

CREOI proposal guidelines

This version is valid for the submission deadline of April 15, 2013. If you are applying for a later submission date, please go to www.creoi.org to confirm that you are using the most current guidelines.

Conservation, Research and Education Opportunities International (CREOI) is a U.S.-based non-profit organization dedicated to furthering the fields of conservation, research and education.

TYPICAL GRANT RANGE: \$2,000 – \$8,000

GRANT MAXIMUM: \$10,000

PROJECT DURATION: maximum of two years

PROPOSAL SUBMISSION DEADLINES: April 15 and October 15 of each year

SUBMISSION PROCESS: email proposal document(s) as attachment(s) to info@creoi.org with the subject heading MONTH YEAR PROPOSAL, e.g., APR 2012 PROPOSAL

We are likely to fund fewer than one quarter of the applications that we receive, so **PLEASE FOLLOW THE INSTRUCTIONS CAREFULLY**. Proposals that do not follow these guidelines may be rejected without review of the actual content or merit of the proposal.

PROPOSAL REQUIREMENTS

Focus areas

Proposals must address at least one of the focus areas listed below. Projects that address multiple focus areas will receive higher priority in the review process; however, overall project and proposal quality will still be the primary determining factor (i.e., a poorly-written proposal presenting a poorly-planned project that addresses all three focus areas will not be selected over an outstanding idea/proposal that addresses only one focus area).

Current focus areas for CREOI funding include:

- **Research:** Projects that advance or address natural resource (i.e., wildlife, ecosystems/habitats) conservation through research. Basic research projects qualify for this focus area; however, applied research projects are encouraged.
- **Education and outreach:** Projects that engage with external organizations or communities in a way that increases the external partners' interest in, knowledge of or capacity to address issues related to the project.

Student support

Projects addressing one of the focus areas above will be more competitive if they include support for a student. A student may be the Principal Investigator or included in other roles on the project. As relevant, please identify students by name as Investigators; if necessary, they may be listed as "to-be-determined".

NOTE: CREOI will occasionally award limited student support for specific training related to a research or outreach project meeting the focus area criteria above, e.g., specialized laboratory training, course or workshop. To qualify for this type of award, the proposal must:

- Identify the most economical transportation, lodging and per diem options
- Provide specific details and documentation of costs
- Provide a specific plan for how expertise gained from the training experience will be disseminated back in the home setting

Individual and laboratory group submission limit

An individual may only be on one proposal per submission deadline, whether as a Principal Investigator or as an Additional Investigator. An individual on a currently funded CREOI proposal (in any capacity) may not apply for additional funds that would be awarded prior to the completion of their current award.

Any organized lab group (e.g., all students supervised by the same advisor, all students associated with an integrated lab unit within which all research is very similar, etc) is limited to a single proposal. Please coordinate within your lab group to decide on a single proposal to be submitted (be creative – try a collaborative project!). If multiple proposals arrive from a single lab group, all proposals will be disqualified.

Repeat proposal submissions

If a proposal is rejected and the Principal Investigator is not specifically invited to resubmit the proposal at a future date, we regret that the proposal will not be eligible for future submission. The same investigator(s) may propose a substantively different project in the future.

Previous grantees are eligible to submit proposals for project expansion, or for completely different projects. Having received a CREOI award previously will not provide a significant advantage or disadvantage. All proposals will be reviewed relative to focus areas and other proposal requirements.

Language requirements

We accept proposals in English and Spanish. If you are not a native English speaker and choose to submit in English, please be sure that you are proficient in written English. If we cannot understand your proposal, we will not be able to accurately evaluate its merit.

File formats

Please submit your proposal documents in as few PDF files as possible (ideally, a single file). Title the document “PI last name_date of submission_#doc.pdf”. For example, “Cruz_Oct2010.pdf” (single file) or “Fernandez_Apr2011_1.pdf”, “Fernandez_Apr2011_2.pdf” (multiple files).

Proposal documents

The body of the proposal must have at least 1-inch (2.54 cm) margins and font size no smaller than 12 point.

I. Summary page

- A. Project title
- B. Principal Investigator
 - Full name

- Affiliation – name of university, government lab, non-governmental organization, etc
- Laboratory unit name or group, if relevant (see laboratory group submission limit above)
- **Current** professional status – select those that apply:
 - undergraduate student
 - master’s student
 - PhD student
 - teaching assistant
 - post-doctoral researcher/fellow
 - professional scientist (e.g., in a government lab)
 - professor/researcher at a university
 - independent researcher/educator
 - other – please explain
 - **DO NOT list your highest degree in this section**
- Contact information – FULL mailing address, telephone, email address
- 1-2 sentences describing the primary responsibilities of the investigator on the proposed project

C. Additional Investigators

If relevant, repeat ALL fields above for any additional project participants. Please be certain that personnel information is thorough and consistent with your Project Narrative, Budget and Budget Justification. You may identify “to-be-determined” participants (e.g., undergraduate field assistants) in this section.

NOTE:

If the principal investigator IS a student, please include the student’s academic supervisor under Additional Investigators even if he or she will not be directly involved in the implementation of the project. Note “academic supervisor” in primary responsibility section and describe other responsibilities, if any.

All other additional investigators should have DIRECT involvement in the implementation of the project.

If the principal investigator IS NOT a student and the project will be including other students, the proposal must clearly identify student involvement, support or training.

D. Total funds requested

E. Project start and end dates, and duration

F. Focus areas – Describe in **one sentence**, if relevant, how your project generally addresses each focus area. Write “not applicable” as needed.

- Research: (e.g., The project studies the foraging ecology of the giant anteater, which is a threatened species.)
- Education or outreach: (e.g., Project participants are visiting local schools to tell children about the giant anteater.)

G. Student support – Identify the total number of students supported by the project and in what capacity (e.g., The project is the Principal Investigator’s PhD work, and two undergraduates will participate in field work.)

- H. Specific project objective(s) – **200 word limit** (may be bulleted or in list format)
If you are applying for specific training funds, please provide objectives for the larger project to which your training will contribute.

II. Project narrative (**starting on a separate page, not to exceed 3 single-spaced pages**)

If you are applying for specific training funds, please write the narrative for the larger project to which your training will contribute and also complete section E.

A. Problem or opportunity being addressed

Provide enough background so that an educated audience can understand the problem, question, opportunity or situation.

Be sure to address the question: Why is this project important?

B. Project objectives (this can simply repeat the summary page objectives or include additional information)

C. Approach and/or methodology

Research

We are most interested in the fundamental methods you will be using. For example, we need to know sample sizes and the spatial and temporal scales of the study (e.g., you will collect 100 samples total, two each at 50 sites in your study area during March and September collection trips). We need to know general techniques you will be using (computer modeling using identified programs, laboratory procedures, etc). We do not need details on these techniques (e.g., mathematical formulas, concentrations of chemical preparations, etc) *unless* the objective of the project is to explore or develop these methods. Please present your methods in a logical manner such that an educated audience can imagine the steps of your work from start to finish.

Education/Outreach

If you are proposing an education/outreach project or you have a **component** of your project that addresses the education/outreach focus area, you must explain your approach in detail. Please describe who your external audience is, how you will interact with them and what materials you will use, when and how often these interactions will occur, etc. In order to qualify for the education/outreach focus area, a clear plan must be presented for these types of activities.

D. Expected outcomes

Be sure to address the questions:

Briefly, and if relevant, what do you expect to learn given your approach or methodology? (You need not predict specific results, such as “higher density in habitat A vs B” but you should make explicit the types of patterns you will reveal, such as “the relationship between density and habitat”.)

Who/what situation will be affected by the outcome of your work (research and education, if relevant)?

How will they/the situation benefit from the outcome of your work (research and education, if relevant)?

E. Specialized training support

If you are applying **only** for specific training funds, please explain the nature of your training opportunity and how it contributes to the overall project. Provide a specific plan for how expertise gained from the training experience will be disseminated back in the home setting. If you are applying for a full research or outreach project, do not include a section E.

III. Geographic map

Please provide a map at an appropriate scale to show where the project will take place. This may, for example, be a map of the country showing four different field locations around the country where samples will be taken, a map of a region showing the eight cities in which schools will be visited, or a map of a province showing the location of a natural reserve where the project will occur. We do not need fine scale maps of individual field sites.

IV. References, if applicable

V. Budget

A. Itemized budget: In tabular format, we need your best estimate of the cost of your project. Example categories of budget items are as listed below. Please use as many categories as are relevant to your project, and be sure to explain any categories added. For each item, please provide enough information that we clearly understand how the grant will be spent. For example, list the supplies to be purchased (sampling tubes, field notebooks, etc). For travel, itemize to indicate how many people are traveling for how long, and what the daily, weekly or monthly (as appropriate) rates are for food, lodging, etc. For tuition and stipends, indicate exact period of support by the grant. If you are applying for specialized training funds, please be certain to identify the most economical travel options, and provide specific details and documentation of costs.

BUDGET	
FIELD AND LAB SUPPLIES	Itemize consumable items for the field and lab such as notebooks, batteries, sampling jars, laboratory reagents, tubes, gloves, etc.
FIELD AND LAB EQUIPMENT	We DO NOT allow equipment purchases for individual items that exceed \$500. Itemize equipment for the field and the laboratory such as cameras, GPS units, tents, balances, gel boxes, etc, but any single item must be under \$500. Explain why existing/shared equipment is not available. Tracking devices (e.g., telemetry collars and tags) are permitted and may exceed \$500 each.
OUTREACH SUPPLIES, MATERIALS AND EQUIPMENT	We DO NOT allow equipment purchases for individual items that exceed \$500. Itemize costs for supplies, materials or equipment related to interactions with external audiences, such as puppets, displays, flyers, posters, information booklets, etc. Please include the costs of professional design services below in purchased services. If the outreach focus area is identified as a component of the project, we expect costs associated with the outreach section of your project narrative.
PROJECT TRAVEL	Itemize and detail the costs of domestic airfare, international airfare, ground transportation (e.g., gas, truck rental, bus, train), boat transportation (e.g., rental, fuel), travel/field insurance, food (indicate # people, # days, cost per person per day), and lodging (indicate # people, # nights, cost per person per night).
CONFERENCE TRAVEL	All the same guidelines apply as for Project Travel. Please see note below regarding conference travel.
TUITION	Itemize the time period and costs for tuition, as well as the relationship to the project. Be sure to identify who is receiving tuition support.
STIPENDS	Itemize the time period and costs for stipends. Be sure to identify who is receiving stipend support, and that personnel information is consistent with your Summary Page, Narrative and Budget Justification.
PURCHASED SERVICES	Itemize any outside services that must be purchased, such as specialized sample analysis and graphic design. Please provide a detailed explanation of the need for purchased services in the budget justification.
OTHER	Explain.

B. Budget justification: ALL items listed in the budget table MUST be clearly linked back to the methods in your project. Please use this section to provide any additional information necessary to explain any of the items. Please also note any additional information related to important costs associated with your project that may not be reflected in the CREOI budget (e.g., funding from other sources without which the project would not be possible). Please be certain that personnel information is thorough and consistent with your Summary Page, Project Narrative and Budget. If you are applying for specialized training funds, provide the

actual site of lodging and documentation regarding per diem costs (e.g., a letter from your host).

NOTE: Expenditures for conferences (registration fees, travel, etc) are *only* eligible for support if the project being funded by CREO is being **presented by a project participant** at the conference. You may include conference costs in your budget and you may be awarded an initial grant that does not include conference funds. Once documentation of acceptance for a talk or poster at a conference is provided, the award recipient will receive the remaining conference funds.

VI. Timeline

Requests for funding may not exceed a project period of two years. Please provide a timeline demonstrating the scope of the project and indicating the completion of major milestones. Be sure to include **actual dates** (e.g., June 2011 as opposed to “month 1”) and that the dates agree with your project start and end dates on your summary page.

VII. Curricula vitae (**not to exceed 2 pages each**)

Please provide a CV for each investigator listed on the Summary Page. **Please begin each CV with education, include the type, date and institution of each degree.** If necessary, you may focus on current projects and provide a publication history (if applicable) with only the most current and most pertinent information relating to your proposal.

VIII. Letter(s) of support

Letters **MUST** be submitted on institutional letterhead and **MUST** include a signature (electronic image is acceptable). For students and post-doctoral researchers, provide a letter of support that discusses **you and the project** from your academic advisor. You may also provide additional letters from other appropriate professionals in the field. If you are visiting another institution for specialized training or collaborative work you must provide a letter of support from your host(s).

IX. Additional materials

Please provide copies of any permits or permit applications required to conduct the proposed project. If the project requires significant collaboration with another entity (community group, fishermen’s cooperative, park administration, etc) please provide a letter of support from the relevant organization(s). If your project includes an outreach component to a specific group or, for example, activities in a school, you should include a letter demonstrating support for your outreach plan with that group or school.

Please do not send emails to check on the status of your proposal. We will contact you shortly after the submission deadline to confirm receipt of your proposal, and to notify you if we have problems opening your files so you may resend them. Once we have made a decision about your proposal we will contact you. Notifications will be made roughly six weeks after the submission deadlines.

PLEASE SEE EXAMPLE SECTIONS BELOW FOR ADDITIONAL GUIDANCE IN PREPARING YOUR PROPOSAL.

EXAMPLE SUMMARY PAGE

Rulers of a Shallow Kingdom: the Blacktip reef sharks of Palmyra Atoll

PRINCIPAL INVESTIGATOR

Michelle Wainstein
University of Seattle
Elasmobranch Ecology Lab
Master's student

University of Seattle
Biology Department
3515 NE Boat Street
Seattle, WA 98107
206.255.4133
mwain@uw.edu

Wainstein will conduct fieldwork and oversee a field assistant, conduct lab work under the supervision of Sussman (academic advisor) and work with Smith on outreach activities.

ADDITIONAL INVESTIGATORS

Django Sussman
University of Seattle
Elasmobranch Ecology Lab
Professor

University of Seattle
Biology Department
3515 NE Boat Street
Seattle, WA 98107
206.255.4297
sussman@uw.edu

Sussman is Wainstein's academic advisor. He will oversee her progress on the project overall and will work directly with Wainstein on lab analyses.

Jane Smith
University of British Columbia
Environmental Education Program
Undergraduate student

University of British Columbia
School of Education
519 East Gilman – T215
Vancouver, BC CANADA

V7J 2K9
604-990-9299
j.smith@ubc.edu.ca

Smith will tour schools in the Pacific Northwest with Wainstein to teach elementary school students about shark biology and conservation.

TOTAL FUNDS REQUESTED: \$7,680

DATES AND DURATION: January 2011 – December 2011 (12 months)

FOCUS AREAS

- Research: Blacktip reef sharks are an apex predator required to maintain healthy levels of biodiversity on coral reefs, and are listed by the IUCN as Near Threatened.
- Education or outreach: The project will deliver important, age-appropriate information about sharks to elementary school students in the Pacific Northwest to advance conservation of marine ecosystems.

STUDENT SUPPORT: 2

The project is the focus of a Master's student research project, and the outreach component will support the training of an undergraduate student in environmental education.

OBJECTIVES

- To quantify home ranges of juvenile and adult blacktip reef sharks with the goal of delineating nursery habitats
- To measure genetic diversity of the Palmyra blacktip reef shark population
- To produce a short film and additional outreach materials for an elementary school audience about the importance of blacktip reef sharks and the threat of shark finning to the species
- To tour twelve Pacific Northwest elementary schools using the outreach materials with the goal of reaching 3,000 students

EXAMPLE BUDGET

NOTE: dollar amounts are for illustrative purposes only and are not intended to reflect actual costs of items.

ITEM	DETAIL	COST
Field and Lab Supplies		
Waterproof lab notebooks	4 x \$10 each	\$40
Collection vials and reagents	To store fin clips for genetic analysis – 100 x \$0.50 each	\$50
Transect materials	Rope, flagging tape, stakes, etc	\$200
DNA extraction supplies	Qiagen kits – 2 kits (for 50 samples each) x \$100 each	\$200
Primers for genetic typing	10 primers x \$15 each	\$150
Reagents for genetic typing	Taq polymerase, dNTPs, buffers, etc for 100 samples	\$100
Field and Lab Equipment		
Digital camera	To document field work and photograph sharks	\$300
Binoculars	To search for sharks – 2 x \$400 each	\$800
Snorkel and SCUBA gear	Rental fee from Palmyra field station – \$5 per day x 2 people x 60 days	\$600
Outreach Supplies, Materials and Equipment		
DVDs	One per school – 12 high quality DVD copies of film x \$5 each	\$60
Laminated shark information cards	One per classroom, print costs – 120 x \$2 each	\$240
Puppets and stage	One set of 6 puppets and stage	\$300
Project Travel		
Domestic airfare	One ticket for field assistant (see below for Wainstein ticket) Seattle – Palmyra Atoll	\$500
Boat rental	Field work at Palmyra – \$5 per day x 60 days	\$300
Boat gas	Field work at Palmyra – \$4 per day x 60 days	\$240
Food and lodging – field work	Combined rate for food and lodging provided by Palmyra field station – \$10 per day x 60 days x 1 field assistant (see below for Wainstein food and lodging)	\$600
Bus tickets	12 trips to local elementary schools x \$20 per ticket x 2 people (Wainstein from Seattle and Smith from Vancouver)	\$480
Lodging – outreach	Approximately half of the schools are far enough away to necessitate lodging for Wainstein and/or Smith – 1 room for 6 nights at \$50 per room	\$300
Food – outreach	\$20 per day x 18 days (12 schools with 6 schools requiring 2 days for at least one person) x 2 people	\$720

Stipends		
Field assistant for fieldwork	Salary for field assistant at Palmyra – \$20 per day for 60 days	\$1200
Purchased services		
Final edit of video	(see below)	\$300
TOTAL		\$7680

Budget Justification

Field and lab equipment – camera and binoculars: Because the field season is long (60 days) and very distant from University of Seattle, cameras and binoculars from Wainstein’s lab group cannot be borrowed. Funding is therefore requested to purchase dedicated items for the project.

Stipend: The field assistant for the project has not yet been selected, but the project will require someone with field experience working with sharks and snorkeling/scuba diving. In order to attract qualified candidates, we request funding in the budget to pay all travel costs for the assistant in addition to providing a modest \$20/day stipend.

Purchased services: While the majority of production and editing of the video can be done by Wainstein, a final professional edit with audio would dramatically improve the quality of the product. These services are provided at a very reasonable cost through the audio-video resources at the University of Seattle.

Additional information: Wainstein already owns a high-quality video camera to take footage of the research project and sharks. The plane ticket, food and lodging for Palmyra for Wainstein are being paid for by a student scholarship from University of Seattle.