

# Jobs and Opportunity Initiative (JOI) and Social Protection Initiative (SPI): TRAVEL/PROPOSAL DEVELOPMENT PROPOSAL GUIDELINES

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This document contains an [Overview](#), [Budget Guidelines](#), an [Application Checklist](#), and a [Main Proposal Template](#) for Travel/Proposal development grants. Please read this document carefully before submitting your proposal.

**Submission instructions:** To respond to this RFP, all applicants must first **submit the required Letter of Interest on WizeHive, using the relevant application link from the JOI or SPI RFP webpages, and following the Applicant Instructions here**. Successful applicants will receive an invitation to proceed with their full proposal materials.

## OVERVIEW

These grants are intended to facilitate very preliminary, exploratory research, and funding typically supports costs related to researcher travel and/or facilitating access to administrative data for designing or conducting a future RCT. Examples of these activities include, but are not limited to, negotiating data use agreements, conducting exploratory data analysis and cleaning, or setting up technical access mechanisms.

**Funding per Travel/Proposal development grant award:** a maximum of US\$10,000. Travel grants are provided as travel reimbursements in accordance with MIT travel policies and should use the specific budget template (see details in the Budget Guidelines section, below). If you cannot bear the costs out of pocket, we recommend that you apply for a pilot grant.

**Project Timeline:** Please note that both the JOI soft skills window and the JOI/SPI joint window cannot fund projects beyond October 31, 2027. Grantees must complete their project development work and submit final reports within one year of receiving the award.

## BUDGET GUIDELINES

**Survey and other in-country expenses:** While designed for travel reimbursements, travel grants can in some cases be used to cover expenses for in-country costs such as hiring enumerators, procuring translation or transcription services, developing instruments, and others. If these expenses are in the budget, J-PAL will provide the forms necessary to document them with your award notice, and you can claim these expenses as a reimbursement once the travel is completed. J-PAL is not able to directly reimburse survey firms or local organizations for these costs. If you need a fieldwork organization to be reimbursed for such work, we encourage you to reach out to [joi@povertyactionlab.org](mailto:joi@povertyactionlab.org) and [spi@povertyactionlab.org](mailto:spi@povertyactionlab.org) before finalizing your proposal materials to confirm whether we will need you to submit pilot proposal materials instead (to avoid requiring you to rework your proposal materials, thus slowing down award set up).

**Please note:** If your scope of work requires reimbursing your host organization (e.g. for fieldwork conducted with a partner such as focus groups or limited surveys) it is your responsibility that your budget follows your host institution's policies for costs, and you must submit a letter from the institution to receive the award that states that they have reviewed your proposal and accept your budget.

**Guidelines for completing a Travel/Proposal development grant proposal budget:**

Be sure to use the Travel/Proposal Development Budget Template on the RFP release page, providing detailed notes in the column provided in the template:

1. Travel grants are paid as reimbursements. Travel/Proposal Development grants are for a maximum of US\$10,000.
2. J-PAL will put you in touch with an MIT travel agent who can book international travel and charge J-PAL directly. If you choose to buy your own ticket, we will not be able to reimburse you until your flights have been completed.
3. J-PAL will only reimburse the lowest-cost available economy/cabin/coach flights. Please review [J-PAL's travel reimbursement policies](#) before completing your budget.
4. Grantees must complete their work and submit final reports within one year of receiving the grant award letter. Expenses will be reimbursed upon submission of an expense report. All expenses must be claimed within 30 days of your return. Expenses should be supported by receipts whenever possible, and all expenses over US\$50 must be supported by receipts.
5. **If your project includes human subject research (HSR),** there will need to be an IRB determination and J-PAL must set-up the award as a subaward. Only travel proposals without HSR can be set up as cost-reimbursable purchase orders to individuals.

**1. Institute to Receive Award (ITRA) and Principal Investigator (PI) Alignment:**

1. The ITRA must employ the PI formally named in the award. This formally-named PI will be the researcher responsible for the subaward agreement, as authorized by the Letter of Transmission. The formally-named PI must be:
  1. An employee of the ITRA, and
  2. PI named in the Letter of Transmission, and
  3. The main PI named in the IRB approval and IRB application

**2. Institutional Review Board (IRB) Requirements:**

1. The IRB is held by the institution that enters into the subaward agreement with MIT. The IRB must have [IORG](#) status and [FWA](#), or
2. If the institution does not have its own IRB, the institution must engage the services of a commercial IRB or third party IRB to review and provide oversight for the research activities.

  

6. In most cases, J-PAL is not able to directly reimburse any individuals or organizations other than the grantees awarded the travel grant. For any requested exceptions, please

contact your Grant Administrator at [joi\\_grant\\_admin@povertyactionlab.org](mailto:joi_grant_admin@povertyactionlab.org) or [spi\\_grant\\_admin@povertyactionlab.org](mailto:spi_grant_admin@povertyactionlab.org) prior to incurring expenses.

7. **Please note that J-PAL Initiatives do not cover PI salaries with the exception of PIs who completed a PhD and are based at an academic institution in a middle- or low- income country.** There are no individual PI limits, but the total budgeted amount for LMIC researcher PI time in aggregate across all co-PIs should not exceed US\$3,750 per award.

#### **8. Allowable Direct and Indirect Costs**

1. Unallowable costs include those labeled as “incidental,” “miscellaneous,” or “contingency.”
  1. Office Rent: Any requests for office rent should be explained in the budget narrative.
2. *Medical insurance:* All grantees are required to provide proof of emergency medical insurance coverage before travel. As many universities provide this to their students, faculty, and staff at no cost, this is not a reimbursable cost under this award. J-PAL can provide information on affordable coverage if needed.
3. *Per diem:* A per diem stipend of US\$25/day-in-country can be claimed to cover food and miscellaneous expenses.
4. Universities in high-income countries (according to the [World Bank classification](#)) can charge up to 10% in indirect costs, applied to total direct costs.
5. Non-university non-profits from any location and universities from mid- or low-income countries may charge up to 15% in indirect costs, applied to total direct costs.
  1. Grantees may have reasonable project support costs included in budgets as direct costs. Such costs should be reasonable and explained in the budget narrative.

## **APPLICATION CHECKLIST**

Please complete all sections in the online portal (WizeHive) by the full proposal deadline. You must upload several documents to complete your full proposal.

1. **Travel Narrative:** Guidance pertaining to the narrative prompts is included in the [Narrative Template](#) below.
2. **Proposal Budget:** Carefully review the Budget Guidelines in this document, and then use the matching excel template, [Travel/Proposal Development Budget Template](#) (please find the template on the JOI or SPI websites), which must be completed in its entirety and saved as a single Excel file with the title: [Project Name][Budget].xls(x).
3. **Budget Narrative:** Detail the costs within the budget, referring to the Budget Guidelines above, in a Word document with the title [Project Name][Budget Narrative].doc(x). This document is required in addition to the Proposal Budget -- i.e. notes included in the Excel sheet do not suffice.

**4. Letter(s) of Support:** It is your responsibility to obtain a letter of support from the following, ensuring that the language meets the conditions as listed. The review board values the partner/institution/adviser confirmation of willingness to work with the research team in review of the proposals. **The initiative team will carefully check the language of each letter and that it has been received on time.** Please upload the file as a single PDF file with the title [PI Last Name, First Name] [Name of Organization Letter of Support].pdf. If any of your letters are not in English, please upload a version that has been translated to English.

- a. *(if relevant)* a letter from any implementing partner(s) indicating the details of their commitment or willingness to engage in discussions to partner on the research
- b. *(if relevant)* a letter/document stating the proposed grant host institution's approval of the proposal materials (if anything beyond PI travel is included in the scope of work).
- c. **PhD students applying as the primary PI are required to include a letter of support from a researcher adviser eligible for this call.** The letter should indicate the adviser's willingness to remain involved in a supervisory role throughout the lifetime of the project.

**5. Validation and Test Accuracy data:** Proposals that include **Artificial Intelligence (AI) or any new specialized technology should include validation and test accuracy data in the proposal**, showing that the technology successfully does what it intends.

## MAIN PROPOSAL TEMPLATE

### Important Information

Review boards appreciate brief or aspects of the study that are more conventional and straightforward, concise answers (which may be well below the word limit) are appreciated. If a question asks for information you have already provided elsewhere in this form, simply indicate this and reference the title of the question where your answer can be found.

### Subaward Setup

For grants with **human subject research**, once all materials including IRB approvals/exemptions have been received, MIT typically takes 90 days to establish the subaward. Please provide conservative rather than optimistic estimates for start and end dates to reduce the likelihood of needing to submit no-cost extension requests.

To ensure that your intended ITRA/PI/IRB combination meets MIT's requirements, please thoroughly review and understand the linked FAQ document. ([FAQ: MIT Policy Concerning Subawards, ITRA, and IRB](#)). Reach out to [joi\\_grant\\_admin@povertyactionlab.org](mailto:joi_grant_admin@povertyactionlab.org) and [spi\\_grant\\_admin@povertyactionlab.org](mailto:spi_grant_admin@povertyactionlab.org) with any questions.

## Full Title of the Proposal

Please enter your proposal title. If it hasn't changed since your LOI, copy the original title. [30 words max]

## Funding Amount

Please enter the amount of requested funding in USD. This should match the amount indicated in your uploaded budget. [2 decimal places; Currency; USD]

## Proposed Period of Performance Start Date

What is the proposed start date for this J-PAL grant's activities?

## Proposed Period of Performance End Date

What is the proposed end date for this J-PAL grant's activities? Please note that both the JOI soft skills window and the JOI/SPI joint window cannot fund projects beyond October 31, 2027.

## Name & Role of Partner Organization

Indicate the name and role of the partner organization on this project, if known at this time. [30 words max]

## Existing Research Project Funded by J-PAL

Are you applying to fund additional research as part of an existing research project previously funded by J-PAL (e.g., a second proposal development grant continuing from a prior proposal development grant, a pilot grant building on a travel/proposal development, a full RCT building on a pilot, etc.)? [Yes; No]

## Existing Research Project Details

Please provide the title and/or J-PAL grant number of your previously funded project. Please explain how the project has progressed since you received the funding from J-PAL. If applicable, please upload your most recent narrative report for this project in the Additional Attachments section at the end of this application. [250 words max]

## Narrative

*We recognize that proposals may evolve and change between the LOI and full proposal submission. To ensure your project's information is up to date, we request that you resubmit your answers to the next two fields.*

## Final Abstract

Write a brief abstract of the study. Please note that this abstract will be added to the Initiative's webpage if the project receives funding. If nothing has substantially changed since the LOI submission, please copy the original response here. *[200 words max]*

## Final Research Focus Areas and/or Cross-Cutting Themes

Please tell us if your focus areas or themes have changed since submitting your Letter of Interest by adding this information here. For reference, the JOI and/or SPI research focus areas and/or cross-cutting themes are:

1. Job Creation;
2. Training and Matching;
3. Social Protection;
4. Identifying which soft skills matter, for whom, and under what conditions;
5. Leveraging soft skills to increase the effectiveness of broader labor markets and private sector development policies and programs;
6. Do soft skills interventions require tackling other constraints to be effective?;
7. Improving implementation quality and scalability of soft skills interventions.

## Statement of Topic

What is your research topic? Travel/Proposal development grants are intended to facilitate preliminary research ideas, so proposals need only address the general topic of interest and current ideas on how the question might be explored through a randomized evaluation.

Proposals do not need to include a detailed program or evaluation design.

- a. Please describe the policy problem that motivates this project and how it fits with the research priorities identified by the Initiative.
- b. Include information about the potential population and key outcomes.
- c. In your response, please also list any proposed partner(s), including J-PAL regional offices, IPA country offices, or other organizations you plan to work with for both program implementation and evaluation. Include the history of the partnership, and any in-kind or financial support they have committed or provided to the project.

*[400 words max]*

## Pathway to an RCT

How will the proposed activities inform the relevance and design of a potential follow-on pilot or full RCT grant proposal? Will this grant provide qualitative data to inform intervention design? How could the findings meet the needs of policymakers or development practitioners?

*[300 words max]*

## AI: Validation and Test Accuracy Data

Proposals that include Artificial Intelligence (AI) or any new specialized technology should include validation and test accuracy data in the proposal, showing that the technology successfully does what it intends. If applicable, please provide that validation and test accuracy data here, or attach it in the “additional attachments” section. If not applicable, please write “N/A.” *[200 words max]*

## Timeline

Please write out a timeline with key project activities. Please note that both the JOI soft skills window and the JOI/SPI joint window cannot fund projects beyond October 31, 2027. *[200 words max]*

## Local Researcher Involvement

Please describe whether/how the project involves researchers local to the project context. *[200 words max]*

## Implications on Equity and Social Inclusion

Please provide a comment on whether the research proposal addresses equity or social inclusion, in any way. Topics of social inclusion include, but are not limited to, gender, income level, location, ethnicity, race, language, citizenship status, disability, and at the intersection of those factors. Explain whether and how the project design allows us to learn about baseline differences between and differential impacts on groups mentioned above. Explain what reasons (if any) there are to expect that the potential intervention(s) studied may have disproportionate benefits for disadvantaged groups. *[200 words max]*

## Potential Risks

To protect research participants, staff, and community members, to comply with donor requirements, and to maintain a strong reputation for ethical research, J-PAL wants researchers to think carefully about the risks their research projects could face and how they will address such risks. The below questions provide an opportunity for researchers to do that. Successful applicants must provide updated answers in annual narrative reports only if there have been substantial changes since their proposal or last annual narrative report. **Please answer the following questions in detail. If none of these issues are applicable (e.g., this is purely a travel grant), please feel free to note that.**

## Completion Risks

Are there any technical, logistical, ethical, or political obstacles and risks that might threaten the completion of the project (e.g., technical platform not ready, implementation capacity, government authorization, or other funding)? How do you plan to monitor and prevent/address these types of risks throughout the project? *[200 words max]*

## Implementing Partners Risks

Please discuss any information about the implementing partner(s) that could pose ethical, reputational, or legal risks (e.g. corruption or misuse of funds, etc). If applicable, what proactive measures have you taken or will you take to assess, monitor, and mitigate/prevent any such potential risks? *[200 words max]*

## Participants, Staff, Community Members Risks

For each of the groups below, please describe any potential unintended consequences or risks of this project to them. What proactive measures have you taken or will you take to assess, monitor, and mitigate/prevent any such potential risks?

1. Program and research participants
2. Staff (e.g., implementing partners, research assistants, enumerators)
3. Community members (e.g., untreated members of a household, untreated neighbors, children, or broader communities if the treatment might have spillover or downstream effects beyond the study sample)

*[200 words max]*

## Contractual Limitations Risk

Are there any contractual limitations on the ability of the researchers to report the results of the study? If so, what are those restrictions, and who are they from? *[200 words max]*

## Child Safeguarding Risks

Particularly for projects working with children, what child safeguarding risks exist? *[200 words max]*

## Institutional Review Board and Institute to Receive Award

According to US federal regulations, a human subject is a living individual about whom an investigator conducting research obtains 1) data through intervention or interaction with the individual (e.g., through an interview, focus group, or survey), or 2) identifiable private information (e.g., individual-level health or education data).

## Human Subject Research

Do you plan to conduct human subjects research during your travel/proposal development? If your project scope of work includes collecting the types of data above, please select Yes. *[Yes, No]*

To ensure that your intended ITRA/PI/IRB combination meets MIT's requirements, please thoroughly review the linked FAQ document. ([FAQ: MIT Policy Concerning Subawards, ITRA, and IRB](#)). Reach out to [joi\\_grant\\_admin@povertyactionlab.org](mailto:joi_grant_admin@povertyactionlab.org) and [spi\\_grant\\_admin@povertyactionlab.org](mailto:spi_grant_admin@povertyactionlab.org) with any questions.

## **Institutional Review Board (IRB)**

For awards that include human subject research, IRB approvals (including exemptions) are required to be in place prior to a subaward agreement being issued and prior to any human subjects research commencing. If this proposal receives initiative funding, you will be required to submit:

1. All IRB approval(s) or exemption(s), and
2. All IRB-approved protocols, and
3. Any IRB-approved consent forms

## **Institutional Review Board (IRB) Requirements**

Please be mindful that MIT requires that either:

1. The IRB is held by the institution that enters into the subaward agreement with MIT. The IRB must have IORG status and FWA (as described below), or
2. If the institution does not have its own IRB, the institution must engage the services of a commercial IRB or third party IRB to review and provide oversight for the research activities.

For the IRB to be considered allowable, it must meet the following criteria as determined by MIT and J-PAL:

1. **IORG** status with the US Office for Human Protections. An IRB's status can be checked by consulting the database of IORGs [here](#).
2. **Federalwide Assurance (FWA)** with the US Office for Human Protections. Status can be checked by consulting the same database as above (link [here](#)).
3. If the IRB is not at the ITRA, then a proof of payment or proof of affiliation is required. Affiliation can be proven with documentation outlining the contractual relationship between the two entities (ITRA and IRB). This proof is most commonly a proof of payment from the ITRA to the IRB. MIT will not accept an Interagency Agreement (IAA) as this documentation.

Approved commercial IRB solutions are [Heartland](#) and [Solutions](#). These IRBs provide review of international research and satisfy J-PAL's IRB requirements; fees can be found on their respective websites. Please ensure that you include the cost of the IRB in your project budget.

## **IRB of Record**

Provide the name of the IRB of Record below. *[15 words max]*

## Is this IRB of Record IORG certified?

[Yes, No]

## Institute to Receive Award (ITRA) and Principal Investigator (PI) Alignment

The ITRA must employ the PI formally named in the award. This formally-named PI will be the researcher responsible for the subaward agreement, as authorized by the Letter of Transmission that is submitted at the Proposal and Award stages. The formally-named PI must be:

1. An employee of the ITRA, and
2. PI named in the Letter of Transmission, and
3. The main PI named in the IRB approval and IRB application

## Institute to Receive Award (ITRA)

Please indicate the institution that will receive the grant funds. *[15 words max]*

## Contact at Institute to Receive Award (ITRA)

Please provide contact information for the person who will be in charge of the contract at the ITRA. *[First Name; Last Name; Role or Title; Email Address; up to 1 contact]*

## Unique Entity ID

Does your ITRA have a Unique Entity ID (UEI) from the website SAM.gov? Please note that, if your proposal is awarded funding, all subawardees of MIT require a UEI from SAM.gov.

1. Yes, my ITRA has a UEI
2. No, my ITRA does not have a UEI
3. I am not sure

## Local Legal Requirements Certification

All PIs and co-PIs certify that they understand they must adhere to all local legal requirements, including obtaining local IRB approval and government research permits, where applicable. Do you agree? *[Yes, No]*

## Budget

### Budget Template

From either the [JOI](#) or [SPI](#) RFP webpages, download and complete the Travel/Development Budget Template. There are two tabs: one for the J-PAL initiative-specific budget and one for the project budget (i.e., the initiative-specific budget plus any other sources of funding you may have). When done, please upload your completed budget in the field below. Please do not

remove the template's formatting, change any of the formatting, or create new columns. [\[File upload\]](#)

## Budget Upload

Please upload a single Excel file with the title: [PI Last Name, First Name][Budget].xls(x) [\[File upload\]](#)

## Budget Narrative

Please justify the expenses outlined in your budget in a Word document with the title [PI Last Name, First Name][Budget Narrative].doc(x), and upload it here. This document is required in addition to the Proposal Budget. Notes included in the Excel sheet of the budget do not suffice. [\[File upload\]](#)

## Letters of Support & Additional Attachments

### Are you applying as a PhD student?

[\[Yes, No\]](#)

If yes, include the **J-PAL Affiliate or Invited Researcher Letter of Support**. PhD student applicants are required to submit a letter of support from a J-PAL Affiliate or Invited Researcher who serves as an advisor on the applicant's dissertation committee. This letter should indicate the advisor's willingness to advise the student throughout the project's lifetime. Please note that in some cases, the advisor may be asked to add their name to the financial award and IRB documents. If your advisor would rather submit this letter confidentially, ask them to email it to [joj\\_grant\\_admin@povertyactionlab.org](mailto:joj_grant_admin@povertyactionlab.org) and [spi\\_grant\\_admin@povertyactionlab.org](mailto:spi_grant_admin@povertyactionlab.org). If the advisor submits the letter by email, the PhD student will need to bypass this upload field by uploading a blank document. [\[File upload\]](#)

### Letter of Support from ITRA

For travel/proposal development projects that will be setup as subawards, a letter or document stating approval of the proposal materials and budget from each proposed institute to receive award (ITRA) is required. Please note that MIT policy states that the project PI needs to be employed at the ITRA and that the ITRA should provide the IRB (either using the Institute's IRB or a third party IRB). The Project PI must be the PI on the IRB. [\[File upload\]](#)

### Additional Attachments

Please attach any relevant materials discussed in your answers to the previous questions, as well as letters of support from partners. [\[File upload\]](#)