SAMS/BAM Research and Capacity Building Grant Scheme

Guidance for Applicants 2024

SECTION 1: GENERAL GUIDANCE

Introduction

These terms and conditions apply to the Society for the Advancement of Management Studies and British Academy of Management (SAMS/BAM) Research and Capacity Building Grant Scheme 2024 which is aimed at UK-based researchers who want to boost their research capacity and/or network within and beyond academia by:

- extending or adding a new dimension to a substantial existing research project.
- undertaking a substantial new research project highlighting the social value of management research on their own or with a small team of co-investigators.
- connecting with other scholars across disciplines to produce collaborative outputs or build an interdisciplinary and/or international investigator team as a foundation for further research.

We particularly welcome applications
- from interdisciplinary and/or international investigator teams; investigator teams involving members from underrepresented ethnic groups, countries, or regions; and investigator teams involving practitioners.
- for which other funding (at least in-kind) from the Principal Investigator's employing institution and/or a third party has been secured.
- in which a long-term trajectory of research is apparent.

Applicants must ensure that they have registered for the mandatory online information session and that they have read this guidance, including the financial guidelines, and Terms and Conditions before applying to this Scheme.

Timeline for funding

This third round of funding is launched on 30th October 2023. The deadline for applicants to submit their application is Monday 29th January 2024 at 17:00 (UK time). Nominated Heads of Department/Schools or institutional approvers will receive an email notification to approve the application by Thursday 1st February 2024 at 17:00 (UK time). Interviews will be held in w/c 17th June 2024, and the earliest project start date is 2nd September 2024. One grant will be awarded in this third funding round.

Applicant eligibility

** Current members of BAM Executive, SAMS Council and/or the Grant Award Committee are not eligible to apply as Principal Investigators or be named as Co-Investigators **

Eligible Principal Investigators must be resident in the United Kingdom, have a doctorate, and be employed at a UK university or other research institution (including museums and galleries) at the time of application and for the duration of the award. They must have a track record of research excellence, demonstrated through their previous academic work and public engagement activity. Early Career Researchers must demonstrate the potential to

deliver a research project of this scale and be formally mentored by a more experienced researcher in their institution. All applicants should also demonstrate the potential for outstanding qualities of intellectual and academic leadership, especially through their track record of willingness to connect, collaborate and network. They must have shown talent and imagination in researching issues of global significance and be able to demonstrate their ability to engage a broad non-academic audience.

IMPORTANT: Only one application as Principal Investigator is permitted per UK institution in each funding round. Please note that an institution refers to the legal institution, and not an individual business school or department. An institution can be involved as a Co-Investigator on an unlimited number of proposals. International co-investigators and/or industry or third-sector collaborations are possible as part of this grant scheme.

Summary requirements for successful grant holders

Successful Grant Holder(s) are required to fulfil the following key conditions upon being awarded the grant:

The Principal Investigator and any Co-Applicants based in schools of management and business must:

- Be a BAM Member at the time of application and maintain valid BAM Membership for the duration of the project.
- Acknowledge SAMS and BAM's support for the project in any publication (written or electronic) that arises as a direct result of the project.
- Inform SAMS and BAM of further research and/or impact that arises as a result of the project.
- Submit a bi-annual 'Interim Project and Financial Report'. This is to ensure that the project is proceeding as planned and to update SAMS and BAM regarding how much of the funding has been spent or committed. Lists of transactions under each of the key budget headings included in the application will be required. The agreed budget is included within Annex 1 of the contract.
- Submit an 'End of Grant Project and Financial Report' of no more than 3,000 words within two months of the completion of the project.
- Present at least one full paper on the research outcomes at the BAM Annual Conference during the life of the project or within one year of completion of the project. If there is any reason that this is not possible, the Applicants must notify BAM and SAMS in writing and explain the circumstances. Costs for attendance at the conference cannot be claimed against the grant.
- Submit a lay person's summary of the research and key findings to be used on the BAM website and social media communication.
- Grant holders may be expected to report to the BAM Chair of Research Grants and/or the BAM Vice Chairs: Research and Publications Subcommittee to discuss research progress.
- The Research Office of Principal Investigator's organisation (lead institution) is responsible for monitoring the conduct of the award and ensuring that ethical standards are met. In cases where the research is not completed or ethical standards are not met, the lead institution will not be eligible for any future funding through this grants scheme.

Submitting an application

Applications must be submitted electronically via the BAM Grants Scheme application portal You can register on the grant portal system any time. The online application form will be made available on Monday 30th October 2023. The grants portal is available here: **https://bam.grantplatform.com/**

To support applicants, there will be a free information session (webinar) and a grant application development workshop in November 2023 incurring a small fee for BAM non-members. Registration for the free information session is a **mandatory requirement** for submission of an application to this scheme and is also required for registering for the optional grant application development workshop. A recording of the free information session will be made available via the BAM Grants webpages for applicants who are unable to attend the event. Attending the grant application development workshop is optional and will not be taken into account in the assessment of applications. Details of both events will be advertised and can be booked via the BAM webpages.

The application deadline for Principal Investigators to submit an application via the [BAM Grants scheme application portal](#) is Monday 29th January 2024, 17:00 (UK time). After you have submitted your application, your nominated Head of Department/School or institutional approver will receive an email notification asking them to approve the application and acknowledge Head of Department/School Declarations. The deadline for applications to be approved is Thursday 1st February 2024, 17:00 (UK time)

You are advised to submit your application before the deadline day in case of any technical issues. Applications will not be accepted after the deadline. Unsubmitted draft applications will not be considered.

It is recommended that you draft your application in a separate Word document before inputting your answers in to the [BAM Grants scheme application portal](#).

Application requirements

The online application form on the BAM Grants scheme application portal includes text boxes for all the details about the project that are required for peer review. In particular:

- Abstract and/or layperson's summary
- Aims and objectives
- Detailed research questions
- Proposed research methodology
- Existing data and any new data to be collected
- Data analysis to be carried out
- Potential problems and risks and how they will be mitigated
- Proposed outcomes and outputs
- Ethical issues and how these will be addressed
- Justification of resources and budget
- Mentoring and other support available within the institution
- Project workplan with key milestones
- Publication and dissemination plan
- Engagement and impact plan
- Engagement with SAMS/BAM Community
- Commitment to EDIR in project design and implementation
- Focus and reach of the project
- Motivations for applying for this Funding Scheme
- References

Each text box has a word limit that must be observed. All essential information (including the applicants CVs and institutional support letter) will be collected through the online application form.

Attachments are only required in the following circumstances:

For early career researchers: *Mentor Statement* - If a mentor is required, the Principal Investigator must provide a letter of recommendation and support from the mentor, confirming their willingness to participate in the project and detailing their role therein.

For applications involving international co-investigators: *International Co-Investigator Head of Department/School Statement* – If the project involves international co-investigators, a letter from their Head of Department/School should be submitted for each International Co-Investigator that has been named in the application.

For applications involving a non-academic collaborator: *Collaborator Letter(s) of Support* - Collaborators' Letters of Support should be submitted for each non-academic collaborator that has been named in the application.

If any of these attachments required for these types of projects is missing from the application, it will be rejected at the initial administrative review stage. For further advice, please contact Stuart Hull on grants@bam.ac.uk.

Institutional approval

IMPORTANT: After submitting your application by the **first deadline of Monday 29th January 2024 at 17:00 UK time**, your nominated Head of Department/School or other institutional approver will receive an email notification asking them to approve your application and agree to the declarations made below. **Changes cannot be made to your application after the first submission deadline. The deadline for institutional approval is Thursday 1st February 2024 at 17:00 UK time.** Please make sure that the person nominated below is aware of this, and the need to approve the application in time for the deadline.

Head of Department/School or institutional approval

Please provide details of your Head of Department/School or institutional approver, who will be receive a notification asking them to confirm the following declarations and approve for the application to be to be put forward to the next stage of assessment:

• This is the only application as lead institution. Only one application as Principal Investigator is permitted per UK institution in each funding round. I acknowledge that 'institution' refers to the legal institution, and not an individual business school or department. An institution can be involved as a Co-Investigator on an unlimited number of proposals.
• the lead institution's Research Office has checked the proposal has been completed in accordance with the guidance for applicants and particularly the financial guidance
• the example terms and conditions have been checked, and the Research Office agrees to these
• If successful, the applicant is to receive the full grant awarded for the purpose of delivering the project outlined in the application. The applicant will be supported to attend the British Academy of Management Annual Conference, where the project will be presented as a mandatory requirement of the grant. BAM conference registration fees, and travel and subsistence to attend the conference cannot be claimed as part of the grant funding.

Review criteria

Applications will be peer-reviewed by subject and/or methodological experts drawn from the British Academy of Management's Peer Review College. The following criteria will be assessed, using a scale of 0 to 5 for each criterion.

Quality of project (50% of overall assessment)

1.1 Does the application demonstrate sound knowledge of the field including literature(s) relevant to the project?

1.2 Are the proposal methodology, research design and method of high quality and original?

1.3 Are the project and the project workplan viable?

1.4 Does the project have potential to contribute to the field (i.e., Conceptual originality and relevance to the wider management and business community)?

1.5 Have the implications of the project on ethics and EDIR been appropriately investigated and considered in the application?

Engagement with the SAMS and BAM communities (20% of overall assessment)

2.1 To what extent does the project fit with the Grant Scheme remit?

2.2 To what extent is the project aligned with one or more BAM Special Interest Groups or the BAM Management Knowledge and Education group as well as SAMS and/or BAM's Mission and one or more of BAM's Strategic objectives (see http://www.socadms.og.uk and https://www.bam.ac.uk/about-bam/strategy-2024.html for details)?

Publication, dissemination and impact plans and value for money (30% of overall assessment)

3.1 Is the project publication and dissemination plan to academic audiences ambitious, specific and aligned with the Grant Scheme remit as set out in Section 1 (introduction) of the guidance for applicants?

3.2 Is the project impact and engagement plan with non-academic audiences ambitious, specific and aligned with the Grant Scheme remit as set out in Section 1 (introduction) of the guidance for applicants?

3.3 Does the project offer value for money?

Summary criterion: Do the proposed outcomes justify the funding requested? This score represents an average of the reviewers' assessments of the above criteria

BAM Special Interest Group (SIG) keywords

Please select up to three BAM SIGs to which your proposed research is relevant. These are required for completion of the online application form.

- Corporate Governance
- e-Business and e-Government
- Entrepreneurship
- Financial Management
- Gender in Management
- Human Resource Management
- Identity
- Innovation
- International Business and International Management
- Inter-Organisational Collaboration: Partnerships, Alliances and Networks
- Knowledge and Learning
- Leadership and Leadership Development
- Management and Business History
- Management Knowledge and Education
- Marketing and Retail
- Operations, Logistics and Supply Chain Management
- Organisational Psychology
- Organisational Transformation, Change and Development
- Performance Management
- Public Management and Governance
- Research Methodology
- Strategy
- Sustainable and Responsible Business

SECTION 2: FINANCIAL GUIDANCE

The SAMS/BAM Research and Capacity Building Grant Scheme Awards Committee will evaluate applications submitted based on the following financial principles and funding criteria. SAMS/BAM is committed to funding one project this funding round, to a maximum value of **£60,000 per funded project over a grant period of 18 months (minimum) to 24 months (maximum).**

1.1 The Grant cannot support full economic costing of projects, given SAMS/BAM's position as Registered Charities but costs for teaching replacement (to be calculated at the lowest lecturer scale) of up to 25% of the total funding requested can be claimed between the Principal Investigator and/or any Co-Investigators.

1.2 The Grant will be contracted between SAMS/BAM and the Principal Investigator's Research Office.

1.3 The Principal Investigator's organisation (lead institution) will issue an invoice to the BAM Grants Administrator to claim the grant.

1.4 The Grant holder(s) must not commit any expenditure prior to the contract being issued and the period of grant having commenced. All expenditure must have taken place within the dates of the project and been accounted for within two months of the project end date.

1.5 Priority will be given to applications that demonstrate value for money and financial clarity.

Eligibility of costs under the Grant Scheme

2. **Staff costs (research salaries and project support): The following items _may be covered_ under the Grant Scheme**

2.1 Salaries, employers' NI and Pension costs associated with teaching replacement

2.2 Research Assistants and other research staff to enable delivery of the project

2.3 Project administration

Ineligible staff costs:

2.4 FEC estates and indirect overheads _**cannot be claimed**_ under the Grant Scheme

3. **Travel, Accommodation and Subsistence (including conference attendance): The following items _may be covered_ under the Grant Scheme with sufficient justification.**

3.1 **Accommodation, Travel and Subsistence**
Applicants should provide estimates of, and justification for all accommodation, travel and other subsistence costs directly relating to the project.

3.2 **Accommodation:** Applicants should obtain reasonably priced hotel accommodation in accordance with their own institution's travel and subsistence policy.

3.3 **Travel:** Travel should be by the most economical means of transport, taking in to account any specific accessibility needs. Applicants should book early and take advantage of cheaper advance tickets, where possible. SAMS/BAM expects that travel will be at the lowest available fare, which should normally be economy/standard travel.

3.4 **Conference attendance:** SAMS/BAM may consider expenses relating to conference attendance if the following criteria apply:

   3.4.1 The theme and subject of the conference is of direct and particular relevance to the application; and

   3.4.2 There are no other sources of funding available to the applicant.

Ineligible costs:

   3.4.3 Costs relating to the mandatory attendance at a BAM Conference within the project duration are NOT eligible. Applicants will need to secure funding from their institution to fulfil the grant requirement of presenting one full paper at a BAM Conference during the award or within one year of project completion.

4. **External services (transcription, translation, data collection, other subcontracts)**

4.1 Assistance in transcription, translation, data collection and data inputting may be funded from the grant if the following conditions are met:

   4.1.1 The costing must be based on an established costing method used within the lead institution, or based on a quote from an official source, such as a professional transcription service that is used by the lead institution.

   4.1.2 The application must include details of how the estimated number of hours has been calculated.

5. **Consumables and materials: The following items *may be covered* under the Grant Schemes if sufficient justification is provided:**

5.1 Stationery

5.2 Computing consumables (e.g. physical or cloud-based storage), equipment rental charges and software fees (up to 5% of the total budget) or purchases specifically required for the project

5.3 Specialist publications that cannot be obtained through the lead institution

6. **Equipment and hardware: The following items *may be covered* under the Grant Scheme if sufficient justification is provided:**

6.1 Laptops for field research can be requested where these are necessary for the research, and not already provided by the institution for research staff on continuing contracts.

6.2 Digital recorders

6.3 Camera and video equipment

Ineligible costs:

6.4 Standard computers that would be provided as standard for existing or new employees will not be covered.

7. **Other research costs: will be considered on a case by case basis.**

Exceptional Items: The following items *may be covered* on an exceptional basis under the Grant Schemes if sufficient justification is provided:

7.1 Subject/interviewee incentives

7.2 Cost of microfiche records

7.3 Specialist reprographic services

7.4 Copyright permission fees