UW-RDRC PROPOSAL Instructions

If invited, **full proposals will be due May 20, 2024** using the guidelines below. Please submit **in the formstack portal**.

Full Proposal Specifications
Proposals should be written in Microsoft Word and double-spaced using headers for each of the sections below. Proposals should not exceed 6, double-spaced pages in length, not including budget, budget narrative, or references.

- Title
- PI & Co-PIs
- Bios (100 words per bio)
- Focal Area(s) addressed
- Keywords (3-5)
- Abstract (150 words)
- Data Sources
- Scientific Significance and Practicality/Policy Relevance
- Methods
- Community-Based Participatory Research (CBPR) & Investigator Community Connections
- Translational Dissemination Plan
- Training Plan for Students/Junior Scholars
- Complementarity or Overlap with Other Funding Statement
- Timeline (Table)
- Budget (using provided template)
- Budget Narrative (using provided template)

Full Proposal Guidelines (Double-spaced, 6 pages, not including budget/budget narrative and references)

Title: A concise title for the project that describes the analysis

PI Name:

Co-PI Name(s):

PI and Co-PI Bio(s): Include a short bio **(100 words max per bio)**

PI and Co-PI CVs: Upload a CV as a pdf. Short version CV preferred.

Focal Areas: (see above)

Keywords: 3-5 words that capture the general topic or approach

Abstract (150 words): This must be written so that a non-technical audience can understand the relevance to Social Security and/or retirement or disability policy. It should clearly define the issue your proposal will address and its relevance to or impact on Social Security programs, policies and/or beneficiaries. It should briefly summarize the "gap" this project will fill and how the work will be completed, again using non-technical language. Specifically state how the project fits into the SSA focal area(s), how the prospective findings could benefit SSA, or how SSA could use the findings of your research.

Data Sources: Identify the data source and dates of data coverage. Do not provide extensive details on well-used public datasets; only include unusual features of the data or details on data that has not been used in prior studies. Projects using internal SSA restricted access data will require an SSA collaborator. Projects requiring direct access to records at SSA should specify whether an SSA researcher has agreed to work with the data on the RDRC researchers' behalf, and if so, which SSA researcher. UW-RDRC can facilitate consults with SSA staff to discuss specific your data/research needs prior to the submission of a proposal.

Questions to Answer: Have you clearly identified data needed for the project? Is the data appropriate to the research question? Are there limitations or advantages to using that data? Is the data already available or do you have a specific plan to collect it yourselves? Have you verified availability or developed a plan to collect and/or develop new data? Have you addressed possible hurdles or obstacles and how you would address those contingencies, like using other data or changing the approach to obtain the data?

Scientific Significance and Practicality/Policy Relevance: Use this section to clarify the project's specific aims. Discuss the significance of the question to SSA and the field at large. Why is this an important topic and how will completing the project have an impact? What are the shortcomings of existing studies that you will overcome? Are you applying novel techniques? Please make sure to cite the prior literature to support your claims.

Questions to Answer: Does the project address an important problem or a critical barrier to progress in the field? Is there a strong scientific premise for the project? If the aims of the project are achieved, how will scientific knowledge, technical capability, and/or clinical practice be improved? How will successful completion of the aims change the concepts, methods, technologies, treatments, services, or interventions that drive this field? Does the research illuminate what is causing what we observe, and explain what is driving observable data? How closely is it related to the SSA's focal areas?

Methods: Proposals should contain a fully developed research plan. Explain the tasks/activities you will conduct to complete the project. Describe the techniques you will use paying attention to features of your analysis cited in the significance section (e.g., if you note that a gap in the literature is the absence of data or a flawed technique, take time to explain how you will address the gap in your methods). Consider utilizing mixed methods (quantitative and qualitative analysis). This could involve using one method to inform the use of another method or using methods from multiple disciplines. For instance, consider whether your quantitative analysis could be further illuminated/strengthened by a qualitative component. For instance, quantitative data collection could be guided by qualitative testing of the collection instruments, are focus groups informed by quantitative analyses, etc. The description of your methods should provide the supporting information to your timeline. Discuss the data source and any necessary data agreements or collaboration, or assistance required from SSA. Proposals without a sufficient description of planned methodology will likely be declined for funding by SSA's review panel.

Questions to Answer: Are the overall strategy, methodology, and analyses well-reasoned and appropriate to accomplish the specific aims of the project? Have you presented strategies to ensure a robust and unbiased approach, as appropriate for the work proposed? Are potential problems, alternative strategies, and benchmarks for success presented? Are the concepts, approaches or methodologies, instrumentation, or interventions novel to one field of research or novel in a broad sense? If the project is in the early stages of development, will the strategy establish feasibility, and will particularly risky aspects be managed?

Community-Based Participatory Research (CBPR) & Investigator Community Connections: SSA prioritizes research that is accessible to non-technical audiences, including policymakers and the public, and which engages input from community stakeholders throughout the research process. Each project will be required to engage a Community Impact Partner (CIP). CIPs will provide input via a meeting (remote or in-person depending on logistics) into early-stage research planning as well as in later stage translational and dissemination work. Please briefly discuss what types of CIPs would add value to this project and how these CIPs will impact your research project timeline. If you are able to propose a CIP, please describe that partner and how this partner will benefit your work. If you do not have a specific CIP, the UW-RDRC will work with funded projects to identify a CIP early in the project timeline.

In addition, SSA is interested in any existing connections, relationships, or lived experience the PI(s) have with the communities/populations studied in this project. How will those experiences better inform the research about the community's issues, position them to conduct the research more effectively, and better interpret the results?

Developing a Translational Dissemination Plan

The UW-RDRC will support a webinar or podcast and 1-page brief on each project. Most projects will also present Work In Progress seminars for internal SSA staff as well as at UW-RDRC seminars or trainings for graduate students. PIs may be eligible for additional UW-RDRC funding upon the acceptance of funded projects to attend conferences or submit to peer-reviewed journals. If you have ideas for additional presentations or seminars, we encourage you to include them in this description. Briefly explain any novel avenues for sharing your work.

Questions to Answer: Does the project include a plan for input and feedback from the communities being studied? Does that involvement include input on the design and execution of the research, including data collection and interpretation of the findings? Is there a plan to disseminate results to the communities studied and to gather their feedback to inform future research? Do investigators have strong connections to the communities being studied and they will benefit the research project?

Training: Briefly describe how the project will employ students or junior scholars, and how working on the project will support their development and expand the community of RDRC researchers. SSA prioritizes RDRC projects that include Historically Black Colleges and Universities (HBCUs), Hispanic American Colleges and Universities (HACUs), and other Minority Serving Institutions (MSIs). Co-author arrangements might be one avenue to achieve this goal. If this project includes a partnership or collaboration with ISSCs/MSIs or HBCUs be sure to include those details. SSA has prioritized projects that engage with institutions described in the SSA Equity Action Plan.

Questions to Answer: Does the project include researchers new to the RDRC, such as junior researchers or those new to the field of retirement and disability policy included who can bring different methodological expertise, new subject matter expertise, lived experience, new perspectives, or other unique contributions?

Complementarity or Overlap: *If applicable:* What other funding do you have or are you considering for this project? List any expected funding from federal and non-federal sources for this project (or list "none" if no other support expected).

Timeline Table: The timeline will include significant analytical and process milestones that conclude with a "deliverable." The timeline should be in the tabular format below. All proposed research projects should be completed in one federal fiscal year (FY), or be able to be broken down into incremental phases completed in each quarter, based on the federal FY quarter (Q1 is Oct-Dec). Projects may edit or add additional rows as needed.

Activity	Completion Date
Project Scope and Agreement Completed	Q1 FY2025
CIP identified and CIP plan in place	Q1 FY2025
Secure Data and Analysis Plan Completed	Q1 FY2025
Review Literature	Q1 FY2025
Develop Analysis	Q2 FY2025
Draft Report	Q3 FY2025
CIP Input and Dissemination Plan Completed	Q4 FY2025
Workshop Presentation(s)	Q4 FY2025

Final report, brief and abstract	September 15, 2025

Budget: A budget template has been provided for this submission and can be found HERE. Typical direct costs budgets range from $60,000 to $175,000 NOT including federally-negotiated indirect costs with your institution. All budgets are September 29, 2024 through September 28, 2025.

Should you have any questions regarding the budget, please contact Andrea Plassman at: 608-347-2080 or aplassman@wisc.edu

Budget Narrative: A budget template has been provided for this submission and can be found HERE. Please provide explanations for how your budget items contribute to the project.

Typical/Common Budget Categories:

- PI Course Release
- PI Course Summer Month
- Co PI Course Release
- Co PI Summer Month
- Other PI Salary (Months or %)
- RA/PA - e.g. 50% 12 or 9-Month
- RA/PA - additional 50% summer months (1-3)
- Tuition Remission
- Data Access or Purchase
- Cost Share (existing non-federal salary or other funding)
- Consultants / Contractors
- Subaward to other university or institution
- Other Direct Costs

Cost Share: In its simplest form, cost share is funds or resources contributed to the project by the applicant. As part of the overall Social Security Administration proposal, UW is required to provide 5% cost share. The original Request for Funding Announcement is located **here.** The reference to the 5% required cost share can be found on page 28. Therefore, if possible, we request that applicants provide 5% in cost share as part of their submission.

We understand if proposals cannot support cost share, however, we encourage those institutions that can add cost share to their submission to do so. Federal requirements surrounding cost share can be found here. If you are unsure of what cost share is or what can be used as cost share, please contact your institution's grant administration department for assistance.