

## Instructions and Guidelines EFSD and Lilly EXPLORING AND APPLYING NEW STRATEGIES IN DIABETES (EXPAND) Programme

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## 1) General Information

### General EFSD grant programme rules and regulations:

- Applications for EFSD grant programmes are invited from single non-profit institutions or groups of such institutions from Europe and associated countries (a detailed country list is provided on the [EFSD website](#) in the General Regulations section). The Principal Investigator and any Co-Investigators must be normally employed at a non-profit institution and the study must be performed at their place of work based in Europe or an associated country.
- Principal Investigators must be paid-up **EASD members** or have an EASD membership application pending. Details on how to become a member can be found on the EASD website: [www.easd.org](http://www.easd.org).
- Investigators may only hold a single EFSD award at any given time. This regulation applies to Principal Investigators as well as Co-Investigators. It does not apply to Collaborators. The EFSD Rising Star Fellowship Programme, EFSD Future Leaders Mentorship Programme for Clinical Diabetologists and EFSD Albert Renold Travel Fellowship Programme are exempt from this regulation.
  - Recipients of an EFSD award may apply for new funding to the same or to another EFSD programme on the condition that the current award is nearing completion (within six months). In this case, the new award cannot be activated until the existing project has been terminated and a final scientific report received and accepted.
  - If any other scientist in the PI's group is currently supported by EFSD, a Statement of Independence must be signed by both, the PI of the current application and the current grant holder. For more information see chapter 9 of this document.
- The duration of each grant may be one year or longer, depending upon the needs of the project and as justified in the application.
- Studies forming part of a larger project will be considered for funding, but this will need to be well justified in the application with clear indication of the total costs, the funding from other sources and the requested amount from EFSD and its allocation.
- All applications will be subject to scientific review by a specialised and independent *ad hoc* committee. Applications for research grants may undergo pre-review (or triage) procedures through a scientific review committee. In this event, any application rejected at pre-review will not be subject to a complete scientific review and no feedback report will be provided to the applicant.
- Grant activation documents must be returned to the EFSD Office within six months from the date of the EFSD award confirmation notice. In exceptional cases and with the prior permission of the EFSD Office, this time period may be extended a further six months. Any funding which has not been activated within twelve months of the award date will be automatically withdrawn.
- All funded Principal Investigators are required to submit a scientific report at the end of the project period. For those projects where funding is administered in

instalments, interim progress reports will also be required and such reports will be subject to assessment prior to the release of any further funds.

- A list of all EFSD regulations can be found on the Programmes link of the EFSD website:

<http://www.europeandiabetesfoundation.org/programmes/generalregulations.html>

For **programme specific** focus areas, review criteria, additional regulations, funding amounts and eligibility criteria, refer to the programme's Request for Application (RFA) which is published on the EFSD website:

<http://www.europeandiabetesfoundation.org/programmes.html>

## IMPORTANT

- **You must submit your application by 23:59 (CET) on the deadline date!** You submit your application by pressing the "Submit Application" button at the end of the submission form. Only submitted applications will be checked by the EFSD office and forwarded to the reviewers.
- All correspondence regarding your application and grant, in case of a successful application, will be sent **only to the PI's email provided in this application**. This email address can be different from the one used for the PI's MyEASD account.
- After submitting your application, you will receive an automatic confirmation email which will also include a link (see next point). Should you not receive this confirmation, please check your spam folder, then contact CTI technical support: [oasis@support.ctimeetingtech.com](mailto:oasis@support.ctimeetingtech.com)
- After submission of your application, you as the Principal Investigator, your Co-Investigators (if applicable) and your responsible Financial Officer will receive automated emails to the addresses provided in the application. **To finalise the application, you, all your Co-Investigators and your responsible Financial Officer must confirm the information accessed through a link provided in these emails.** These confirmations may be made up to 3 working days after the Programme deadline date. More information regarding this confirmation is provided in chapter 8.
- Within two weeks of the programme deadline date you will receive a second email once your application has been checked by the EFSD office. Should you have not received confirmation by then, please contact the EFSD Office: [foundation@easd.org](mailto:foundation@easd.org)

## Help

If you are having **technical difficulties** with the system, please contact

[oasis@support.ctimeetingtech.com](mailto:oasis@support.ctimeetingtech.com)

or call +1-217 398 1792 (Monday - Friday, 8 am - 5 pm US CT).

For **any other queries**, please contact the EFSD Office

[foundation@easd.org](mailto:foundation@easd.org)

or call +49-211-75 84 69-0 (Monday - Friday, 8 am - 4 pm CET).

## 2) Access the EFSD Online Application System

The EFSD online application system can be accessed via the [MyEASD](#) platform.

A link to the MyEASD Login is provided [here](#) or in the upper right corner of the [EFSD](#) and [EASD](#) home pages.

Log in to MyEASD with the email address and password from your existing account for EASD Membership or any other EASD application (EASD Annual Meeting Registration, EASD Annual Meeting Abstract Submission, EASD e-Learning, or EASD Virtual Meeting). If you do not have a MyEASD account yet, you will need to create one.

Once you are logged in at MyEASD, click on the “EFSD Applications” link and you will be directed to the start page of the EFSD online application system.

If you access the EFSD online application system for the first time, you will have to approve the third party data access confirmation by clicking on “I approve”. Then you will be directed to the start page of the EFSD online application system.

## 3) Getting Started in the EFSD Online Application System

Instructions on how to operate this online application system will be written in blue.

On the start page of the EFSD online application system is an overview which programmes are currently open for application in which application year. Towards the end of a year there will be more than one application year with open programmes.

To get to the programme you want to submit an application for or edit an existing one, click on the cube/grid icon in the upper left corner of the page, next to the home button. Then select the application year that contains your programme of interest.

You will be directed to the “Instructions and Guidelines” page of the application year you selected where you will find some general instructions and where you can download more detailed instructions and guidelines (e.g. this document) for your application type (e.g. grant, travel fellowship).

To begin a new application or access an existing one, click the “Applications” link in the page header.

Choose the programme you want to apply for and click “+ Add new” to begin an application.

To access an existing application, click on its title displayed below the programme name.

## 4) EFSD Research Grant Application

Instructions on how to operate the EFSD online application system will be written in blue.

To submit a grant application to EFSD in this system, you have to complete 13 steps, with the first step being to create a new application from the system’s start page, followed by 12 steps or sections of the actual application.

Once you started an application, the steps or sections of the application process are shown in a menu on the left-hand and can be accessed by clicking on the respective term.

All fields marked \* are required and you have to complete all required items in a step before you can then click “Save and Continue” and thereby save your work entered in this section. You will then automatically be directed to the next application section.

You can exit your application and the website at any time and your input will be automatically saved once you completed all required items in a section and clicked “Save and Continue”.

**You can re-enter the system and continue and/or edit your application any time before the programme deadline as long as you have not submitted your proposal yet.**

When you are ready to submit your application, click the "Submit Application" button at the end of the submission form. You can only submit an application when all required steps are completed.

After submitting your proposal and before the programme deadline, you will be able to access your application but you will not be able to make any more edits.

After the submission deadline you will no longer be able to access your application.

**IMPORTANT!** You must submit your application by 23:59 CET on the deadline date or it will not be forwarded to the reviewers!

## Step 1: Begin or Edit an Application

To **create a new grant application**, click the “+ Add New” button for the programme you want to submit an application for.

You can edit your application any time before the programme deadline as long as you have not submitted your proposal (by pressing the “Submit Application” button at the end of the submission form). **A submitted application will have the proposal status “Locked”**, a not yet submitted application will have the status “Incomplete” or “Complete”, respectively.

To **modify an existing proposal**, click on its title displayed below the programme name.

To make any edits, click the left-hand menu for the section you would like to edit.

**IMPORTANT!** Remember to click “Save and Continue” after making any edits!

## Step 2: Proposal Information

In this section you are asked to submit the following information:

- Title of proposal (max 100 characters including spaces)  
*Please note, the provided text field will only accept max 100 characters, any additional characters will be automatically cut off.*
- Total budget requested

*Please refer to the programme's RFA for the maximal funding amounts available*

*Please fill in only numbers, the system will format automatically*

- Project type (clinical or basic)  
*Clinical research is defined as a study performed in vivo, in human individuals with focus on clinically relevant and diabetes-related outcomes.*
- Project duration (project period in months, project start and end dates) *For project start and end dates, only the respective month and year are requested. If your project is for example over 12 months starting in January, you may either use December the same year or January the following year as the project end date.*
- Scientific abstract (max 2,500 characters including spaces)  
*Please note, the abstract text field will only accept up to 2,500 characters. If your abstract is within this limit but appears truncated in the field, please check if it includes any special characters or hidden characters that are not accepted by the system.*
- Up to five keywords (optional)

Fill in all required information and click "Save and Continue".

**IMPORTANT:** You have to complete this section to start the application process and to gain access to the Principal Investigator, Co-Investigator and Financial Officer sections (steps 10 - 12). You may, however, edit it later.

### Step 3: Financial Support

In this section you are asked to submit information on:

- Other active EFSD applications (if any)  
*You are welcome to apply for several EFSD programmes at the same time, this information only serves to expedite EFSD processes in case of a successful application.*
- Other support sought for this particular project (if any)
- Previous and current EFSD awards (if any)  
Recipients of an active EFSD award may apply for new funding to the same or to another EFSD programme on the condition that the current award is nearing completion (within six months). **If you currently hold an active EFSD award**, please submit a short status report/statement indicating the remaining tasks and expected completion date of this award as an upload in the Additional Documents section (step 9). Please keep this statement short and simple and do not include any scientific results. Please note that the new award cannot be activated until the existing project has been terminated and a final scientific report received and accepted.
- Currently active EFSD awards of your colleagues (if any)  
If any other scientist in your group is currently supported by EFSD, your application will only be considered if you, as the Principal Investigator named for this grant, can provide clear evidence that you are a fully independent researcher. In this case, you are required to download our **Statement of Independence** which must be signed by both the PI of this application and



the current grant holder and uploaded as part of this application in the Additional Documents section (step 9). More information and exceptions can be found in chapter 9 of this document.

- Currently active EFSD awards of your Co-Investigators (if any)
- All your other financial support (if any)

In addition, upload the **abstract pages of all sources of support** (pending or current) as a single pdf file in the Additional Documents section (step 9).

**IMPORTANT!** Please be aware that EFSD does not support a Principal Investigator or Co-Investigator with more than one EFSD award at any given time, whether or not the projects are in related fields and independent of the EFSD programme providing the respective funding. For exemptions refer to EFSD Rules and Regulations. It will, therefore, be necessary for all investigators to have completed the current project supported by EFSD and have submitted a final scientific report before any new funding can commence. Furthermore, the current award must be nearing completion (within six months) in order for any new application to be considered. Collaborators are exempt from this regulation.

Be completely open about support from other sources, including support from pharmaceutical industry. If the project is already supported from other sources, please explain this in detail and justify the additional/complementary resources requested. Please give funding amounts in Euro, regardless of budget currency.

Fill in all required information and click “Save and Continue”.

If any member of your research group currently holds an active EFSD award, download the Statement of Independence using the provided link in this section.

Upload the abstract pages of all sources of support (if applicable) as a single pdf file and the signed Statement of Independence (if applicable) in the Additional Documents section (step 9).

#### **Step 4: Ethical Approval**

In this section you are asked if your project involves experiments requiring ethical approval/s.

Please **do not include approvals as part of this application** (e.g. as an upload).

Should this application result in the granting of an award, a copy of the confirmation and/or signature page of all ethical human and/or animal approval/s will need to be attached to the grant activation documentation. The approval/s must conform to the national laws of the country where the research is to be carried out. Please note that no payments will be transferred until the appropriate approval/s have been granted and a copy received in the EFSD Office.

Answer the mandatory question and click “Save and Continue”.

## Step 5: Budget

In this section you are asked to provide a detailed budget for your project using the budget table A provided as a download.

A copy of budget table A is also provided in chapter 11 of this document.

The total budget requested and budget period that you provided in the Proposal Information section (step 2) will be automatically reproduced in this section and vice versa.

The total budget submitted must match the total being requested from EFSD. The budget period (time) during which the sum requested will be spent according to the specific needs of the project must be clearly stated and justified where indicated.

If the sum requested is part of a larger overall costing, then this may be explained in the Budget Justification section (step 7).

Please state your costs in Euros. If you are applying from a country outside the Euro Zone, please convert your local currency into Euros, using the exchange rate on the date of your application.

For salary requests, please note that EFSD accepts gross salaries including social charges and fringe benefits. The salary requested may not exceed (% effort) x (gross salary for the time period of the project).

You may (but are not required) to list all personnel involved in this project in the budget table, even if you do not request any salary for them. In this case, enter "0" or "n/a" in the respective salary request box and you do not need to disclose their institutional base salary.

Requests for indirect costs may not be higher than 10% of the subtotal direct costs.

Download budget table A using the link provided in this section, complete the budget document and then paste it into the editor in the online application system. Then click "Save and Continue".

For details on consultant/contractual costs, fill out budget table B in the Contractual Costs section (step 6) and enter the total amount into section D of the main budget table.

**IMPORTANT! Do not** deviate from this format, any budgets not submitted in the correct format will not be reviewed.

## Step 6: Contractual Costs

In this section you are asked to provide a detailed budget for any contractual costs (i.e. work carried out at another institution or company) requested in the detailed main budget (step 5) using the budget table B provided as a download.

A copy of budget table B is also provided in chapter 12 of this document.

Please list equipment costs also under Equipment in your main budget (step 5).

Download budget table B using the link provided in this section, complete the budget document and then paste it into the editor in the online application system. Then click "Save and Continue".



Enter the total amount of your contractual costs (subtotal direct costs in table B) into section D: Consultant / Contractual Costs in main budget table A (step 5).

**If your budget does not include any contractual costs, fill in n/a.** Please do not paste the empty budget table into the editor.

**IMPORTANT! Do not** deviate from this format, any contractual costs not submitted in the correct format will not be reviewed.

## Step 7: Budget Justification

In this important section you are asked to provide a justification for each item listed in the budget including contractual costs, as well as for the expected duration (time in months) of the project.

Provide clear justification for each budget item. This will allow the reviewers to determine whether the budget is appropriate for the proposed work. It might be helpful to explain local funding policies underlying certain requests.

If you apply for partial funding of a larger research project, please indicate clearly the total costs of the project, the funding from other sources and the planned allocation of EFSD funds. This will allow reviewers to assess financial feasibility of the whole project and the contribution of the new work, supported by EFSD, towards the overall success of that larger project.

This budget justification will be reviewed carefully and the Review Committee may on occasion and at its discretion recommend an award in a lesser amount considered more appropriate for the proposed studies.

Fill in all required information and click “Save and Continue”.

## Step 8: Work Distribution

In this section you are asked to provide information on:

- Your collaborators for this project – their names and institutions
- The distribution of work between your own, your Co-Investigator’s and your collaborator’s institutions

*Which experiments/measurements will be performed where*

- Percentage of work to be carried out by the PI and Co-Investigators (if any)  
*Please note, these percentages do not have to add up to 100% if additional personnel will be involved in the project*

**IMPORTANT!** A signed letter of confirmation from each collaborator on the project and any Co-Investigator not working in the PI’s institution is required. **Guidelines on Collaborative Agreements** including a mandatory statement are provided in chapter 7 of this document.

Fill in all required information and click “Save and Continue”.

Upload your collaborative agreements as a single pdf file in the Additional Documents section (step 9).

## Step 9: Additional Documents

In this section you are asked to upload your biographical sketch, your full research plan, and, if applicable, your Co-Investigator/s' biographical sketch/s, your collaborative agreements, confirmation letter of support of collaborating institution/local health authority, abstract pages from other sources of support, signed Statement of Independence and feedback from a previous unsuccessful EFSD application for the same project.

A list of the documents you are required to upload in this section as part of your application can be found in table 1 on the next page and in chapter 10 of this document. Remember to **use clear headings on your documents** as these will later be combined to a single document for the reviewers.

Please upload all documents in pdf format.

Please do not use fonts that are not commonly used (e.g. Arial MT) as these might affect the document that will be later accessed by the reviewers.

**IMPORTANT!** Please follow our **guidelines for biographical sketches, full research plan and collaborative agreements** provided in chapters 5 - 7.

**IMPORTANT!** Comply with the **length restrictions for the biographical sketches and research plan** as documents exceeding these parameters will not be forwarded for review.

More information regarding the Statement of Independence is provided in chapter 9.

If you previously submitted this project unsuccessfully to EFSD and received feedback, refer to the research plan guidelines (chapter 6), general considerations.

<b>Uploads mandatory for every application</b>	
PI's Biographical Sketch	Guidelines in chapter 5 max 3 pages, Arial 12
Research Plan	Guidelines in chapter 6 max 8 pages, Arial 12 + references
<b>Uploads mandatory if applicable to the application</b>	
Co-Investigator/s' Biographical Sketch/es	Guidelines in chapter 5 max 3 pages, Arial 12 per bio-sketch
Collaborative Agreements	Guidelines in chapter 7, one single pdf
Confirmation letter of support of collaborating institution/local health authority	one single pdf
Abstract pages from all other sources of support (pending or current)	one single pdf

Signed Statement of Independence	Information in chapter 9 Download in the Financial Support section (step 3)
Previous EFSD feedback to this project	Information in Research Plan Guidelines, chapter 6
Status report of current, active EFSD award	Information in chapter 4, step 3

Table 1: List of documents required to upload in the Additional Documents section

There is no restriction on max file size (e.g. 5MB) in the system. However, if you try to upload a large document using a lower speed internet connection, this might result in a time-out and error message and you may not be able to upload the document. If possible, divide the document into several smaller documents (e.g. several abstract pages from other support) and upload them separately or reduce the file size. If a division of the document (e.g. research plan) is not possible, nor a reduction in file size and you do not have access to faster internet, please contact the EFSD office for support.

**To upload a document**, enter a description of your file (e.g. research plan) and use the “Search...” button below the description’s text field to select the respective file on your computer, then click the "Add File" button to upload.

Repeat this until all files are uploaded

**IMPORTANT!** You have to enter a description of your file or you will not be able to upload!

You can check if you uploaded the correct file by clicking on the respective file caption name.

Once a file is uploaded, a “Continue” button will appear at the bottom.

Once all files have been added, click "Continue" to get to the next application section.

## Step 10: Principal Investigator

In this section you are asked to enter your contact details.

Your contact details (name, institution, institutional address, phone and email address) and your EASD member number will be **automatically pre-filled from your EASD membership account**. This information can be amended in the online application system except for your name and EASD member number. If your contact information is outdated, please remember to also update your information in your EASD membership account.

If you do not have a membership account yet, you have to enter the requested information manually.

**IMPORTANT!** All correspondence regarding your application and grant in case of a successful application will be **sent only to your e-mail provided in this application**. Principal Investigators must be paid-up **EASD members**. Your membership number and membership status (“true” or “false” meaning active or not) will be automatically transferred from your EASD membership account and you will not be able to make edits to these fields.

If you are not an EASD member, a number following EFSD\_ will appear in the EASD member number field and the information “false” for your member status.

**If you are not yet an EASD member or if your EASD membership has expired**, you have to become an EASD member or renew your membership, or your application will not be considered for funding. You may, however, apply for EASD membership and an EFSD award at the same time. To renew, re-activate or apply for EASD membership, go to the EASD Membership section in [MyEASD](#). Here you can also access your membership profile if you are a paid-up EASD member, update your contact details and check when your membership will expire. More information on EASD membership and how to become a member can also be found on the EASD website: [www.easd.org](http://www.easd.org).

Please note that the EASD membership application/renewal system in MyEASD will be closed from 1 July until after the EASD Annual Meeting each year. Instructions on how to apply for EASD membership in order to apply for an EFSD award during this time period will then be published on the Programme link of the EFSD website.

Check and/or fill in all required information and click “Save and Continue”.

You will be directed to summary page of your contact details. If you wish to return to the page where you entered your contact details, click “Edit”. Click “Continue” to get to the next application section.

## Step 11: Co-Investigator

In this section you are asked to enter the names and contact details of your Co-Investigators (if applicable).

**Co-Investigators** are equal participants who are jointly responsible for the project, whilst collaborators have a smaller input relating to one aspect of the project.

Any Co-Investigators of EFSD grant programmes must be normally employed at a non-profit institution in Europe or an associated country.

**IMPORTANT!** The regulation regarding only one EFSD award being held at a time applies to Co-Investigators as well as PIs. It does not apply to collaborators. Please make sure that your Co-Investigators are aware of this EFSD regulation and that this applies even if they do not receive any funds from this proposal in case of a successful application.

**If you do not have any Co-Investigators** for this application, continue directly to the next application step by selecting “Collaborating institution/local health authority” from the left-hand menu.

**If you have more than one Co-Investigator**, please note that you will be able to add more on the following page.

All Co-Investigators must be entered individually.

A biographical sketch of every Co-Investigator must be uploaded in the Additional Documents section (step 9). Please follow the guidelines provided in chapter 5 and comply with the length restrictions for biographical sketches (max 3 pages in font no smaller than Arial 12 points and single line spacing) as this will be strictly enforced.

From any Co-Investigator not working in the Principal Investigator's institution a signed collaborative agreement (see chapter 7) is also required, to be uploaded in the Additional Documents section (step 9).

**IMPORTANT!** After submission of your application, your Co-Investigators will receive an automated email to the address provided for them in this section of the application. **To finalise the application, all Co-Investigators must confirm the information accessed through a link provided in that email.** This confirmation may be made up to 3 working days after the Programme deadline date. Please instruct your Co-Investigators accordingly. More information on the subject of this confirmation is provided in chapter 8.

If you do not have any Co-Investigators, skip this step by selecting "Collaborating institution/local health authority" from the left-hand menu and continue directly to the next step.

If you have one or more Co-Investigators, enter the name and contact details of your first Co-Investigator and click "Save and Continue".

You will be directed to a summary page of your Co-Investigator's contact details where you can also add more Co-Investigators if applicable.

To add an additional Co-Investigator, click "Add a Co-Investigator", enter the name and contact details of your second Co-Investigator and click "Save and Continue". Repeat this step if necessary.

To delete a Co-Investigator, click "Delete" in the respective line in the Co-Investigator overview page.

To edit a Co-Investigator's contact details, click "Edit" in the respective line in the Co-Investigator overview page.

Once you entered all Co-Investigators, click "Continue" to get to the next application section.

## Step 12: Collaborating Institution/Health Authority

In this section you are asked to enter the names and contact details of the collaborating institution/health authority.

Fill in all required information and click "Save and Continue".

To delete or edit the collaborating institution details, click "Delete" or "Edit".

Once you entered the collaborating institution, click "Continue" to get to the next application section.

## Step 13: Financial Officer

In this section you are asked to enter the name and contact details of the responsible Financial Officer in your institution to whom, in case of a successful application, funds should be sent and who will keep a full account of disbursements.

Please note that there is a length restriction on the officer's job title of 20 characters.

**IMPORTANT!** After submission of your application, your responsible Financial Officer will receive an automated email to the address provided in this section of the application. **To finalise the application, the responsible Financial Officer must confirm the information accessed through a link provided in that email.** This

confirmation may be made up to 3 working days after the Programme deadline date. Please instruct your Financial Officer accordingly. More information on the subject of this confirmation is provided in chapter 8.

Fill in all required information and click “Save and Continue”.

Click “Continue” on the next page to get to the next application step.

To delete or edit your financial officer’s details, click “Delete” or “Edit”.

## **Step 14: Summary and Submission**

In this section you can review your work and submit your application once you have completed all required steps.

Note, you will only be able to submit your application if you have completed all required information.

If your application is complete, a “Submit Application” button will be displayed on the summary page.

If your application is not yet complete, you will see a notice which step(s) still need completion.

You can also view and print a printer-friendly version of your application.

To check your attached document, click on the respective file caption name in the list of “Additional Documents”.

You can edit your application any time before the programme deadline as long as you have not submitted your proposal yet.

### **IMPORTANT! No changes can be made after submission!**

Check your application carefully and make sure that it is accurate and complete.

To make edits, click the left-hand menu for the section you would like to edit.

For the sections “Principal Investigator”, “Co-Investigator” and “Financial Officer” you will be directed to the summary page of the corresponding section. To access their contact details, click “Edit”.

**IMPORTANT!** Remember to click “Save and Continue” after making any edits!

**To submit your application, click the “Submit Application” button.**

**IMPORTANT! You must submit your application by 23:59 CET on the programme deadline date or it will not be forwarded to the reviewers!**

Shortly after the submission, you will receive an **automatic confirmation email which will also include a link. To finalise your application, you must confirm the information accessed through this link.** If you do not receive this email, please remember to check your spam folder, then contact CTI technical support [oasis@support.ctimeetingtech.com](mailto:oasis@support.ctimeetingtech.com). More information regarding this confirmation is provided in chapter 8.

As mentioned in the previous sections (step 11 and 12), your Co-Investigators (if applicable) and your responsible Financial Officer will receive automated emails to the addresses provided in their sections of this application. **To finalise the application, also all your Co-Investigators and your responsible Financial Officer must confirm the information accessed through a link provided in these emails.** These



confirmations may be made up to 3 working days after the Programme deadline date. Please instruct your Co-Investigators and Financial Officer accordingly. More information regarding this confirmation is provided in chapter 8.

You as the Principal Investigator will receive a **second email once your application has been checked by the EFSD office**. If you do not receive this second email within two weeks of the programme deadline date, and it was not transferred to your spam folder, please contact the EFSD Office [foundation@easd.org](mailto:foundation@easd.org).

You will still be able to access your application after submission and before the programme deadline, but you will not be able to make any more edits.

After the programme deadline you will no longer be able to access your application.

## 5) Guidelines Biographical Sketch

**IMPORTANT!** Biographical sketches **must not exceed 3 pages per investigator written in type no smaller than 12-point Arial with single line spacing**. Documents exceeding these parameters will not be forwarded for review.

A biographical sketch should contain the following information:

- Name
- Date and place of birth
- Education (in reverse chronological order)
  - Name / location of college or university
  - Highest degree
  - Year conferred
  - Field of study
- Research and/or professional experience (in reverse chronological order)
- Publications (in reverse chronological order)
  - Titles of and complete references to all publications during the past three years (in reverse chronological order)
  - Earlier publications pertinent to this application
  - If a complete list of publications exceeds the three-page limit, choose those most pertinent to this application.

Please list your education and employment in **reverse chronological order**.

Biographical sketches are only necessary for the Principal Investigator and Co-Investigators (if applicable). Upload the biographical sketches in the Additional Documents section of the application system (step 9).

## 6) Guidelines Research Plan

**IMPORTANT!** The research plan **must not exceed 8 pages written in type no smaller than 12-point Arial with single line spacing** including preliminary data (figures and tables), but excluding references. No additional material (such as manuscript reprints, appendices etc.) will be accepted. Any application exceeding this page limit will not be forwarded for review.

Upload your research plan in the Additional Documents section of the application system (step 9).

## **General considerations**

- A clear relationship to diabetes (and to any specific focus of a particular call for applications) must be obvious.
- Ensure that the sections in the proposal are balanced in length (see suggested page lengths below): a long introduction leaving too little space for preliminary data and a detailed work plan will decrease the chances of success.
- The review panel will consider the information provided as an example of the principal investigator's approach to a research objective and as an indication of ability in this area of research.
- If you have applied unsuccessfully to any EFSD programme with this project previously, you are required to upload a **copy of the feedback** with this application if applicable. Furthermore, please provide proof in the narrative text on how you have incorporated the comments to improve your project plan.

## **Research plan structure**

### **a. Introduction (suggested length 1-2 pages)**

- 1) Objective
- 2) Background and current status of research in the proposed field of study that has led to this proposal.
  - Be careful and honest in describing the background literature (work from others).
  - It is important that the reader gets a feel for novelty. Which gap in knowledge is being filled by the proposal?
  - Hypothesis: A carefully crafted introduction/background will make the formulation of the hypothesis obvious. This should be formulated as precisely and distinctly as possible. Is it novel? Is it important? If the study is hypothesis-free or descriptive, this must be justified.

### **b. Specific aims for the period of requested support (suggested length ¼ page)**

- Must succinctly describe the approach to test the hypothesis.
- Too many aims may give the impression of fragmentation.

### **c. Preliminary data (suggested length 2-3 pages)**

- This is an important part of the application that will provide evidence to reviewers of the rationale and feasibility of the proposed experiments.
- Refer briefly to any of your own previously published work that is directly relevant to the proposed experiments.
- Describe relevant new experiments and provide unpublished preliminary data in the form of figures or tables.

**d. Detailed plan of investigation with clearly set out project plan, methods, time plans with milestones and deliverables (suggested length 3-4 pages)**

- Please state if a power analysis has been performed and provide details of same. If this is not the case, please explain why a power analysis is not applicable to the project.
- Does the work plan correspond to the aims in a direct fashion?
- Potential pitfalls: It is useful to openly discuss challenges or vulnerabilities to a certain approach and to elaborate on potential alternatives to give the feeling that the best way forward has been chosen.
- If the study is a clinical trial, all aspects of design must be carefully considered. It is helpful to ensure that appropriate expertise is represented in the proposal.

**e. Novelty and importance of this work – relevance to the specific aims of this EFSD Research Programme if applicable (suggested length ½ page)**

**f. Facilities available (suggested length ½ page)**

**g. References (not included in the page limit)**

## 7) Guidelines Collaborative Agreements

A signed letter of confirmation from each Collaborator and any Co-Investigator not working in the Principal Investigator's institution is required.

In addition to information which the Collaborator/Co-Investigator feels is relevant to the application, this letter should contain the following sentence:

*"I herewith confirm that I have read and agreed with the scientific protocol of this application. The application is feasible and includes novel aspects that will advance scientific knowledge in this field, and that the protocol of this project is in accordance with the requirements outlined in the Announcement for this Programme".*

Upload all Collaborative Agreements in a single pdf file in the Additional Documents section of the application system (step 9).

## 8) Confirmation to Finalise Application

After submission of this application, you as the Principal Investigator, your Co-Investigators (if applicable) and your responsible Financial Officer will receive automated emails to the addresses provided in the application. These emails will contain a link to a page with statements that **you, all your Co-Investigators and your responsible Financial Officer must confirm in order to finalise the application** by clicking the "confirm" button on the bottom of the respective page.

These confirmations may be made up to 3 working days after the Programme deadline date. Please instruct your Co-Investigators and Financial Officer accordingly.

You as the **Principal Investigator** will be asked to confirm the following statements:

*"I hereby confirm that I am the Principal Investigator in this application and that the information submitted is accurate and complete (to the best of my knowledge.)"*

*and that I shall accept the EFSD Regulations as stated in the Programmes section of the EFSD website if this application is funded.*

*I further confirm that all staff grading and salaries quoted are correct and in accordance with the normal practice of this institution.*

*I agree to accept responsibility for the scientific and technical conduct of the research project.*

*I am aware that EFSD does not support a Principal Investigator or Co-Investigator with more than one award at any given time, whether or not the projects are in related fields and independent of the EFSD programme providing the respective funding. Recipients of an EFSD award may apply for new funding to the same or to another EFSD programme on the condition that the current award is nearing completion (within six months) and the new award cannot be activated until the existing project has been terminated and a final scientific report received and accepted.”*

Your **Co-Investigators** will be asked to confirm the following statements:

*“I hereby confirm that I am a Co-Investigator in this application and that the information submitted is accurate and complete (to the best of my knowledge,) and that I shall accept the EFSD Regulations as stated in the Programmes section of the EFSD website if this application is funded.*

*I am aware that EFSD does not support a Principal Investigator or Co-Investigator with more than one award at any given time, whether or not the projects are in related fields and independent of the EFSD programme providing the respective funding. Recipients of an EFSD award may apply for new funding to the same or to another EFSD programme on the condition that the current award is nearing completion (within six months) and the new award cannot be activated until the existing project has been terminated and a final scientific report received and accepted.”*

Your **responsible Financial Officer** to whom funds should be sent and who will keep a full account of disbursements if this application is funded will be asked to confirm the following statement:

*“All funds will be transferred from EFSD accounts. EFSD is a non-profit entity registered at the County Court Düsseldorf, Germany. The industry collaborators are not involved in the review process or decision on the grant awardees and they will have no rights to the results obtained from any funded research project. Therefore, funding through EFSD should not be subject to VAT. I hereby confirm that I read and accept the conditions above.”*

## **9) Statement of Independence**

No investigator may hold more than one EFSD award at a time, and this may create a problem when a second investigator wishes to apply for EFSD support from within the same institution or research group. Such applications will only be considered if the Principal Investigator named for this grant can provide clear evidence that he or she is a fully independent researcher.

Therefore, if any other scientist in the applicant’s group is currently supported by an EFSD award, a Statement of Independence must be signed by both the PI of the current application and the current grant holder and uploaded as part of the application in the Additional Documents section (step 9).

The Statement of Independence can be downloaded in the Financial Support section of the application system (step 3) and contains the following statement that must be undersigned:

*“I hereby confirm that the PI on the current application will appear either as first or last author on any publications arising from the work that may be funded by EFSD, and that any existing grant holder will NOT feature as first or last author on any such publications.”*

Any breach of the above described publication rule may lead to immediate withdrawal of EFSD funding to both applicants.

**Exemptions:** The EFSD Rising Star Fellowship Programme, EFSD Future Leaders Mentorship Programme for Clinical Diabetologists and EFSD Albert Renold Travel Fellowship Programme are exempt from the only one EFSD award per investigator regulation. If a colleague of the applicant is holding any of these awards, a Statement of Independence is not required.

## 10) Overview Uploads

You can upload your documents in the Additional Documents section of the application system (step 9).

Please upload all documents in pdf format.

Remember to use clear headings on your documents as these will later be combined to a single document for the reviewers.

Please do not use fonts that are not commonly used (e.g. Arial MT) as these might affect the document that will be later accessed by the reviewers.

Uploads in Additional Documents section (step 9)	
<b>PI’s Biographical Sketch</b>	Mandatory for every application Guidelines in chapter 5 Length restriction: max 3 pages, Arial 12
<b>Research Plan</b>	Mandatory for every application Guidelines in chapter 6 Length restriction: max 8 pages, Arial 12 w/o references
<b>Co-Investigator/s’ Biographical Sketch/es</b>	Mandatory for each co-investigator (if any) Guidelines in chapter 5 Length restriction: max 3 pages, Arial 12 per biographical sketch

<b>Collaborative Agreements</b>	Guidelines in chapter 7, one single pdf
<b>Confirmation letter of support of collaborating institution/local health authority</b>	One single pdf
<b>Abstract pages from all other sources of support</b> (pending or current)	If applicable to the application, one single pdf
<b>Previous EFSD feedback to this project</b>	If applicable to the application Information in Research Plan Guidelines, chapter 6, general considerations
<b>Statement of Independence</b>	If applicable to the application Download in the Financial Support section (step 3), information in chapter 9
<b>Status report of current, active EFSD award</b>	Information in chapter 4, step 3

## 11) Budget Table A

<b>A: Personnel: (name if possible)</b>	<b>Role on project</b>	<b>% Effort on project</b>	<b>Institutional base salary/Year</b>	<b>Salary request *</b>
<b>Subtotal Euro:</b>				
<b>B: Supplies (description):</b>			<b>Subtotal Euro</b> _____	
<b>C: Other costs (please specify):</b>			<b>Subtotal Euro</b> _____	



D: Consultant / contractual costs = subtotal direct costs from Contractual Costs section (Budget B)	<b>Subtotal Euro</b> _____
E: Equipment (please describe):	<b>Subtotal Euro</b> _____
<b>SUBTOTAL DIRECT COSTS</b>	<b>Euro</b> _____
<b>INDIRECT COSTS (maximum 10% of Direct Costs)</b>	<b>Euro</b> _____
<b>TOTAL BUDGET REQUEST</b> (Direct + indirect costs including salaries)	<b>TOTAL Euro</b> _____

\* Gross salary including social charges, fringe benefits. The salary requested may not exceed (% effort) x (gross salary for the time period of the project).

For details on consultant/contractual costs, fill out budget table B contractual costs and enter the total amount into section D of this table.

You may (but are not required) to list all personnel involved in this project in the budget table, even if you do not request any salary for them. In this case, enter "0" or "n/a" in the respective salary request box and you do not need to disclose their institutional base salary.

## 12) Budget Table B: Contractual Costs

<b>A: Personnel (name if possible)</b>	<b>Role on project</b>	<b>% Effort on project</b>	<b>Institutional base salary/Year</b>	<b>Salary request*</b>
<b>Subtotal Euro:</b>				

B: Supplies (description):	<b>Subtotal Euro</b> _____
C: Equipment (please describe)**	<b>Subtotal Euro**</b> _____
D: Other costs (please specify)	<b>Subtotal Euro</b> _____
<b>SUBTOTAL DIRECT COSTS***</b>	<b>TOTAL Euro***</b> _____

\* Gross salary including social charges, fringe benefits. The salary requested may not exceed (% effort) x (gross salary for the time period of the project).

\*\* Also list equipment costs under E: Equipment in budget table A.

\*\*\* Enter subtotal direct costs under D: Consultant/contractual costs in budget table A