Reference Guide

of the Funding Request Form of the IEEE Technical Activities Board Committee on Standards (TCoS) Standards Association (SA) Discretionary Fund

Introduction

Standards are a means of moving research topics from the lab into commercial deployment. Innovative new standards-related products and services have the potential to be of benefit to humanity, meeting the IEEE's mission.

The Call's primary purpose is to use seed funding to:

- Promote activities leading to submission of a new project authorization request (PAR) to IEEE SA.

- Publicize the importance of IEEE SA standards development activities through meetings, workshops or conferences.

- Cultivate the interest in contributing to IEEE SA standards through various means such as participation recognition with certificates.

- Prioritize on new applications for sustainability and cost effectives.

Please be sure to carefully review the FAQs prior to submitting your proposal.

Proposal Title

The Proposal Title should be a one-line description of the scope of your proposed project. In particular, it should not say something like "TCoS Funding Request".

Proposal Type

The proposal type can be either "New" or "Rollover".

- If the proposal requests additional scope and/or funding for an approved project or if it requests that some of the funding for a previously approved project be provided during the following calendar year, then this is a "Rollover". All TCoS projects are approved on a calendar year basis. If the work will fall in more than one calendar year, then a rollover proposal is required.

- Any other proposed work is a "New" proposal.

Proposal Leader Name, Email, Affiliation/Employer, Region

Complete information for the Proposal Leader is required.

- The "affiliation/employer" is particularly important because it discloses possible conflicts of interest. The affiliation is the organization that the proposer represents. It might be an employer, a professional society, or something else. If that proposer is paying attention to the interests of some organization, then that is an affiliation.

The "region" refers to a specific IEEE Region the Project Leader is located. As mentioned in the entry "Endorsing Society/Council", please note that your proposal will not be approved if you do not get endorsement from an IEEE Society or IEEE Council.

Does Proposed Work involve Patent Examination? (If yes, explain)

Past experience has demonstrated that some issues may involve legal considerations that will extend the time needed to evaluate your proposal.

If your proposed work may involve the examination of existing or potential patents, evaluation of the proposal may be delayed consulting with legal staff. In such cases, it would be wise to respond "Yes" in the "Does proposed work involve patent examination?", provide supporting information in the "If yes, explain", and submit the proposal early so that required consultation may be performed in a timely manner. Of particular note is that any intellectual property created from the funding project is owned solely by the IEEE.

Joint Work with Non-IEEE Org? (If yes, explain)

Past experience has demonstrated that some issues may involve legal considerations that will extend the time needed to evaluate your proposal.

If your proposed work may involve joint work with any organization outside of IEEE, evaluation of the proposal may be delayed consulting with legal staff. In such cases, it would be wise to respond "Yes" in the "Joint work with non-IEEE Org?", provide supporting information in the "If yes, explain", and submit the proposal early so that required consultation may be performed in a timely manner.

Alternative Proposer Name, Email, Affiliation/Employer

If your project has more than one proposal leader, complete information for the alternative proposal leader is required.

- The "affiliation/employer" is particularly important because it discloses possible conflicts of interest. The affiliation is the organization that the proposer represents. It might be an employer, a professional society, or something else. If that proposer is paying attention to the interests of some organization, then that is an affiliation.

Point of Contact Funding/Finance

Complete information for the point of contact related to funding/finance of your proposed project is required. This individual should be prepared to provide SWIFT or ACH bank information immediately if the proposal is awarded.

Endorsing Society/Council

It will be beneficial to provide evidence of buy-in by an IEEE Society or IEEE Council, especially if the successful execution of your proposed project and/or exploitation of its result depend upon continuing effort by the IEEE Society or IEEE Council. Of particular note is that any IEEE SA standards project is managed by a Standards Committee of an IEEE Society or IEEE Council.

List the IEEE Society or IEEE Council that you have contacted about this project proposal. ***Your proposal will not be approved without this information.***

Endorsing Society/Council/OU

If there is more than one IEEE Society or IEEE Council endorsing your project proposal, please list it here.

If there is any IEEE Organizational Unit endorsing your project proposal, please also list it out.

If your proposal involves outreach to other communities or depends on the interest of others, please list them too and provide some evidence of their interest.

Scope of Work

Provide a description or statement of the work to be undertaken, the products of the work, and the steps to be taken in performing the work. Explain the relationship of the work and the products to achieving the SMART objectives. Please refer to Q1, Q2, and Q3 of the FAQs for the scope of the seed funding opportunities, the SMART objectives, and the proposal evaluation process, respectively.

Expertise and Experience

Explain how the leadership team has the necessary expertise and experience to lead the project to a successful completion.

Market Relevance

Explain how the project satisfies an unmet market need and will attract volunteers to engage in the project. Quantitative explanations are preferred, e.g., the expected number of active participants in drafting a new standards project authorization request (PAR). Justify the explanation.

Innovation

Explain into which of the following categories your proposed project fits:

- Promote activities leading to submission of a new project authorization request (PAR) to IEEE SA.

- Publicize the importance of IEEE SA standards development activities through meetings, workshops or conferences.

- Cultivate the interest in contributing to IEEE SA standards through various means such as participation recognition with certificates.

- Prioritize on new applications for sustainability and cost effectives.

Explain the relationship, if any, to the current standards program of the supporting IEEE Society, IEEE Council, or IEEE Organizational Unit. Explain how the proposed project would take an innovative approach or pursue an innovative objective. Previous work done must be clearly identified, why it is timely to do it now.

Of particular note is that evaluators of the committee may give preference to proposals submitted from IEEE Societies/Councils with limited or no IEEE SA standards development activities.

Commitments and Support

If you have commitments from IEEE Societies, IEEE Council(s), IEEE Organizational Units(s), and/or other subgroups to support this proposal (e.g., staff and volunteer resources, matching fund), describe them.

Contingencies

If there are any IEEE or external contingencies, e.g., other proposals, support, or activities, on which this proposal depends, describe them. Has this proposal been put forward to other bodies for consideration? What is the outcome? It is part of risk assessment and management.

Importance (List of topics)

If the project addresses strategic goals of IEEE, IEEE Technical Activities (TA) or IEEE SA, explain how. These goals can be found at the following places:

- IEEE: https://www.ieee.org/about/ieee-strategic-plan.html#2020-2025-goals

- IEEE TA: https://www.ieee.org/about/volunteers/tab.html

- IEEE SA: https://standards.ieee.org/about/strategy.html

Diversity

If the project addresses diversity goals of the IEEE, explain here.

Impact

When the project is completed, describe how the world, the profession, and/or the IEEE will be improved. Your proposal will not be funded without a clearly stated SMART measure of success.

Mentoring

Be aware that TCoS, at its discretion, shall assign a mentor to an approved proposal. The mentor must be incorporated as a part of your leadership team. The mentor is intended to provide experience in standards-related matters and to be a communication link between your project and TCoS. Explain how you will incorporate a mentor into your project leadership team.

Funding and itemized expense(s)

For "Funding", estimate the funding required for this proposal. An award may be for up to USD$10,000. In addition, in alignment with the priorities of SA and the IEEE, up to USD$20,000 may be offered for new IEEE SA standards proposals that impact sustainability for either our material universe, for instance, energy or climate change, or sustainability in our information universe, for instance, in internet safety, security, or usefulness.

For the itemized expenses (e.g., "Expense 1/2/3"), describe how the funds will be used and justify the need for those expenses. Be aware that purchases of assets, including software licenses, will undergo a possibly time-consuming procurement process. If the project will generate some income to offset expenses, explain that.

Please pay attention to the following:

- If you submit the proposal for the call for seed funding opportunities with March as the month of the submission deadline, the project may fall in more than one calendar year and therefore, divide the funding accordingly.

- If your proposal involves travel, then you shall be aware of the IEEE Travel Program, https://www.ieee.org/membership/services/travel/, and the Expense Reimbursement Guidelines for IEEE Volunteers, https://www.ieee.org/content/dam/ieee-org/ieee/web/org/travel-expense-reimbursement-guidelines.pdf. **PLEASE NOTE:** This program DOES NOT support/allow First/Business/Premium Economy/Economy Plus airfare. If the proposal includes travel, the proposal leader must supply the approved travelers and the amount they are reimbursed up to, prior to booking travel.

- ***Proposal funding is provided via reimbursement of expenses, not up-front grants.*** Reimbursements for travel will be made via IEEE's Concur system. Reimbursements for other expenses will be made electronically via the ACH or SWIFT banking systems. The project's point of contact for funding/finance should be prepared to provide ACH or SWIFT information immediately if the proposal is approved. The designated point of contact will be required to track expenses and submit for reimbursement per the IEEE Finance Operations Manual, https://www.ieee.org/content/dam/ieee-org/ieee/web/org/financial-ops-manual.pdf .

Please refer to Q4, Q5, and Q6 of the FAQs for additional details on what can and cannot be funded.

Is your project related to sustainability? (If yes, explain)

If the scope of your proposal is related to sustainability, please provide related information. In addition, it would be wise to share with the evaluators your understanding of sustainability.

For IEEE standards development related to sustainability, please visit
https://standards.ieee.org/featured/sustainable-development/

Is your project related to open source? (If yes, explain)

If the scope of your proposal is related to open source, please provide related information.

For IEEE SA's open source platform for standards development, please visit
https://saopen.ieee.org/

Milestones/tasks

This is a very important part of the proposal. Careful attention to this section will improve the chances that the proposal will be approved and will simplify your reporting of progress if the proposal is approved.

Provide a schedule for the work with named milestones, e.g. Phase x, the date that the milestone is expected to be achieved, the products that will be produced for that milestone and the estimated cost to reach the milestone. Alternatively, provide a list of tasks, the date on which the task is to be completed, the products of the task, and the estimated cost of the task.

The schedule must include a starting and ending date. For the purpose of this section, assume that project would be approved and funding would be available 90 days after the relevant deadline for proposal submission.

The schedule must also include progress reports prior to any reimbursement during the execution of the project, and an additional report at the conclusion of the project. The progress reports should be succinct--reporting milestones reached or unreached, progress toward achievement of the SMART objectives, and any changes in plan. We do not want subjective statements; we want quantitative reports calibrated against this schedule and the SMART objectives. Please refer to Q7 of the FAQs about how a progress reporting is done.