

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

This document contains an [Overview](#), [Budget Guidelines](#), an [Application Checklist](#), and a [Narrative 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: The JOI soft skills window cannot fund projects beyond June 30, 2027, 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 joip@povertyactionlab.org and 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.** MIT now requires that at least one project PI be employed by the organization receiving the subaward and funds.

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. International travel: 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. 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.
4. **If your project includes human subject research:**
 1. **IRB Requirements:** MIT requires that the IRB determination must be held by the institution that enters into the subaward agreement with MIT. The PI at the ITRA must be listed as the main PI on the IRB. If the institution does not have its own IRB, the institution must engage the services of a commercial IRB to review and provide oversight for the research activities. [Heartland](#) and [Solutions](#) provide review of international research and satisfy J-PAL's IRB requirements; fees can be found on their respective websites. Further information about this MIT policy can be found [here](#) and [here](#). Consult with J-PAL regarding including the cost of this commercial entity in the project budget.
 1. J-PAL requires that the reviewing IRB have IRB Organization (IORG) status with the US Office of Human Protections. [You can look up the IORG status of an IRB here.](#)
 2. **Institute to Receive Award (ITRA) Requirements:** If your project requires paying an organization directly, MIT requires that at least one project PI have an official affiliation with the organization receiving the subaward.
5. J-PAL is not able to cover travel or trip protection insurance, lost luggage insurance, incidental expenses, or grantees' time. **In most cases, J-PAL is not able to directly reimburse any individuals or organizations other than the grantees awarded the travel grant.**

6. **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.

7. ***Allowable Direct and Indirect Costs***

1. Unallowable costs include those labeled as “incidental,” “miscellaneous,” or “contingency.” Any costs for 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.
6. We understand that the cap on overhead or indirect costs under this initiative is low and that 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. All templates for these documents are provided at the [RFP release webpage](#) and listed below.

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](#), which must be completed in its entirety and saved as a single Excel file with the title: [PI Last Name, First 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 [PI Last Name, First 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:** Please obtain a letter of support from the following, each saved as a single PDF file with the title [PI Last Name, First Name] [Name of Organization Letter of Support].pdf:
 - a. (*optional*) 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. (*required*) 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. **Graduate 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 (see the [Guidance for Graduate Student Applicants for details](#)).

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.

LETTER OF INTEREST TEMPLATE

The online application will require you to address the below prompts. The text provided below each bolded subsection helps provide guidance on what the JOI and SPI Board is looking for to effectively evaluate your proposal.

Given aspects of the RFP review are blinded, **please refrain from using identifying language in your proposal narrative, e.g. we encourage you to use the grammatical third person when citing (co-)PIs' work.**

Important Information

Primary Eligible Researcher

Please identify one researcher who is eligible for J-PAL Initiative funding. This may be the principal PI and/or any eligible co-PI. Details for only one primary eligible researcher are required in cases where there's more than one eligible researcher. Other PIs who are eligible can be added as co-PIs.

PI Eligibility Category

Indicate how the researcher is eligible for J-PAL Initiative funding. [*J-PAL Affiliate; Invited Researcher; PhD Student; J-PAL Postdoc; Regional Scholar*]

PhD Student Applicants

If you are a PhD student, please indicate the J-PAL-affiliated researcher who serves or will serve as an advisor on your dissertation committee.

Organization Name of Eligible Researcher

Please tell us the name of the organization the eligible researcher (i.e., the professor or PhD student) is affiliated with.

Organization Type

Indicate the eligible researcher's organization type: "University" or "Other." If you choose "Other" instead of "University," please contact the JOI and SPI teams at jo@povertyactionlab.org and spi@povertyactionlab.org to provide more details.

[University; Other]

Organization Website of Eligible Researcher

[Short answer]

Country Where Organization of Eligible Researcher is Based or Headquartered

[Dropdown]

Team Members & Roles

Please add all your project team members and indicate their role(s) on the project/application. Please copy and paste the role exactly as it is written below so that it matches our internal database.

Role options are: Applicant; Primary PI; Co-PI; PI at Institute to Receive Award; Reporting Contact; Secondary Reporting Contact; IRB Contact; Finance Contact; Collaborator; Contact for Contracting (e.g., grant manager or research administrator); Other (please specify role or title).

If you are the applicant and a PI (or another role), indicate so by adding yourself as an applicant and then again as a PI. As the applicant, you will be receiving all notifications related to this application.

PI Certification

1. I certify that any listed eligible researchers have agreed to be active, engaged, and responsive PIs or advisors on this project. Eligible researchers who are involved have confirmed they will be dedicated to guaranteeing quality control on all aspects of this research and that their participation is not merely to provide access to resources and funding to other project team members who would otherwise be ineligible.
2. I certify that all eligible researchers are up to date on reporting for all existing grants, across all J-PAL initiatives.

[Yes; No]

Demographic Information

J-PAL is collecting information about all project teams, including demographic information, to better understand and support our research network. As the applicant, we kindly ask that you send the language and [link](#) included below to all PIs/Co-PIs on your proposal research team. Provide your proposal name and each member's role (as you listed them on the application) when you send out the blurb. Please complete the "Team Member and Roles" section first before sending out the email(s) so that your team members are already in the system. Completion of this step is required for all PIs on your research team. If you have any technical problems with completing this step please email help@povertyactionlab.org or the JOI and SPI teams directly.

Feel free to cut and paste this suggested language in an email to send to the PIs and Co-PIs on your team:

J-PAL is collecting information about all project teams, including demographic information, to better understand and support our research network. J-PAL is requiring all PIs and Co-PIs on our research team to complete this [short form](#). This data will only be accessible in disaggregated, identifiable form to select J-PAL staff. Aggregate, anonymized data will be used to report to key partners such as donors and may be included on their website.

Demographic Information Confirmation

Please confirm that every PI/co-PI has completed the questions in the above-linked survey. You may select "Not Yet" so as to finish other questions. However, if you submit the application without "Yes" selected, your application will not be considered (until the surveys are complete). If you select "Yes" and PIs or co-PIs have not completed their surveys, their applications will not be considered until the surveys are complete. Check here to indicate that all PIs/co-PIs have completed this survey.

[Yes; Not Yet]

Project Details

Full Title of Proposal [30 words max]

Funding Amount

Amount of requested funding in USD.

Proposed Period of Performance Project Start Date

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

Proposed Period of Performance Project End Date

What is the proposed end date for this J-PAL grant's subaward activities? Please note that the JOI soft skills window cannot fund projects beyond June 30, 2027, and the JOI/SPI joint window cannot fund projects beyond October 31, 2027.

Past and Future Submissions to J-PAL

Have you submitted or do you plan to submit this LOI and proposal to any other J-PAL Initiative RFP, including in any previous JOI or SPI rounds of funding? *[Yes; No]*

Details about Past and Future Submissions

If you answered yes above, please state which initiative(s), year/season of RFP, and the name of the LOI/proposal you submitted or plan to submit. Example: "GI Spring 2019 Using Mobile Phones to Improve Service Delivery." Are the PI team, context, and research question the same as in the previously submitted proposal?

Please explain whether the project received funding and what type of funding it received (Travel/Proposal Development, Pilot, RCT, Scale, Multidisciplinary). Additionally, please explain how the project has progressed since it was last submitted to the initiative(s), and explain how you addressed the feedback that was provided with your last submission. *[350 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

If yes, please provide the title and/or J-PAL grant number of your previously funded project. Please explain how the project has progressed since it was last submitted to the initiative. *[250 words max]*

Abstract

Write a study abstract, including the project description, research question, and intervention or treatment to be evaluated. Discuss the project's technical design, what is going to happen during the project, the practical value of your project, the conceptual value of your research, and the distributional implications of your work. Provide context about proposed partners and a timeline. Please note that this abstract will be added to the JOI and/or SPI's webpages if the project receives funding. *[250 words max]*

Research Focus Areas and/or Cross-Cutting Themes

Please indicate which JOI and/or SPI focus areas or themes your proposal relates to; these are described in detail in the RFP materials. Please note that your proposal can fall under one or multiple themes. Options:

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

Initiative Alignment

Please briefly describe how the project aligns with JOI and/or SPI's research focus areas and/or cross-cutting themes. *[250 words max]*

National Location

In which country or countries will your research or travel take place?

MAIN PROPOSAL TEMPLATE

Important Information

Timeline

Please write out a timeline with key project activities. Please note that the JOI soft skills window cannot fund projects beyond June 30, 2027, and the JOI/SPI joint window cannot fund projects beyond October 31, 2027. *[250 words max]*

Name & Role of Partner Organization

Indicate the name and role of the partner organization on this project, if known at this time. *[100 words max]*

Narrative

Change of 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.

Changes to Abstract

Write a study abstract, including the project description, research question, and intervention or treatment to be evaluated. Discuss the project's technical design, what is going to happen during the project, the practical value of your project, the conceptual value of your research, and the distributional implications of your work. Provide context about proposed partners. 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 abstract here. *[250 words max]*

Prompts for Topic Statement

1. Travel/proposal development grants are intended to facilitate very preliminary, exploratory research, so proposals need only address the general topic of interest and current ideas on how the question might be explored through a pilot and a randomized evaluation in the future.
2. They do not need to include a detailed program or evaluation design, but should clearly indicate how this grant will help the research team develop a strong proposal in a future RCT.
3. If there is any survey component, please explicitly include the number of individuals surveyed. Please list activities, which could include preliminary data collection such as focus groups or small sample surveys to understand the barriers that program participants may face, working to set up data sharing agreements and/or MOUs.

Topic Statement

Please answer the prompts above in the space below: *[500 words max]*

Policy Motivation

Provide a summary of the policy problem that motivates this preliminary research and how it fits with the topics outlined in the RFP materials. *[250 words max]*

Potential Policy Impact

Please briefly describe the potential policy impacts of this intervention (policies, programs, processes, or delivery mechanisms), including whether and how the project could inform policy or program design in this context or more broadly. How will it meet the needs of your partner? *[250 words max]*

Anticipated Target Population and Context

What population(s), if known at this time, will the intervention attempt to impact? What characteristics do they have? If applicable, do you have any comments on the target population and context's alignment with JOI and/or SPI's priorities? *[300 words max]*

Unique Contribution to the Field

What knowledge gap are you addressing, and how will it advance the field? Explain the project's potential to provide a unique scientific contribution. Provide a brief literature review to demonstrate the uniqueness of your project. Note that a full reference list can be attached in the "Additional Attachments" section. *[500 words max]*

Pathway to an RCT

Describe how results from this travel/proposal development grant would inform a future RCT? Describe, specifically, what researchers and practitioners can expect to learn from this travel/proposal development grant:

1. Will it provide qualitative data to inform intervention design?
2. How could the findings meet the needs of policymakers or development practitioners?
3. In what specific ways will the travel/proposal development grant prepare researchers for a full RCT project?
4. Outline the hypothesized pathway and scope for impact. Clearly establish a plausible and promising link between the proposed approach to be tested and the hypothesized channel for impact.
5. Indicate the reliability of existing evidence from relevant expert opinion in your research context.

[300 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. *[500 words max]*

Gender Implications and Analysis

Does the proposal address any gender issues? For example, have you taken into account how gender considerations could affect the outcomes of the intervention? *[250 words max]*

Gender Reporting

Does the proposal disaggregate data and outcomes by gender? Pilot and RCT projects are required to report on gender-disaggregated impacts: Please briefly explain whether you will disaggregate gender impacts or why this would not be feasible. *[250 words max]*

Local Researcher Involvement

Please describe whether/how the project involves researchers local to the project context. *[300 words max]*

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." *[300 words max]*

Potential Risks

To protect children, 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

Are there any technical, logistical, ethical, or political obstacles and risks that might threaten the completion of the project (e.g., 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

Please discuss any information about the implementing partner(s) that could pose ethical, reputational, or legal risks (e.g., child safeguarding, 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? *[150 words max]*

Child Safeguarding

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

Participants, Staff, Community Members

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? i. Program and research participants ii. Staff (e.g., implementing partners, research assistants, enumerators) iii. Community members (e.g., untreated members of a household, untreated neighbors, or broader communities if the treatment might have spillover or downstream effects beyond the study sample) *[300 words max]*

Contractual Limitations

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? *[150 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*]

IRB Organization Information

Note: Please be mindful that MIT requires that the IRB determination must be held by the institution that enters into the subaward agreement with MIT. The PI at the ITRA must be listed as the main PI on the IRB. If the institution does not have its own IRB, the institution must engage the services of a commercial IRB to review and provide oversight for the research activities. [Heartland](#) and [Solutions](#) provide review of international research and satisfy J-PAL's IRB requirements; fees can be found on their respective websites. Furthermore, MIT requires that the PI named on the IRB must be employed by the institute receiving the award. Information about this MIT policy can be found [here](#) and [here](#). Consult with J-PAL regarding including the cost of this commercial entity in the project budget. J-PAL also requires that the reviewing IRB have IRB Organization (IORG) status with the US Office of Human Protections.

[You can look up the IORG status of an IRB here.](#)

Institutional Review Board (IRB) of Record

If the project has not received an IRB exemption and IRB review is required (i.e., you plan to conduct human subject research), please provide the current or expected IRB of record. IRB Requirements - If this proposal receives initiative funding, we will ask that you submit:

- All IRB approval(s) or exemption(s)
- All IRB-approved protocols
- Any IRB-approved consent forms

Please provide the name of the IRB of Record.

Is this IRB of Record IORG certified?

[*Yes, No*]

Institute to Receive Award (ITRA)

PLEASE NOTE: MIT now requires that at least one project PI be employed by the organization receiving the subaward and funds. Please see this [memo](#) and [FAQs document](#) for more information.

If applicable (if performing Human Subjects Research), please indicate the institution that will receive the grant funds.

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/Proposal Development Budget Template. There are two tabs: one for the JOI- and/or SPI-specific budget and one for the project budget (i.e., the JOI- and/or SPI-specific budget plus any other sources of funding you may have). When done, please reupload the budget in the budget section of the online application portal. Please note that the budget is formatted specifically for this application. Please do not remove the formatting, change any of the formatting, or create new columns. *[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 do not suffice. *[File upload]*

Letters of Support & Additional Attachments

Are you applying as a PhD student?

[Yes, No]

J-PAL Affiliate or Invited Researcher Letter of Support

For PhD students: PhD student applicants are required to submit a letter of support from a J-PAL Affiliate or Invited Researcher who serves as an adviser on the applicant's dissertation committee. This letter should indicate the adviser's willingness to advise the student throughout the project's lifetime. Please note that in some cases, the adviser may be asked to add their name to the financial award and IRB documents. *[File upload]*

Letter of Support from Implementing Partner

Optional: Travel/Proposal Development projects are recommended to provide a letter of support from their implementing partner. This letter should indicate a willingness to work with the research team. *[File upload]*

Letter of Transmission

For travel/proposal development projects that will be set up 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]*