

2023

Ngā aratohu Tono
Whānui 2023 mā ngā
kaitono

Full Proposal guidelines for applicants

FUNDING FOR RESEARCH
EXCELLENCE

MARSDEN FUND

TE PŪTEA RANGAHAU
A MARSDEN

ROYAL
SOCIETY
TE APĀRANGI

Ngā kaupapa

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These guidelines pertain to Marsden Fund **Fast-Start** and **Standard** proposals **ONLY**.

Ngā huringa mō te rauna Tono Whānui Changes for the Full Proposal round 2023

COVID-19: The guidelines and timetable have been written as if the round will proceed as normal, however assessment processes in the Full Proposal round may need to change at short notice to respond quickly to a rapidly evolving situation. Research offices and applicants will be notified if there are any changes to the Full Proposal round. Any changes will also be posted on our website:
<https://www.royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/mf-research-funding-covid-19-updates/>

- As in EOI round: Vision Mātauranga section moved forward in the proposal (now section 2) and text box increased to 200 words
- The research-related sections, along with the timetable, roles and resources and ethical considerations, are now in Section 3 (changed from section 2)
- The proposal declaration (Section 9) has been updated, with an extra sentence added
- As in EOI round: Proposals must not benefit a Russian state institution (including but not limited to support for Russian military or security activity) or an organisation outside government that may be perceived as contributing to the war effort

Wātaka Timetable

Early Dec 2022	Guidelines available and web site active
Monday 20 February	Closing date for EOIs and Marsden Fund Council Award proposals (noon) <i>Extended from 16 Feb</i>
By 22 Feb	Convenors provided with lists of proposals and summaries
1-3 March	Panellists sent EOIs
April 3-6, 12-14	Assessment panel meetings
Thurs 4 May	Marsden Fund Council meeting
Tues 9 May	Invitations for Full Proposals*
Wed 21 June	Closing date for Full Proposals (noon)
By Fri 30 June	Proposals sent to referees
By 7 July	Proposals sent to Panellists
Mon 31 July	Referee reports returned to the Marsden Fund
Wed 2–Thu 3 August	Marsden Fund Council Meeting (Strategic)
Wed 16 August	Referee reports available from web portal (for comment)**
Wed 30 August	Deadline for applicant responses (noon)
Mon 18–Fri 29 Sept	Assessment Panel meetings
Thu 12 October	Marsden Fund Council meeting
Approx early November	Results announced

* This is when they are electronically sent from the Marsden Fund.

** Note that reports received later than 16 August will have later deadlines for responses.

All Full Proposals must be submitted no later than **12 noon (NZST), Wednesday 21 June 2023**, via the application portal.

For more details on Marsden Fund objectives, eligibility criteria, number of proposals per person, Principal Investigator (PI) exclusion rule and assessment criteria, please refer to the *2023 Expression of Interest (EOI) Guidelines*.

Tuku tonu Proposal submission

As for the EOI round, submission of Full Proposals is web-based. You will be able to use your URL from the EOI round to access the application portal. Your proposal number, panel, title, and name and contact details of the contact PI, as well as all other PIs and

Associate Investigators (AIs) and mentor (if applicable) will automatically be carried forward from your EOI.

Takotoranga Formatting

As for the EOI round, please follow these rules when filling in the Full Proposal templates:

- Typeface size: 12-point
- Font: Times or similar size
- Spacing: Single-spacing, 12-point
- Margins: 2 cm on the left side of the page and 2 cm on the right (2 cm top, 1.5 cm bottom)
- Adhere to the given space limitations, especially in Sections 3a-3e
- Instructions on templates should be removed
- No attachments except where requested
- Coloured images / text may be included in sections 3a-3h of the proposal.
- Links (URLs) should not be included in the background / overall aims / proposed research sections. However, they may be listed in the "References" section (3e) if they are publicly accessible.

IMPORTANT: Images are not permitted in CVs.

The guidelines on formatting must be followed. Failure to do so may result in the application not being considered.

Hard copies of Full Proposals are not required.

Declaration and status pages

Section 9 (all proposals): All contact PIs are required to tick a box online to indicate their acceptance of the conditions.

Section 10 (Fast-Start proposals only): We require one electronic status page for Section 10 for each Fast-Start proposal. Section 10 should be filled in and signed by a duly authorised agent and uploaded to the application portal.

The deadline for Full Proposals, declarations, Fast-Start status pages and collective declarations is **12 noon (NZST), Wednesday 21 June 2023**. Late proposals will not be accepted.

Ngā kaitirotiro Audiences

Different parts of the proposal should be addressed to the appropriate audiences.

Public: The Title and Summary sections should be in plain language, without compromising accuracy. These will be made publicly available if the proposal is funded.

Assessment Panel: The Background and Overall Aim sections should address an audience with a general understanding of the areas considered by a particular panel.

Expert Referees: The Proposed Research section should address specialists in the field. Here the intended audience are expert referees (and any experts on the panel). It is anticipated that expert commentary on this section will provide confidence to the panel that the proposals are rigorous, and have a basis in prior research using a sound research methodology.

It is important to support the Background, Overall Aims and Proposed Research sections by the use of references. Please ensure that these are not only to the applicants' own work.

Te hunga whakapā me ngā whakahaere tuku kirimana Contacts and contracting organisation

The host organisation of the contact person will be responsible for signing off all Full Proposals (and also Section 10 for Fast-Start proposals). Administration contact on the research proposal is through the institution's research office. Private applicants may sign off as their own host.

The host organisation of the PI will be responsible for fulfilment of the contract and is required to guarantee that resources and research time are available.

Any funding awarded is GST inclusive. Successful private applicants will have to register for GST.

Contracts will be based on the information contained in the Full Proposal. If the applicant is offered the full amount requested, the proposal will be the basis for the contract. If the funding awarded is less than that requested, then the contract will be negotiated to reflect this.

Although a contract is with a host organisation for administrative purposes, if there is significant change in personnel on a project, the Marsden Fund can either transfer the contract to a new institution to which a key person has shifted or terminate the project. Other changes to the contract need to be notified to the Marsden Fund and a variation approved. A successful private applicant can also act as the contractor.

The submission of progress reports to the Marsden Fund is a contractual requirement. A written report describing in a prescribed format the progress of the year's research is required at the end of years one and two. If any preliminary work has been described in

the proposed research, you will be asked to describe what has happened to this work in the first progress report. A final report, following a prescribed format, must be provided at the completion of the funding period.

Trusted Research Guidance

As at the EOI round, researchers should familiarise themselves with the [Trusted Research Guidance for Institutions and Researchers](#). If there are any questions arising from this, please consult your Research Office.

New Zealand has an open and collaborative research and innovation system, and values academic freedom and research conducted independently by individuals and organisations. While the government is actively seeking to increase the international connectedness of the research and innovation system, there are potential risks with international partnerships that have to be identified and managed to prevent damaged reputations (including harm to researchers), lost intellectual property (IP), and harm to New Zealand's national interests ([Trusted Research Guidance for Institutions and Researchers](#)).

One such risk is that sensitive technologies* may be accessed by others and applied to purposes that are not consistent with New Zealand's values or interests. In order to manage these potential risks, a risk analysis of those projects that are offered funding in the 2023 Marsden Fund selection round will be performed. In the unlikely event that any funded project appears to contain a high level of risk, risk mitigation strategies may need to be employed. These would be developed after a discussion with the Principal Investigator and the relevant institution(s) and may form part of the contractual conditions of the project.

**Technologies become sensitive when they: are or could become dual use i.e., have both a civil and military/security application; or, underpin, or have the potential to underpin, significant economic value for New Zealand.*

NEW: For a proposal to be eligible for funding, it must not benefit a Russian state institution (including but not limited to support for Russian military or security activity) or an organisation outside government that may be perceived as contributing to the war effort.

More information is available at <https://www.mbie.govt.nz/about/news/new-eligibility-criteria-restricts-science-research-funding-that-could-contribute-to-russias-war-effort/>

Vision Mātauranga

This section was included in *the 2023 EOI Guidelines*.

Background

Vision Mātauranga is a policy about innovation, opportunity and the creation of knowledge that highlights the potential contribution of Māori knowledge, resources and people.

[https://royalsociety.org.nz/what-we-do/funds-and-](https://royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/application/submitting-a-proposal/vision-matauranga/)

[opportunities/marsden/application/submitting-a-proposal/vision-matauranga/](https://royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/application/submitting-a-proposal/vision-matauranga/)

<https://www.mbie.govt.nz/science-and-technology/science-and-innovation/agencies-policies-and-budget-initiatives/vision-matauranga-policy/>

There are four themes:

- **Indigenous Innovation**, which involves contributing to economic growth through *distinctive research and development*.
- **Taiao**, which is concerned with achieving *environmental sustainability* through iwi and hapū relationships with land and sea.
- **Hauora/Oranga**, which centres around improving *health and social wellbeing*.
- **Mātauranga**, which involves exploring *indigenous knowledge*.

Vision Mātauranga and the Marsden Fund

Please note that Vision Mātauranga is included as an assessment criterion:

*Proposals must consider the relation of the research to the themes of Vision Mātauranga and, **where relevant**, how the project will engage with Māori.*

For the EOI round, applicants indicate using a tick box whether Vision Mātauranga is relevant and, if so, which of the four themes apply (Section 2).

At the Full Proposal round, up to one additional page will be available for statements on Vision Mātauranga immediately following the description of research in Sections 3a-3c. This is to enable Vision Mātauranga to be more easily integrated into the conceptual framework and/or research design. Where Vision Mātauranga is appropriate to a proposal, it can contribute to the assessment of its overall excellence.

How do I decide whether to include a Vision Mātauranga statement in my proposal?

A Vision Mātauranga statement must be included for all research that has relevance for Māori. The research category descriptions outlined in the next section may help you decide if this applies to your project. Please note, however, that those categories are fluid, there may well be overlap between them, and not every point in each category need apply.

Categories of research

The five categories identified below have been adapted from those on the National Science Challenge, Biological Heritage website <https://bioheritage.nz/about-us/vision-matauranga/> hosted by Manaaki Whenua Landcare Research. Please note that there may well be overlap between categories as in categories 2 and 3 in terms of the nature and degree of relevance to Māori.

The original categories were set out by the Ministry of Business, Innovation and Employment (MBIE) in information for the Endeavour Fund c. 2015.

Research with no specific Māori component

- No mātauranga Māori (Māori knowledge) is used.
- Māori are not associated with the research process (for example: not on any research management/advisory/governance panels; it is not inclusive of Māori land or institutions; nor the subject of any component of the research).
- Work is not likely to be of greater direct relevance to Māori than members of any other group.

Research specifically relevant to Māori

This category includes research projects where:

- There is specific relevance to Māori.
- Mātauranga Māori may be used in a minor way to guide the work and its relevance to Māori.
- It includes work that contributes to Māori aspirations and outcomes.

Research involving Māori

This category includes research projects where:

- Mātauranga Māori may be incorporated in the project, but is not central to the project.
- Research is specifically and directly relevant to Māori and Māori are involved in the design and/or undertaking of the research.
- The work typically contributes to Māori (for example: iwi; hapū; organisations) aspirations and outcomes.

Māori-centred research

This category includes research projects where:

- The project is Māori led, and where Mātauranga Māori is used alongside other knowledges (for example: through frameworks; models; methods; tools; etc.).
- Kaupapa Māori research is a key focus of the project.

- Research is typically collaborative or consultative, with direct input from Māori groups, commonly including Māori researchers or a collaboration with Māori researchers or researchers under the guidance/mentoring of Māori.
- There is alignment with and contribution to Māori (for example: iwi; hapū; organisations) aspirations.

Kaupapa Māori research

This category includes research projects where:

- Mātauranga Māori is incorporated, used and understood, as a central focus of project and its findings.
- Research is grounded in te ao Māori and connected to Māori philosophies and principles.
- Research typically uses kaupapa Māori research methodologies.
- Te reo Māori may be a central feature to this kaupapa or research activity, and key researchers have medium to high cultural fluency or knowledge of tikanga and reo.
- The research is generally led by a Māori researcher; non-Indigenous researchers may carry out research under the guidance/mentoring of a Māori researcher.
- Māori participation (iwi; hapū; marae; individual) is high.
- The work contributes strongly to Māori (for example: iwi; hapū; organisations) aspirations and outcomes and is mana enhancing.

Developing a Vision Mātauranga statement

It is important to keep in mind that there is no single approach or prescription for Vision Mātauranga: one size does not fit all and there are many possible ways of addressing Vision Mātauranga. Vision Mātauranga should not, however, be seen as an add-on, nor should it be treated as separate from the research, methods or people involved in the project. A holistic approach that considers reciprocity and relationships is therefore desirable.

Vision Mātauranga does not begin and end with your Vision Mātauranga statement. You should document how you have considered Vision Mātauranga and demonstrate applicable actions and relationships throughout the research. The following questions may be useful to consider when conceptualising and writing your project:

- Have you co-created the research topic/issue with an iwi or Māori organisation?
- What does working in partnership with iwi mean to you as researchers?
- To what extent have you discussed the research with Māori partners and agreed on the methodology you will use?
- Was there full disclosure and informed consent to the proposed research with Māori partners? How has that agreement/informed consent been agreed to?
- Has budget been disclosed and agreed to with Māori partners? Is there provision in that budget for Māori involvement, capability development and consultation?
- Is there appropriate Māori researcher involvement in the project, both in terms of PI/Als and capability development?
- What provisions have you made to ensure there is advice from appropriate Māori organisations throughout the life of the research project? If there are concerns or disagreements with Māori partners, how are these to be resolved?
- What provisions have you made to ensure there is appropriate technology transfer to Māori partners as the research proceeds and as findings become available towards the end of the project?
- Are there benefits to Māori? What are they? And how have these been agreed with Māori partners?
- How is the project an opportunity to build the capacity of Māori researchers or students in your discipline, both now and for the future?
- How might this research build new, or enhance existing, relationships with Māori?
- How will you share the research outcomes with Māori?
- Has there been agreement about the intellectual property ownership of research findings with Māori partners? What is the nature of that agreement?
- Is there a need for members of the research team to be proficient in te reo? How has this aspect been addressed?
- Is there a Tiriti o Waitangi component or requirement in your research?
- Is the research mana enhancing?

Vision Mātauranga resources

Below you will find a non-exhaustive list of published resources that describe, discuss, and talk about how researchers have engaged with Vision Mātauranga and kaupapa Māori research. These range from early conceptions of Vision Mātauranga to more recent frameworks. The resources underscore the diverse ways Vision Mātauranga may be approached across disciplines and methodologies.

Allen, W., Jamie M. Ataria, J. M., Apgar, J. M., Harmsworth, G., and Tremblay, L. A. (2009). Kia pono te mahi putaiao—doing science in the right spirit. *Journal of the Royal Society of New Zealand*, 39:4, 239-242. DOI: [10.1080/03014220909510588](https://doi.org/10.1080/03014220909510588)

Crawford, S. (2009). Mātauranga Māori and western science: The importance of hypotheses, predictions and protocols, *Journal of the Royal Society of New Zealand*, 39:4, 163-166. DOI: [10.1080/03014220909510571](https://doi.org/10.1080/03014220909510571)

Broughton, D. (Te Aitanga-a-Hauiti, Taranaki, Ngāti Porou, Ngāpuhi), and McBreen, K. (Waitaha, Kāti Māmoe, Ngāi Tahu). (2015). Mātauranga Māori, tino rangatiratanga and the future of New Zealand science. *Journal of the Royal Society of New Zealand*, 45:2, 83-88. DOI: [10.1080/03036758.2015.1011171](https://doi.org/10.1080/03036758.2015.1011171)

Kana, F. and Tamatea, K. (2006). Sharing, listening, learning and developing understandings of Kaupapa Māori research by engaging with two Māori communities involved in education. *Waikato Journal of Education*, 12, 9-20. <https://researchcommons.waikato.ac.nz/bitstream/handle/10289/6198/Kana%20Sharing.pdf?sequence=3&isAllowed=y>

Macfarlane, S., Macfarlane, A. and Gillon, G. (2015) Sharing the food baskets of knowledge: Creating space for a blending of streams. In A. Macfarlane, S. Macfarlane, M. Webber, (eds.), *Sociocultural realities: Exploring new horizons*. Christchurch: Canterbury University Press, 52-67.

Moewaka Barnes, H. (2006). Transforming Science: How our Structures Limit Innovation. *Social Policy Journal of New Zealand Te Puna Whakaaro*, 29, 1-16. <https://www.msd.govt.nz/documents/about-msd-and-our-work/publications-resources/journals-and-magazines/social-policy-journal/spj29/29-pages-1-16.pdf>

Pihama, L., Tiakiwai, S.-J., and Southey, K. (eds.). (2015). *Kaupapa rangahau: A reader. A collection of readings from the Kaupapa Rangahau workshops series*. (2nd ed.). Hamilton, New Zealand: Te Kotahi Research Institute. https://researchcommons.waikato.ac.nz/bitstream/handle/10289/11738/Kaupapa%20Rangahau%20-%20A%20Reader_2nd%20Edition.pdf?sequence=7&isAllowed=y

Smith, L. T., Maxwell, T. K., Puke, H., and Temara, P. (2016). Indigenous knowledge, methodology and mayhem: What is the role of methodology in producing indigenous insights? A discussion from Mātauranga Māori. *Knowledge Cultures*, 4(3), 131-156.

A video resource is available at: <https://www.royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/marsden-fund-application-process/information-for-applying-to-the-marsden-fund/>

Ngā aratohu mō te whakaoti i ngā wāhanga o te tono

Guidelines for completing the proposal sections

Applying in te reo Māori

If applicants wish to complete some, or all, sections of their full proposal in te reo Māori, they are welcome to do so. However, because some panellists and referees who will be assessing their proposal will not be fluent in te reo Māori, an English translation of the section(s) will be necessary. Applicants, therefore, are encouraged to provide a translation for those sections as supplementary material over and above the page limits set for the relevant section of the proposal. Applicants must still keep to the set page limits for the “official” proposal, but can use additional pages for the translation.

The online portal at present will not allow additional documents or pages, so we ask that anyone who is providing a translation sends it **by email** to rachel.averill@royalsociety.org.nz by the closing date of June 21st 2023. If an applicant chooses not to provide a translation, then we will arrange for a translation to be made by one of the third-party translation services that we use for our own publications. Please note that because this will be carried out by a third-party service, we will not be able to guarantee the accuracy of the translation.

Please note that a glossary of widely-used Māori terms is included as an appendix in both the referee guidelines and Council & Panel guidelines:

<https://www.royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/marsden-fund-application-process/assessing-proposals/>

Section by section

Most sections of the Full Proposal application have brief explanatory statements about what is required. The following notes are for assistance.

Changes in PIs, AIs and mentors are not permitted at the Full Proposal stage, except in extraordinary circumstances and only with the permission of the Marsden Fund. However, small changes in FTE values from the EOI round may be made without reference to the Marsden Fund.

All costs should be in New Zealand dollars.

Section 1a: Title, Panel and Follow-on Funding Details

Same as for the EOI.

If a title change is proposed, please contact the Marsden Fund for approval.

Guidance for titles, from the EOI guidelines: The title of your proposal should be in plain language, be descriptive, and no more than 25 words in length. Please note that the title helps potential reviewers decide whether to assist us in the review process, so please avoid puns, proverbs, colloquialisms, whimsical or obscure popular culture

references. A clear title will also help the Marsden Fund Council meet its obligations to communicate the relevance and importance of Marsden-funded research to the New Zealand public. For this reason, the Marsden Fund Council reserves the right to alter your title, should your proposal be funded.

Please note that as for the EOI, the follow-on funding tick box and text box will not be accessible to anyone involved in the assessment of proposals.

Section 1b: Contact person and Other Investigators

Same as the EOI. All information, including the agreement of all investigators, will be carried through to the Full Proposal round.

Section 1c. Fields of Research (FOR), Socio-Economic Objectives (SEOs)

Same as the EOI. This section is not displayed in the full proposal PDF.

Section 1d: Summary, Type of Research Activity

These have been carried over from the EOI for reference. However please note that the full proposal summary (up to 200 words in length) is different from the shorter summary required in the EOI, both in terms of length and the intended audience. It should summarise the proposed research in straightforward language, but without loss of accuracy or excessive over-simplification. Note that this will be made publicly available should the proposal be successful, and may be published as part of the Marsden Fund's publicity.

If the summary contains confidential or sensitive material, please indicate this at the summary start: "This summary contains sensitive or confidential information and will be released when the contract is completed".

As for the EOI, the type of research activity is not accessible to anyone involved in the assessment of the proposals.

Section 2: Vision Mātauranga

Same as the EOI.

However, any applicants who ticked N/A at the EOI stage can revise this at the Full Proposal stage. Comments in the text box carried over from the EOI can be changed at the full proposal, if required.

Please address this section before completing sections 3a-3d, to ensure that the correct page limits for 3a-3d are applied.

Please note that panellists will assess each proposal for Vision Mātauranga relevance, whether the applicant has indicated N/A or not.

Sections 3a – 3d: Background, Overall Aim, Proposed Research and Vision Mātauranga

Section 2 (Vision Mātauranga themes) will be carried over from your EOI. If you wish to change the categories, or add them, please do this prior to completing this section, to ensure that the correct page limits are applied.

- If no Vision Mātauranga theme is identified in Section 2, the total page limit for this section is **five pages**, with no set limit for each section within this.
- If one or more Vision Mātauranga theme is identified in Section 2, the total page limit for this section is **six pages**, with no set limit for each section within this.

Please read the definitions of these sections clearly and avoid repetition.

Section 3a: Background

Use this section to give a context for the proposal by summarising in plain language the state of knowledge in the field.

Section 3b: Overall Aim of the Research

Use this section to state the general goals and specific objectives of the research proposal. Outline the potential for significant scholarly impact of your proposal (incorporating novelty, originality, insight and ambition).

Section 3c: Proposed Research

This section should cover, where appropriate, the hypotheses being tested, the methodology to be used, sampling design, and methods of data analysis. Please ensure that your description covers the period of funding sought (up to three years), and that it includes contributions by collaborators and postgraduate students (if any).

If you identify one or more Vision Mātauranga themes in Section 2, please elaborate here how this fits in with your proposed research. For example, you may wish to discuss consultations and linkages, relevance, conceptual framework and/or proposal design, and outcomes (in addition to statements in Section 3d).

The Marsden Fund Council is keen to see an increased emphasis on ethical considerations of the proposed research, particularly in the social sciences disciplines.

- If the proposed research requires ethics approval, please use this section to show that you have considered all of the ethics issues associated with your research. Your discussion should satisfy the panel that your processes are meaningful, and for social science disciplines in particular, that you have fully considered how your methods will affect the communities you are working with. It is important that you do not concentrate solely on your theoretical argument at the neglect of methodology, implementation, and community safety.

- Compliance information (for example: permit numbers; details of ethics approvals gained) should be detailed in Section 3h (Ethical or Regulatory Obligations).

Section 3d: Vision Mātauranga

Please refer to guidance included earlier in this document on Vision Mātauranga.

If you identify one or more Vision Mātauranga themes in Section 2, please include discussion of this within Section 3d, for example, on consultation and linkages, relevance, conceptual framework and/or proposal design, and outcomes.

Statements on Vision Mātauranga should be contained within Section 3d, following the description of research (Sections 3a-3c). This is to enable Vision Mātauranga to be more easily integrated into the conceptual framework and/or research design. Where Vision Mātauranga is appropriate to a proposal, it can contribute to the overall excellence.

Compliance aspects, such as access to culturally sensitive material and knowledge, should be covered in Section 3h, “Ethical or Regulatory Obligations”.

Aspects of Vision Mātauranga relating to relevant experience can be included in the “Roles and Resources” section (3g) and can also be incorporated into sections 3a-3c.

It is also essential that any costs associated with Vision Mātauranga capability development and engagement are accounted for in the budget (sections 6 and 7), as stated earlier in this document in the Vision Mātauranga guidelines:

- *Is there appropriate Māori researcher involvement in the project, both in terms of PI/Als and capability development?*
- *Has budget been disclosed and agreed to with Māori partners? Is there appropriate provision in that budget for Māori involvement, capability development and consultation?*

Section 3e: References

References for the Background, Overall Aims, Proposed Research and Vision Mātauranga sections (Sections 3a-d) should be listed here.

Applicants are requested to:

- Ensure that the references have been published, so that they are readily accessible when the proposal is being assessed.
- Bold any applicants’ names if they appear in the reference list.
- Include titles of each reference.

There is a limit of **four** pages for this section when previewed as a document on the portal. This section does not include the use of footnotes; it should contain a list of references only, rather than further explanation of ideas covered in sections 3a-3d. Links (URLs) may be included if they are publicly accessible.

Sections 3f – 3h: Timetable, Roles and Resources, and Ethical or Regulatory Obligations

One assessment criterion includes the ability and capacity of the researchers to carry out the research. Sections 3f- 3h are an opportunity to demonstrate that the research is feasible, and that the researchers have a clear plan. Researchers should indicate how they intend to use their time, what the roles of various personnel will be, any anticipated ethical or regulatory obligations, and any potential administrative hurdles (such as permits, access or approvals) that they will need to deal with.

Fast-Start applicants should use these sections to demonstrate that they have the support in place to run an independent research project (including mentors and institutional support), and how the project will provide a solid basis for independent research in their future career.

The total page limit for Sections 3f to 3h is two pages, with no set limit for each section within this. Please read the definitions of these sections clearly and avoid repetition. Where practical, utilise paragraph breaks, subheadings or bold fonts to clearly signpost your proposal.

Section 3f: Timetable

Describe in general terms the advances you hope to make in each year. It is acknowledged that this timetable may be revised as the research progresses.

Section 3g: Roles and Resources

In this section, please explain briefly:

Roles: The contribution that each named team member will make to the proposed research. This should clearly explain the FTE requests. If un-named personnel are included in the proposal (for example: technicians; students; post-doctoral fellows; etc.) please indicate role, what skills are being sought, and what steps will need to be taken to fill these positions. This section should additionally include a description of the role of team members for which no FTEs are being sought, such as mentors. This section should illustrate that the project has the personnel to manage the expected workload of the project, to ensure its smooth management, and to deliver results.

Fast-Start applicants should use this section to demonstrate how the proposed research will support their independent research career. Discuss opportunities for your career development and be clear on the role of any mentors or AIs (if applicable).

Resources: Clearly state the resources required for the proposed research that the team will have access to. This is an opportunity to discuss the practical requirements of your proposed research. For example: access to libraries/collections/archives; access to required instruments/equipment/techniques/materials; ability to do fieldwork (for example: site access; assistance; etc.); access to pools of participants.

If there are any special requirements for the proposed research, please explain how these will be met.

Please note that if applicants will require logistical support from Antarctica New Zealand, this should have been signalled at the EOI stage. Applicants are required to engage with Antarctica New Zealand prior to the completion of the Full Proposal. This engagement should be documented in this section of the Full Proposal.

COVID-19: As a result of the COVID-19 pandemic there may be uncertainty around some research activities, such as those which require travel. If this is the case for your proposed project, please explain how this risk will be mitigated.

Section 3h: Ethical or Regulatory Obligations

Any permissions, approvals, etc., should be listed in this section.

It is your responsibility to ensure that all ethical or regulatory obligations are met (for example, from the Environmental Protection Authority [EPA], Ministry for Primary Industries [MPI], Animal Ethics, Human Ethics). It is also your responsibility to organise access to facilities, fieldwork sites, archives, materials etc. This section should make clear that you have anticipated or gained the necessary formal approvals for your intended research, for instance, Department of Conservation permits, EPA permits, and so forth.

Researchers should plan the necessary approvals well in advance, to ensure no delays to the project should it be funded. Researchers should contact their institutional ethics committee and research offices for further information. Researchers will need to provide information on the current state of their ethics approval.

Note that only compliance aspects related to ethical or regulatory considerations should be covered here. Ethical considerations in the context of the research methodology should be discussed in detail in the Proposed Research section (3c), as mentioned previously.

Social research

Researchers collecting personal information should be aware of their obligations around obtaining consents, data security, maintaining the anonymity of individuals, sensitivity around cultural issues and all other ethical considerations as appropriate. If there is any uncertainty, researchers should consult their institutional ethics committee.

There is a requirement that any researchers working with children follow the guidelines of their host institution's child protection policy, in accord with section 19 of the Vulnerable Children's Act 2014. Should the host institution not have a child protection policy, researchers should comply with the Society's guidelines:

<https://www.royalsociety.org.nz/who-we-are/our-rules-and-codes/policy-on-child-protection/child-protection-policy>

Research using animals

Research using animals is covered by the Animal Welfare Act 1999, which is administered by the National Animal Ethics Advisory Committee (NAEAC).

The Act encourages researchers to consider the Three Rs:

- **Replacement:** Replacing animals with non-animal alternatives. Computer models can sometimes be used for teaching instead of live animals.
- **Reduction:** Using as few animals as necessary.
- **Refinement:** Pain or suffering must be reduced as much as possible, for example, by using painkillers.

For further information on NAEAC and your obligations as a researcher, you should contact your institutional ethics committee well in advance of your proposal. More information on research involving animals is available at <https://www.naeac.org.nz/>

Please note that animal welfare legislation requires animal ethics committees to **explicitly** consider whether a research proposal has assessed the “replacement” option.

Details of ethical approval for social science research or animal research, or regulatory approval (for example, approval for use of genetically modified organisms) need to be received before any grant is paid.

Section 4: Personnel (FTE) table

The personnel information requested in Sections 4 (Full Time Equivalent (FTE) Table) and 6 (Budget) should contain the total time (expressed as a proportion of FTE, where 0.1 means 10% of one FTE, or one day per fortnight) that each researcher will spend on the project.

All FTEs should be included in the FTE table (Section 4), regardless of whether Marsden funding is being requested for them. However, in the budget (Section 6), FTEs should be recorded as zero if Marsden funding is not requested for them. Note that this distinction means that the total FTE count per year may differ between the FTE table and the budget.

Please note that overseas investigators cannot have their time or institutional costs paid for by Marsden Fund.

Post-doctoral researchers and / or postgraduate students can be included in the research team. Summer students may also be included under the “postgraduate student” category if required.

Post-doctoral researchers may be part-time or full-time on a Marsden Fund proposal.

Postgraduate students can be supported on Marsden Fund proposals on a fixed-rate basis. The values are \$35k scholarship per year, plus fees (New Zealand resident rates) for PhD students or \$22k scholarship plus fees (New Zealand resident rates) for one year for Masters students. These figures assume the postgraduate students are assigned to the research on a full-time basis.

More information about postgraduate scholarships can be found here:

<https://www.royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/information-for-grant-recipients/marsden-funded-postgraduate-scholarships/>

For summer studentships, please check with your Research Office for guidance on scholarships.

Those involved in the assessment of the proposal require this information to determine whether the total resources being requested are sufficient and realistic to achieve the goals and objectives indicated in the proposal in Section 3. Please note that the absolute minimum combined time for all PIs is now 0.1 FTE per year. This is designed to provide flexibility in special cases. However, the Marsden Fund Council expects that sufficient PI time be allocated to carry out the project successfully. The total time that is to be devoted to the project, specified in Section 4, will form part of the contractual obligations to Royal Society Te Apārangi.

Section 5: CV and Publications

These have been carried over from the EOI. Please update if necessary, using the same template as for your EOI.

Please put the publication year **in bold** if it is in the last 5 years.

Sections 6 and 7: Budget

The budget information is contained in Sections 6 and 7. The Marsden Fund is operated under Terms of Reference set down by the Minister of Research, Science and Innovation. The Terms of Reference state that funds awarded are to cover the full costs of a proposal. Full costing shall include direct costs, associated personnel costs and an appropriate share of overhead costs such as institutional administration and depreciation of capital assets and buildings. Please note that collaborating researchers from outside New Zealand are able to be included in proposals but **are not able to receive direct funding support for their time or institutional costs**. However, costs associated with collaboration (in other words: travel and accommodation) may be covered under “direct costs”.

The Terms of Reference also state that shared funding in the form of one party paying direct costs and the other paying indirect costs will not be permitted. The Marsden Fund may, however, support pieces of work that are related to programmes already being sustained through some other funding route (for example, Centres of Research Excellence [CoREs]) providing that the application is for a discrete piece of work. Where relevant, the wider programme should be described to demonstrate that the Marsden Fund proposal complements other work being carried out by the applicant. This procedure has been adopted to prevent cross-subsidisation, especially where Government funds are involved.

The Marsden Fund Council wishes to be assured that the funding arrangements for Marsden Fund projects are appropriate. If insufficient information is available to provide this assurance, the Marsden Fund Council will seek to obtain these details before funding is approved. Applicants are advised that this need for further information will not play any part in the Marsden Fund Council’s assessment of the merit of the proposed research.

In identifying the full cost of their proposal, applicants should see the sample budget within this document, which is prepared as a guide.

Note on Vision Mātauranga costs:

If the proposed research has any Vision Mātauranga themes, it is essential that any costs associated with Vision Mātauranga capability development and engagement are accounted for in the budget (sections 6 and 7). This could include (but is not limited to):

- Salary (and associated overhead) costs for any PIs / AIs
- Research assistant time
- Student scholarship support
- Costs of engagement or consultation (direct expenses). Examples could include: donation to the organisation or marae committee as a way of recognising expertise and contribution; koha; vouchers; providing resources such as books or research findings to the communities involved
- Costs of dissemination (for example: hui) – direct expenses

Guide on project size (Standard Proposals)

Guidance is included here on the maximum size of Standard Proposals. The Marsden Fund Council particularly wants to provide support for individual researchers or small teams in contrast to supporting large teams assembled to undertake programmes of research that could be supported by other funding agencies. The preferred types of projects are those from individuals or small teams, to investigate bright new ideas, involving the assistance of a post-doctoral fellow, research assistants or postgraduate students where appropriate.

The Assessment Panels and the Marsden Fund Council also prefer to be able to fully fund the proposals they are evaluating where possible. Each panel works within a limited budget, and very large proposals can substantially affect a panel's ability to fund projects at the full value requested. To overcome this, there is a maximum amount per proposal, which differs between panels. There is no minimum. Amounts applied for may vary from year to year, as long as the total amount applied for is no greater than the total maximum amount.

Note that the total maximum amount is a strict cap.

Panel	Average maximum amount per year	Total maximum amount over 3 years
BMS	\$320k	\$960k
CMP	\$320k	\$960k
EHB	\$290k	\$870k
EIS	\$320k	\$960k
EEB	\$320k	\$960k
ESA	\$320k	\$960k
HUM	\$220k	\$660k

MIS	\$240k	\$720k
PCB	\$320k	\$960k
SOC	\$290k	\$870k

Please note that maximum amounts listed above are exclusive of GST.

Where other funding for research relevant to the proposal is being provided or sought, it must be detailed, as required, in Section 8 (Other Funding). It is appreciated that many other applicants will be involved in applications to other funding sources or have funding for related work. **This is to be encouraged.** However, to assist in the assessment of Marsden Fund proposals, the Marsden Fund Council and panels need to be aware of other funding applied for or received. Although the price of a proposal is of secondary consideration, after the grading of proposals on the basis of the Marsden Fund criteria, the price of each proposal will be taken into account by the Marsden Fund Council. Applicants should also bear in mind that approximately \$74 million (excluding GST) is expected to be allocated to Full Proposals funded in the 2023 round. This includes Fast-Start and Standard grants (but not Marsden Fund Council Award grants).

If any applicants have sought other funding for work related to the Marsden Fund application (to be detailed in Section 8, "Other Funding") and they are subsequently successful, they should let the Marsden Fund office know immediately.

Budget template

The budget template is an Excel file with a "Budget" tab (section 6) and a "Direct Costs" tab (section 7). Any inputs into the "Direct Costs" tab will automatically be carried through to the corresponding category on the "Budget" tab and show up in grey cells.

The budget template automatically calculates all subtotals and totals, as well as total FTEs.

Note: White cells on either tab can have data entered, but grey cells cannot.

Please remove any hyperlinks in the budget before uploading to the application portal as these will cause errors.

Budgeted categories

SALARIES AND SALARY-RELATED COSTS

The figures in this category are to cover only the costs of personnel employed on the research proposal in the application. This should include the direct costs (in other words: salary) and indirect or salary related costs (for example: superannuation; ACC and fringe benefits). Costs of general management and administration are to be excluded from this section and included as overheads. Any subcontracted personnel should not be included in this section but incorporated under the "Direct Costs" part of "Other Costs".

Collaborating researchers from outside New Zealand can be included in proposals but are not able to receive direct funding support for their time (FTE) or institutional costs

(overheads). For payment of any FTE or overheads on a Marsden grant, investigators are required to be New Zealand-based.

The FTEs of personnel shown in the *budget* page **should only be those where costs and time are associated with Marsden funding**. If Marsden funding is not sought for particular individuals (for example: overseas investigators; post-doctoral researchers with stand-alone fellowships; or postgraduate students with other sources of funding) then the individual should still be named on the budget page but with zero FTEs recorded.

Postdoctoral fellows

Postdoctoral researchers may be part-time (usually 0.3 FTE or more) or full-time on a Marsden Fund proposal. This should be indexed to L1 to L3 salary scales, or as appropriate. Please check with your host institution for more information.

INDIRECT COSTS

Overheads

Indicate the cost of overheads that relate to the research proposal. These should be directly proportional to the time spent on the project. Overheads include managerial time not included in the proposal, the cost of support services, the cost of financial and accounting systems, corporate activities, the cost of premises and other indirect costs. Cost of premises may be either the annual rental cost, or the depreciation cost, of premises and should be proportional to the project's use of the institution's premises for the research proposal.

DIRECT COSTS

Details of costs should be listed in Section 7 ("Direct Costs" tab of the template) and should be broken down by year.

Expendables

This category should include the general operating expenses associated with the research proposal such as consumables, travel (for conferences, collaboration etc.), any direct costs associated with Vision Mātauranga, capital purchases under \$5,000, and other miscellaneous costs associated with research. (This does not mean that equipment can be divided into separate components all less than \$5,000 each).

Details of expendables should be given in Section 7(a). Please give details of major working expenses. Equipment costs should be included under Equipment Depreciation/Rental, Section 7(b).

Items with a large cost (in other words: over \$5,000) should be included under "Extraordinary Expenditure" and explained in Roles and Resources (Section 3g).

Equipment depreciation/rental

The Marsden Fund does not fund the purchase of equipment directly but may allow for an annual depreciation or rental cost. In the case of rental costs, the share of the total

cost of the equipment should be proportional to the proposal's use of the equipment. For example, if a confocal microscope costs \$40,000/annum to run, and the proposal uses the microscope for 10% of its time, the Full Cost to the project would be \$4,000/annum.

Note: Many institutions make a general provision for depreciation in their overhead costs. If this is the case, depreciation costs should be incorporated in "Indirect Costs". If not, depreciation costs should be included here. In the case of depreciation not already provided for under "Indirect Costs", the cost of equipment should be assigned in proportion to the expected life of the equipment and the planned usage. If a request is made for equipment depreciation or rental, the details should be listed in Section 7(b).

Students

Postgraduate students are awarded scholarships free of income tax and may be supported on Marsden Fund proposals at the stipulated rates. **These are set at \$35k scholarship per year, plus fees (New Zealand resident rates) for PhD students, or \$22k scholarship plus fees (New Zealand resident rates) for Masters students for one year.** These figures assume the postgraduate students are assigned to the research on a full time basis. Fees should be included in the direct costs.

More information about postgraduate student support is included here:

<https://www.royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/information-for-grant-recipients/marsden-funded-postgraduate-scholarships/>

Summer students may be included under this category and their FTEs indicated (for example, if a summer student is working on the project for 3 months of a year, their FTE for that particular year will be 0.25). For summer studentships, please check with your Research Office for guidance on scholarships.

Sub-contractors

Any costs where services are purchased from other organisations should be included in this section. Where personnel are sub-contractors they should be shown in this section, named, and their time-commitments shown in the FTE column with details in Section 7(c). If sub-contractors are also Principal or Associate Investigators, they should be listed in both places, with the FTEs and associated costs included **only** in the "Sub-contractor" section. Named sub-contractors for whom a CV is supplied will generally be PIs or AIs.

Where a sub-contractor is a New Zealand research organisation, please break down costs per year into salary, overheads and direct costs according to the table shown in Section 7(c). Other sub-contractors (for example: private individuals) may provide the annual cost as a single figure in the budget, rather than breaking down the costs.

Extraordinary expenditure

These are the costs of any extraordinary items that make the research significantly more costly than standard laboratory or office-based research efforts. An example might be time on a major facility, like a research ship or a linear accelerator and, as

mentioned above under Expendables, travel costs where these are a major item. If you use this category, you need to identify the nature of the expenditure in Roles and Resources (Section 3g).

GST

The cost of the research proposal should be GST inclusive. Note that the budget template provided will automatically calculate GST at 15% and the GST-inclusive total. The GST-exclusive amounts shown in the "subtotal (a) + (b)" row should be compared with the maximum average amount per year for that panel.

Budget example

You may be requesting one, two or three years of funding. This example shows three years, with the budget cap for the CMP panel.

6. Budget (NZ\$)

	Year 1		Year 2		Year 3	
Salaries (giving names):	BUDGET	FTE	BUDGET	FTE	BUDGET	FTE
Principal Investigator (s)						
Dr Leota	\$30,000	0.20	\$38,000	0.25	\$32,000	0.20
Associate Investigator(s)						
Dr Kahurangi (see below)						
Dr Amarillo (overseas, no salary requested)		0.00		0.00		0.00
Post-doctoral fellow(s)						
Research/Technical Assistant(s)						
	\$65,000	1.00	\$67,000	1.00	\$69,000	1.00
Others (name)						
Salary-related costs						
ACC levies	\$850		\$900		\$840	
Total Salaries & Salary-related costs (a)	\$95,850	1.2	\$105,900	1.25	\$101,840	1.2
Other Costs:						
Indirect Costs:						
Overheads (110%)	\$105,435		\$116,490		\$112,024	
Direct Costs:						
Expendables* (specify) ¹						
	\$42,065		\$49,610		\$47,436	
Equipment depreciation /rental (specify) ¹						
	\$3,000		\$3,000		\$3,000	
Students						
PhD	\$35,000	1.00	\$35,000	1.00	\$35,000	1.00
Sub contractors (specify) ¹						
Univ of Southland	\$31,650	0.1	\$20,000	0.05	\$17,700	0.05

Extraordinary expenditure (specify)						
Total Other Costs (b)	\$217,150	1.1	\$224,100	1.05	\$215,160	1.05
Sub Total (a) + (b)	\$313,000	2.3	\$330,000	2.3	\$317,000	2.25
G.S.T. at 15%	\$46,950		\$49,500		\$47,550	
TOTALS	\$359,950	2.3	\$379,500	2.3	\$354,550	2.25

* Including non-salary costs associated with Vision Mātauranga, and student fees if applicable
 1 Data from Direct Costs Sheet

In this example Expendables, Equipment depreciation/rental and Sub-contractors need to be further explained on the separate page provided for Section 7.

7. Direct Cost Budget Details

Please specify the items for the following (excluding GST). Please break down into costs per year.

a) Expendables								
			Year 1		Year 2		Year 3	
			BUDGET		BUDGET		BUDGET	
Student fees (2 PhD)			\$14,000.00		\$14,500.00		\$15,000.00	
Conference travel							\$7,000.00	
Resources needed for Vision Mātauranga engagement			\$4,000.00		\$4,000.00		\$3,000.00	
Chemicals and general consumables			\$4,065.00		\$6,110.00		\$2,436.00	
DNA sequencing			\$20,000		\$20,000		\$20,000	
AI Amarillo visit to host institution					\$5,000.00			
TOTALS (excl. GST)			\$42,065.00		\$49,610.00		\$47,436.00	
* including any non-salary costs associated with Vision Mātauranga, if applicable								
b) Equipment depreciation/rental								
			Year 1		Year 2		Year 3	
			BUDGET		BUDGET		BUDGET	
Spectrometer used 50% for this project			\$3,000.00		\$3,000.00		\$3,000.00	
TOTALS (excl. GST)			\$3,000.00		\$3,000.00		\$3,000.00	
c) Subcontractors								
University of Southland								
			Year 1		Year 2		Year 3	
			BUDGET FTE		BUDGET FTE		BUDGET FTE	
Salaries: (giving names)								
Dr Kahurangi			\$13,000 0.1		\$6,750 0.05		\$7,000 0.05	

Other Costs:							
Indirect Costs: Overheads	\$14,300		\$7,425		\$7,700		
Direct Costs:							
Expendables* (specify)	\$4,350		\$5,825		\$3,000		
Consumables							
Students							
TOTALS (excl. GST)	\$31,650	0.1	\$20,000	0.05	\$17,700	0.05	

For extraordinary expenditure – please describe under “Roles and Resources” (Section 3g)

Section 8: Other Funding

Please note that any applicants who declared “other funding” in section 6 of the EOI should provide an update in this section if necessary.

If any applicants have sought other funding for work related to the Marsden Fund application and they are subsequently successful, they should let the Marsden Fund office know immediately.

Part (a): Indicate whether non-Marsden funding (for example: MBIE; Health Research Council; Centre of Research Excellence; Tertiary Education Commission; MPI; commercial; other) has been i) received or ii) applied for, for this or for research relevant to this proposal.

Part (b): Please provide details of previous or current Marsden funding held by PIs or AIs, FTEs, their role in the project (PI or AI) and the completion date for the research.

Part (c): Please indicate whether any of the PIs or AIs are listed as named investigators on any other Marsden Fund Full Proposals from **this funding round** (name, role, proposal number, panel).

Part (d): Please also indicate any periods of leave to be sought during the period of proposed Marsden Fund research.

Section 8 should not exceed **two pages in total**.

Section 9: Declaration Page (Updated)

All contact PIs are required to tick a box online to indicate their acceptance of the terms and conditions of the Full Proposal and should read the declaration page before they do so.

Please note that an extra sentence has been added to the Declaration page:

“As the Principal Investigator, you take full responsibility for the content of the application, including the suitability and validity of cited sources and originality of content”.

Section 10: Fast-Start status page

This is required for all Fast-Start proposals. The status of the PI is recorded and signed off by the employer or a duly authorised agent. A separate template is available from the application portal for this purpose. We require one electronic copy of the section 10 status page per Fast-Start proposal to be submitted by institutions' Research Offices via the application portal in time for the deadline.

Institutional Declaration

Institutions should sign a collective declaration for all their proposals, which is available for download from the "Agent Declaration" menu and should be uploaded when signed, the same as for the EOI round.

Ngā kaitaunaki Referees

If there is any person whom you do not wish to referee your Full Proposal, please state this, providing reasons, in a communication provided to the Society on letterhead. The latest date to receive referee exclusion notifications is within one week of receiving the invitation to submit a Full Proposal – in other words, **before May 16th 2023. The number of people that can be excluded as potential referees is strictly limited to three.**

Please note that referee exclusions apply only to the funding round in which they are requested and are not carried over from year to year. They need to be requested anew for each funding round. If an applicant excludes a particular referee, does not get funded and gets through to the full round in future years, that referee exclusion will need to be requested again if the applicant still wishes to exclude them.

The Marsden Fund Council will endeavour to provide two, and preferably three, referee reports for each Full Proposal. Referees are not identified to applicants, nor are grades made available to applicants.

Referee reports will be posted on the application portal. The main batch of referee reports will be posted on the portal on 16th August; from this date onwards, reports will be posted as they are received. Applicants should submit their responses through the web portal. The main deadline for responses will be 30th August. This deadline will be extended for reports received after August 16th and will be indicated on the portal. We will endeavour to give applicants two weeks to respond, but for very late reports this may be constrained by full round panel meeting dates.

Applicant responses to the referee reports are strictly limited to one page per referee report. For example, if a proposal has three referee reports, then three separate responses of one page each may be submitted. **Please note that it is not possible to submit one combined response of up to three pages.**

If you do not wish to reply to a particular report, please could you indicate this by ticking “No Response” on the portal so that we can be certain that we have all the responses back.

Note that the responses do not go back to the referees but are considered by the assessment panel only. Applicants should bear this in mind when writing their responses.

Also please note that panellists will consider full proposals, referee reports and all applicant responses together when coming up with their final grades.

Referees are not involved in the final funding decision.

Whakahoki whakaaro **Feedback**

It is anticipated that for unsuccessful applicants, the comments from the available referee reports can be discussed further with their panel convenor.

Whakapā mai Contact details

The Marsden Fund is administered by Royal Society Te Apārangi.

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<https://royalsociety.org.nz/what-we-do/funds-and-opportunities/marsden/>

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