANAGEMENT FEES

Costs incurred, typically by the lead organisation, to manage recruitment and the project work of external consultants/contractors and delivery partner programme staff where these costs are significant (i.e., they result in specific additional direct programme costs in excess of normal organisational cost levels).



MATCHING

Cost sharing; In-kind contribution; Direct contribution; Cash contribution

External in-kind contribution to proposed work

The value of third-party, in-kind contributions. Match funding may be the portion of project or programme costs not borne by the funding agency or pass-through entity. Costs used to satisfy matching or cost-sharing requirements are subject to the same policies governing allowability as other costs under the approved budget.

Can be used to provide evidence to support: external commitment to proposed work; collaborative research



NEGOTIATED INDIRECT COST RATE AGREEMENT (NICRA)

In the US, a document published to provide an estimate of the indirect cost rate negotiated by a recipient organisation, covering facilities and administrative costs and fringe benefit expenses incurred by the organisation.



NET CONTRIBUTION

Net contribution generated by proposed work

Sales value less variable cost of sales. Expressed as total contribution, contribution per unit, or as a percentage of sales. Also termed income less direct costs and estates.



ON-COSTS

Employer's contributions; Fringe benefits

Costs incurred in addition to salaries to budget the full employment costs of a new post or existing staff member. May include: social security/national insurance and superannuation (pension) contributions.



OTHER COSTS

Non-staff costs; Other direct costs

Other costs of proposed work

Costs of other items dedicated to the project that are not attributed elsewhere. May include: consumables; books; survey fees; purchase/hire of vehicles; and recruitment and advertising costs for staff directly employed on the project.



OTHER DIRECTLY ALLOCATED

Non-staff costs; Other direct costs

Other directly allocated costs of proposed work

Costs of shared resources incurred through the project. May include: costs of technical staff; and access to research facilities such as equipment and IT systems.



PERSON MONTHS

Person months allocated to proposals

Forecast person months allocated to proposed work

Expresses the effort (amount of time) that personnel devote to a specific project or programme. When calculating and justifying the time budget, it is important to take account of each individual's existing contract terms (i.e., by calendar or academic year, or with summer months included or excluded).

Can be used to provide evidence to support: staff capacity to undertake proposed work



PERSONNEL COSTS

Staff costs

Costs incurred or allocated by a recipient organisation for personnel to deliver a project or programme. These costs comprise actual salaries plus all fringe benefits normally included as part of personnel remuneration (provided that these costs are in line with the recipient organisation's usual policy on remuneration).



PRE-AWARD COSTS

Pre-award expenditure; Pre-agreement costs

Costs incurred prior to the commencement date of a project or programme period or during the initial budget period of a competitive segment (under a multi-year award). These costs, which would otherwise be allowable, are incurred in anticipation of the award and at the applicant's own risk.

Can be used to provide evidence to support: risks, liabilities and limitations associated with pre-award costs



PREMISES AND OFFICE COSTS

Estates costs

Project income coverage of premises and offices

Costs associated with managing, maintaining and running an organisation's premises and offices. May include: rent and imputed rent; mortgage costs; depreciation; management of facilities; building insurance; rates; maintenance and cleaning; groundworks and gardening; utilities; catering; vending services; and residential accommodation.

Can be used to provide evidence to support: costing and pricing approach to overheads; Negotiated Indirect Cost Rate Agreement (NICRA); financial stability by recovery of premises and offices costs



PRICE

Sales value; Income; Funder contribution

Price of proposed work

Recovery of direct costs against price

The amount eventually paid by the funder. Different funders have different rules which dictate the contribution they are able or willing to pay.

Can be used to provide evidence to support: top projects by price; project value track record (e.g., must have undertaken X projects worth over X currency in the last three years); financial stability by recovery of costs against price



PROFITS

Fees

Profits generated by proposed work

A profit or fee under a grant is not a cost, but an amount in excess of actual allowable costs. In accordance with normal commercial practice, and dependent on a funder's terms and conditions, a profit or fee may be paid to a contractor providing routine goods or services to a grant recipient.



PROGRAMME INCOME

Funder contribution

Income from proposed work

Recovery of direct costs against income

Gross income earned by a grant recipient that is directly generated by a supported activity or earned as a result of the award during the period of performance, as defined by the funder's terms and conditions. May include: fees for services performed; use or rental of premises or personal property acquired by the project or programme; sale of commodities or items fabricated by the project or programme; licence fees and royalties on patents and copyrights; and principal and interest on loans made from award funds, subject to the funder's terms and conditions on making such loans.

Can be used to provide evidence to support: top projects by income; project value track record (e.g., must have undertaken X projects worth over X currency in the last three years); financial stability by recovery of costs against income

STAFF COSTS

Personnel costs

Payroll costs requested for staff (full- or part-time) who will work on the project or programme and whose time can be supported by a full audit trail during the life of the project.



TEACHING REPLACEMENT

Buyout

Salary costs of an individual to undertake the normal duties of the applicant or project participant for the duration of the buyout period.

Can be used to provide evidence to support: staff capacity to undertake proposed work



TOTAL COSTS

Total project costs; Total programme costs

Total costs of proposed work

Recovery of total costs against income

Total allowable costs, including direct costs, F&A costs and the value of in-kind contributions made by third parties, incurred by a recipient in accomplishing the objectives of the award during the period of performance. May include costs charged to the grant and costs borne by the recipient organisation to satisfy a matching or cost-sharing requirement.

Can be used to provide evidence to support: top projects by value; project value track record (e.g., must have undertaken X projects worth over X currency in the last three years); financial stability by recovery of costs



TRANSPARENT APPROACH TO COSTING (TRAC)

A uniform approach to the costing of research activities undertaken by all UK higher education institutions. TRAC uses expenditure information from published financial statements and cost adjustments to provide the full economic cost (FEC) of activities. It therefore encompasses both the direct and indirect costs of activities and an adjustment to historic expenditure to reflect the full, sustainable costs of the activities.



TRAVEL AND SUBSISTENCE

Travel; Accommodation; Travel, accommodation and subsistence allowances

Costs incurred by staff working on a project or programme for travel, subsistence (and accommodation where allowable), where these are required to accomplish the objectives of the award.



TRAVEL, ACCOMMODATION AND SUBSISTENCE ALLOWANCES

Travel; Accommodation; Travel and subsistence

Allowances for staff working on a project or programme for travel, accommodation and related subsistence, provided they are in line with the recipient organisation's usual practices on travel costs and do not exceed thresholds periodically approved by the funder.



WORKABLE DAYS

Number of working days staff are allowed to work on a project or programme, respecting working time standards set through national laws, collective agreements or under applicant organisations' normal accounting practice.



ETHICS

Ethics and ethical compliance play an integral role in any project or programme. Funders require institutions undertaking research to ensure projects are carried out ethically and with integrity. Having research ethics policies and procedures, and a Committee, are often essential qualifying conditions for receiving funding. In addition, good clinical practice can facilitate a cooperative culture for an institution's staff in developing good practice for research activities. However, it can also drive rifts between cooperating institutions by creating strict barriers to collaboration. We have not included those terms specific to clinical research, due to the extensive detail in these areas, and we have excluded non-ethics specifics terms where possible as they can be realised with context (e.g. Risk, Anonymisation).

Developing ethics tracking ideas for this glossary prompted questions around how institutions document pre-award ethical issues for tracking purposes. The key difference as to whether ethics is tracked at pre-award is the amount of research conducted by the institution involving human participants and sensitive materials (e.g. biological, highly-confidential), and those involving data. Reporting of ethics will be most helpful for identifying projects with ethical concerns requiring documentation for consent and material transfer, for example, where a small research office needs to manage the process efficiently and without chasing researchers.

Qualifying requirements in the ethics category revolve around funder and national regulation and compliance; we have therefore generalised our examples to provide the widest benefit (e.g. data management plan).

ANONYMISED DATA

Proposed work involving anonymised data

Information that does not relate to an identified or identifiable natural person. During anonymisation, personal data must be stripped of sufficient elements so that it is not, or is no longer, possible to identify an individual (also known as a data subject) from the dataset.

Can be used to provide: evidence that proposed work using anonymised data will undergo ethics review

CG

ASSENT

Apparent agreement to take part in research from an individual who is judged unable to provide valid consent.

S

CLINICAL TRIALS

Clinical trials submitted/awarded to the institution

A research study involving human participants to see if a medicine, treatment or intervention works properly or improves services. In trials, participants are prospectively assigned to one or more interventions to evaluate the effects of those interventions on health and/or behavioural outcomes. Clinical trials are used to determine whether new biomedical or behavioural interventions are safe, efficacious and effective.

Can be used to provide evidence to support: clinical trials awarded for clinical trial registry; compliance with registry requirements

S

COMPETENT PARTICIPANTS

Competence

Human participants able to give informed consent to their own participation in research. A competent participant can: (1) understand the nature and effects of the decision; (2) weigh up the information provided and come to a decision about it; and (3) communicate their decision.

Q

COMPLIANCE

Proposals compliant with regulations

Proposals non-compliant without ethical review

Adherence to requirements and responsibilities, often imposed by legislation and/or regulation, that organisations assume during a project or programme. Organisations sign certifications or representations regarding compliance for most projects or programmes. They should therefore have systems in place to ensure compliance and maintain adequate records to demonstrate compliance if challenged or audited.

Can be used to provide evidence to support: compliance with funder/national requirements

NGO

CONFIDENTIALITY**Proposed work involving confidential information**

Privacy attached to certain information, including commercial or personal data.

Can be used to provide: evidence that proposed work using confidential information will undergo ethics review

**CONFLICT OF INTEREST (APPARENT)**

Conflict of Interest (perceived)

Proposals in which a person appears to have a conflict of interest

A situation in which a project participant has a financial, personal, political or other interest that is not likely to bias their judgment or decision-making concerning any ethical or legal obligation or duty, but which may appear to do so from the perspective of an outside observer.

Can be used to provide: declarations of conflict of interest

**CONFLICT OF INTEREST (FINANCIAL)****Proposals in which an organisation has a financial conflict of interest**

A situation in which a project participant (individual or organisation) has a significant financial interest that a designated official reasonably determines could directly and significantly affect the design, conduct or reporting of the project or programme.

Can be used to provide: declarations of conflict of interest

**CONFLICT OF INTEREST (INSTITUTIONAL)****Proposals in which an organisation has a conflict of interest**

A situation in which an organisation has financial, political or other interests which are likely to bias decision-making concerning the performance of ethical or legal duties.

Can be used to provide: declarations of conflict of interest

**CONTROLLED DATA****Proposed work involving controlled data**

Data which may be identifiable and thus potentially disclosive, but to which access may be granted by a relevant authority to accredited users.

Can be used to provide evidence to support: data management planning; compliance with data access rules



DATA CUSTODIAN

Data controller

Proposed work involving a data custodian

A person who determines the purposes for which, and way, any personal data are to be processed in line with regulations or legislation. The principal legal liability for data breaches lies with data custodians/controllers.

Can be used to provide evidence to support: responsibility for personal data processing



DATA MANAGEMENT PLAN

Proposals with data management plans

Describes how data will be acquired, produced, processed and stored during research. The plan specifies: how data will be managed, described, and stored; what standards will be applied; and how data will be handled and protected during and after the completion of the project or programme.

Can be used to provide evidence to support: data management planning; compliance with data access rules



DATA PRODUCER

Data depositor

An individual or organisation named on a licence as having sufficient responsibility to grant rights on behalf of a data collection. Typical depositors/producers May include: Principal Investigators; creators; and copyright owners of a data collection.

Can be used to provide evidence to support: data management planning; data roles in proposed work



ETHICS PROTOCOLS

Accepted and approved procedures for addressing ethics issues in commonly occurring situations during research projects or programmes.



GOOD CLINICAL PRACTICE (GCP)

Proposal requires valid GCP certification

A standard for the design, conduct, performance, monitoring, auditing, recording, analyses and reporting of clinical trials. GCP provides assurance that the data and reported results are credible and accurate, and that the rights, integrity and confidentiality of participants are protected.

Can be used to provide evidence to support: compliance with ethical standards; ethics certification



HUMAN PARTICIPANT

Human subject

Proposed work involving human participants

A person who is the subject of study and whose personal information is used for the purposes of research. This information may be gathered directly from the individual or obtained indirectly.

Can be used to provide: evidence that proposed work will undergo ethics review



INFORMED CONSENT

Consent

The process of making and communicating a free, voluntary and informed decision by a competent participant or proxy. Research regulations specify the types of information that must be disclosed to the participant. Informed consent is usually recorded by means of a written, signed and dated form.



INFORMED CONSENT DOCUMENTATION

A record to document the process of consent approved by an authorised board or ethics committee. Research regulations require that consent be documented; however, an authorised board or ethics committee may decide to waive documentation of consent if the research is minimal risk and: (1) the principal risk of the study is breach of confidentiality and the only record linking the participant to the study is the consent form; or (2) the research involves procedures that normally do not require written consent outside of the research context.



PARTICIPANT INFORMATION

Given to potential human participants to help them make an informed decision about their participation in research.



(SENSITIVE) PERSONAL DATA

Proposed work involving (sensitive) personal data

Sensitive personal data includes information about: the racial or ethnic origin of a person; their political opinions; their religious beliefs or other beliefs of a similar nature; their physical or mental health or condition; their sexual life; the commission or alleged commission by them of any offence; any proceedings for any offence committed or alleged to have been committed by them; the disposal of such proceedings; or the sentence of any court in such proceedings.

Can be used to provide evidence to support: data management planning; compliance with personal data rules



PROCESSING DATA

The act of obtaining, recording or holding information or data or carrying out any operation or set of operations on information or data, including, but not limited to: (1) organisation, adaptation or alteration of the information or data; (2) retrieval, consultation or use of the information or data; (3) disclosure of the information or data by transmission, dissemination or otherwise making available; or (4) alignment, combination, blocking, erasure or destruction of the information or data.



RANDOMISED

The allocation of participants to receive (or not receive) a particular intervention.



RESEARCH ETHICS

The moral principles and actions guiding and shaping research from its inception through to completion, including the dissemination of findings and the archiving, future use, sharing and linking of data.



RESEARCH ETHICS COMMITTEE (REC)

Research Ethics Panel (REP); Ethical Review Board (ERB); Ethical Review Committee (ERC); Human Research Ethics Committee (HREC); Institutional Review Board (IRB); Institutional Ethics Committee (IEC)

An independent body, typically constituted of medical, scientific and non-scientific members, appointed to review research and assess whether a study, project or programme complies with an agreed set of moral principles and actions. The group's responsibility is to ensure the protection of the rights, safety and well-being of research participants by, among other things, reviewing, approving, and providing continuing review of protocols, amendments, methods and materials.



RESEARCH INTEGRITY

Following ethical standards in the conduct of research.



RESEARCH MISCONDUCT

Intentional, knowing or reckless behaviour in research that is widely viewed as unethical and/or illegal. This May include: fabrication, falsification, plagiarism or other practices that seriously deviate from those that are commonly accepted within the scholarly community for proposing, conducting, or reporting research and other scholarly activities. Research misconduct does not include honest error or honest differences in interpretations or judgments of data.



RESPONSIBLE CONDUCT OF RESEARCH

Proposal requires valid responsible code of conduct statement

Following ethical and scientific standards, legal and organisational rules in the conduct of research.

Can be used to provide evidence to support: compliance with ethical standards; ethics training



VALID CONSENT

Consent to participate in a research study or intervention is valid if it meets three conditions: (1) it is made by a competent participant; (2) the consent process is free from coercion; and (3) the consent is informed.



KNOWLEDGE EXCHANGE AND IMPACT

Over recent years, it has become increasingly important for researchers to demonstrate the impact of their findings from projects and programmes; this is driven by funders requests for information of how activities will create impact, both at proposal stage and through more traditional monitoring and evaluation once the project is awarded. Defining terms for pre-award, and associated tracking and qualification considerations, has been a challenge, as most requirements from mainstream funding bodies are for reporting of Knowledge Exchange and Impact (KEI) activities that resulted from research.

At proposal stage KEI is planned and presented as best-case scenarios. The glossary concentrates on key activities presented in proposal development (KEI and subsections; Knowledge Transfer, Economic and Societal Impact), and key terms that guide the development of impact plans (models and categories within them; Logic Models, Theory of Change). In addition, funders still use very disparate language, therefore researchers must be mindful of how the concept of KEI has evolved across national and sector terminology.

The terms for KEI could almost all be included in reporting as “project includes” said term across the portfolio and within projects, but we have not included these repetitive and simple tracking ideas. On the other hand, we have also not delved into more in-depth reporting of individual KEI activities, which would be conducted post-award. As part of our review of qualification criteria we noted that key concerns centre around a demonstrable research track record of impactful research, who it would reach (sector of society), and whether the institution has capacity to plan and deliver.

ACADEMIC IMPACT

Proposed work will generate academic impact

The contribution that research makes in shifting understanding and advancing scientific method, theory and application across and within disciplines.

Can be used to provide evidence to support: planned academic impact



ASSUMPTIONS

Hypotheses about factors or risks which could affect progress towards a goal. Assumptions are made explicit in theory-based evaluations where monitoring systematically tracks the anticipated results chain.



BENEFICIARIES

Beneficiaries of proposed work

The individuals, communities, or organisations expected to benefit directly or indirectly from a project or programme.

Can be used to provide evidence to support: beneficiaries and non-academic relationships



CAPACITY BUILDING

A coordinated set of deliberate interventions leading to: (1) skill upgrading, both general and specific; (2) procedural improvements; and (3) organisational strengthening.



CITIZEN SCIENCE

A research method by which non-expert individuals or communities can participate and collaborate in a study, project or programme. Approaches May include: crowdsourcing data; working with volunteers to analyse existing datasets; and collaborating with communities in designing research studies.



CO-CONSTRUCTION

Co-development; Co-production

An approach to learning that focuses on collaborating with others to build a body of knowledge and understanding that is shared by everyone in the group. Individuals are actively involved in the process of developing understanding as equal partners.



CONCEPTUAL IMPACT

Proposed work will generate conceptual impact

The contribution that research makes to reframe debates and the concepts and language of policy and practice deliberations and discourse.

Can be used to provide evidence to support: planned conceptual impact



ECONOMIC AND SOCIETAL IMPACT

Socio-economic impact

Proposed work will generate socio-economic impact

The contribution that research makes to a demonstrable societal or economic benefit, for individuals, communities, organisations, geographic areas or nation states.

Can be used to provide evidence to support: planned socio-economic impact



ENGAGED RESEARCH

Processes by which researchers interact with stakeholders at any or all stages of a research process including, but not limited to: issue formulation; production or co-creation of new knowledge; knowledge evaluation; and dissemination.



EVIDENCE-INFORMED PRACTICE

A combination of the best available evidence or findings from research with the experience and judgment of practitioners, end-users and decision-makers to deliver measurable benefits.



GOALS

Ideals resulting from a high-level vision. Goals are beyond the control of a project or programme, but a project or programme can contribute directly to their eventual realisation.



IMPACT

Proposed work will generate impact

A result or effect that is caused by, or is attributable to, a project or programme. Impact is often used to refer to higher level effects or changes that occur in the medium or long term. An impact may be intended or unintended, positive or negative.

Can be used to provide evidence to support: planned impact



IMPACT ASSESSMENT

Proposed work will assess impact

Analysis to measure (or forecast) the longer-term effects of a project, programme or an organisation's work on target groups, communities or wider society.

Can be used to provide evidence to support: plans to monitor impact



IMPACT ASSESSMENT PROCESS

The methods used to analyse (or forecast) all the changes which are expected to occur due to the implementation and application of a given policy option, intervention or uptake of research. Impacts may occur over different timescales, affect different actors and be relevant at different scales (local, regional, national or transnational).



IMPACT EVALUATION

Impact assessment; Evaluation; Monitoring and evaluation

Proposed work will evaluate impact

A systematic study of all changes that can be attributed to a particular intervention, such as a project, programme or policy. An evaluation typically involves the collection of baseline data for both an intervention group and a comparison or control group, as well as a second round of data collection after the intervention, sometimes many years later.

Can be used to provide evidence to support: plans to evaluate impact



INDICATOR

Target

Indicators of impacts for proposed work

A quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect changes connected to an intervention, or to help assess the performance of a project or programme.

Can be used to provide evidence to support: metrics for impacts for proposed work



INPUTS

The financial, human, and material resources used for a project or programme to achieve impact.



INSTRUMENTAL IMPACT

Policy impact

Proposed work will generate instrumental impact

A change in, or the development of new, policy, practice or service provision, the shaping of legislation or systematic altering of behaviours through policy or legislation based on the influence of a project, programme or intervention.

Can be used to provide evidence to support: planned instrumental impact



KNOWLEDGE EXCHANGE (KE)

Proposed work includes knowledge exchange (KE) activities

The processes by which knowledge, ideas and data move between a knowledge source and potential users of that knowledge. In all models of knowledge exchange, information, expertise and experience are exchanged with businesses, society and/or the economy. The shared knowledge has potential to affect innovation, and to change, transform, enhance, or generate new or improved professional practice, policies, technologies, products, services and public perceptions.

Can be used to provide evidence to support: planned knowledge exchange



KNOWLEDGE INTERMEDIARIES

Facilitators

Individuals who bring producers and users of knowledge together, thus connecting research evidence with user demand.



KNOWLEDGE MANAGEMENT

The process that makes knowledge available from knowledge collection and storage through to knowledge transfer and dissemination.



KNOWLEDGE MOBILISATION

Aligning research, policy and practice to make knowledge useable and accessible through collaboration, in order to improve products, services and outcomes for end users and target beneficiaries.



KNOWLEDGE TRANSFER

Proposed work includes knowledge transfer (KT) activities

A one-way process of sharing knowledge with an end-user by adopting more of a teacher-student learning relationship rather than a mutual exploration of an issue with shared knowledge generation and exchange.

Can be used to provide evidence to support: planned knowledge transfer



LOGFRAME

Logic model; Logical framework

A management tool used to improve the design of interventions, most often at the project level. A logframe identifies strategic elements (inputs, outputs, outcomes, impact) and their causal relationships, indicators, and the assumptions or risks that may influence success and failure. The tool facilitates planning, execution and evaluation of a development intervention.



LOGIC MODEL

Logical framework; Logframe

A visual diagram depicting the various components of a project or programme to illustrate how these components are congruently linked together to achieve intended outputs, outcomes and impacts.



MONITORING

Proposed work will monitor impacts

The routine tracking and reporting of priority information on a project or programme. May include: quantitative or qualitative indicators of inputs, activities, outputs and outcomes.

Can be used to provide evidence to support: plans to monitor impacts.



OUTCOME EVALUATION

Evaluation; Impact assessment; Impact evaluation; Monitoring and evaluation (M&E)

An assessment to measure the effects of a project or programme on targeted groups. The evaluation may focus on short and/or intermediate outcomes (e.g., changes in knowledge, skills, attitudes and behaviours) that are important to stakeholders so that delivery of the evaluation is feasible and meaningful.



OUTCOMES

Impacts

The primary results that a project or programme aims to achieve, often in terms of the knowledge, attitudes or practices of a target group.



OUTPUTS

Results; deliverables; products

The direct products or deliverables of a project or programme which may include: publications; prototypes; patents; toolkits; datasets.



PARTICIPATION (TOOL)

A management tool that provides quick feedback on project effectiveness during implementation. It captures perspectives and insights from stakeholders, beneficiaries and project implementers.



PROCESS EVALUATION

Evaluation; Impact assessment; Impact evaluation; Monitoring and evaluation (M&E)

A comparison between the intended implementation, delivery and reach of a project or programme, and its actual implementation, delivery and reach. The evaluation indicates whether a project or programme is being delivered as intended.



PUBLIC ENGAGEMENT

Citizen engagement; Civic engagement

Proposed work includes public engagement activities

Approaches by which the activities, outputs and outcomes of a project or programme can be shared with the public. Engagement is a two-way process, involving interaction and listening, with the goal of generating mutual benefit.

Can be used to provide evidence to support: planned public engagement.



TARGET

Indicator

A specified result (output or outcome), often expressed as a value of an indicator, that a project or programme intends to achieve.



TARGET GROUP

Beneficiary

Specific individuals, communities or organisations for whose benefit the project or programme is undertaken.



THEORY OF CHANGE

An outcomes-based approach that applies critical thinking to the design, implementation and evaluation of projects or programmes that intend to support change through their delivery.



PERSONNEL

Understanding categories of personnel is integral in relation to researcher management, in particular at pre-award due to the need for clarity on the people involved in a project or programme. This can provide assurance on the capacity, responsibility and governance on research activities, and provide visibility for researchers and support staff colleagues. These terms have been designed to balance between research personnel, such as the Principal Investigator or Visiting Fellow, and support staff such as Grants Officer and Programme Manager, whilst maintaining that the terms should be broadly confined to research staff.

Tracking the participation of personnel across proposals is helpful not only to institutions in reviewing resourcing, but it also aids researcher development and guides support staff in identifying key areas of guidance and training needs. For example, proposal submission and success rate (which are recommended reports for this category) would demonstrate an Early Career Researcher's (ECRs) track record, but also show institutionally for which funders have the most ECR submissions. This could provide weight for a business case to senior management to organize a workshop with this funder. As part of our review of qualification criteria we noted that the key concerns fell in two areas: ability to demonstrate a research track record commensurate with the career stage or criteria; and capacity to undertake work based on workload.

CHIEF INVESTIGATOR

Chief Researcher; Principal Investigator; Coordinating Investigator; Investigator

Proposals led by a Chief Investigator

Proposals led by the organisation

The lead researcher for a project or programme who is responsible for its overall conduct (in addition to specific responsibilities as a member of the research team).

Can be used to provide evidence to support: research independence; Chief Investigator track record



CLINICAL RESEARCH ASSOCIATE

Proposals involving Clinical Researchers

Proposals in which a Clinical Researcher has participated

An individual who operates independently from the clinical study site and who functions as a monitor and/or auditor and/or a project director within a project or programme.

Can be used to provide evidence to support: clinical research experience for the institution and individual



CLINICIAN

Clinician researcher; Clinical Researcher; Clinical scientist

Proposals involving clinical researchers

Proposals in which a Clinical Researcher has participated

An individual who conducts research and provides direct patient care within a project or programme.

Can be used to provide evidence to support: clinical research experience for the institution and individual



CO-INVESTIGATOR (CO-I)

Co-applicant; Collaborator

Proposals involving Co-Investigators (internal/external)

Proposals in which a Co-Investigator has participated

An individual who has responsibilities similar to those of a Principal Investigator (PI) on a research project or programme. While the PI has ultimate responsibility for the conduct of a project or programme, Co-Is are also obligated to ensure the work is conducted in compliance with applicable laws and regulations and organisational policies governing the conduct of funded research.

Can be used to provide evidence to support: research independence; Co-I track record; individual and organisational collaboration



CONSULTANT

Proposals involving consultants

Proposals in which a consultant has participated

An individual or organisation that provides professional advice or services for a fee, but normally not as an employee of a recipient organisation. In unusual situations, an individual consultant may be both a consultant and an employee of the same party.

*Can be used to provide evidence to support: consultants track record;
consultant management experience*

**EARLY CAREER RESEARCHER (ECR)**

New Investigator; Early Stage Researcher; Early Stage Investigator

Proposals involving Early Career Researchers

Proposals in which an Early Career Researcher has participated

An individual who is within a fixed number of years since the award of their PhD (the point of a successful viva) or equivalent professional training, or their first academic appointment (first part- or full-time paid contract of employment that lists research and/or teaching as primary functions). The number of years varies by funder, but is typically between six to eight years, usually excluding any period of career break.

*Can be used to provide evidence to support: transition to research independence;
researcher track record*

**GRANT OFFICER**

Grant Administrator

A funder's designee who is responsible for the business management aspects of an award.

**MID-CAREER RESEARCHER**

Proposals involving Mid-Career Researchers

Proposals in which a Mid-Career Researcher has participated

An individual who is between a fixed number of years since the award of their PhD (the point of a successful viva) or equivalent professional training, or their first academic appointment (first part- or full-time paid contract of employment that lists research and/or teaching as primary functions). The number of years varies by funder, but is typically between five to 12 years, usually excluding any period of career break.

*Can be used to provide evidence to support: transition to research independence;
researcher track record*



NAMED RESEARCHERS

Other participants

Proposals in which a researcher has participated

Researcher submission and success rates

An individual named on a grant application who is crucial to the project or programme but does not meet PI or Co-I criteria.

Can be used to provide evidence to support: researcher track record



OTHER PARTICIPANTS

Named researchers

Anyone actively associated with a project or programme.



POST-DOCTORAL RESEARCHER

Proposals involving Post-doctoral Researchers

Proposals in which a Post-doctoral Researcher has participated

Post-doctoral Researcher submissions and success rates

An individual who has received a doctoral degree (or equivalent) and is engaged for a temporary, defined period of mentored advanced training to enhance their professional skills and research independence to levels needed to pursue a research career.

Can be used to provide evidence to support: transition to research independence; researcher track record



PRINCIPAL INVESTIGATOR (PI)

Chief Investigator; Chief Researcher; Coordinating Investigator; Investigator

Proposals led by a Principal Investigator

Proposals led by an institution

An individual responsible for the preparation, conduct and administration of a research grant, contract or other funded project or programme in compliance with applicable laws, regulations and policies governing the conduct of funded research. They have primary responsibility for technical compliance, completion of programmatic work, and fiscal stewardship of awarded funds.

Can be used to provide evidence to support: research independence; PI track record



PROGRAMME MANAGER

Centre Manager; Institute Manager

Proposals involving research support

An individual who works in a team of academic research and business staff within an organisation. They oversee, plan, organise and communicate the start-up and ongoing delivery of a programme of activities and functions. A PM coordinates and supports multidisciplinary teams of researchers from across organisations.

Can be used to provide evidence to support: capacity to undertake proposed work



RESEARCH PERSONNEL

Researchers

Proposals in which a researcher has participated

Individuals who are employed and/or involved in any aspect of conducting protocol-driven research studies, projects or programmes. May include: researchers, administrators, clinical staff, research services consultants, project managers and others.

Can be used to provide evidence to support: researcher track record



RESEARCH SUPPORT STAFF

Professional services staff; Admin support; Project support

Proposals involving research support

Individuals who support the conduct of research studies, projects or programmes through a range of expert, administrative and management services. Their roles may be project- or programme-specific or provided through organisational support teams, including professional services and technical support staff.

Can be used to provide evidence to support: capacity to undertake proposed work



RESEARCHER

Research Assistant; Named researcher; Post-doctoral researcher; Research personnel

Proposals in which a researcher has participated

An individual whose primary responsibility is to conduct research and who is employed specifically for this purpose by an organisation. Researchers have different contract types, levels of training, experience and responsibility, and different career expectations and intentions. Disciplinary and organisational contexts mean a broad range of job titles fall within this definition.

Can be used to provide evidence to support: researcher track record



VISITING FELLOW

Visiting Scholar

Proposals involving Visiting Fellows

Proposals in which a Visiting Fellow has participated

An individual not employed by, but affiliated with, an organisation who is recognised for their contribution to research and/or a specific project or programme.

Can be used to provide evidence to support: Visiting Fellow track record



VISITING PROFESSOR IN PRACTICE

Proposals involving Professors in Practice

Proposals in which a Visiting Professor in Practice has participated

An individual with appropriate distinction within their area of practice without having sufficient academic credentials.

Can be used to provide evidence to support: Visiting Professor in Practice track record



VISITING SCHOLAR

Visiting Fellow

Proposals involving Visiting Scholars

Proposals in which a Visiting Scholar has participated

An individual with sufficient academic credentials from another organisation who will spend a period at an organisation (typically less than 12 months). A Visiting Scholar is expected to be physically present at the host institution for part or all of their appointment and play an active part in the intellectual life of the organisation.

Can be used to provide evidence to support: Visiting Scholar track record



VISITING SENIOR FELLOW

Proposals involving Visiting Senior Fellows

Proposals in which a Visiting Senior Fellow has participated

An individual, who has already published work of distinction, and who is recognised for their contribution to research, a specific project or programme, and/or other activities. They are not employed by the organisation but are affiliated with it.

Can be used to provide evidence to support: Visiting Senior Fellow track record



FORMS OF ENGAGEMENT

Partnerships and collaboration are key to success with many funders but more importantly, to ensure that the proposed project or programme is delivered successfully, which often requires input from different actors. When building equitable partnerships, it is important to be clear and creative to ensure that a meaningful relationship is co-developed, which can be documented and demonstrated.

There are differences in the ways that funders define and prioritise the forms of engagement between researchers and/or institutions, as shown by our similar and synonymous terms here. Understanding the common definitions can serve as a starting point before and during proposal development. The type and level of collaborations used contribute to a funder's understanding of meaningful and equitable partnerships, particularly in connection with international partnerships broadly, and specifically with African institutions. Having this information can provide context for decision-making when figuring out how to structure relationships within and among different institutions.

These defined terms will help to provide a basis for tracking the critical relationships, collaborations, and partnerships that individuals and institutions undertake in research, which is information that is often requested by potential funders and can feed directly into costing and pricing structures. Whether they are formal contracts or informal agreements, effective tracking will strengthen these relationships, improve capacity for communicating the nature of collaborations, and increase the probability of qualifying for funds.

AFFILIATE*Associate***Proposals involving Affiliates****Proposals in which an Affiliate has participated**

An individual or organisation not employed or contracted commercially, who will conduct temporary research-related activities, using an organisation's facilities and collaborate with research personnel.

Can be used to provide evidence to support: collaborative research; in-kind contribution from providers

**AWARDEE***Recipient or prime recipient; Lead institution; Grantee or prime grantee; Pass-through entity***Proposals in which the institution is an awardee**

An individual or organisation that receives an award directly from a funding/awarding agency or pass-through entity, based on an approved application, to carry out a project or program.

Can be used to provide evidence to support: track record as awardee

**CALL FOR FUNDING***Call for proposals; Notice of funding opportunity (NOFO); Funding opportunity announcement; Research funding announcement*

A thematic and financial framework that describes a problem to be tackled by research, the scope of project proposals and the funding budget (and project limits) available to meet this challenge.

**GRANT BENEFICIARY***Awardee; Recipient or prime recipient; Lead institution; Grantee or prime grantee; Pass-through entity*

An individual or organisation with whom a grant agreement has been signed or to whom a grant decision has been notified.

**COLLABORATION***Partnership; Alliance; Consortium***Proposals involving collaborators****Proposals in which a collaborator has participated**

An equal partnership between two or more entities or individuals who are pursuing mutually interesting and beneficial research.

Can be used to provide evidence to support: collaborative research



CONSORTIUM

Syndicate; Collaboration

Proposals involving multiple collaborators

An association of two or more entities or individuals working together on a common, well-defined scientific area, and sharing some common methods.

Can be used to provide evidence to support: collaborative research



CONSORTIUM AGREEMENT

Partnership agreement; Cooperative agreement; Collaboration agreement

A legally binding agreement that states how a research project or programme will be carried out by the award recipient and one or more other organisations that are separate legal entities.

Can be used to provide evidence to support: robust contracting practices



CONSULTANT AGREEMENT

Consultancy contract

A legally binding agreement between a person or organisation willing to provide advice and other related services, and the recipient of those services, usually in return for a sum of money. It outlines the scope of work to be conducted and other terms and conditions related to the agreement which may include: intellectual property rights in results; academic control over the work to be done; and the right to publish

Can be used to provide evidence to support: robust contracting practices



CONTRACT RESEARCH

Proposals for contract research activities

An agreement by which an organisation accesses the expertise of academics to improve its products or services. Companies procure specialist expertise through contract research when in-house capabilities are insufficient.

Can be used to provide evidence to support: contract research



DEBARMENT

Exclusion

The process by which a funder prevents an individual or organisation from participating in funding applications. If debarred or excluded, the person or organisation may not receive financial assistance (under a grant, cooperative agreement, sub-award, or sub-contract under a grant) for a specified period of time.



FELLOWSHIP

Proposals for fellowship activities

Funding applied for directly by an individual, or to where an institution may apply as host on behalf of an individual to manage research funds. Fellowships typically funding individual research and career development activities.



FUNDER

Donor; Sponsor; Customer

Proposals to a funder

Proposals to a type of funder

An organisation that provides funding for research, either through direct project or programme funding or through block funding. The research system has many funders with different missions and objectives. May include: public sector funders, charities, industry, and businesses.

Can be used to provide evidence to support: track record with funder, track record with a type of Funder



HOST INSTITUTION

Lead organisation; Receiving institution/organisation

Proposals as host institution

Any organisation that can accommodate a Principal Investigator and the project or programme research team. May include: universities; research centres; research institutes; public and contract research organisations.



JOINT VENTURE (JV)

Co-partnership

Proposed work involving joint ventures

Joint ventures entered for proposals

An association of two or more entities in which one member has the authority to conduct all business for and on behalf of all the other members. A joint venture may or may not have a legal personality distinct from that of its members.



LETTER OF INVITATION (LOI)

A letter from a funder, addressed directly to an individual or organisation, inviting them to submit details of a proposed project or programme.



MATERIAL TRANSFER AGREEMENT

Data Transfer Agreement

Proposed work involving material transfer

Material Transfer Agreements entered for proposals

An agreement between parties required when material (e.g., biological materials, compounds, equipment, prototypes, data, etc.) for use in research is transferred into or out of an organisation on a non-commercial basis.

Can be used to provide evidence to support: robust contracting practices, compliance with material transfer regulations



MEMORANDUM OF AGREEMENT (MOA)

Terms of Agreement; Memorandum of Understanding

Proposals involving a Memorandum of Agreement

Memoranda of Agreement entered for proposals

A legally binding document describing a cooperative relationship between two or more entities that wish to work together on a project or to meet a mutually agreed objective. This document provides the terms and details of the partnership.

Can be used to provide evidence to support: robust contracting practices



MEMORANDUM OF INTENT (MOI)

Record of Intent; Note of Intent; Letter of Intent

Proposals involving a Memorandum of Intent

Memoranda of Intent entered for proposals

A formal document, confirming an intent to sign a secondary agreement. This letter outlines the principal framework of the forthcoming agreement and is signed with an expectation that the agreement will be fully executed.

Can be used to provide evidence to support: robust contracting practices



MEMORANDUM OF UNDERSTANDING (MOU)

Proposals involving a Memorandum of Understanding

Memoranda of Understanding entered for proposals

A formal agreement to establish an official partnership or collaboration. The agreement is not legally binding but carries a degree of seriousness and mutual respect and should be treated accordingly.

Can be used to provide evidence to support: robust contracting practices



NON-DISCLOSURE AGREEMENT (NDA)

Confidentiality Agreement

Proposals involving a Non-Disclosure Agreement

Non-Disclosure Agreements entered for proposals

A legally binding agreement in which an individual or organisation promises to treat specific information as confidential or proprietary and not to disclose this information to others without proper authorisation.

Can be used to provide evidence to support: robust contracting practices



NOTICE OF AWARD (NOA)

Award letter; Offer letter; Grant notification

A formal document issued to notify a recipient organisation that an award has been made and that funds may be requested from the designated payment system or office.



NOTICE OF FUNDING OPPORTUNITY (NOFO)

Call for funding; Call for proposals

A thematic and financial framework that describes a problem to be tackled by research, the scope of project proposals and the funding budget (and project limits) available to meet this challenge.



PRIME (RECIPIENT)

Proposals as prime recipient

The individual or organisation that directly receives funds and is ultimately responsible to the funder for accurate completion of project or programme targets by all entities involved.

Can be used to provide evidence to support: track record as prime recipient



PROJECT PARTNERS

Collaborators

Proposals involving partners

Proposals in which a partner has participated

Individuals or entities who have an integral role in a project or programme. They may provide cash or in-kind contributions such as expertise, staff time, use of facilities, etc. but do not typically receive funding directly from the funder or prime recipient.

Can be used to provide evidence to support: collaborative research



REQUEST FOR PROPOSAL

Standard Request for Proposal; Call for proposals; Call for funding

A document prepared by a funder to elicit proposals from organisations who have the capability to undertake research projects or programs, based on a standard request for proposals.



RESEARCH CONTRACT

Agreement

A legally binding agreement that governs research between an organisation and external individuals or entities, whether those organisations are funding or participating in the research.

Can be used to provide evidence to support: robust contracting practices



SECONDMENT AGREEMENT

Proposed work involving a secondment

An agreement that permits an employee to temporarily transfer to another job for a defined period and for a specific purpose, to the mutual benefit of all parties.



STANDARD REQUEST FOR PROPOSAL

Request for proposal

A template document used by a contracting, commissioning, or funding agency as the basis for a request for proposals.



SUB-AWARD

Sub-awards; Sub-grants; Sub-agreements

A legally binding agreement for the purpose of passing funding from a prime recipient to an external organisation to undertake collaborative research on a project or programme.



SUB-AWARDEE

Sub-recipient; Collaborating institution; Collaborator; Sub-grantee

Proposals involving sub-awardees

Proposals in which a sub-awardee has participated

An organisation receiving a sub-award for performing research activities on a project or programme.

Can be used to provide evidence to support: sub-awardees for supply-chain transparency; collaborative research.



SUB-CONTRACTING

Outsourcing

Proposals involving sub-contractors

Proposals in which a sub-contractor has participated

The practice of assigning, or outsourcing, part of the obligations and tasks under a contract to another party (the sub-contractor).

Can be used to provide evidence to support: sub-contractors for supply-chain transparency



TERMS OF AGREEMENT

Terms of reference; Terms and conditions

All the legal requirements imposed on a project or programme by a funder, whether based on statute, regulation, policy, or other documents referenced in the grant award, or specified by grant award documentation. The terms of agreement may include both standard and special conditions that are considered necessary to attain a project or programme's objectives, facilitate post-award administration, conserve funds, or otherwise protect the funder's interests.

Can be used to provide evidence to support: robust contracting practices



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