



**National
Multiple Sclerosis
Society**

Policies and Procedures:

Research and Clinical Funding Programs and Other Awards

Revised March 22, 2024

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INTRODUCTION

THE NATIONAL MULTIPLE SCLEROSIS SOCIETY

The National Multiple Sclerosis Society (“National MS Society,” “Society”) was organized in 1946 by people with a particular interest in multiple sclerosis, and it is chartered as a non-profit charitable agency under the laws of the State of New York. Our vision is A World Free of MS. Our mission is to cure MS while empowering people affected by MS to live their best lives. To fulfill this mission, the Society funds cutting-edge research, drives change through advocacy, facilitates professional education, collaborates with MS organizations around the world, and provides services designed to help people with MS and their families move their lives forward.

Our Strategic Plan calls for worldwide collaboration to accelerate research progress toward pathways to cures. The Society is empowered to make grants of money for use by individuals within lawfully established agencies or institutions to further its mission. The Society also emphasizes industry partnerships by providing milestone-driven drug development funding to private companies.

RESEARCH FUNDING PRINCIPLES AND PRIORITIES

RESEARCH FUNDING PRINCIPLES

The complexity of MS requires a comprehensive research strategy that fuels knowledge and speeds better treatments, health care policies, and new disease and symptom management therapies so that there are treatments for everyone and so that people with MS can live their very best lives.

The Society provides grant funding, research training, and shared resources, to support the brightest scientists exploring questions underlying MS. We manage a diverse portfolio of academic and commercial research projects, provide training fellowships, foster global collaboration, and convene experts to identify strategic research priorities. Our objectives are achieved by ensuring funding of the best science regardless of geography.

Consistent application of the following principles will help accelerate progress toward a world free of MS.

- 1) We prioritize research that advances the Society’s strategic plan, with a focus on stopping the disease in its tracks, restoring what has been lost, and ending MS forever through a cure for all forms of MS.
- 2) We maintain a diverse research portfolio that includes short- and long-term investments, balances risks and rewards, and funds research globally.
- 3) We balance investments in research initiated by individual investigators with investments in Society-directed research areas, all focused on bridging knowledge gaps, seizing opportunities and addressing research priorities.
- 4) We promote synergies between researchers in diverse disciplines and develop strategic partnerships to accelerate progress.
- 5) We invest in all types of research including laboratory models, human studies, population-based approaches, and data-intensive investigations that leverage both researcher and patient reported outcomes.
- 6) We support the full spectrum of basic, translational, and clinical research. We also strive to break down barriers to commercial development to ensure that new treatments and wellness approaches are available to those affected by MS as quickly as possible.
- 7) We use independent expert review to ensure that each research proposal receives a fair, competent and objective assessment of its scientific merit, relevance to MS, relevance to the MS community, and alignment with the Society’s research priorities.
- 8) We attract and support new investigators to the MS field to foster a robust future workforce focused on finding solutions for MS.
- 9) We expect Society-funded researchers to adhere to rigorous and ethical experimental methods and reporting practices.
- 10) We believe that sharing data and resources enhances research and speeds scientific discovery. Data and resources developed through Society-sponsored research will be made available to other researchers after publication in an expeditious manner.

RESEARCH PRIORITIES: PATHWAYS TO MULTIPLE SCLEROSIS CURES

The National MS Society is focused on achieving breakthroughs to cures for multiple sclerosis. Our progress will be hastened with a roadmap that describes the knowledge gaps, milestones and research priorities that will lead to cures for everyone living with MS. The Roadmap was developed in consultation with scientific experts, healthcare providers and people affected by MS. We believe the Pathways to Cures Roadmap will inspire the alignment of global resources on the most pressing questions in MS research and accelerate scientific breakthroughs that lead to cures for everyone living with MS.

The Roadmap includes three Pathways: STOPPING MS disease activity, RESTORING function by reversing damage and symptoms, and ENDING MS by preventing new cases. [Follow this link](#) for executive summaries outlining key aspects of research needed to drive the Stop, Restore and End pathways. If you would like advice about whether and how your research may fit with these priorities, please reach out to a Society research staff person.

Goal 1: STOP pathway—No more disease activity

Stopping MS is defined as achieving a state of no new disease activity, no worsening of daily living or quality of life, and no change in disease manifestations or clinical activity in people living with either relapsing or progressive forms of MS. Understanding disease heterogeneity across diverse populations of people with all forms of MS over time is important to stopping disease activity and protecting the central nervous system from further assault, and to create a permissive environment for myelin repair and other restoration efforts. Achieving a better understanding of the mechanisms of progression as MS evolves over time will help inform future therapeutic strategies. People with MS will play an active role in the pathway. As digital tools and technologies advance, data may be used to improve detection of changes in disease course, to monitor and measure neuroprotective processes, and to advance toward precision medicine tailored to individuals. Similarly, these tools might aid in supporting lifestyle modifications to benefit wellness.

Goal 2: RESTORE Pathway—Reverse symptoms, and recover function to enable full participation in society

MS can result in many different symptoms, including vision loss, pain, fatigue, sensory loss, impaired coordination, mobility, and cognitive and mood changes. Symptom severity and duration varies from person to person. Historically, rehabilitation aims to improve symptoms, with medical management of the disease kept separate. There is data supporting the idea that restoration of function, not only symptom management, is possible in MS.

Preserving and repairing myelin is likely to be one of the best ways we can prevent neurodegeneration. Exploring additional ways to slow down or stop neurodegeneration should reveal strategies that mitigate progressive forms of MS. In addition, the integration of repair and maintenance of repaired tissue with rehabilitation efforts is critical.

Translation of knowledge from basic mechanisms to functional impact is needed to optimize treatment, manage symptoms, and ultimately restore function for people living with both relapsing and progressive forms of MS. For this to occur, translational research using animal models of MS focused on understanding pathophysiological mechanisms as well as the study of human behavior and symptomatic therapies will be needed.

Goal 3: END Pathway—No new cases of MS (prevention)

Ending MS is defined as no new cases of MS. Preventing new cases of MS will require population-based public health initiatives and individual-based interventions. Primary prevention involves identifying causal risk factors and limiting exposures to those MS risk factors in the general population. Secondary prevention focuses on individuals at high risk for MS and developing and deploying interventions in the period prior to clinical stages of disease to reduce or eliminate the risk of developing MS. While efforts will be made to advance both objectives, a focus on Secondary Prevention could potentially lead to the development of approaches with benefits for people living with MS in the near term.

ADMINISTRATION OF THE RESEARCH GRANTS AND TRAINING PROGRAMS

The intention of the Society is to encourage and support only the highest quality research and training in areas related to multiple sclerosis. For investigator-initiated grants and training awards, the awardee institution (payee) must be a not-for-profit institution. The principal investigator must have an appointment with the awardee

institution and be authorized to submit an application under the terms of the awardee institution; the principal investigator may have a dual appointment arrangement with a separate institution not party to the award. As stated in the section on Subcontracts and Subawards, if a proposal is awarded it is the responsibility of the awardee institution to administer and manage any subcontracts or subawards necessary and in line with the approved proposal, including for dual appointment arrangements; the National MS Society will not enter into third party agreements. For Society-initiated research contracts and targeted funding opportunities, research at for-profit organizations may be eligible for support. Specific eligibility requirements are listed in descriptions of individual grant and fellowship programs.

Principal investigators performing or coordinating research at multiple sites should be prepared to coordinate that research through the main awardee institution within their institutional policies. Please refer to language on subcontracts and subawards throughout for additional detail on how to capture these other expenses.

The administration of research grants, contracts and training programs is the responsibility and function of the Research Programs team of the National MS Society, with the aid and advice of various standing and ad hoc peer review and oversight committees and other special consultants. These advisors are selected for their knowledge within their chosen fields and for their recognized accomplishments in research. All applications for support are reviewed and evaluated by the appropriate reviewing bodies.

The payment of grants and awards approved for the support of these programs is contingent upon the availability to the Society of the necessary funds and the compliance of grantees with Society policies and reporting requirements.

Review and funding decisions: The Society relies on a multi-step review process to evaluate funding requests.

For research and scientific grants: First, a peer review is conducted by leading scientists, physicians and other experts from virtually every field related to MS to assess applications in terms of the significance of the project, the relevance of the project to the Society's research priorities, the approach or methods to be used, the innovation of its concepts, the investigator's qualifications and available resources, and suitability of the proposed budget. Next, a Community Review of MS Research Committee comprised of people with MS and care partners evaluates the proposals deemed to be most scientifically meritorious for alignment with community relevance. Finally, the Society's CEO, after considering advice from multiple sources, including the reviews described above, makes the final decision on the projects that will be advanced for funding.

For fellowships and early career awards: First, a peer review is conducted by leading scientists, physicians and other experts from virtually every field related to MS to assess applications in terms of the potential of the candidate, the significance of the project, the relevance of the project to the Society's research priorities, the approach or methods to be used, the innovation of its concepts, training environment, and experience of the mentor. The Society's CEO, after considering advice from multiple sources, makes the final decision on the awards that will be advanced for funding.

Notification: All applicants are notified via email of the status of their applications and are provided access to reviewers' comments in a timely fashion. For those approved for funding, the principal investigator will be notified electronically of the duration and amount of the award and will be provided with a budget that reflects acceptable types and amounts of expenditures for each award year.

Award Payment Schedules: Payments for most awards will be remitted quarterly to the grantee institution. Pilot Research Awards are paid as a lump sum at the start of the award. For multi-year awards, payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports.

REVIEW AND AWARD SCHEDULE FOR APPLICATIONS

Type of Application	Deadline for Receipt of Application	Official Notice (dates subject to modification)	Anticipated Start Date
RESEARCH GRANTS	July/August	February	April 1
REQUESTS FOR APPLICATIONS (RFAs)	January/February	June/July	October 1
BIOSTATISTICS/ INFORMATICS/ COMPUTATIONAL BIOLOGY AWARDS	August	February	July 1
CAREER TRANSITION FELLOWSHIPS	Preliminary application April/May, full application August	February	July 1
CLINICIAN SCIENTIST DEVELOPMENT AWARDS	August	February	July 1
HARRY WEAVER AWARDS	August	February	July 1
MENTOR-BASED POSTDOCTORAL FELLOWSHIPS IN REHABILITATION	July/August	February	July 1
POSTDOCTORAL FELLOWSHIPS	August	February	July 1
SYLVIA LAWRY PHYSICIAN FELLOWSHIP AWARDS	August	February	July 1
CLINICAL CARE FELLOWSHIPS	August	February	July 1
INSTITUTIONAL CLINICIAN TRAINING AWARDS	August	February	July 1
COMMERCIAL RESEARCH OPPORTUNITIES	Variable	Variable	Variable
STRATEGIC INITIATIVES	n/a	Variable	Variable

BEFORE YOU APPLY

Overview: The online grants management system called MS Grants has been implemented for preparation and submission of research proposals to the Society. MS Grants can be found at <https://nmss.fluxx.io>.

Please note:

- Submission of proposals is exclusively electronic for all parts of the proposal, including institutional approval and appendix materials, and no paper copies of any part of the proposal will be accepted by the Society.
- Passwords for accessing the site never expire and a new password will not be needed for each cycle.
- Compatible browsers include Chrome, Firefox, and Safari. Internet Explorer is not fully compatible and should be avoided. Check with your IT department for information on installing one of these browsers if you do not already have one.

How to Register with MS Grants: If you do not already have a password, you will need to register and be approved for access to the Web site. Go to <https://nmss.fluxx.io/lois/new> to complete the online registration form and submit your registration by clicking on the words “Submit Request.” This will submit your request for access to the site to the Research Programs staff of the Society. The staff will review your registration information to verify that you are qualified to apply for funding from the Society. If approved, you will receive an e-mail message containing your login credentials within two business days. Once you have obtained a user ID and password, go to <https://nmss.fluxx.io/> and log in at the login page. Once you log in, you will be able to see which funding opportunities are active along with the deadlines for each. You will also be able to begin the preparation of your application.

How to Reset Your Password: If you need to reset your password, please click on Reset or Create Password on the main login page for MS Grants or go to https://nmss.fluxx.io/forgot_password. At the next screen, enter the e-mail address that you used to register and click on Submit. The system will send you an e-mail with a link to reset your password.

Questions: Detailed instructions for using the new system are available in the MS Grants system and on the Society’s Website: <http://www.nationalmssociety.org/For-Professionals/Researchers/Apply-Online>.

APPLICATION PROCEDURES

The Society encourages applicants to contact program officers with any question regarding funding programs or proposals prior to submission. Otherwise, applicants can consult individual program sections of this document, program webpages, and application checklists for a description of application specific content. Applicants can consult downloadable instructions from the grants management system, MS Grants, for a complete description of navigating the MS Grants portal, starting applications, and application workflows.

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

The Pre-Application: The Society encourages personal contact with the program officer and discussion of possible ideas for proposals. In addition, in the online system this process has been formalized through the use of a “Pre-Application” step. For each funding opportunity, there is a pre-application that must be completed and submitted to the Society before the applicant can prepare a full application. For most programs, the pre-application must be submitted no later than one week prior to the posted application deadline. The pre-application is reviewed by Society staff to ensure that the proposal idea is consistent with the funding opportunity and the mission of the Society. Once the pre-application is approved you will receive an automated message from the system, and you will be able to begin preparation of the full application. In some cases, Society staff may send the pre-application back to you for clarification or changes before final approval.

NOTE: Pre-applications for Career Transition Fellowships are handled differently. The pre-application for the Career Transition Fellowships requires a summary of the proposed research along with biographical sketches of the applicant and mentor, as well as a letter of endorsement from the mentor. These pre-applications are reviewed

before applicants are invited to submit a full application. Please see the Career Transition Fellowships program section for more information.

How to Complete the Pre-Application: Once you are logged in, click on Funding Opportunities to see a list of available funding opportunities, along with information on the application deadlines. Find the funding opportunity to which you wish to apply and click on Apply Now. This will open the pre-application. Enter a title for your pre-application (this can be changed later) and complete the Eligibility Quiz. The Eligibility Quiz will establish whether you are eligible to apply for that funding opportunity. If you pass all of the eligibility criteria, the rest of the pre-application will open, and you can begin to complete this step. If you fail one or more of the eligibility criteria, you will not be able to prepare and submit a pre-application for that program. You are welcome to contact Society staff if you need additional assistance. When you submit the pre-application, it will be reviewed by a program officer at the Society. You will receive notification of approval, disapproval, or the need for changes, within two business days. Read the full instructions for the funding opportunity to which you want to apply for further details. These are located in the Application Instructions section of the grantee portal.

How to Complete the Full Application: Once your pre-application has been approved (generally within two business days), you can log in and begin to prepare the full application. At the grantee portal, click on the Open Full Applications link, and then on Edit, to begin working on the full application. You can work on the various parts of your full application in any order you want, save your work, and return to continue working as many times as you want. Please note, unless otherwise stated all applications must be submitted in the English language, including all materials and documentation, and budgets and financial reports must be submitted in U.S. dollars to be considered for review. Detailed instructions for completion of the full application including page limits are available in the grantee portal.

Please note, for applicants with existing Society grants, pre-applications may be declined if the applicant has any overdue progress reports and/or new awards might not be executed until the applicant is compliant on existing grant reporting.

Inclusion of underrepresented groups in clinical research: The National MS Society is committed to expanding engagement of underrepresented groups in research and in clinical trials so that solutions are developed for everyone affected by multiple sclerosis. Grant proposals for clinical research are required to describe the planned composition of the study population in terms of sex/gender and racial/ethnic diversity. Additionally, annual reporting must include subject accrual broken down by group. Any exclusions based on sex/gender or race/ethnicity must include a rationale and justification. The Society considers the NIH Guidelines ([link](#)) as an example of an appropriate approach to inclusion of underrepresented groups. Grant proposals must include an outreach plan for recruiting and retaining diverse study participants. The [MS Minority Research Engagement Partnership Network](#) has developed this [toolkit](#) to assist researchers in their outreach to underrepresented populations.

DEVELOPING THE BUDGET

Please refer to the program description pages for additional budgeting instructions, especially for detailed accounting procedures that pertain to phases of Career Transition Fellowships.

Disallowed Expenses: Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, or laundry and maintenance services. With the exception of some training programs, funds may not be used to offset any tuition or other similar fees, or dues to organizations such as federations or societies. No funds shall be budgeted as “contingency funds” except by special arrangement with the Society. **Unless prior approval in writing has been obtained from the Society, expenditures are likely to be disallowed for items that were not specifically included in the budget of the award.** See specific instructions provided for individual funding programs for further details.

Personnel Salary Cap: Beginning in June 2020, the Society salary cap policy is aligned with that of the National Institutes of Health (NIH) and the Society will not pay pro-rated salaries that exceed the NIH salary cap as of the application deadline date. NIH policy on salary caps and historical values are available here: https://grants.nih.gov/grants/policy/salcap_summary.htm.

Patient Care Costs: Funds requested for hospitalization and/or professional medical services for study subjects.

Permanent Equipment: Permanent equipment may be requested in research proposals and will be considered only if essential to the successful execution of the proposed work. No equipment-only grants will be considered. Equipment is an article of tangible nonexpendable property having a useful life of more than one year. The definition of equipment is not driven by the cost of the item, so relatively inexpensive items that are designed to last more than one year should be considered equipment, and not supplies. Each item of equipment and its cost must be clearly detailed in the equipment section of the budget and justified in detail within the budget justification, including why said equipment is essential to the successful execution of the proposed work. There is no arbitrary cap on equipment requests, however, equipment requests will be considered on a case-by-case basis. Indirect costs are not allowed on equipment. In preparing the proposed budget, all equipment must be listed as equipment and not as consumable supplies. The Society does not recognize any dollar threshold to distinguish equipment vs. supplies.

Office equipment, computers, office supplies, books and journals may not be purchased with grant funds unless included in the application and specifically approved in the budget of the grant awarded. The cost of installing equipment purchased with funds of the grant is not allowed unless such funds were requested in the application and specifically approved in the budget of the grant awarded.

Equipment is intended for the sole use of the Principal Investigator, Co-Investigator, project staff, and any collaborators listed as personnel on the award specifically to execute the approved scope of the project, unless cost-shared with another funding source. Title of the equipment purchased with National MS Society funds will be vested in the grantee institution conducting the research project. The grantee institution is explicitly responsible for the maintenance, control, and all associated costs of capital equipment in its custody and control.

Consumable Supplies: Consumable supplies may be purchased with Society grant funds and may include any type of laboratory supplies, including purchase and maintenance of experimental animals.

Travel: Expenses travel related to the successful performance of the research may be charged to a grant only when allowed by the grant funding program, justified in the application, and within the amount specifically approved in the grant. In addition, expenses for conference travel of up to \$3,000 per year is allowed. Travel expenses whenever charged to grant funds shall be in accordance with grantee institutional policies and procedures.

Other Expenses: Any other expenditure directly related to the cost of conducting the proposed research may be requested in the application for a grant. However, construction or renovation costs are not permissible expenditures under any circumstances. Additionally, publication fees in excess of \$3000 per year must be justified and approved by the program officer; and for multiyear projects, the Society will not pay publication fees in the first year.

Indirect costs: For several Society research funding programs, including RFAs, Research Grants, Pilot Research Projects, Biostatistics/Informatics/Computational Biology Junior Faculty Awards, Career Transition Fellowships (faculty phase), Harry Weaver Scholar Awards, Mentor-Based Postdoctoral Fellowships, and Institutional Clinician Training Awards, indirect cost will be automatically calculated by the system. Indirect cost is 10% of the direct costs, except that indirect costs are not allowed in connection with funds requested or expended for purchase, modification or installation of equipment. Indirect costs will not be provided for grants, subcontracts, or subawards to institutions outside of the United States, or for most training awards. Applicants from U.S. based institutions with foreign subcontracts or subawards should reach out to society staff to ensure indirect costs calculated correct. Otherwise, see specific instructions provided for individual funding programs for further details.

Limited Relocation Costs for Funded Fellows: Funds to cover the cost of one-way travel to the institution where the training is provided are available but only for the fellow/mentee and not for family members or for transportation of household belongings. The relocation costs must be requested in the application, and the amount requested must be comparable to economy class transportation by air or equivalent. Relocation costs are available to awardees of the following award mechanisms: Mentor-Based Fellowships Program in Rehabilitation (for the mentee), Postdoctoral Fellowships, Sylvia Lawry Physician Fellowships, Clinician Scientist Development Fellows, Institutional Clinician Training Awards (for the mentee), and Career Transition Fellowships.

Subcontracts and Subawards: Any subcontract or subaward budget items should be entered into the Subcontract/Subaward budget section, organized by budget category. If there are multiple subcontracts and/or

subawards these line items are all entered into the same section and should be differentiated in the budget justification. Where allowed, and if a proposal is awarded, it is the responsibility of the awardee institution to administer and manage any subcontracts or subawards necessary and in line with the approved proposal. The National MS Society will not enter into third party agreements with awardee subcontractors or subawardees.

Authorization (Institutional Approval): Your application is not actually submitted to the Society until the Institutional Official approved submission of the application. The Institutional Official must be registered with the system and must be the individual designated by you in the Institutional Official section of the application. Once the principal investigator has submitted the application, a system message will be sent via e-mail to the Institutional Official stating that an application is pending authorization. The Institutional Official must then log on to the system, open the application, and complete the authorization. This must be completed prior to 5:00 PM Eastern Time on the date of the deadline.

DURING THE AWARD PERIOD

The following policies apply to all funding programs unless otherwise indicated below and/or in program descriptions of individual funding opportunities.

Award Payment Schedules: Payments for most awards will be remitted quarterly to the grantee institution. Pilot Research Awards are paid as a lump sum at the start of the award. For multi-year awards, payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports.

Annual Research Report: Unless otherwise stated in the grant agreement or contract, a report of progress made on research projects and fellowships is due within 30 days after the anniversary date, along with a copy of the annual approval letter from the Institutional Review Board (IRB) and/or Institutional Animal Care and Use Committee (IACUC). Note: Sylvia Lawry Physician Fellowships and Clinical Care Fellowships IRB documentation is not required in the Annual Research Report. For fellowships, a report from the mentor is also due within 30 days after the anniversary date. This progress report includes an annual Report of Expenditures (see under “Annual Financial Reports”) and reprints of all published papers and preprints in press or submitted related to results accomplished under the grant or fellowship. Manuscripts will be respected as privileged communications. See special provisions related to progress reporting for **Career Transition Fellowships**. Payment for continued support of a research project depends on the timely receipt, review, and approval of the annual research progress report. Failure to comply with annual reporting requirements within 30 days of the anniversary date may lead to suspension of payments or termination of award. All annual reports and associated documentation will be submitted using the MS Grants system.

Final Research Report: A final report of the progress on research projects is due within 30 days of the termination of a grant. This report is in addition to any interim progress report that may have been included in an application to the Society for further research support. Individuals who fail to comply with final reporting requirements will not be permitted to apply to the National MS Society for research support until requirements are satisfied. The final report will be submitted using the MS Grants system.

Early Termination of Award: If a grantee, fellow or mentor elects to terminate an award prior to the date indicated in the award notice, the Society must be notified immediately in writing. An award may also be revoked by the Society after the start date. The revocation of an award may not require return of funds previously expended or committed. Grounds for revocation of an award will be deemed to exist: (1) if the investigator requests, in writing, that the award be terminated for any reason; (2) if the investigator is unable to carry out the research or training at the original institution; (3) if the sponsoring institution requests in writing that the award be terminated because of the awardee’s termination of his/her academic appointment, or a mentor requests in writing that the fellowship be terminated because of unsatisfactory performance; (4) if the fellow’s mentor becomes unable to continue the supervision of the fellow’s training and a replacement acceptable to the Society is not named within 30 days by the sponsoring institution; (5) if the investigator fails to notify the Society of any change in his/her affiliation with the department or institution on record at the time the award was made; (6) if the investigator changes any aspect of the award from that which was originally approved by the Society, including significant changes in the specific aims of the research studies, without prior notification and approval by the Society; (7) if the progress is considered

unsatisfactory after evaluation of a progress report, or the institution fails to submit a satisfactory expenditure report; (8) when annual reports of progress and recommendation for continuation are not received from the principal investigator within 60 days of the end of each award anniversary year; (9) if the investigator is found by an institutional investigation to have committed scientific misconduct or fraud; or (10) by action of the Board of Directors of the Society.

Extension of Term (No cost extension): An extension of the term of a grant without additional funds may be approved when requested and justified in writing. Extensions of term will be for either 6 or 12 months, and, except for unusual circumstances, only one extension will be given for any grant. A request for an extension must include: (1) the amount of money to be carried into the extension period; (2) a statement of why the funds were not used in the original grant period; (3) a statement of how the funds will be used during the extension; and (4) a report of the research progress and a financial report for the previous year, on forms provided by the Society. A request for an extension must be made within 60 days of the termination date of a grant.

Transfer of an Award to a New Institution: Written approval from the Society is required for the transfer of the legal and administrative responsibilities for a grant from one institution to another before the end date of an active grant. The principal investigator should contact their Society program officer prior to the transfer date to obtain approval.

For approval of such a transfer the Society requires:

- A statement from the principal investigator with the reason for the transfer request, including comments regarding the any impacts to the original proposal, continued availability of materials, facilities, or collaborations necessary to complete the research or award and a detailed list of any equipment being transferred (if applicable).
- A letter from the new institution confirming the new faculty appointment.

After approval from the Society, to complete the transfer the Society requires:

- From the original institution:
 - A final progress report from the principal investigator for the work completed at the original institution
 - An acceptable final financial report from the original institution
 - Any refund of unexpended funds from the original institution to the Society
 - A signed amendment from the original institution relinquishing the remainder of the award
- From the new institution:
 - A detailed budget from the principal investigator for the transferred amount at the new institution including an outline of any major changes
 - A fully executed award agreement between the Society and the new institution
 - For research involving human subjects and/or animals, written approval from the new institution's Institutional Review Board and/or the Institutional Animal Care and Use Committee must be received prior to initiation of payment

Equipment purchased with the award and necessary for the continuation and success of the project will be transferred to the new grantee institution consistent with institutional policy of the original institution, and title vested in the new institution for use by the designated principal investigator and personnel listed on the project.

Transfer of an Award to a new Principal Investigator: In most cases, a grant terminates when the principal investigator becomes unable to continue supervision of the research or award. However, within 30 days after such an occurrence, the original institution or principal investigator may request that the grant be continued with the responsibility transferred to a new principal investigator. Such changes cannot occur without prior approval in writing by the Society. For approval of such a transfer the Society requires:

1. A statement from the original institution or principal investigator of the reason for the transfer request, including comments regarding the continued availability of equipment, materials, facilities, or collaborations necessary to complete the research or award.
2. A biosketch outlining the qualifications for the new principal investigator and any other new key personnel

After approval from the Society, to complete the transfer the Society requires:

1. Depending on the status of the original award the new principal investigator may be required to submit a final financial report for expenses incurred under the original principal investigator or a revised detailed budget.
2. A statement of any changes in the budget or proposal. For substantial changes the new principal investigator may be required to submit a revised budget.
3. An award amendment from the Society that confirms the new principal investigator.

Fellowship awards and training awards may not be transferred to a different individual (applies to Biostatistics Junior Faculty awards, Career Transition Fellowship awards, Clinician Scientist Development awards, Harry Weaver Scholar awards, Postdoctoral Fellowship awards, Sylvia Lawry Physician Fellowship awards, and Clinical Care Fellowship awards). In the event that a fellow is unable to continue with training, the fellowship award will be terminated prematurely.

Change of Mentor for a Fellowship Award Recipient: (applies to Postdoctoral Fellowships, Sylvia Lawry Physician Fellowships, Clinician Scientist Development Fellows, and the advanced training period of the Career Transition Fellowships) Fellowship awards are not independent investigator awards; therefore, if a fellow's mentor becomes unable to continue the supervision of the fellow's training, a replacement may be proposed by the sponsoring institution, subject to approval by the Society. Any fellow considering a change in mentor for other reasons must notify the Society in writing to obtain approval. In all cases, fellows that require or may require a change of mentor are encouraged to reach out to their program officer as soon as possible to discuss options and next steps. If appropriate, the Society may communicate with mentors after review of the change request to discuss any concerns that might influence the transfer. In the event that the fellow is unable to continue with an approved research project or training plan with a new mentor, the fellowship award is non-transferable, and the award will be terminated.

Publications and Reprints: The Society expects that the results of research will be published in appropriate journals. The responsibility for publication lies with the principal investigator. The results of any work supported by a grant from the Society may be published without being reviewed by the Society. Therefore, responsibility for direction of the work is not to be ascribed to the Society. The Society must be acknowledged in all dissemination materials (e.g., publications, scientific exhibits, scientific presentations, press releases, etc.) related to research supported in full or in part by the Society. The following acknowledgment, or its equivalent, should be used: **“This investigation was supported (in part) by a [insert type of award] from the National Multiple Sclerosis Society.”**

As soon as a manuscript is accepted for publication, a copy of it, with the name of the journal and the expected date of publication, should be sent by email to the Society program officer associated with the grant (the program officer contact info can be found in MS Grants). Please notify the Society if a press release from the institution or journal is being prepared for distribution. Manuscripts will be respected as privileged communications.

Tykeson Conference on MS for Society Fellows and Junior Faculty Awardees: Through a generous contribution from Mr. Donald Tykeson (late volunteer and member of the Society's National Board of Directors), the National MS Society holds a meeting of Society's fellows and faculty awardees on alternate years. All Society fellows and faculty awardees whose awards are active at the time of the conference are required to attend at the Society's expense. The goal is to improve the sharing of research information among the Society's awardees, develop a sense of community among our investigators, strengthen their commitment to MS, and establish new collaborations among these researchers. **Investigators funded under the following funding mechanisms are required to attend:** Postdoctoral Fellowships, Sylvia Lawry Physician Fellowships, Clinician Scientist Fellowships, Harry Weaver Scholar Awards, Mentor-Based Postdoctoral Fellowships Program in Rehabilitation Research, and Career Transition Fellowships.

Presenter Support Award for Dependent Care: We recognize that research and clinical fellows funded by the National MS Society may have children or dependent adults, and that caring for these dependents may present a major challenge to presenting research at virtual or in-person scientific/clinical meetings. Such meetings are one of the primary venues for scientists or clinicians to present new work to colleagues and receive feedback at an early stage of their career, and are crucial to career advancement.

With that in mind, the National MS Society is offering the Presenter Support Award for Dependent Care to cover expenses around caring for dependents in order to present research at virtual or in-person conferences. Fellows funded by the National MS Society who are presenting research at a poster session, platform presentation, or as an invited speaker, can apply for this award. The award is \$1,000 annually and can be used for one or more meetings. Reimbursable expenses include (but are not limited to) providing airfare for your children or for your caregiver to accompany you to the meeting, flying a relative out to help with care at your home while you're at the meeting, or extra help paying for at-home or on-site daycare.

Please contact the Society program officer for your fellowship to request this award. The request should include the following: name and location of the meeting; type of presentation (poster, platform, invited speaker); and specifics about the need for support and how funds will be used.

The program officer will provide a Presenter Support Award for Dependent Care form. Following the meeting(s), please submit this form with receipts to be reimbursed, and with the approval email from the program officer. Receipts from care providers must include tax ID or Social Security number.

BUDGETING AND ACCOUNTING

The grantee institution shall maintain complete and accurate books, records and accounts that, in reasonable detail, accurately document the use of the Award. The National MS Society shall have the right to have such books, records and accounts reviewed and audited at a mutually convenient time upon prior written notice to you.

Please refer to the program description pages for detailed accounting procedures that pertain to phases of the **Career Transition Fellowships**.

Rebudgeting of Funds for Research Grants (including targeted RFA awards and Strategic Initiative

awards): rebudgeting between and among categories of the budget approved in grants may be made as follows: (1) rebudgeting between personnel and consumable supplies categories may be made at the discretion of the grantee institution, but (2) no rebudgeting of funds may be made without prior approval in writing by the Society for equipment costing more than \$1,000, travel, indirect costs, or other items not specifically identified in the approved budget. In rebudgeting personnel funds on a grant, the percent effort of the Principal Investigator must maintain at least a 5% level of commitment, with or without salary, to the project, or as stated in the specific program section. Unless prior approval in writing has been obtained from the Society, expenditures are likely to be disallowed for items not specifically included in the budget of the grant awarded.

See special rules regarding rebudgeting of funds for **Biostatistics/Informatics/Computational Biology Junior Faculty Awards, Career Transition Fellowships, Harry Weaver Scholar Awards, Mentor-based Postdoctoral Fellowships in Rehabilitation, and Institutional Clinician Training Awards**. Otherwise, rebudgeting between categories is not allowed for fellowship awards—**Clinician Scientist Development Awards, Postdoctoral Fellowship Awards, Sylvia Lawry Physician Fellowship Awards, and Clinical Care Fellowship Awards**.

Annual Financial Reports: A brief account of the expenses for each award is due within 30 days after the anniversary date during the term of a grant. Any unexpended funds remaining at the end of each year may be carried over to the next grant year; however, unexpended funds in excess of 50% or more of total remitted funds from the previous 12-month reporting period require approval from their Society program officer and grantees must provide an explanation. The Society may temporarily suspend payments for projects with excessive unexpended funds.

Final Financial Reports: A full account of all expenses made for an award is due within 90 days of the termination of the grant. Unexpended funds remaining at the end of the grant must be returned to the Society if renewal support is not awarded. If renewal support is provided, remaining funds from the previous grant will be applied to the first payment of the renewal grant. Instructions for this report will be emailed to the grantee's institution prior to the end of the award. The Society is not responsible for over-expenditures of grants.

LEAVES

Vacations: Vacations will be subject to institutional policy.

Military Service: The Society will consider reinstating an award that is interrupted by military service, provided the request is made (1) within three months of the awardee's discharge from military service, and (2) not more than three years after entering the armed forces or public health services.

Leave for PIs (non-fellows): Salary payments during leave (including parental leave) will be subject to and consistent with the policies of the Institution and the laws of the jurisdiction where the grant is executed. Adherence to these policies and laws may result in disparate leave pay depending on the recipient institution. Awardees may request additional unpaid leave outside of the scope of their Institute's policies. These requests will be reviewed and granted at the discretion of the National MS Society.

In all cases of leave, a request/notification must be submitted in writing to the appropriate Society program officer within 30 days prior to leave whenever possible. The request must include the expected start and end dates of the leave of absence, the signature of the requestor, and the signature of an Institutional Official. Additionally, the request should identify a contact for continued correspondence during the leave period. Any changes to the expected start date of the leave should be communicated to the program officer via email within 7 days after the actual start date of the leave of absence. Leave may not exceed 12 months.

Once notified, the program officer will work with the requester and the Institution to determine the appropriate strategy to manage the award during the absence. It is possible for leave to be taken with continued award support, or for the grant to be placed in a no-cost extension for the duration of the leave. In the latter case, no charges to the grant will be allowed during that period. Such a leave does not reduce the total number of months of program support for which an individual is eligible.

Maternity/Parental Leave for Fellows: Fellows funded by the National MS Society may use up to 60 calendar days (equivalent to 8 work weeks) of their fellowship term for maternity leave (the birth of a child). Parental leave is available for a spouse/partner for six weeks immediately following the birth of a child or for a fellow in instances of the adoption of a child or placement of a foster child. The fellow will be provided with their stipend from the National MS Society under the terms of the fellowship award during this maternity/parental leave. Additionally, in cases where the fellowship award is extended, the grant end date for the fellowship will be extended in line with the length of leave approved and will be supplemented with up to 60 calendar days of stipend at the terminal year rate, so the fellow will receive their stipend during their leave and during the fellowship extension.

Maternity/Parental leave requests must be submitted in writing to the appropriate Society program officer within 30 days prior to leave – using the Maternity/Parental Leave Request Form available for download in MS Grants or from our [website](#). The request must include an appropriate justification for the leave of absence, the expected start and end dates of the leave of absence, any request for an award extension beyond the end date, the signature of the fellow, and the signature of an Institutional Official. Any changes to the expected start date of the leave should be communicated to the program officer via email within 7 days after the actual start date of the leave of absence.

Additionally, fellows must provide advanced notification to their grantee institution prior to taking maternity/parental leave. Notification of mentors and others about plans to use leave must be consistent with the organization's policy.

Other Leave for Fellows: For leave outside of maternity/parental leave, requests will be reviewed and granted at the discretion of the National MS Society in keeping with the policies of the Institute and the laws of the jurisdiction where the grant is executed. In all cases of leave, a request/notification must be submitted in writing to the appropriate Society program officer within 30 days prior to leave whenever possible. The notification must include the expected start and end dates of the leave of absence, any request for an award extension beyond the end date, the signature of the fellow, and the signature of an Institutional Official. Any changes to the expected start date of the leave should be communicated to the program officer via email within 7 days after the actual start date of the leave of absence. Additionally, notification to mentors about plans to use leave must be consistent with the fellow's Institutional policies.

AFTER THE AWARD PERIOD

Fate of Equipment: Upon termination of the award, all equipment purchased with National MS Society funds is permanently vested in the institution at award termination.

Unexpended Funds: Because budgets in applications for grants are estimates of the funds required to perform the research indicated, unexpended funds may remain at the end of each year and at the termination of the grant. Unexpended funds remaining at the termination of the grant must be returned to the Society if renewal support is not awarded. Refund instructions are available on our website, within the final report on MS Grants, or can be shared by contacting your Society grant administrator. If renewal support is provided, remaining funds from the previous grant will be applied to the first and, if necessary, subsequent payments of the renewal grant and the renewal support budget will be reduced accordingly.

Status Report: The Society requests that career transition fellows submit a brief statement five (5) years after completion of an award, indicating changes in professional status during the intervening period, updates in contact information and the area of current research interest, and providing a bibliography plus pdf files of published articles of work conducted during the interval.

Fellows Provide Updates: The Society periodically (every 4-5 years) conducts surveys of its past fellows to assess their career output since their postdoctoral years. To assist the Society in keeping track of our former fellows, we request that the Society be notified of changes in their professional status, professional contact information, and the area of research interest.

LEGAL AND REGULATORY POLICIES

Bonded Financial Officer: The Society requires that the Financial Officer administering Award funds be bonded or that the Awardee's Institution maintains insurance to protect against the misappropriation of funds. If the Financial Officer is not bonded and the Awardee Institution does not carry insurance, the Awardee Institution agrees that it will replenish to the Research Project any misappropriation of funds.

Research involving human subjects: The Society will not support research involving human subjects without prior receipt of written approval of the specific research proposed from the grantee institution's Human Institutional Review Board (IRB or other appropriate Committee). This approval must be signed by the Chairperson of the Committee, and a copy of the letter must be received by the Society on an annual basis during the funding term of the research award. In addition, all studies involving humans must be performed in accordance with the guidelines stated in the Declaration of Helsinki as described in the Code of Federal Regulations, Title 45 and Part 46 (<http://www.hhs.gov/ohrp/policy/ohrpregulations.pdf>).

The National Multiple Sclerosis Society supports funding of biomedical research utilizing all types of human cells. The Society also supports adherence to the strictest ethical and procedural guidelines for the use of these cells.

Note for Sylvia Lawry Physician Fellowships: Beginning in 2024, the Society will not require IRB documentation in the application or before initiating the award. The Society expects that all clinical trials that the Sylvia Lawry fellow is involved with will have IRB approval, or be IRB exempt, and universities must be able to provide documentation of IRB approval or exemption upon request.

Research involving animals: For research involving animals, written approval from the grantee's Institutional Animal Care and Use Committee (IACUC) must be received by the Society prior to the release of any funds. This approval must be signed by the Chairperson of the Committee, and a copy of the letter must be received by the Society on an annual basis during the funding term of the research award.

All biomedical research that involves the use of animals must adhere to the following principles:

- Animals shall be used in biomedical research only when no other means of obtaining scientifically sound, valid and useful results are available.
- The minimum number of appropriate animals required to obtain and validate results shall be used.

- The acquisition, care and use of animals must be in accordance with all applicable federal, state and local laws and regulations.
- Certifications must be received from research facilities prior to being approved for a research grant that the facility(ies), its researchers and employees adhere to the Animal Welfare Act, National Research Council Guide for the Care and Use of Laboratory Animals, and any appropriate U.S. Department of Agriculture or National Institutes of Health regulations and standards.
- In cases requiring the death of an animal, only the most appropriate and humane form of euthanasia shall be used consistent with the purpose of the research.

The [Guide for the Care and Use of Laboratory Animals: Eighth Edition](#) is available as a [free download](#).

Liability/Limitation on Damages/Indemnification

- (a) The Society shall have no liability to grantee or the grantee's institution, affiliates, officers, directors, trustees, employees, agents, or subcontractors/subawardees (hereafter referred to as subcontractors) for any claim, loss, damage, or injury incurred in the course of the performance of this agreement or otherwise in connection therewith, unless due to the intentional misconduct or gross negligence of the Society.
- (b) The Society shall not be liable to grantee with respect to any subject matter of this agreement for any special, indirect, incidental, consequential, punitive damages, or lost profits, under any contract, negligence, strict liability or other legal or equitable theory.
- (c) Grantee and its institution will indemnify, hold harmless, and defend the Society from and against all claims, demands, actions, liabilities, damages, and expenses (including reasonable attorneys' fees and litigation costs) resulting therefrom, or arising out of, or related to, the execution of this agreement by the grantee, or the representations or certifications made by grantee herein and except in the case of force majeure, and except to the extent caused by the gross negligence or willful misconduct of the Society.
- (d) To the best of its knowledge after reasonable inquiry, at the date of signature of the present Agreement, grantee is not aware that its work and deliverables under this agreement will infringe or otherwise violate intellectual property rights of any third party. Grantee will require any subcontractor to make the same representation in its agreement with subcontractor. Notwithstanding the foregoing, grantee agrees to indemnify, hold harmless, and defend the Society from and against third party claims, demands, actions, liabilities, damages, and expenses (including reasonable attorneys' fees and litigation costs) resulting there from, arising out of, or related to any action by a third party that is based on a claim grantee's work or deliverables infringes or otherwise violates intellectual property rights of any third party.

Invention policy and procedure: Recipients of research grants, center awards, postdoctoral training fellowships, transition awards, faculty awards, pilot awards, research contracts, and other research support vehicles (hereinafter known as "GRANTS") from the National Multiple Sclerosis Society shall adhere to the intellectual property policies of the grantee institution, including, if required, the assignment to the grantee institution of title in any invention work to which they have contributed. If the grantee institution has no intellectual property policy providing for such transfer, or elects to waive its rights in such intellectual property, the grantee or the grantee institution shall notify the National Multiple Sclerosis Society promptly and in sufficient time to protect the rights in such intellectual property. To the extent permitted by law, the grantee or the grantee institution shall promptly assign all rights in and to such invention to the National Multiple Sclerosis Society or to a third party designated by the National Multiple Sclerosis Society.

All inventions made with the support, in whole or in part, with GRANTS from the National Multiple Sclerosis Society shall be reported by the grantee institution in confidence to the National Multiple Sclerosis Society within one month of their disclosure to personnel at the grantee institution responsible for such matters. Both the grantee and the grantee institution will make reasonable efforts to refrain from any action that might reasonably impair the ability to obtain patent protection for any invention, such as submitting for publication a manuscript describing the invention or offering the invention for sale or public use prior to filing an application to patent the invention.

Unless prohibited by federal law, the National Multiple Sclerosis Society shall participate in income and other economic benefits derived from any such inventions and will determine, as necessary, when/if to enter into an agreement with the owner of results (e.g. grantee institution, principal investigator or subcontractor) after such disclosure. Such agreement shall provide that income derived from the invention shall be distributed in proportion

to the contributions by the National Multiple Sclerosis Society, the grantee institution and, where applicable, other sponsoring agencies, after deductions of reasonable expenses incurred in obtaining intellectual property protection.

In the event that the grantee institution elects not to pursue patent protection for an invention as to which the grantee institution, principal investigator or subcontractor is named as an inventor or co-inventor, or to discontinue patent prosecution or maintenance for any such invention, the grantee institution will notify the National Multiple Sclerosis Society promptly and in a reasonable time to protect the intellectual property rights in and to such invention. To the extent permitted by law, the grantee institution shall promptly assign all rights in such invention to the National Multiple Sclerosis Society or to a third party designated by the National Multiple Sclerosis Society.

Upon issuance of a patent, the grantee institution shall itself through the identification of a license or through a licensee take appropriate steps to commercialize the invention in a timely fashion. The grantee institution shall include provisions in all exclusive licenses requiring diligent commercialization of the invention, setting appropriate milestones to measure licensee performance and permitting cancellation of the license (or conversion of the license to a nonexclusive license) in the event the licensee fails to achieve the required performance levels. If the grantee institution or its licensee has not taken effective steps, within five years after a patent issues on an invention supported by Society GRANTS and administered by the grantee institution, to commercialize the invention, the grantee institution shall assign title in and to such patent to the National Multiple Sclerosis Society or its designee, unless prohibited by law or unless the grantee institution can show reasonable cause as to why it should retain title.

The grantee institution shall report annually to the National Multiple Sclerosis Society on its commercialization efforts resulting from GRANTS, including the names of current licensees, the relevant terms of any licenses that have been executed and the receipt of any royalties due under such licenses.

Commercial research/Fast Forward: Fast Forward is a nonprofit organization, a separate and wholly-owned subsidiary of the National Multiple Sclerosis Society, established to accelerate the development of new treatments for MS. The Society is not obliged to provide funds through Fast Forward to pursue any invention that was developed originally from support, in whole or in part, with research grants, center awards, postdoctoral training fellowships, transition awards, faculty awards, pilot awards, research contracts, and other research support vehicles from the National Multiple Sclerosis Society. In addition, the Society does not forfeit its rights to any invention that was developed originally from support, in whole or in part, with National MS Society awards if the Society does not fund a project through Fast Forward.

Equal opportunity regulations: The National Multiple Sclerosis Society adheres to a policy of equal opportunity in employment and requires that all United States institutions to which its research or training awards are made adhere to federally mandated equal opportunity policies; institutions outside of the U.S. must adhere to locally applicable equal opportunity policies.

Sharing of resources: Investigators who receive funds from the National Multiple Sclerosis Society are expected to share, in a timely manner, research resources developed with the Society's support with qualified investigators. Examples of such resources include (but are not limited to) cell lines, antibodies, and model organisms (e.g., transgenic mice). Investigators are expected to deposit data into the appropriate public database upon publication of research results.

Confidentiality, Data Privacy and Data Security: The Investigators (including the Institutions and any subcontracting investigators or institutions) must follow all applicable data privacy laws to protect the data of the individuals involved in any research projects. Investigators must obtain freely given, informed, and unambiguous consent, as approved by the Internal Review Board, from all data subjects to use their personal information as part of the study. The consent may be specific consent or broad consent, provided that it complies with the law in the governing jurisdiction. Further, Investigators shall ensure that all reasonable precautions are taken to protect the integrity and the confidentiality of the information. If the research study takes place in the European Union (EU) or includes data from any data subjects from the EU, the Investigators shall comply with the General Data Protection Regulation (GDPR). All studies conducted in the United States must comply with the Health Insurance Portability and Accountability Act (HIPAA) and any relevant more stringent state laws. Studies involving investigators or data subjects from other countries must adhere to the privacy laws of that jurisdiction. The Investigators shall not disclose to the Society underlying personal information or sensitive personal data (as defined by GDPR) or personal health information (as defined by HIPAA). The Investigators shall defend and indemnify the Society for any

liability (including notice to impacted individuals) arising from allegations that the investigator failed to comply with applicable data privacy laws during the course of the study.

Clinical Trials Registration and Data Sharing: National Multiple Sclerosis Society-supported clinical trials must be registered on www.clinicaltrials.gov or another public platform, and updated as stipulated by the information platform, including submission of results. The Society expects that the Principal Investigator(s) of Society-funded clinical trials to publish the results of the trial regardless of the outcome. The publication of disappointing or negative outcomes is important for the unbiased advancement of clinical research and also is an ethical imperative, given the sacrifices of trial participants. The Society supports [National Academy of Medicine recommendations](#) for sharing clinical trials data, recognizing the need to protect the privacy and honor the consent of clinical trial participants; safeguard legitimate economic interests of sponsors; guard against invalid secondary analyses; and give researchers adequate time to analyze the data they have collected and appropriate recognition for their intellectual contributions. Applications for proposed clinical trials must include a plan for how and when data from the trial will be shared and should include data-sharing costs in budget requests or provide an explanation for why data sharing is not possible. Awardees are expected to deposit data, including clinical trials data, into an appropriate public database, if such platform exists, upon publication of research results.

Policy on scientific misconduct and fraud: Any institution that receives funds from the National Multiple Sclerosis Society must have written policy guidelines on conflict of interest and scientific misconduct and fraud. It is the responsibility of the institution, the grantee/awardee and subcontractor to inform the National Multiple Sclerosis Society immediately, in writing, of any institutional investigation into the conduct of an investigator whose work is supported by Society, and to keep the Society informed in a timely manner of the progress and outcome of such investigation. A finding by the institutional investigation that the investigator or subcontractor was guilty of research fraud or misconduct is sufficient grounds to terminate Society support of a project and may jeopardize future support for the investigator or subcontractor from the Society.

DETAILS OF INDIVIDUAL FUNDING PROGRAMS

RESEARCH GRANTS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The Society welcomes investigator-initiated applications for support of studies with high relevance to multiple sclerosis and the Society's [research priorities](#). The Society supports fundamental as well as applied studies, non-clinical or clinical in nature, including projects in patient management, care and rehabilitation. To be considered for funding, all projects must show relevance to the Society's [research priorities](#).

ELIGIBILITY

Principal Investigator: It is expected that the person indicated as the principal investigator in an application for a grant is the one who is personally and actively responsible for the conduct of the research and who is considered eligible by his or her institution to apply for a research grant. The principal investigator must hold an M.D., Ph.D. or the equivalent at the time of submission. Postdoctoral fellows, residents, and other trainees and individuals in mentored positions are not eligible to apply to the research grants program; fellows are encouraged to apply for one of the Society's research training programs. The principal investigator need not be a United States citizen.

Institution: Institutions, except in unusual circumstances, are the official recipients of grants made for the support of specific research by the principal investigator. The recipient institution may be in any country permitted under United States policies and must be a non-profit organization. Applicants are also encouraged to apply for research funding from local sources.

Multiple Applications: All principal investigators or institutions that meet the eligibility requirements to apply for the Research Grants program are allowed to submit more than one application for different ideas within the same deadline.

Please note, for applicants with existing Society grants, pre-applications may be declined if the applicant has any overdue progress reports and/or new awards might not be executed until the applicant is compliant on existing grant reporting.

PREPARATION AND REVIEW OF APPLICATIONS

Definitions of Research Grant Applications: If there are any questions about the application type (new, renewal, resubmission) then applicants should contact the program officer identified on the program website to discuss.

- **New applications:** A "new" application is a research proposal that has not been previously submitted for funding to the National MS Society.
- **Renewal applications:** A "renewal" application is a proposal that seeks follow-on funding to continue research leads generated from a recently completed grant. No grant is renewed automatically. Support beyond the term originally approved is dependent upon submission and approval of a renewal application for a new grant.
 - Renewal applications must include in the narrative a summary of findings generated from the previous grant.
- **Resubmission applications:** A "resubmission" application is any research proposal to the Research Grants program that was previously reviewed through the Society's peer review process but not funded. If it has been more than 2 years since an applicant has received reviewer comments on the proposal, the applicant should contact the program officer to confirm whether the application should be considered a resubmission. If an applicant has submitted this proposal more than twice, the applicant should contact the program officer. If there are any questions about whether an application is a resubmission applicants should contact the program officer identified on the program website.
 - **All resubmissions must include a response to reviewers' comments** and summarize substantial additions, deletions, or other changes from the previous proposal as part of the resubmitted application narrative.

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines> and specific award opportunities listed on MS Grants.

English Language: All applications must be submitted in the English language, including all materials and documentation, and budgets. Financial reports must be submitted in U.S. dollars.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Term/Project Length: The Society will outline current limitations to the award term, total budget, and project length in each funding announcement for research awards.

Supplemental Funds: During the term of a grant, supplemental funds may be requested. Such requests must be justified in writing. Depending on the size of the supplement, peer review of the request may be required. In all cases, the PI should first reach out to their program officer regarding the appropriateness of a supplemental funding request and how to move forward.

GENERAL CATEGORIES OF EXPENDITURES

Investigators may request funds for the following categories of expenditure: salaries for professional and non-professional personnel, patient care costs, permanent equipment, consumable supplies, travel, other expenditures not included under the above categories, and indirect costs.

Personnel: The salaries of all personnel paid from grant funds shall be in accordance with the prevailing policies of the grantee institution. However, budgets for multi-year research grants **cannot** include cost-of-living or similar salary increases for personnel working on the project other than postdocs. Requested salaries are not to be used to replace salaries or portions of salaries already assured by institutional or other funds. Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, laundry and maintenance services, or student fees and tuition costs. Graduate student stipend or salary is allowable and should be consistent with the other technical and non-professional support. A biographical sketch must be included for any PI, Co-I, technical staff, and postdoctoral researchers listed on grants and the budget justification for personnel should be written in terms of percent effort.

1) **Professional Support**

Professional Salaries: The principal investigator must spend at least 5% of his or her time working on the grant, with or without salary support. However, the salary support may not exceed 75% of the PI's salary. All other investigators and co-investigators are not impacted by the PI percent effort restrictions and their salary may be requested in proportion to the time they spend directly on research supported by the grant.

Salary Cap: Beginning in June 2020, the Society will align its salary cap policy is aligned with that of the National Institutes of Health (NIH) and the Society will not pay pro-rated salaries that exceed the NIH salary cap as of the application deadline date NIH policy on salary caps is available here: https://grants.nih.gov/grants/policy/salcap_summary.htm.

2) **Technical and Non-Professional Support**

Salaries for technical and non-professional personnel, including stipend or salary for graduate student workers, may be requested in proportion to the time they will spend on research directly supported by the grant.

3) **Postdoctoral Support**

Postdoctoral researchers may be supported on research grants, as technical or non-professional collaborators. The salary levels requested for each year must be based on the Society's [stipend scale](#) (pdf). The annual salary for postdoctoral researchers is determined by the number of FULL years of relevant postdoctoral experience. The salary for each subsequent full year of support should increase to reflect the next level on the [stipend scale](#). Relevant experience may include research experience, internship, or residency. The salary paid to the postdoctoral researchers cannot be less than the approved scale but can be higher if the institution opts to supplement the funds granted by the Society.

4) **Fringe Benefits:**

Costs to the grantee institution of Social Security, retirement and group insurance plans may be requested in the application for persons whose salaries are to be paid from the grant. All such expenditures are to be in accordance with the prevailing policies of the grantee institution and proportional to the percentage of the employee's time devoted to the research for which the grant is made.

Patient Care Costs: See Introduction for general policies on patient care costs.

Permanent Equipment: See Introduction for general policies on equipment.

Consumable Supplies: See Introduction for general policies on consumable supplies.

Travel: See Introduction for general policies on travel.

Other Costs: See Introduction for general policies on other costs.

Subcontracts and Subawards: A subcontract or subaward with another institution, to be administrated and managed by the applicant/awardee institution may be included in the proposal and budget. The subcontract or subaward budget items should be entered into the Subcontract/Subaward budget section, organized by budget category. If there are multiple subcontracts and/or subawards these line items are all entered into the same section and should be differentiated in the budget justification. The grants management system will incorporate these direct and indirect costs into the final budget calculations. There is no minimum requirement of effort for subcontractor or subaward personnel. If a proposal is awarded it is the responsibility of the awardee institution to administer and manage any subcontracts and subawards necessary and in line with the approved proposal; the National MS Society will not enter into third party agreements with awardee subcontractors or subawardees.

Indirect Costs: The grants management system will automatically add indirect cost of 10% of the sum requested for allowable expenses as outline in the Application Procedures section. Please note that indirect costs are not allowed in connection with funds requested or expended for: purchase, modification or installation of equipment and indirect costs will not be provided for grants or subcontracts/subawards to institutions outside of the United States. Applicants from U.S. based institutions with foreign subcontracts or subawards should reach out to society staff to ensure indirect costs are calculated correctly.

REQUESTS FOR APPLICATIONS (RFA)

See Introduction for general policies, procedures, and obligations related to applying for and receiving Society awards.

INTRODUCTION AND GOALS OF THIS AWARD

The Requests for Applications (RFA) award program provides funds for targeted research to address gaps or high priority research directions identified through the National MS Society's Pathways to Cures Roadmap. Each RFA will describe the research area to be supported and any exclusions. The scope, budget, and duration of awards will be specific to the RFA. The Society expects applicants to apply their unique expertise and creativity to address the RFP objectives.

ELIGIBILITY

Academic Institutions, Principal Investigator: It is expected that the person indicated as the principal investigator in an application for a grant is the one who is personally and actively responsible for the conduct of the research and who is considered eligible by his or her institution to apply for a research grant. The principal investigator must hold an M.D., Ph.D. or the equivalent at the time of submission. Postdoctoral fellows, residents, and other trainees are not eligible to apply; fellows are encouraged to apply for one of the Society's research training programs. The principal investigator need not be a United States citizen.

For-Profit/Commercial Organizations (When Specified in the RFA): Principal Investigators from commercial organizations can either be the lead scientist with an M.D. or Ph.D., or a project manager. When a project manager is used in this role it is expected that the project team will include one or more scientists with an M.D., Ph.D., or the equivalent, that will be personally and actively responsible for the conduct of the research.

Institution: Institutions, except in unusual circumstances, are the official recipients of grants made for the support of specific research by the principal investigator. The recipient institution may be in any country permitted under United States policies. Applicants are also encouraged to apply for research funding from local sources.

Multiple Applications: Unless otherwise specified in the RFA call, all principal investigators or institutions that meet the eligibility requirements to apply are allowed to submit more than one application for different ideas within the same deadline.

Please note, for applicants with existing Society grants, pre-applications may be declined if the applicant has any overdue progress reports and/or new awards might not be executed until the applicant is compliant on existing grant reporting.

PREPARATION AND REVIEW OF APPLICATIONS

Academic Institutions: Refer to specific RFA announcements for information and guidelines on application content. Refer to the [Research Grants](#) for categories of expenditures and budget policies, and the specific RFA announcement for any deviations. Refer to the [Introduction](#) section within this document for information on the application review process.

For-Profit/Commercial Organizations: Refer to specific RFA announcements for information and guidelines on application content. Refer to the [Research Grants](#) for categories of expenditures and budget policies, but note the PI's effort requirements do not apply to commercial applicants. Please also refer to the specific RFA announcement for any additional deviations.

Refer to the [Commercial Research/Fast Forward Awards](#) for information on the application review process.

Resubmission applications: As each RFA announcement is unique, the RFA program applications do not distinguish resubmissions; however, RFA program applicants who are not funded are encouraged to reapply to our Research Grants program.

CONDITIONS OF AWARD

Academic Institutions: Refer to the Introduction for general information about conditions of Society awards. Refer to the [During the Award Period](#) section within this document for information on annual progress and financial reporting.

For-Profit/Commercial Organizations: Refer to the [Commercial Research/Fast Forward Awards](#) for information about conditions of Society awards for commercial research. Refer to the [Commercial Research/Fast Forward Awards](#) for information on quarterly progress and financial reporting.

BIostatISTICS/INFORMATICS/COMPUTATIONAL BIOLOGY JUNIOR FACULTY AWARDS

This award program was made possible by the Marilyn Hilton MS Research Fund

See Introduction for general policies, procedures, and obligations related to applying for and receiving Society awards.

INTRODUCTION AND GOALS OF THIS AWARD

The goal of this program is to create protected time for a junior faculty member to collaborate with an established MS research group to develop expertise in MS clinical trials, real-world evidence, epidemiology, data mining, artificial intelligence, machine learning, and/or other related biostatistics, informatics, or computational biology research, and to inspire them to pursue critical questions in MS research throughout their career. Candidates must have begun academic careers as biostatistics faculty members and be within seven years of having concluded their Ph.D. or equivalent degree. The award provides three years of partial salary or equivalent support, as well as some support for access to datasets.

ELIGIBILITY

Previous Training and Experience: Candidates are eligible who hold a doctoral degree (Ph.D. or equivalent) in biostatistics, data science, computational biology, informatics, artificial intelligence, machine learning, or related field, and are within seven years of completion of their terminal degree.

Eligibility and Sponsoring Institution: Candidates must hold an academic appointment at the assistant professor (or equivalent) level at a university, professional school or research institute at the initiation of the award. The recipient institution may be in any country not subject to official U.S. sanctions and must be a non-profit organization.

Citizenship: U.S. citizenship is not required.

APPLICATION PROCEDURES

Timing: Applications for the Biostatistics/Informatics/Computational Biology Junior Faculty Awards are accepted once per year. Previous applicants are permitted to reapply. For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Content of Proposal: The submitted proposal should contain 1) An overview of the candidate's current activities and outline of the planned MS research collaboration. The applicant should list collaborators and describe the overarching themes of the planned MS research, long-term goals, and relevance to the Society's [research priorities](#) (3 pages maximum). The MS research collaborators should be at the same institution or in near geographic proximity. 2) More details about the aims of the collaborative research and letter(s) of support and CV from one or more members of the MS group with whom candidate proposes to collaborate. The second section will consist of a proposed 3-year research project(s) that supports the candidate's overarching research program. This section will include background, specific aims, experimental design, dataset(s) to be evaluated, any preliminary data, and any other sources of support for this work. This section should follow the general conventions of a research grant proposal and should not exceed 10 pages.

Resubmission Applications: An application to the Biostatistics/Informatics/Computational Biology Junior Faculty Awards program is considered a resubmission if the applicant has applied to this program previously with any institution, collaborator, or research proposal. Further, all applicants that are resubmitting are required to respond to reviewers' comments and summarize substantial additions, deletions, or other changes from the previous application as part of the application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

BIOSTATISTICS/INFORMATICS/COMPUTATIONAL BIOLOGY JUNIOR FACULTY AWARDS

Review Group and Criteria: Each application will be reviewed by the Society's Review Committee on Fellowships. The committee will assess the applicant's qualifications, the suitability of the MS research team with whom the candidate will collaborate, and the scientific merit of the proposed project(s).

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Relationship between Candidate and Sponsoring Institution: The candidate is personally responsible for conduct of the research program, while the institution serves as the official recipient of the award, both salary and grant. The candidate will not in any sense be an employee of the National Multiple Sclerosis Society but rather of the institution. It is expected that the institution will develop plans for continuing the candidate's appointment and for continued salary support beyond the award. Included in the application must be a letter from the chair of the department expressing the department's commitment to the candidate in terms of time to conduct the research and salary support.

Term and Amount of the Award: The award includes both salary and research support, for a non-renewable three-year period paid through the sponsoring institution. The principal investigator and the grantee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports.

Salary or Teaching Buy-out: The program provides partial (25-50%) salary support or teaching buy-out funds, with a 3% annual increase in each of the remaining 2 years. The total salary may be supplemented by funds from other sources to a level commensurate with the current pay scale of the sponsoring institution, but not to exceed the salary cap indicated below.

Salary Cap: The Society's top base salary prior to pro-ration may not exceed NIH salary caps (in place on date of application), available here: https://grants.nih.gov/grants/policy/salcap_summary.htm

Fringe benefits: Will be paid by the Society at the rate current in the sponsoring institution, on that part of the salary contributed by the Society.

Dataset Fees: The maximal direct costs for dataset fees that may be requested and justified in the grant budget of the award is \$20,000 per year. Sources of other support/funding should be specified for datasets that require more than \$20,000 per year.

Travel: Justified travel fees of \$3,000 per year to attend a domestic conference are also permitted to the extent that they further the goals of the collaboration.

Disallowed Expenses: Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, or laundry and maintenance services. Funds may not be used to offset any tuition or other similar fees. Office equipment, computers and supplies and books and journals may not be purchased with award funds unless specifically requested in the application and approved in the budget of the award.

Rebudgeting: Rebudgeting of "Salary" funds that were originally budgeted for the awardee's salary may be allowable if the funds can be re-allocated in ways that meaningfully support the underlying project; please reach out to your program officer for prior approval from the Society. Additionally, purchase of equipment or increasing the amount budgeted for travel requires prior written approval from the Society.

Extension of Term of Award: An awardee may request extension of the term of the award without commitment of further funds. See Introduction for details.

CAREER TRANSITION FELLOWSHIPS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The National MS Society's National Board of Directors has determined that ending the devastating effects of MS will require a cadre of well-trained scientists engaged in MS-related research. The Society's Career Transition Fellowships addresses this need by fostering the development and productivity of young scientists who have potential to make significant contributions to MS research and help ensure the future and stability of MS research.

The Career Transition Fellowships targets current postdoctoral trainees who demonstrate both commitment and exceptional potential to conduct MS-related research. The award provides funding over five years to support a two-year period of advanced postdoctoral training in MS research and the first three years of research support in a new faculty appointment.

ELIGIBILITY

Previous Training: Applicants must hold a doctoral degree (M.D., Ph.D. or equivalent) and must be in a research-oriented postdoctoral training program at an academic, government, or non-profit research institution. Individuals with less than two or more than five years of postdoctoral research experience at the time of application are ineligible for this award. Clinically related training periods such as medical residencies or sub-specialty fellowships will not be counted towards an applicant's eligibility requirement for postdoctoral research experience.

Citizenship: There are no citizenship requirements for individuals applying from U.S. institutions. However, individuals seeking support for advanced postdoctoral training at foreign institutions must be U.S. citizens.

Advanced Postdoctoral Period: The applicant must arrange for the proposed advanced postdoctoral training with an appropriate mentor and institution prior to submitting an application. Whether this phase is proposed to occur with the applicant's current mentor and institution or take place with a new mentor and institution, the plan should demonstrate that new training will be obtained.

Faculty Support Period: The recipient of this fellowship must secure a faculty position at a research institution prior to completion of the two-year advanced training period. The faculty appointment may be at the same institution used for the advanced training period, providing that independence is demonstrated, or at a new institution. There are no citizenship requirements for individuals regardless of the location during the faculty support period.

APPLICATION AND REVIEW PROCESS

The application process for this award involves two levels of review, a pre-application and a full application.

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Preliminary Application

Requirements for Preliminary Applications: A one-page summary detailing the proposed research activities to be conducted during the postdoctoral and faculty award periods; a one-page statement of relevance of the proposed research to the Society's [research priorities](#); a one-page statement of career goals; a biographical sketch of the applicant and of the proposed mentor detailing prior graduate and postdoctoral training experience and publications; and a letter of endorsement from the proposed mentor.

Evaluation Criteria for Preliminary Applications: The review committee will evaluate the following elements of the preliminary application:

- 1) The proposed research plan and its relevance to the Society's [research priorities](#).
- 2) The applicant's research productivity as judged by the publication record from graduate and prior postdoctoral training and from information provided by the current postdoctoral mentor.
- 3) The likelihood that the candidate will develop an independent research career related to MS.

Full Application

Selected applicants will be invited to submit a 12-page proposal detailing research activities planned for a two-year period of advanced postdoctoral training and for the first three years of a faculty appointment. The proposed mentor must provide a letter of support with the application. In addition, letters of recommendation from three other additional individuals must be submitted online. It is the responsibility of the applicant to ensure that all letters are received by the deadline, and an application may be considered incomplete without them.

Concurrent Applications: Individuals invited to submit a full application for a Career Transition Fellowship may not dually submit an application for a Postdoctoral Fellowship and may not dually submit an application for a Research Grant.

Resubmission Applications: An application to the Career Transition Fellowships program is considered a resubmission if the applicant has applied previously to this program with any proposed training institution, mentor, or research proposal. Further, all applicants that are resubmitting are required to respond to reviewers' comments and summarize substantial additions, deletions, or other changes from the previous application as part of the application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Review Group: The Society's standing Review Committee on Fellowships will review full applications.

Evaluation Criteria for Full Applications: The review committee will evaluate the following elements of the full applications:

- 1) The personal and professional qualifications and future potential of the applicant as judged by the recommendation letters and past research productivity.
- 2) The scientific merit, significance and relevance of the training and research plan to the Society's [research priorities](#).
- 3) The potential of the award to facilitate the applicant's development into an independent investigator committed to MS research.

CONDITIONS OF AWARD – ADVANCED TRAINING PERIOD

See Introduction section for general information about conditions of Society awards.

Term or Duration of Advanced Training Period: The duration of the advanced training period will be up to two years. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above. Additionally, the Society is willing to consider requests for reinstatement of the award if it is interrupted by military service or other major events.

Postdoc Stipend: The stipend levels requested for each year of the training period must be based on the Society's [stipend scale](#) (pdf). The amount of the stipend must relate to the applicant's professional status and previous training and experience. The current annual stipend for postdoctoral trainees is determined by the number of FULL years of relevant postdoctoral experience at the time of fellowship appointment. The stipend for each subsequent full year of support should increase to reflect the next level on the [stipend scale](#). No departure from the approved scale will be allowable. For the purposes of determining stipend, relevant experience may include research experience, internship, or residency. No additional costs for fringe benefits are allowed other than the Institutional Allowance described below.

Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of supplementation must be stated in the application, and the Society must be notified of subsequent additional support. Fellows may spend up to 10% of their time in teaching or clinical duties, if appropriate. However, it is the intent of this fellowship award that the majority of the fellow's time will be spent on the approved Society training program.

Similarly, Society postdoctoral stipends may be used to supplement other support to reach the total amount recommended by the Society. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society training program.

Awards are paid to the training institution on a quarterly basis. The fellow, the mentor, and the awardee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each award year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports. Fellows are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

Institutional Allowance: An allowance of \$7,850 per year may be requested to help institutions defray the costs of providing the fellow's training, e.g. insurance, fringe benefits, etc. These funds should be used primarily to help underwrite the costs of medical insurance for the fellow, either by enrolling the fellow in a group plan, or turning over the funds to the fellow to help pay for his/her independent plan. These funds may be used to cover medical insurance for the fellow's spouse or family members if consistent with the universities policies. Travel to scientific meetings, research supplies and related expenses may be paid from the balance of the institutional allowance. Funds may not be used to offset any tuition or other similar fees.

Indirect Costs: Indirect costs are not allowed during the advanced training period.

Research Allowance: A research allowance of \$25,000 per year will be provided for the duration of the advanced training period. The research allowance may include laboratory personnel costs (excluding applicant's stipend, which is requested separately) including fringe benefits at the rate current in the sponsoring institution and proportional to that part of the salary contributed by the Society; patient care costs directly relevant to the research and not obtainable from other sources; equipment and consumable supplies (including any type of laboratory supplies and purchase and maintenance of experimental animals); limited travel funds; and occasionally other costs. Office equipment, computers, office supplies, books and journals may not be purchased with grant funds unless requested in the application and specifically approved in the budget of the grant awarded. The awardee's institution holds title to equipment purchased with award funds.

Travel: Expenses for domestic or foreign travel may be charged to an award only when included in the application and within the amount specifically approved in the award.

Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, or laundry and maintenance services. Funds may not be used to offset any tuition or other similar fees. Office equipment, computers and supplies and books and journals may not be purchased with award funds unless specifically requested in the application and approved in the budget of the award.

Unless prior approval in writing has been obtained from the Society, expenditures are likely to be disallowed for items that were not specifically included in the budget of the award.

Unexpended Funds: Any unexpended funds remaining at the end of the first year of the training period may be carried over to the second year. At the end of the training period, fellows may request nominal unexpended funds be re-allocated and carried over into the faculty phase; please see below "Activation of the Faculty Phase" for additional information.

Personnel Policies: Transition fellows are not considered employees of the National Multiple Sclerosis Society but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS

Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the transition fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Investigator status during advanced training period: Fellowship awardees are not considered independent investigators and the award status is contingent upon an ongoing relationship with their mentor or PI. If the fellow obtains an independent position, then please refer to the section below for policies on carryover of funds into an independent research award.

Non-Research Activities: Transition fellowships are awarded to support training in research and are not intended to support clinical training directed toward the completion of internship and/or specialty board certification or as a substitute for funding the conduct of research ordinarily provided by the award. Similarly, transition fellowships cannot be used to provide support for individuals whose primary responsibility is teaching and/or service, although fellows are allowed to spend up to ten percent of their time in teaching or clinical duties, if appropriate.

Termination of the Advanced Training Period: The advanced training period will automatically terminate after two years, and subsequent payments will be placed on hold. It is expected that after two years the fellow will have secured a faculty appointment and requested activation of the Faculty Period of the award. If a faculty position is obtained prior to the end of the two years of advanced training, the remainder of the training period is forfeited. Fellows may request unexpended funds of a nominal amount be reallocated for use during their faculty phase. See the section “Activation of Faculty Phase” below for more information.

If a fellow or a mentor elect to terminate the training period on a date prior to that indicated in the letter of award, the Society must be notified immediately in writing of the action taken and of the date involved. Grounds for revocation of an transition period will be deemed to exist: (1) if a fellow is unable to carry out the research at the original institution; (2) if a mentor requests in writing that the fellowship be terminated because of unsatisfactory performance by the fellow; (3) if a fellow requests in writing that the fellowship be terminated for any reason; (4) if the fellow’s mentor becomes unable to continue the supervision of the fellow’s training and a replacement acceptable to the Society is not named within 30 days by the sponsoring institution; (5) if the fellow changes any aspect of the award from that which was originally approved by the Society, including the mentor, the department, the institution and/or the specific aims of the research studies, without prior notification and approval by the Society; (6) when annual reports of progress and recommendation for continuation are not received from both the mentor and the fellow within one month of the end of each award anniversary year; or (7) for a cause established by due process of law; or as a consequence of institutional review committee’s determination of fraud or malfeasance.

ACTIVATION OF FACULTY SUPPORT PERIOD

Transition fellows must secure an independent faculty appointment at an academic or non-profit research organization prior to the end of the advanced training phase to initiate the faculty support phase of the award. Faculty appointments at the institution associated with the advanced postdoctoral training period will be allowed provided that fellows demonstrate their independence from the postdoctoral mentor. Upon acceptance of a faculty position at a new institution or promotion to a faculty-level title at the current institution, a fellow must immediately notify the Society to request the activation of the faculty phase of the award.

Prior to activation of the faculty period of the award, the following documents must be submitted the Society for review:

- 1) A formal request for initiation of the faculty support period.
- 2) A final progress report for the advanced postdoctoral period, including a final letter of evaluation from the mentor, and a final financial report from the institution.
- 3) A detailed budget for the faculty support period, including any request to reallocate any unexpended funds of a nominal amount from the advanced training period.
- 4) A letter of support from the chair of the department at the institution of employment, confirming an independent faculty appointment and detailing the nature of the appointment, the institutional resources, and the financial support provided to the new faculty member.
- 5) Other supporting materials, including relevant institutional review body details (e.g., IRB and/or IACUC approvals, etc.).

The request for activation of the faculty support period will be reviewed in an expedited fashion by Society professional staff in consultation with members of the Review Committee on Fellowships as needed.

It is expected that the fellow will continue the previously approved research plan during the faculty period. Under exceptional circumstances, the research plan, as outlined in the original application, may be reconsidered. In such instances, a revised research plan detailing the proposed changes and providing justification for the revisions must accompany the documents listed above. Society staff may request outside review of the revised research plan, and the Society may decline the request for activation of the faculty period if the revised research program is found to lack scientific merit or relevance to the Society's [research priorities](#).

If a faculty appointment is not secured prior to completion of the advance postdoctoral training period, or if the required documentation is not submitted; or if the proposed research has changed to a degree that is not acceptable, funding for the faculty phase will not be initiated and the award will be terminated after the two-year advanced postdoctoral training period.

CONDITIONS OF AWARD – FACULTY SUPPORT PERIOD

See Introduction section for general information about conditions of Society awards.

Activation of Faculty Period: Transition fellows must secure an independent faculty appointment at an academic or non-profit research organization to initiate the faculty support phase of the award. Faculty appointments at the institution associated with the advanced postdoctoral training period will be allowed provided that transition fellow demonstrates independence from the postdoctoral mentor.

Research Program: The transition fellow is expected to spend at least 75% of the working time on fundamental or clinical research, the remainder being reserved for patient care, teaching, or service.

Relationship between Fellow and Sponsoring Institution: The awardee is personally responsible for conduct of the research program, while the institution serves as the official recipient of the award. The fellow will not in any sense be an employee of the National Multiple Sclerosis Society but rather of the institution. For the faculty phase of the award, it is expected that the institution will develop plans for continuing the recipient's appointment and for continued salary support beyond the award. Included in the request for activation of the faculty phase must be a letter from the chair of the department expressing the department's commitment to the fellow in terms of laboratory space, time to conduct the research, and salary support.

Term and Amount of Award during Faculty Period: The faculty period of the award provides \$125,000/year in direct costs, for a non-renewable three-year period paid through the sponsoring institution. The transition fellow and the awardee institution will be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each award year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports.

General Categories of Expenditures

Transition fellows may request funds for the following categories of expenditure: salaries for professional and non-professional personnel, patient care costs, permanent equipment, consumable supplies, travel, other expenditures not included under the above categories, and indirect costs.

Personnel: The salaries of all personnel paid from award funds shall be in accordance with the prevailing policies of the awardee institution. Requested salaries are not to be used to replace salaries or portions of salaries already assured by institutional or other funds.

1) **Professional Support**

- ◆ **Professional Salaries:** The transition fellow must spend at least 20% of his or her time working on the award to request salary support. Up to 75% of annual salary support may be requested, with a 3% annual

increase in each of the remaining 2 years. Salary for other investigators associated with an award may be requested in proportion to the time they spend directly on research supported by the award.

- ◆ .
- ◆ Fringe benefits will be paid by the Society at the rate current in the sponsoring institution, on that part of the salary contributed by the Society.
- ◆ Salary Cap: Beginning in June 2020, the Society will align its salary cap policy is aligned with that of the National Institutes of Health (NIH) and the Society will not pay pro-rated salaries that exceed the NIH salary cap as of the application deadline date NIH policy on salary caps is available here: https://grants.nih.gov/grants/policy/salcap_summary.htm.
- ◆ **Postdoctoral Research Associates** may be supported by this award. The salary levels requested for each year must be based on the Society's [stipend scale](#) (pdf). The annual salary for postdoctoral researchers is determined by the number of FULL years of relevant postdoctoral experience. The salary for each subsequent full year of support should increase to reflect the next level on the stipend scale. Relevant experience may include research experience, internship, or residency. No departure from the approved scale will be allowable. A biographical sketch must be included for any postdoctoral associate listed on awards.

2) **Technical and Non-Professional Support**

Salaries for technical and non-professional personnel, including stipend or salary for graduate student workers, may be requested in proportion to the time they will spend on research directly supported by the award.

Fringe Benefits: Costs to the awardee institution of Social Security, retirement and group insurance plans may be requested in the application for persons whose salaries are to be paid from the award. All such expenditures are to be in accordance with the prevailing policies of the awardee's institution and proportional to the percentage of the employee's time devoted to the research for which the award is made.

Patient Care Costs: Funds requested for hospitalization and/or professional medical services for study subjects.

Permanent Equipment: Scientific equipment purchased with Society funds becomes the property of the awardee's institution. The cost of installing equipment purchased with funds of the award is not allowed unless such funds were requested in the application and specifically approved in the budget of the award. Office equipment, computers, supplies, books, and journals may not be purchased with award funds unless specifically requested in the application and approved in the budget of the award.

Consumable Supplies: Consumable supplies may include any type of laboratory supplies, including purchase and maintenance of experimental animals.

Travel: Expenses for domestic or foreign travel related to the successful performance of the research may be charged to an award only when included in the request of activation and within the amount specifically approved in the award. Travel expenses whenever charged to award funds shall be in accordance with awardee institutional policies and procedures.

Other Expenses: Any other expenditure directly related to the cost of conducting the proposed research may be requested in the request for faculty phase activation. However, construction or renovation costs are not permissible expenditures under any circumstances. Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, laundry and maintenance services, or student fees and tuition costs. Graduate student stipend or salary is allowable and should be consistent with the other technical and non-professional support.

Indirect Costs: The awardee's institution, through the officer signing the application, may add an amount for indirect costs up to 10% of the sum requested by the fellow except that indirect costs are not allowed in connection with funds requested or expended for purchase, modification or installation of equipment. Indirect costs will not be provided for grants or subcontracts/subawards to institutions outside of the United States; applicants from U.S. based institutions with foreign subcontracts or subawards should reach out to society staff to ensure indirect costs are calculated correctly. Indirect costs may only be requested for the faculty phase of the award.

Rebudgeting: Rebudgeting of “Salary” funds that were originally budgeted for the awardee’s salary may be allowable if the funds can be re-allocated in ways that meaningfully support the underlying project; please reach out to your program officer for prior approval from the Society. Additionally, purchase of equipment or increasing the amount budgeted for travel requires prior written approval from the Society. Otherwise, funds may be rebudgeted among budget categories without prior approval from the Society.

ACCOUNTING PROCEDURES FOR BOTH PHASES OF THE AWARD

Annual Financial Reports: A brief account of the expenses made for each phase of the Transition Fellowship award is due within 30 days after the anniversary date. Any unexpended funds remaining at the end of each award year may be carried over to the next year during the term of the advanced training period and the faculty period. A notice requesting this report will be sent approximately 30 days before the anniversary date of the award.

Final Financial Reports: The two phases of the award are considered separately, and a full account of all expenses made are due within 90 days of the termination of the advanced training period and within 90 days after the end of the faculty period. Any unexpended funds remaining at the end of the award must be returned to the Society. A notice requesting the final report will be sent to the financial officer of the awardee’s institution.

PROGRESS REPORTS FOR BOTH PHASES OF THE AWARD

Over the term of the award, the Society requires several different types of progress reports from recipients:

Annual Progress Reports: A report of research progress is due within 30 days of the anniversary date during the term of the award along with a copy of the annual approval letter from the IRB and/or IACUC. Approximately one month before the end of a funding cycle, you will receive a notice requesting the report. Upload reprints or pdf files of all published reports and preprints of all reports in press or submitted but not yet published of the results of research accomplished under the award. The mentor (during the advanced training period) or the Departmental Chairperson (during the faculty period) must also submit a letter of evaluation and report of progress prior to the start of a new funding cycle.

All progress reports are considered privileged communications, and their distribution is limited to the reviewing consultants and research staff of the Society.

Failure to comply with annual reporting requirements within 60 days of the anniversary date may lead to suspension of payments or termination of award. Awards so terminated will not be reactivated.

Final Progress Report: A final report of research progress is required within 30 days after termination of the award. This should cover the entire period of the award. Approximately one month prior to termination of award, the Society will email forms and instructions for completing the progress report. All progress reports are considered privileged communications, and their distribution is limited to the reviewing consultants and research staff of the Society. Individuals who fail to comply with final reporting requirements will not be permitted to apply to the National MS Society for research support until requirements are satisfied. There is no mentor letter of evaluation required for final reports.

CLINICIAN SCIENTIST DEVELOPMENT AWARDS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The National MS Society seeks to attract and train promising young investigators and physicians into the field of MS by supporting the training of postdoctoral fellows in studies related to MS. The Society's research goals are to stop disease progression, restore function, and end MS forever through prevention. The Clinician Scientist Development Awards supports the training of outstanding post-residency clinicians committed to careers in academic medicine with an emphasis on MS clinical research. This program supports three years of research training in an environment where talented young clinicians address problems in multiple sclerosis with the most current scientific tools.

Base stipend is determined according to post-graduate year and is supplemented by an institutional allowance.

Through the generosity of the American Brain Foundation (ABF) one meritorious applicant will be chosen by the ABF to receive The National MS Society -ABF MS Clinician Scientist Development Award. This Awardee will receive the benefits described for the Clinician Scientist Development Awards as well as an additional \$25,000 annual stipend supplement sponsored by the ABF (paid through the National MS Society).

ELIGIBILITY

Previous Training: Applicants must hold an M.D., D.O. or equivalent clinical degree from an accredited institution, and must be licensed to practice medicine in the United States prior to the start of the fellowship. Applicants must be at the final year of residency or beyond of an accredited residency program at the time of the application deadline. Fellowships will initiate upon completion of residency training.

Citizenship: There is no citizenship requirement; however, the individual applying for the award must be licensed to practice medicine in the United States prior to the start of the fellowship.

Mentor and Institution: The applicant must arrange a proposed training program with an appropriate mentor at a U.S. institution prior to submitting an application. Training may occur with the applicant's current institution or may take place at a new institution. A plan of training must be formulated and agreed on by the mentor and the applicant and described in detail in the application.

REVIEW OF APPLICATIONS

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Application Materials: Application instructions for each funding opportunity are made available on the grants management system, MS Grants.

Interview: Each applicant must agree to a phone interview with a member of the Society's Review Committee on Fellowships or its designee.

Resubmission Applications: An application to the Clinician Scientist Development Awards program is considered a resubmission if the applicant has applied previously to this program with any proposed training institution, mentor, or research plan. Further, all applicants that are resubmitting are required to briefly summarize the changes made in response to the criticisms and issues raised by the reviewers of your previous application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Review Process: Applications for this program will be reviewed in two stages by both the Society's Review Committee on Fellowships and the ABF Research Council. The review process will encompass the following steps:

CLINICIAN SCIENTIST DEVELOPMENT AWARDS

- 1) The Society's Review Committee on Fellowships will review applications and interview applicants as a separate but integrated part of its annual fellowship review process. The Society's Fellowship Committee will meet during November/December following the application deadline and will make funding recommendations for the Clinician Scientist Fellowships to the Society.
- 2) The Society will forward its funding recommendations for the Clinician Scientist Fellowship applications to the ABF.
- 3) The AAN Research Council will review the Society's-recommended applications and will recommend one fellow to receive the joint National MS Society-ABF MS Clinician Scientist Fellowship. This stage of review will take place during December/January following the application deadline. Fellows not selected by the ABF, but still recommended for funding by the Society, will be eligible to receive Society fellowships.

Evaluation Criteria: Applications will be evaluated by both the Society's Fellowship Committee and the ABF Research Council using the following criteria:

- 1) The applicant's background, training and potential to develop into a productive physician scientist based on the research proposal, letters of recommendation, and the results of the phone interview;
- 2) The originality, quality, and relevance of the proposed research plan to the Society's [research priorities](#);
- 2) The environment in which the training program will be conducted, specifically, the qualification and the established expertise of the mentor in participation in clinical research in MS, and the potential for intra- and inter-departmental/institutional interactions for the clinical fellow, and the institutional resources available.

Funding Decisions: One applicant will be funded with an enhanced stipend as National MS Society-ABF MS Clinician Scientist Fellows that provides a \$25,000 supplement to the standard Society clinician scientist award. All other funded applicants will receive a Clinician Scientist Development Award that does not include the \$25,000 supplement. Outcomes of the review will be distributed to all applicants following final review by the Society and the ABF Research Council. Applicants will receive notification by February following the application deadline, and awards will begin on July 1 or thereafter.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Activities and Time: Fellows are expected to spend at least 75% of active time engaged in the research activities described in the application. Fellows may spend up to 25% of their time in teaching or clinical duties, if appropriate, unrelated to the specific aims of the fellowship. Fellowships awarded through this program are intended to support training in clinical research and may not be used to support individuals whose primary responsibility is teaching and/or clinical service.

Term or Duration of Award: Applicants may request up to three years of support. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above. Additionally, requests for reinstatement of an award interrupted by military service or other major events will be considered on a case-by-case basis.

Annual Mentor Evaluations: Along with standard Society reporting requirements, the mentor must also submit an annual letter of evaluation and report of progress of the fellow prior to the start of a new funding cycle. There is no letter of evaluation required for final reports.

GENERAL CATEGORIES OF EXPENDITURES

Financial Commitments: The Society will provide a stipend for each year, dependent on the PGY level of the applicant. The Society will also provide \$7,850 as an institutional allowance. Recipients of the National MS Society-ABF MS Clinician Scientist Fellowship will receive an additional \$25,000 enhanced stipend to supplement the base stipend in each year. Otherwise, no additional funds for fringe benefits or indirect costs are allowed other than the Institutional Allowance described below.

Fellowship Stipend: The stipend requested for each year of the period must be based on the Society's [stipend scale](#) (pdf). The amount of the stipend must relate to the applicant's PGY level and experience at the time of the fellowship appointment. The stipend for each subsequent full year of support should increase to reflect the next level on the [stipend scale](#). No departure from the approved scale will be allowable.

Supplementation of the award with other grants or by the fellowship institution is permissible, but fellows may not accept other fellowships, similar awards, or have another source of support for more than 50% of their research salary while holding this award. Supplementation to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of supplementation must be stated in the application (if known in advance of the application), and the Society must be notified of subsequent additional support. Under no circumstances may the conditions of salary supplementation interfere with, detract from, or prolong the trainee's approved Society training program.

Awards are paid to the training institution on a quarterly basis. The awardee, mentor, and the grantee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society (and the ABF if applicable) of annual financial and research progress reports. Awardees are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

Institutional Allowance: An allowance of \$7,850 per year will be provided to institutions. These funds should be used primarily to help underwrite the costs of medical insurance for the fellow, either by enrolling the fellow in a group plan, or turning over the funds to the fellow to help pay for his/her independent plan. These funds may be used to cover medical insurance for the fellow's spouse or family members if consistent with the universities policies. Travel to scientific meetings, research supplies and related expenses, may be paid from the balance of the institutional allowance. No other funds are provided to defray the costs of research or training. Funds may be used to offset any tuition or other similar fees. Purchase of personal computers is not an allowable expense.

Rebudgeting: Rebudgeting between categories—Stipend and Institutional Allowance—is not allowed for Clinician Scientist Development fellowship awards. Any questions should be discussed with the Society program officer.

Personnel Policies: Awardees are not considered employees of the National Multiple Sclerosis Society (or the ABF if applicable) but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the award is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Investigator status: Fellowship awardees are not considered independent investigators and the award status is contingent upon an ongoing relationship with their mentor or PI. If the fellow obtains an independent position, then please refer to the section below for policies on carryover of funds into an independent research award.

Non-Research Activities: The award is made to support training in research and is not intended to support clinical training directed toward the completion of internship and/or specialty board certification or as a substitute for funding the conduct of research ordinarily provided by research grants. Similarly, this award cannot be used to provide support for individuals whose primary responsibility is teaching and/or service.

CARRYOVER OF FUNDS TO A FACULTY POSITION

If a Clinician Scientist fellow obtains an independent position or its equivalent after initiation and completion of a majority of the fellowship award period, but before the termination of the awarded fellowship period, remaining funds from the fellowship award may be carried over to the new position as an independent National MS Society research grant.

The conversion of an award cannot be made without prior approval in writing by the Society (and ABF, if applicable). Prior to approval, the following documents must be submitted to the Society (and ABF, if applicable) for review:

- 1) A formal request for conversion to a research grant
- 2) A final fellowship progress report, including a letter of support from the mentor confirming the faculty appointment and a final financial report from the fellowship institution.
- 3) A detailed budget for the faculty support period. Note, funds may be used for salary or rebudgeted for research expenses.
- 4) A letter of support from the chair of the department at the institution of employment, which details the nature of the appointment, the institutional resources, and the financial support provided to the new faculty member
- 5) Other supporting materials, including relevant institutional review body details (e.g. IRB and/or IACUC approvals, etc.)

If the conversion to a research grant is approved, it is expected that the fellow will continue the previously approved research plan. The new award will be governed by the terms of a research grant.

HARRY WEAVER SCHOLAR AWARDS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

Harry Weaver, Ph.D., known worldwide for his contribution to neurosciences and multiple sclerosis research, was the Society's Director of Research from 1966-1977. Throughout his tenure with the Society and throughout his career, Dr. Weaver continued to encourage young investigators to enter and pursue MS research, and to broaden our understanding of basic and clinical aspects of MS. In recognition of Dr. Weaver's contribution to the neurosciences and MS research, and to his dedication to young researchers, the Society named this prestigious award in his honor.

A limited number of awards will be offered to highly qualified candidates who have concluded their research training and begun academic careers as independent investigators in an area related to multiple sclerosis. The awards are designed to provide salary and grant support for a five-year period, thus permitting the awardee to establish competence in his/her chosen research area. Application must be made jointly by the candidate and the institution in which an appointment is held.

ELIGIBILITY

Previous Training and Experience: Candidates are eligible who hold a doctoral degree (M.D., Ph.D. or equivalent) and have received sufficient research training at the postdoctoral level to be capable of independent research. Individuals who are more than seven years beyond the completion of their postdoctoral training are not eligible for this award.

Sponsoring Institution: Candidates must hold or have been offered an academic appointment at the assistant professor (or equivalent) level at an approved university, professional school or research institute in the United States at the initiation of the award.

Citizenship: U.S. citizenship is not required.

Concurrent Applications and Ongoing Research Support: 1) An applicant for a Weaver Award should not dual-submit an application to the Society's regular research grants program at the same deadline date. 2) However, because the award is primarily intended to provide faculty salary support, the scientific proposal may overlap with existing or pending grants. The applicant should clearly demonstrate that they have the financial resources – whether in the form of start-up funds or other forms of funding to support the conduct of their research program. 3) The awardee is expected to submit applications for additional research funding to the Society or other funding organizations during the course of the Weaver award.

APPLICATION PROCEDURES

Timing: Applications for the Harry Weaver Scholar Awards are accepted once per year. Previous applicants are permitted to reapply. For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Content of Proposal: The submitted proposal should contain two sections. 1) An overview of the candidate's ongoing and planned research program (3 pages maximum). The applicant should describe the overarching themes of their research, long-term goals, and relevance to the Society's [research priorities](#). 2) The second section will consist of a proposed 5-year research project that supports the candidate's overarching research program. This section will include background, specific aims, experimental design and preliminary data. This section should follow the general conventions of a research grant proposal and should not exceed 10 pages. This project would be supported in part by the Weaver award and may also be supported by other sources of funds that the applicant may have or anticipates receiving.

Resubmission Applications: An application to the Harry Weaver Scholar Awards program is considered a resubmission if the applicant has applied previously to this program with any institution or research proposal.

Further, all applicants that are resubmitting are required to respond to reviewers' comments and summarize substantial additions, deletions, or other changes from the previous application as part of the application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Review Group and Criteria: Each application will be reviewed by the Society's Review Committee on Fellowships. The committee will assess the applicant's qualifications and commitment to multiple sclerosis, the suitability of the institutional setting, the potential impact of their research program, and scientific merit of the proposed project.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Research Program: The applicant is expected to spend at least 75% of the working time on fundamental or clinical research, the remainder being reserved for patient care, teaching, or service. His/her research program is expected to concern one or more aspects of multiple sclerosis-related investigation. This may be in areas such as epidemiology, genetics, neurochemistry, neurobiology, neurophysiology, virology, immunology, or pharmacology, or patient management, care and rehabilitation, and may be carried out on MS patients, on animal models of MS, or on other model systems.

Relationship between Candidate and Sponsoring Institution: The candidate is personally responsible for conduct of the research program, while the institution serves as the official recipient of the award, both salary and grant. The candidate will not in any sense be an employee of the National Multiple Sclerosis Society but rather of the institution. It is expected that the institution will develop plans for continuing the candidate's appointment and for continued salary support beyond the award. Included in the application must be a letter from the chair of the department expressing the department's commitment to the candidate in terms of laboratory space, time to conduct the research, and salary support.

Term and Amount of the Award: The award includes both salary and research support, for a non-renewable five-year period paid through the sponsoring institution. The principal investigator and the grantee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports.

- a) **Salary:** The candidate must spend at least 20% of his or her time working on the research award to request salary support. Up to 75% of annual salary support may be requested (but in no case exceed \$75,000 in the first year), with a 3% annual increase in each of the remaining 4 years and the budget justification for personnel should be written in terms of percent effort. The total salary may be supplemented by funds from other sources (but not from private practice) to a level commensurate with the current pay scale of the sponsoring institution.

Salary Cap: Beginning in June 2020, the Society will align its salary cap policy is aligned with that of the National Institutes of Health (NIH) and the Society will not pay pro-rated salaries that exceed the NIH salary cap as of the application deadline date NIH policy on salary caps is available here:
https://grants.nih.gov/grants/policy/salcap_summary.htm.

Fringe benefits: will be paid by the Society at the rate current in the sponsoring institution, on that part of the salary contributed by the Society.

- b) **Research Support:** The maximal direct costs for research support that may be requested in the grant budget of the award is \$30,000 in the first year, increasing incrementally each year up to \$40,000 in the last year. The research support may be distributed across any of the following budget categories (further information about the expenses allowable in each category can be found in the "DEVELOPING THE BUDGET" section of the introduction):
 - **Personnel:** the budget may include laboratory personnel costs (in addition to the applicant's salary) within the following guidelines:

- **Salary cap:** The Society salary cap policy is aligned with that of the National Institutes of Health (NIH) and the Society will not pay pro-rated salaries that exceed the NIH salary cap as of the application deadline date NIH policy on salary caps is available here: https://grants.nih.gov/grants/policy/salcap_summary.htm.
- **Postdoctoral research associates** may be supported by this award. The salary levels requested for each year must be based on the Society's [stipend scale \(pdf\)](#). The annual salary for postdoctoral researchers is determined by the number of FULL years of relevant postdoctoral experience. The salary for each subsequent full year of support should increase to reflect the next level on the stipend scale. Relevant experience may include research experience, internship, or residency. No departure from the approved scale will be allowable. A biographical sketch must be included for any postdoctoral associate listed on awards.
- **Fringe benefits:** will be paid by the Society at the rate current in the sponsoring institution, on that part of the salary contributed by the Society.
- **Patient Costs:** patient care costs directly relevant to the research and not obtainable from other sources. Note any payment for participation should be included as "Other Costs".
- **Permanent Equipment:** equipment necessary and justified for the work may be requested. The grantee institution holds title to equipment purchased with award funds.
- **Consumable Supplies:** consumable supplies including any type of laboratory supplies, MRI costs, and purchase and maintenance of experimental animals.
- **Other Costs:** other costs including any payment for participation may be justified and included in the budget.
- **Travel:** limited travel funds up to \$3,000 per year may be requested as part of Research Support costs. Expenses for domestic or foreign travel may be charged to a grant only when included in the application and within the amount specifically approved in the grant.
- **Subcontract/Subaward Direct Expenses:** if any subcontracts or subawards will be used, please identify those expenses by category within the subcontract/subaward budget.

Grant funds may not be used for facilities and administration costs (F&A). This includes but is not limited to administrative support staff, purchasing, accounting, financial record keeping, or laundry and maintenance services. Funds may not be used to offset any tuition or other similar fees. Office equipment, computers and supplies and books and journals may not be purchased with award funds unless specifically requested in the application and approved in the budget of the award.

Rebudgeting: Rebudgeting of "Salary" funds that were originally budgeted for the awardee's salary may be allowable if the funds can be re-allocated in ways that meaningfully support the underlying project; please reach out to your program officer for prior approval from the Society. Additionally, purchase of equipment or increasing the amount budgeted for travel requires prior written approval from the Society. Otherwise, "Research Support" funds may be rebudgeted among budget categories, without prior approval from the Society.

Extension of Term of Award: An awardee may request extension of the term of the award without commitment of further funds. See Introduction for details.

Title: Recipients of an award will be known as "Harry Weaver Scholars" of the National Multiple Sclerosis Society. This title will be used in publications, programs or other announcements in which an awardee's name appears during his/her tenure of an award. They are expected to hold simultaneously an academic title as determined by the nature of their institutional appointment.

MENTOR-BASED POSTDOCTORAL FELLOWSHIPS PROGRAM IN REHABILITATION RESEARCH

MENTOR-BASED POSTDOCTORAL FELLOWSHIPS PROGRAM IN REHABILITATION RESEARCH

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The Society welcomes applications for support of mentors and institutions that provide training of postdoctoral fellows in research related to multiple sclerosis rehabilitation that may serve to advance the mission of the Society.

This program provides support for a mentor-institution combination that is responsible for the recruitment, selection, and training of postdoctoral fellows to pursue a career in rehabilitation research applied to multiple sclerosis and similar disorders. The mentor should be an established and active researcher in MS or a related field. The fellowship will provide for support of a postdoctoral fellow who will work closely with the mentor. The mentor and fellow may come from a variety of different fields including medicine, physical, occupational, or speech therapy, psychology, rehabilitation engineering, nursing, or other fields. The research training may focus on fundamental as well as applied studies but must be relevant to both rehabilitation of individuals with MS and to the Society's mission.

The program of training to be supported should enhance the likelihood that the trainee will: (a) perform meaningful and independent research relevant to multiple sclerosis rehabilitation and (b) obtain a suitable position that will enable him or her to do so. This award is made to a mentor-institution combination and not directly to the postdoctoral fellow. The award is designed to emphasize opportunities for new research training and broadening scientific competence of the postdoctoral fellow.

ELIGIBILITY

Mentor and Institution: The mentor must hold a faculty appointment at an accredited institution and have adequate research funding and support to provide an appropriate training environment for the postdoctoral fellow. It is the responsibility of the mentor and institution to recruit and select one or more appropriate postdoctoral fellows and to provide an appropriate program of training and experience leading to independence in the conduct of rehabilitation research in multiple sclerosis.

Postdoctoral Fellows: Fellows with 0-36 months of previous postdoctoral training are eligible to be supported by this award. Fellows must hold, or be candidates for, a Ph.D., M.D., or equivalent degree. However, a fellowship under this program cannot be activated for a doctoral candidate until the Society has received written notification from a university or professional school that an appropriate doctoral degree has been awarded. Once postdoctoral candidates are selected, their credentials must be submitted to the Society by the mentor for final review and approval.

Citizenship: U.S. citizenship is not required either for mentors or postdoctoral fellows working at institutions in the United States. Mentors and institutions outside the United States may apply to this program but are requested to submit dual applications to governmental granting agencies and/or other non-profit funding agencies in their own country.

REVIEW OF APPLICATIONS

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Application: The mentor and organization are considered jointly to be the "applicant" and must provide: (1) a description of the facilities and environment available for training; (2) the academic qualifications of the proposed mentor; (3) a brief account of the nature of the ongoing research and training activities within the mentor's organization as they relate to the program of training proposed, including research projects available to the fellow; (4) a meaningful description of the proposed program of training, including the nature of the mentor/fellow

MENTOR-BASED POSTDOCTORAL FELLOWSHIPS PROGRAM IN REHABILITATION RESEARCH

relationship; and (5) an exact and itemized statement of all financial requirements, (under the limitations noted below). Supplemental grants are rarely made to cover costs not specifically requested in the original application.

In addition, the following elements should be incorporated in the application:

- Specific selection criteria for the postdoctoral fellow(s) to be trained
- Specification of the discipline(s) of the postdoctoral fellow(s) to be trained
- An emphasis on training for a career in a specific field of **rehabilitation research**
- A well-articulated training plan with enough specifics to allow for meaningful evaluation
- The major focus of training to be on **rehabilitation research** with exposure to other fields
- Evidence of the track record of the mentor(s) in training postdoctoral fellows, peer-reviewed research and publication
- A description of how the different disciplines represented in the training program will work together
- A statement to the effect that the fellow(s) will write and submit at least one grant and one scientific article during the course of the award

Resubmission Applications: All mentors that are resubmitting are required to respond to reviewers' comments and summarize substantial additions, deletions, or other changes from the previous application as part of the resubmitted application.

If the mentor has applied to the Mentor-Based Postdoctoral Fellowships program within the previous 2 years, then that application is considered a resubmission. If it has been more than 2 years since a mentor has received comments on an application to this program, the mentor should contact the program officer to confirm whether the application should be considered a resubmission. If a mentor has applied more than twice, the mentor should contact the program officer. If there are any questions about whether an application is a resubmission mentors should contact the program officer.

Selection of the Postdoctoral Fellow: It will be the responsibility of the mentor to identify and recruit the postdoctoral fellow and to submit the fellow's qualifications to the Society for approval. Information concerning the proposed fellow is **not** to be submitted as part of the original application for support. Instead, the mentor will submit the fellow's qualifications at some point **after** the application for support has been submitted. The qualifications for the proposed fellow can be submitted either: 1) prior to notification of the outcome of the review of the mentor's application for support or 2) after the mentor's application for support has been approved. This will provide the mentor with ample time and opportunity to identify and recruit the most promising candidate. The Society will review the qualifications of the proposed fellow when this is submitted and provide an answer to the mentor in a timely fashion. Funds to support the postdoctoral fellow will not be released until the Society has reviewed and approved the mentor's selection.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Term or Duration of Mentor-Based Award: The mentor-based fellowships program will have a term of five years. However, the term of training of each postdoctoral fellow will be determined by the mentor based on the period of time required for the training needed for development of an independent investigator. Support for a given postdoctoral fellow will not usually be provided for less than one year or more than three years. Each mentor-based fellowship award will provide sufficient funds to support a single postdoctoral fellow for five years. However, the mentor may divide this time in a variety of ways such as support for a single postdoctoral fellow for three years followed by a different fellow for two years. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave for fellows as outlined in the During the Award Period section above; otherwise at its discretion, the awardee organization may consider requests for reinstatement of a fellowship interrupted by military service or other major events.

Fellowship Stipend: The stipend levels requested for each year of the fellowship award must be based on the Society's [stipend scale](#) (pdf) plus a maximum of 25% for fringe benefits. The amount of the stipend must relate to

MENTOR-BASED POSTDOCTORAL FELLOWSHIPS PROGRAM IN REHABILITATION RESEARCH

the applicant's professional status and previous training and experience. The current annual stipend for postdoctoral trainees is determined by the number of FULL years of relevant postdoctoral experience at the time of fellowship appointment. The stipend for each subsequent full year of support should increase to reflect the next level on the [stipend scale](#). No additional costs for fringe benefits beyond the standard 25% are allowed. Relevant experience may include research experience, internship, or residency. The salary paid to the fellow cannot be less than the approved scale but can be higher if the institution opts to supplement the stipend funds granted by the Society.

Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of supplementation must be stated when the postdoctoral fellow is nominated, and the Society must be notified of subsequent additional support. Fellows may spend up to 20% of their time in teaching or clinical duties, if appropriate, for example to meet requirements for licensure or certification. However, it is the intent of this fellowship award that the majority of the fellow's time will be spent on the approved Society's training program.

Similarly, Society postdoctoral stipends may be used to supplement other support to reach the total amount recommended by the Society. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society's training program.

Awards are paid to the training institution on a quarterly basis. The mentor, the grantee institution, and the fellow will each be advised electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports. Fellows are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

Travel Allowance: An allowance of no more than \$3,000 per year may be made to help institutions defray the costs of travel for the postdoctoral fellow to one or more scientific meetings.

Mentoring Expenses: An allowance of no more than \$10,000 per year may be made to help institutions defray the costs incurred by the mentor in the course of providing training and supervision to the postdoctoral fellow. The funds may be used for mentor's salary support, supplies or similar expense. However, these funds cannot be used for the purchase of equipment or for mentor's travel.

Rebudgeting: Fellowship stipend amount cannot be rebudgeted to another budget category. Otherwise, the "Mentoring Expenses" funds may be rebudgeted among allowable budget expenses (mentor's salary support, supplies, or similar expenses, excluding equipment and mentor's travel), without prior approval from the Society. Please reach out to your Society program officer if there are any questions.

Change of Mentor: If the mentor becomes unable to continue the supervision of the fellow's training, a replacement may be named by the sponsoring institution pending the prior approval by the Society.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Non-Research Activities: Postdoctoral fellowships are awarded to support training in research and are not intended to support clinical training directed toward the completion of internship and/or specialty board certification or as a substitute for funding the conduct of research ordinarily provided by research grants. Similarly, postdoctoral fellowships cannot be used to provide support for individuals whose primary responsibility is teaching and/or service, although fellows are encouraged to spend up to twenty percent of their time in teaching or clinical duties, if appropriate.

POSTDOCTORAL RESEARCH FELLOWSHIPS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The Society welcomes applications for support of training of postdoctoral fellows in studies related to multiple sclerosis that may serve to advance the mission of the Society.

The Society supports fundamental as well as applied studies, non-clinical or clinical in nature, including projects in patient management, care and rehabilitation. To be considered for funding, all projects must show relevance to the Society's [research priorities](#).

The Society offers postdoctoral fellowship grants to unusually promising recipients of M.D., Ph.D. or equivalent degrees when it appears that the program of training to be supported by the grant will enhance the likelihood that the trainee will: (a) perform meaningful and independent research relevant to multiple sclerosis in the future, and (b) obtain a suitable position that will enable them to do so. Postdoctoral Fellowship Awards are not made to applicants seeking continuing support for the completion of an on-going research project or to those in a training program leading to a degree. This fellowship program is primarily for stipend support. The proposed postdoctoral program should emphasize opportunities for new research training and broadening scientific competence of the applicant.

ELIGIBILITY

Previous Training: Applicants with 0-36 months of previous postdoctoral training at the time of the application submission deadline may apply for this award. Applicants must hold, or be candidates for, an M.D., Ph.D. or equivalent degree; however, it is expected that doctoral candidates will have completed their degree before the anticipated award start date. A fellowship will not be activated for a doctoral candidate until the Society has received written notification from a university or professional school that an appropriate doctoral degree has been awarded. The Society will consider applications from individuals with more than 36 months experience on a case-by-case basis. Individuals seeking such consideration should contact the Society.

Citizenship: U.S. citizenship is not required for applicants who desire training in institutions in the United States. However, applicants who plan training in other countries must be U.S. citizens. Applicants may submit dual applications to governmental granting agencies and other non-profit funding agencies.

Mentor and Institution: It is the responsibility of the applicant to make all arrangements for the proposed training with an appropriate mentor and institution, prior to formal application.

REVIEW OF APPLICATIONS

Application: The research proposal must provide: (1) a meaningful description of the proposed program of training, (2) the academic qualifications for both the proposed fellow and mentor, (3) letter of support from the mentor, including a brief account of the nature of the ongoing activities within the mentor's laboratory, especially as they relate to the program of training proposed, (4) an exact and itemized statement of all financial requirements, including salary, relocation costs of travel and institutional allowances (under the limitations noted below). In addition, three letters of recommendation must be submitted online. It is the responsibility of the applicant to ensure that all letters are received by the deadline, and an application may be considered incomplete without them.

Resubmission Applications: An application to the Postdoctoral Research Fellowships program is considered a resubmission if the applicant has applied previously to this program with any proposed training institution, mentor, or research proposal. Further, all applicants that are resubmitting are required to briefly summarize the changes made in response to the criticisms and issues raised by the reviewers of your previous application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Interview: Each applicant must agree to a phone interview with a member of the Review Committee on Fellowships or its designee. This is an integral part of the evaluation of all applications and may not be substituted with other means of communication.

Review Group: All applications are reviewed by the National MS Society's Review Committee on Fellowships.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Term of Award: Fellowship support will not be provided for more than three years. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above. Additionally, the Society is willing to consider requests for reinstatement of a fellowship interrupted by military service or other major events.

Fellowship Stipend: The stipend levels requested for each year of the fellowship award must be based on the Society's [stipend scale](#) (pdf). The amount of the stipend must relate to the applicant's professional status and previous training and experience. The current annual stipend for postdoctoral trainees is determined by the number of FULL years of relevant postdoctoral experience at the time of fellowship appointment. The stipend for each subsequent full year of support should increase to reflect the next level on the [stipend scale](#). No departure from the approved scale will be allowable. For the purposes of determining stipend level, relevant experience may include research experience, internship, or residency. No additional funds for fringe benefits or indirect costs are allowed other than the Institutional Allowance described below.

Institutions may not modify the stipend levels to provide support less than the Society's stipend scale. However, institutions may supplement the fellow's stipend. Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of supplementation must be stated in the application, and the Society must be notified of subsequent additional support. Fellows may spend up to 10% of their time in teaching or clinical duties, if appropriate. However, it is the intent of this fellowship award that the majority of the fellow's time will be spent on the approved Society's training program.

Similarly, Society postdoctoral stipends may be used to supplement other support to reach the total amount recommended by the Society. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society's training program.

Awards are paid to the training institution on a quarterly basis. The fellow, the mentor, and the grantee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports. Fellows are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

Institutional Allowance: An allowance of \$7,850 per year may be requested to help institutions defray the costs of providing the fellow's training, e.g. insurance, fringe benefits, etc. These funds should be used primarily to help underwrite the costs of medical insurance for the fellow, either by enrolling the fellow in a group plan, or turning over the funds to the fellow to help pay for his/her independent plan. These funds may be used to cover medical insurance for the fellow's spouse or family members if consistent with the universities policies. Travel to scientific meetings, research supplies and related expenses may be paid from the balance of the institutional allowance. No other funds are provided to defray the costs of research or training. Funds may not be used to offset any tuition or other similar fees. Purchase of personal computers is not an allowable expense.

Rebudgeting: Rebudgeting between categories—Stipend and Institutional Allowance—is not allowed for Postdoctoral Research Fellowships awards. Any questions should be discussed with the Society program officer.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the Application Procedures section of the Introduction; otherwise, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Investigator status: Fellowship awardees are not considered independent investigators and the award status is contingent upon an ongoing relationship with their mentor or PI. If the fellow obtains an independent position, then please refer to the section below for policies on carryover of funds into an independent research award.

Non-Research Activities: Postdoctoral fellowships are awarded to support training in research and are not intended to support clinical training directed toward the completion of internship and/or specialty board certification or as a substitute for funding the conduct of research ordinarily provided by research grants. Similarly, postdoctoral fellowships cannot be used to provide support for individuals whose primary responsibility is teaching and/or service, although fellows are allowed to spend up to ten percent of their time in teaching or clinical duties, if appropriate.

Annual Mentor Evaluations: Along with standard Society reporting requirements, the mentor must also submit an annual letter of evaluation and report of progress of the fellow prior to the start of a new funding cycle. There is no letter of evaluation required for final reports.

CARRYOVER OF FUNDS TO A FACULTY POSITION

If a postdoctoral fellow obtains an independent position or its equivalent after initiation and completion of a majority of the fellowship award period, but before the termination of the awarded fellowship period, remaining funds from the fellowship award may be carried over to the new position as an independent National MS Society research grant.

The conversion of an award cannot be made without prior approval in writing by the Society. Prior to approval, the following documents must be submitted to the Society for review:

- 1) A formal request for conversion to a research grant
- 2) A final fellowship progress report, including a letter of support from the mentor confirming the faculty appointment and a final financial report from the postdoctoral institution.
- 3) A detailed budget for the faculty support period. Note, funds may be used for salary or rebudgeted for research expenses.
- 4) A letter of support from the chair of the department at the institution of employment, which details the nature of the appointment, the institutional resources, and the financial support provided to the new faculty member
- 5) Other supporting materials, including relevant institutional review body details (e.g. IRB and/or IACUC approvals, etc.)

If the conversion to a research grant is approved, it is expected that the fellow will continue the previously approved research plan. The new award will be governed by the terms of a research grant.

SYLVIA LAWRY PHYSICIAN FELLOWSHIP AWARDS FOR TRAINING IN MS CLINICAL TRIALS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

Sylvia Lawry, founder and long-time leader of the National MS Society and the International Federation of MS Societies, started her quest for a cure with one simple advertisement in *The New York Times*: “multiple sclerosis: will anyone recovered from it please contact patient.” From that humble start Sylvia Lawry founded the National MS Society, and until her death in 2001, garnered influence and resources and focused the attention of the public, medical and scientific communities worldwide to find the cause and cure of multiple sclerosis. To commemorate Sylvia Lawry’s life, passion and tenacious spirit, and as a living tribute to the difference one person can make, The National MS Society named the Physician Fellowship Program in her honor.

With the increasing number of new therapies being developed for use in MS, there is a need for physicians trained in conducting clinical trials. Clinical trials to test the safety and efficacy of therapies for multiple sclerosis are highly complex and require special expertise and knowledge to monitor this highly variable disease.

It is the intent of this program that the individual with an MD or equivalent medical degree will acquire formal training, under the tutelage of an established investigator, in a broad range of key elements associated with conducting clinical trials in MS. These may include design of study protocols, recruitment of patients, power calculations, randomization procedures, use of controls, identification of appropriate inclusion and exclusion criteria, identification of primary and secondary outcome measures, maintenance and assessment of blinding, informed consent, safety monitoring and evaluation, and data access and statistical analysis. These elements must be integrated in the plan of training.

The proposal must provide documentation that:

- the clinical fellow will be actively trained in multiple ongoing MS clinical trials, preferably at various phases to provide exposure to the recruitment stage through data analysis.
- a formal curriculum appropriate for clinical trial training, including courses in biostatistics, epidemiology, or other related courses is available at the institution and will be part of the fellowship experience. Although it is not required, the review committee looks favorably on a training plan that includes the completion of a Master’s degree in clinical research or another related research topic.

Applicants are encouraged to demonstrate the breadth of the training they will receive by expanding on the experiences they will gain through work on specific trials/projects. They are also encouraged to connect their training plan to their stated research interests and career objectives.

Applicants should not submit a detailed research project plan.

ELIGIBILITY

Previous Training: Individuals must have received a MD or equivalent medical degree from an accredited institution and must be licensed to practice medicine in the United States prior to starting their fellowship. Residents who have or will have received training in one of the medical specialties relating to multiple sclerosis, and who are entering their final year of residency or beyond at the time of the application deadline, are eligible to apply.

Citizenship: There is no citizenship requirement; however, the individual applying for the award must be licensed to practice medicine in the United States prior to starting their fellowship.

Activities and Time: Clinical fellowships are awarded to support training in clinical trials and are not intended to support the completion of internship and/or specialty board certification. Similarly, this clinical fellowship cannot be used to provide support for individuals whose primary responsibility is teaching and/or clinical service. It is expected that supervised training in the clinical evaluation and treatment of MS patients will be obtained as part of the fellow’s involvement in clinical trials. Fellows may spend up to 10% of their time in teaching or other clinical duties, if appropriate, unrelated to the specific aims of the fellowship.

Mentor and Institution: Proposals may only be submitted by medical institutions in the United States where investigators are actively engaged in MS clinical research and where ongoing MS clinical trials are being conducted. The mentor's expertise must be established by previous participation in well-designed clinical trials in MS.

Before submitting an application, a candidate must arrange for appointment to an appropriate U.S. institution and acceptance by a mentor who will oversee the training. The application must be endorsed by the applicant's proposed mentor and the head of the department in which the training will be received. A plan of training must be formulated and agreed on by the mentor and the applicant, and described in detail in the application.

REVIEW OF APPLICATIONS

The applicant and the mentor must provide an adequate description of the formal and informal training program, current or planned MS clinical trial(s), and how these essential elements are to be incorporated into the training plan. An itemized statement of all financial requirements, including salary, tuition, and relocation costs of travel must be included in the application. In addition, three letters of recommendation must be submitted online. It is the responsibility of the applicant to ensure that all letters are received by the deadline, and an application may be considered incomplete without them.

Resubmission Applications: An application to the Sylvia Lawry Physician Fellowship Awards program is considered a resubmission if the applicant has applied previously to this program with any proposed training plan, training institution, or mentor. Further, all applicants that are resubmitting are required to briefly summarize the changes made in response to the criticisms and issues raised by the reviewers of your previous application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Interview: Each applicant must agree to a phone interview by a member of the Review Committee on Fellowships or its designee.

Evaluation Criteria: Applications will be evaluated on the following criteria:

- 1) the applicant's background, training, potential to develop into a productive physician scientist, and the phone interview
- 3) the environment in which the training program will be conducted, specifically, the qualification and the established expertise of the mentor in participation in well-designed clinical trials in MS, and the potential for intra- and inter-departmental/institutional interactions for the clinical fellow
- 3) description of the formal and informal training programs, including participation in ongoing clinical trials and the planned curriculum relevant to clinical trials, such as courses in biostatistics and/or epidemiology.
- 4) institutional commitment to the program, adequacy of existing resources and plans for use of institutional funds to augment training resources (for such costs as tuition, etc.)

Review Group: All applications are reviewed by the Society's Review Committee on Fellowships.

CONDITIONS OF AWARD

See Introduction section for general information about conditions of Society awards.

Term and Duration of Award: This award may be made for a period of up to three years. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above. Additionally, the Society is willing to consider requests for reinstatement of a fellowship interrupted by military service or other major events. Successful applicants who applied in their final year of residency are expected to begin their fellowships following completion of their residencies.

Fellowship Stipend and Tuition Costs: Up to \$75,000 per year stipend may be requested for salary, fringe benefits and/or tuition costs. These funds may be allocated in any proportion in each of the award years as agreed

upon by the fellow, mentor, and the institution. Specifics of the allocation must be requested in the original application and reported in the annual financial reports.

The total salary of the fellow may be supplemented by funds from other sources to a level commensurate with the current pay scale of the sponsoring institution, and with the applicant's professional status and previous training and experience. The extent of this supplementation must be stated in the application, and the Society must be notified of subsequent additional support. Under no circumstances may the conditions of salary supplementation interfere with, detract from, or prolong the trainee's approved Society's training program.

Awards are paid to the training institution on a quarterly basis. The fellow, the mentor, and the grantee institution will each be notified electronically of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and research progress reports. Fellows are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

No other funds are provided to defray the costs of training, and indirect costs are not allowed on this award.

Rebudgeting: Rebudgeting between categories—Stipend and Tuition—is not allowed for Sylvia Lawry Physician Fellowship Awards without prior approval from the Society program officer.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Investigator status: Fellowship awardees are not considered independent investigators and the award status is contingent upon an ongoing relationship with their mentor or PI.

Institutional Review Board Documentation: Beginning in 2024, the Society does not require IRB documentation from Sylvia Lawry Physician Fellows in the application or before initiating the award. The Society expects that all clinical trials that the fellow is involved with will have IRB approval, or be IRB exempt, and universities must be able to provide documentation of IRB approval or exemption upon request.

Annual Mentor Evaluations: Along with standard Society reporting requirements, the mentor must also submit an annual letter of evaluation and report of progress of the fellow prior to the start of a new funding cycle. There is no letter of evaluation required for final reports.

MULTIPLE SCLEROSIS CLINICAL CARE PHYSICIAN FELLOWSHIPS

ADULT CARE

This policy section is specific to applicants who will spend the majority of their time in adult neurologic care of patients with MS. The section specific to applicants who will spend the majority of time in pediatric neurologic care can be found on page 54.

See pages 4-21 for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

Consistent with its mission to move toward a world free of multiple sclerosis, the National Multiple Sclerosis Society supports the professional development and training of physicians in the comprehensive care of people with MS. The MS Clinical Care Physician Fellowships program offers a one-year, post-residency program designed to train board eligible/certified neurologists or psychiatrists in specialized MS clinical care. The program provides fellows with the opportunity to perform new patient consultations and follow-up evaluations under the direct supervision of an MS specialist physician. The fellows will also participate in multidisciplinary team activities, lectures, and professional meetings, leading to the acquisition of skills and knowledge necessary to provide personalized, high-quality MS care.

The applicant and mentor are expected to propose a program that involves direct, supervised MS patient care, with other activities that will expose the applicant to a multidisciplinary healthcare team and didactic activities. Keep in mind that the focus of this fellowship is clinical care. **This is not a research-focused fellowship.**

After completing the fellowship program, the fellows will have acquired the skills and experience necessary to develop into physicians who:

- Provide high-quality, state-of-the-art, comprehensive clinical care to patients with MS
- Become an active participant and future leader in the MS clinical community

Within two years of the fellowship experience, the fellows are expected to:

- Establish or join an active MS clinical practice in the United States
- Volunteer with the Society (e.g., as a member of the local Healthcare Provider Councils or Board of Trustees, as an advocacy activist, or as a speaker at a patient or professional education program, etc.)
- Actively participate in related professional associations

ELIGIBILITY

Previous Training: Applicants must meet the following criteria:

- Hold an MD or DO degree (or equivalent)
- Be licensed to practice medicine in the United States prior to the start of the fellowship

Residents who have or will have received training in neurology or psychiatry in the United States, and who are entering their final year of residency or beyond at the time of the application deadline, are eligible to apply.

Citizenship: There is no citizenship requirement.

Mentor and Institution: It is the responsibility of the applicant to make arrangements for the proposed training with an appropriate mentor and institution prior to applying. It is the expectation that the mentor (and co-mentor, when relevant) will be providing the majority of the direct supervision and training to the fellow to achieve the objectives of the program.

The Society will only allow one applicant to this program from an individual institution and/or mentor within the same deadline; however, an Institution may have two applicants if one is applying for an adult fellowship and the other for a pediatric fellowship. Institutions that have an active Institutional Clinician Training Award will not be eligible to apply for individual Clinical Care Fellows.

APPLICATIONS AND REVIEW

Applications: Application instructions for each funding opportunity are made available on the grants management system, MS Grants. In MS Grants, select ‘MS CLINICAL CARE PHYSICIAN FELLOWSHIP’ and ‘adult’ for the application type.

Training Components, Activities and Time – Majority of Time Spent in ADULT MS Care: The applicant and mentor will propose a program of study that includes the following activities in the following proportions:

- 60% - Direct, **supervised** MS patient care.
- 20% - Exposure to the multidisciplinary healthcare team and activities, including physical medicine and rehabilitation, nursing, physical therapy, occupational therapy, speech therapy, social services, clinical and cognitive psychology, nutrition and wellness, neuro-urology, vocational rehabilitation, orthotics, neuroradiologic interpretation and electrodiagnostics.
- 20% - Didactic and other scholarly activities, such as producing a clinical paper, review, poster, etc., attending lectures, grand rounds, seminars, and professional meetings. While the fellow may be involved in the conduct of a clinical research project, this is not a research-focused fellowship.

Interview: All clinical fellowship applicants must agree to participate in an interview with a member of the Society’s Clinical Training Programs Committee.

Resubmission Applications: An application to the Clinical Care Fellowships program is considered a resubmission if the applicant has applied previously, with either an adult or pediatric care focus, and with any proposed training institution or mentor. Further, all applicants that are resubmitting are required to briefly summarize the changes made in response to the criticisms and issues raised by the reviewers of your previous application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Evaluation Criteria:

Applications will be evaluated on the following criteria:

- 1) the applicant’s background, training, potential to develop into a productive MS clinician, and the interview
- 2) the environment in which the training program will be conducted, specifically the qualifications and expertise of the mentor and the institutional commitment to the program, including adequacy of existing resources and plans for use of institutional funds to augment training resources (for such costs as tuition, etc.)
- 3) description of the formal and informal training programs, including direct supervised MS patient care, exposure to MS multidisciplinary healthcare team, and didactic activities

The program description should include what training will be available to the fellow for working with Veterans and military servicemembers as well as [populations that experience health disparities](#), which include racial and ethnic minority groups, people with lower socioeconomic status, underserved rural communities, sexual and gender minority groups and people with disabilities.

Review Group: All applications are reviewed by the National MS Society’s Clinical Training Programs Committee.

CONDITIONS OF AWARD

Term or Duration of the Fellowship: This fellowship is for a period of 12 months, starting July 1. Successful applicants who applied in their final year of residency are expected to begin their fellowships following completion of their residencies.

Fellowship Stipend: The stipend offered is \$75,000, payable to the institution, to cover the fellow’s salary and fringe benefits, and institutional costs. (Note: Indirect/institutional costs may be included in the stipend budget, not to exceed 10% of the award). It is the intent of this fellowship award that the fellow’s time will be spent on the approved Society’s training program.

Supplemental Funds: Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of anticipated supplementation should be stated in the application and the Society must be notified of subsequent additional support. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society training program.

Rebudgeting: Rebudgeting between categories—Stipend and Institutional Allowance—is not allowed for Clinical Care Physician Fellowship awards. Any questions should be discussed with the Society program officer.

Participation in Society Educational Programs: In addition to following the training plans outlined in the application, funded fellows are also expected to attend and participate in the educational programs organized by the Society staff for clinical fellows. New fellows will receive communication from Society staff about the schedule.

Transfer of a Fellowship Award: The transfer of an award from one institution to another along with transfer of the fellow cannot be made without prior approval in writing by the Society and will require re-submission of select application materials for review and approval by the Society.

Change of Mentor: If the fellow's mentor becomes unable to continue the supervision of the fellow's training, a replacement may be named by the sponsoring institution pending approval by the Society. However, in the event that the fellow is unable to continue with the training, the fellowship award is non-transferable.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society, but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacation days, sick leave, holidays, etc.

Termination of Fellowship: Whenever a fellow or a mentor elect to terminate a fellowship on a date prior to that indicated in the letter of award, the Society must be notified immediately in writing of the action taken. Grounds for revocation of the fellowship will be deemed to exist:

1. if a mentor requests in writing that the fellowship be terminated because of unsatisfactory performance by the fellow
2. if a fellow requests in writing that the fellowship be terminated for any reason
3. if the fellow's mentor becomes unable to continue the supervision of the fellow's training and a replacement acceptable to the Society is not named
4. if the fellow changes any aspect of the award from that which was originally approved by the Society, including the mentor, the department, and/or the institution without prior notification and approval by the Society
5. when reports of progress are not received from both the mentor and the fellow within one month of the date due
6. for a cause established by due process of law; or as a consequence of an institutional review committee's determination of fraud or malfeasance.

EVALUATIONS

The mentor will evaluate the fellow at the end of the 12-month term via a written evaluation submitted to the Society and the fellow. Upon completion of the program, the fellow will also evaluate the mentor and the training program via a written evaluation submitted to the Society. In addition, the Society will conduct follow-up surveys with the fellow to determine long-term outcomes of the program.

MULTIPLE SCLEROSIS CLINICAL CARE PHYSICIAN FELLOWSHIPS

PEDIATRIC CARE

This policy section is specific to applicants who will spend the majority of their time in pediatric neurologic care of patients with MS and related conditions. The section specific to applicants who will spend the majority of time in adult neurologic care can be found on page 51.

See pages 4-21 for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

Consistent with its mission to move toward a world free of multiple sclerosis, the National Multiple Sclerosis Society supports the professional development and training of physicians in the comprehensive care of people with MS. The MS Clinical Care Physician Fellowships program offers a one-year, post-residency program designed to train board eligible/certified neurologists or physiatrists in specialized MS clinical care. The program provides fellows with the opportunity to perform new patient consultations and follow-up evaluations under the direct supervision of an MS specialist physician. The fellows will also participate in multidisciplinary team activities, lectures, and professional meetings, leading to the acquisition of skills and knowledge necessary to provide personalized, high-quality MS care.

The pediatric neurology applicant and mentor are expected to propose a program that involves direct, supervised MS and related demyelinating disease patient care, with other activities that will expose the applicant to a multidisciplinary healthcare team and didactic activities. Keep in mind that the focus of this fellowship is clinical care. **This is not a research-focused fellowship.**

After completing the fellowship program, the fellows will have acquired the skills and experience necessary to develop into physicians who:

- Provide high-quality, state-of-the-art, comprehensive clinical care to pediatric patients with MS and other related demyelinating disorders
- Become an active participant and future leader in the MS clinical community

Within two years of the fellowship experience, the fellows are expected to:

- Establish or join an active MS clinical practice in the United States
- Volunteer with the Society (e.g., as a member of the local Healthcare Provider Councils or Board of Trustees, as an advocacy activist, or as a speaker at a patient or professional education program, etc.)
- Actively participate in related professional associations

ELIGIBILITY

Previous Training: Applicants must meet the following criteria:

- Hold an MD or DO degree (or equivalent)
- Be licensed to practice medicine in the United States prior to the start of the fellowship

Residents who have or will have received training in pediatric neurology or physiatry in the United States, and who are entering their final year of residency or beyond at the time of the application deadline, are eligible to apply.

Citizenship: There is no citizenship requirement.

Mentor and Institution: It is the responsibility of the applicant to make arrangements for the proposed training with an appropriate mentor and institution prior to applying. It is the expectation that the mentor (and co-mentor, when relevant) will be providing the majority of the direct supervision and training to the fellow to achieve the objectives of the program.

The Society will only allow one applicant to this program from an individual institution and/or mentor within the same deadline; however, an Institution may have two applicants if one is applying for an adult fellowship and the other for a pediatric fellowship. Institutions that have an active Institutional Clinician Training Award will not be eligible to apply for individual Clinical Care Fellows.

APPLICATIONS AND REVIEW

Applications: Application instructions for each funding opportunity are made available on the grants management system, MS Grants. In MS Grants, select ‘MS CLINICAL CARE PHYSICIAN FELLOWSHIP’ and ‘pediatric’ for the application type.

Training Components, Activities and Time – Majority of Time Spent in PEDIATRIC MS AND RELATED DISORDERS Care: The applicant and mentor will propose a program of study that includes the following activities in the following proportions:

- 60% - Direct, **supervised** MS and related demyelinating disease patient care. The majority of this time (50-85%) should be spent in a pediatric setting with the remainder (at least ½ day per week) dedicated to adult patient care.
- 20% - Exposure to relevant pediatric neurology subspecialties (neurogenetics, leukodystrophy, neuro-rheumatology, infectious disease, etc.) and the multidisciplinary healthcare team and activities, including physical medicine and rehabilitation, nursing, physical therapy, occupational therapy, speech therapy, school social services, case management, clinical and cognitive psychology, nutrition and wellness, vocational rehabilitation, orthotics, neuroradiologic interpretation and electrodiagnostics.
- 20% - Didactic activities, such as producing a clinical paper, review, poster, etc., attending lectures, grand rounds, seminars, and professional meetings. While the fellow may be involved in the conduct of a clinical research project, this is not a research-focused fellowship.

Resubmission Applications: An application to the Clinical Care Fellowships program is considered a resubmission if the applicant has applied previously, with either an adult or pediatric care focus, and with any proposed training institution or mentor. Further, all applicants that are resubmitting are required to briefly summarize the changes made in response to the criticisms and issues raised by the reviewers of your previous application.

If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Interview: All clinical fellowship applicants must agree to participate in an interview with a member of the Society’s Clinical Training Programs Committee.

Evaluation Criteria:

Applications will be evaluated on the following criteria:

- 1) the applicant’s background, training, potential to develop into a productive MS and related demyelinating disease clinician, and the interview
- 2) the environment in which the training program will be conducted, specifically the qualifications and expertise of the mentor and the institutional commitment to the program, including adequacy of existing resources and plans for use of institutional funds to augment training resources (for such costs as tuition, etc.)
- 3) description of the formal and informal training programs, including direct supervised MS and related demyelinating disease pediatric patient care, exposure to MS multidisciplinary healthcare team, and didactic activities

The program description should include what training will be available to the fellow for working with Veterans and military servicemembers as well as [populations that experience health disparities](#), which include racial and ethnic minority groups, people with lower socioeconomic status, underserved rural communities, sexual and gender minority groups and people with disabilities.

Review Group: All applications are reviewed by the National MS Society’s Clinical Fellowship Review Committee.

CONDITIONS OF AWARD

Term or Duration of the Fellowship: This fellowship is for a period of 12 months, starting July 1. Successful applicants are expected to begin their fellowships following completion of their residencies.

Fellowship Stipend: The stipend offered is \$75,000, payable to the institution, to cover the fellow's salary and fringe benefits, and institutional costs. (Note: Indirect/institutional costs may be included in the stipend budget, not to exceed 10% of the award). It is the intent of this fellowship award that the fellow's time will be spent on the approved Society's training program.

Supplemental Funds: Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of anticipated supplementation should be stated in the application and the Society must be notified of subsequent additional support. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society training program.

Rebudgeting: Rebudgeting between categories—Stipend and Institutional Allowance—is not allowed for Clinical Care Physician Fellowship awards. Any questions should be discussed with the Society program officer.

Participation in Society Educational Programs: In addition to following the training plans outlined in the application, funded fellows are also expected to attend and participate in the educational programs organized by the Society staff for clinical fellows. New fellows will receive communication from Society staff about the schedule.

Transfer of a Fellowship Award: The transfer of an award from one institution to another along with transfer of the fellow cannot be made without prior approval in writing by the Society and will require re-submission of select application materials for review and approval by the Society.

Change of Mentor: If the fellow's mentor becomes unable to continue the supervision of the fellow's training, a replacement may be named by the sponsoring institution pending approval by the Society. However, in the event that the fellow is unable to continue with the training, the fellowship award is non-transferable.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society, but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacation days, sick leave, holidays, etc.

Termination of Fellowship: Whenever a fellow or a mentor elect to terminate a fellowship on a date prior to that indicated in the letter of award, the Society must be notified immediately in writing of the action taken. Grounds for revocation of the fellowship will be deemed to exist:

1. if a mentor requests in writing that the fellowship be terminated because of unsatisfactory performance by the fellow
2. if a fellow requests in writing that the fellowship be terminated for any reason
3. if the fellow's mentor becomes unable to continue the supervision of the fellow's training and a replacement acceptable to the Society is not named
4. if the fellow changes any aspect of the award from that which was originally approved by the Society, including the mentor, the department, and/or the institution without prior notification and approval by the Society
5. when reports of progress are not received from both the mentor and the fellow within one month of the date due
6. for a cause established by due process of law; or as a consequence of an institutional review committee's determination of fraud or malfeasance.

EVALUATIONS

The mentor will evaluate the fellow at the end of the 12-month term via a written evaluation submitted to the Society and the fellow. Upon completion of the program, the fellow will also evaluate the mentor and the training program via a written evaluation submitted to the Society. In addition, the Society will conduct follow-up surveys with the fellow to determine long-term outcomes of the program.

INSTITUTIONAL CLINICIAN TRAINING AWARDS

See Introduction on pages 4-21, for general policies, procedures, and obligations related to awards.

INTRODUCTION AND GOALS OF THIS AWARD

Consistent with its mission to move toward a world free of multiple sclerosis, the National Multiple Sclerosis Society supports the professional development and training of physicians in the comprehensive care of people with MS. The Society welcomes applications for support of mentors and institutions that will provide training for board-certified/eligible neurologists and physiatrists in new patient consultations, treatment and follow-up evaluations under the direct supervision of an MS specialist physician, as well as participation in multidisciplinary team activities, lectures, and professional meetings. The goal is for fellows to acquire the skills and knowledge necessary to provide personalized, high-quality care for individuals with MS.

This program provides support for a mentor-institution combination that is responsible for the recruitment, selection, and training of postdoctoral fellows to pursue a clinical career specializing in the care of individuals with multiple sclerosis and similar disorders. The mentor should be an established and active clinician in the MS field. The fellowship will provide for support of postdoctoral fellows who will work closely with the mentor.

The fellow selected by the mentor must hold an MD, DO or equivalent degree, be licensed to practice medicine in the United States, have completed a residency in neurology or physiatry in the U.S., and plan on practicing medicine in the U.S. following the fellowship. The program of training to be supported should enhance the likelihood that the trainee will:

- Establish or join an active MS clinical practice in the United States
- Volunteer with the Society (e.g., as a member of the local Healthcare Provider Councils or Board of Trustees, as an advocacy activist, or as a speaker at a patient or professional education program, etc.)
- Actively participate in related professional associations

ELIGIBILITY

Mentor and Institution: The mentor must have an MD, DO, or equivalent degree, be board certified in neurology or physiatry, hold a faculty appointment or the equivalent at an accredited institution such as a university or teaching hospital, spend a minimum of 25% time on MS clinical care, have a clinical practice that includes relationships with a multidisciplinary care team, and work in a setting that can support an appropriate training environment for the postdoctoral fellow. It is the responsibility of the mentor and institution to recruit and select one or more appropriate postdoctoral fellow(s) and to provide an appropriate program of training and experience leading to independence in the conduct of clinical care in multiple sclerosis. Once postdoctoral candidates are selected, their credentials will be submitted to the Society for final review and approval.

Note: Beginning in 2024, Institutions with an active Institutional Clinician Training Award will not be able to have an applicant for an individual Clinical Care Fellowship award. An Institution without an active award Institutional Clinician Training Award may apply to both programs in the same cycle, but if funding is awarded for an Institutional Clinician Training Award then funding will not be awarded for any individual Clinical Care Fellows.

Citizenship: U.S. citizenship is not required either for mentors or postdoctoral fellows, but all training must occur at institutions in the United States, and both the mentor and the fellow must be licensed to practice medicine in the U.S.

REVIEW OF APPLICATIONS

Timing: For application deadlines and timing of review and potential start dates, see <http://www.nationalmssociety.org/For-Professionals/Researchers/Deadlines>.

Application: The mentor and organization are considered jointly to be the “applicant” and must provide: (1) a detailed description of the facilities and environment available for training; (2) the academic qualifications of the proposed mentor; (3) a thorough and meaningful description of the proposed program of training, including the nature of the mentor/fellow relationship; (4) letters of collaboration or support from any individuals whose

cooperation is necessary for the proposal (ex. co-mentors); and (5) an exact and itemized statement of all financial requirements, (under the limitations noted below). Supplemental grants are rarely made to cover costs not specifically requested in the original application.

In addition to the above, the following elements should be incorporated in the application:

- A recruitment plan and specific selection criteria for the postdoctoral fellow(s) to be trained.
- A well-articulated training plan with specifics to allow for meaningful evaluation. As a guideline, it is expected that at least 50% of the fellow's time will be spent in direct, supervised MS patient care, with a clear outline of the mentor/co-mentor's roles.
- There should be significant exposure to the multidisciplinary healthcare team, including physical medicine and rehabilitation, nursing, physical therapy, occupational therapy, speech therapy, social services, clinical and cognitive psychology, neuro-urology, vocational rehabilitation, orthotics, neuroradiologic interpretation and electrodiagnostics.
- The fellow should be involved in didactic activities, such as producing a clinical paper, review, poster, etc., attending lectures, grand rounds, seminars, interaction with the Society, and professional meetings.
- The program description should include what training will be available to the fellow for working with Veterans and military servicemembers as well as [populations that experience health disparities](#), which include racial and ethnic minority groups, people with lower socioeconomic status, underserved rural communities, sexual and gender minority groups and people with disabilities.
- Evidence of the track record of the mentor(s) in training postdoctoral fellows.
- A description of how the different disciplines represented in the training program will work together.

Resubmission Applications: All applicants that are resubmitting are required to respond to reviewers' comments and summarize substantial additions, deletions, or other changes from the previous application as part of the resubmitted application.

If the Institution has applied to the Institutional Clinician Training Awards program within the previous 2 years, with any proposed PI mentor, then that application is considered a resubmission. If it has been more than 2 years since an Institution has received comments on an application to this program, the mentor should contact the program officer to confirm whether the application should be considered a resubmission. If an Institution has applied more than twice, the applicant should contact the program officer. If there are any questions about whether an application is a resubmission applicants should contact the program officer.

Selection of the Postdoctoral Fellow: It will be the responsibility of the mentor to identify and recruit the postdoctoral fellow and to submit the fellow's qualifications to the Society for approval. Information concerning the proposed fellow is **not** to be submitted as part of the original application for support. Instead, the mentor will submit the fellow's qualifications at some point **after** the application for support has been submitted. The qualifications for the proposed fellow can be submitted either 1) prior to notification of the outcome of the review of the mentor's application for support, or 2) after the mentor's application for support has been approved. This will provide the mentor with ample time and opportunity to identify and recruit the most promising candidate.

The mentor must submit the proposed fellow name and qualifications to the Society prior to the start of the fellowship. The Society will review the qualifications of the proposed fellow when this is submitted and provide an answer to the mentor in a timely fashion. Funds to support the postdoctoral fellow will not be released until the Society has reviewed and approved the mentor's selection.

CONDITIONS OF AWARD

Term or Duration of Award: The Institutional Clinician Training Awards will have a term of three years. However, the term of training of each fellow will be determined by the mentor based on the period of time required for the training needed for development of an independent clinician. Support for a given fellow will not usually be provided for less than one year or more than three years. Each Institutional Clinician Training Award will provide sufficient funds to support a single fellow for three years. However, the mentor may divide this time in a variety of ways such as support for a single fellow for two years followed by a different fellow for one year. Beginning in 2020, fellows

funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above. Additionally, at its discretion, the awardee organization may consider requests for reinstatement of a fellowship interrupted by military service or other major events.

Fellowship Stipend: The fellow's stipend offered is \$75,000, payable to the institution, plus up to an additional 25% to cover fringe benefits. Supplementation or additional support to offset the cost of living may be provided by the awardee's institution but must not require any significant obligation from the trainee. The extent of supplementation must be stated when the fellow is nominated, and the Society must be notified of subsequent additional support. It is the intent of this fellowship award that the fellow's time will be spent on the approved Society's training program. Under no circumstances may the conditions of supplementation interfere with, detract from, or prolong the trainee's approved Society training program.

Awards are paid to the training institution on a quarterly basis. The mentor, the grantee institution, and the fellow will each be advised of the duration and amount of the award and will be provided with a budget that reflects the approved expenditures for each grant year. Payment of subsequent years is dependent upon a) availability of funds; and b) receipt, review, and approval by the Society of annual financial and progress reports. Fellows are considered employees of the institution, and their salaries are paid by the institution according to the payment policy and schedule of the institution.

The mentor must notify the Society if there will be no fellow for a given year. Any adjustment in the length of the grant will then be discussed and determined on an individual basis.

Limited Relocation Costs: Funds to cover the cost of travel to the institution where the training is provided are available but only for the fellow and not for family members or for transportation of household belongings. The relocation costs must be requested in the original application and the amount requested must be comparable to economy class transportation by air or equivalent.

Travel Allowance: An allowance of no more than \$3,000 per year may be made to help institutions defray the costs of travel for the postdoctoral fellow to one or more professional meetings.

Mentoring Expenses: An allowance of no more than \$10,000 per year may be made to help institutions defray the costs incurred by the mentor in the course of providing training and supervision to the postdoctoral fellow. The funds may be used for mentor's salary support, supplies or similar expenses. However, these funds cannot be used for the purchase of equipment or computers, or for mentor's travel.

Rebudgeting: Fellowship stipend amount cannot be rebudgeted to another budget category. Otherwise, the "Mentoring Expenses" funds may be rebudgeted among allowable budget expenses (mentor's salary support, supplies, or similar expenses, excluding equipment and mentor's travel), without prior approval from the Society. Please reach out to your Society program officer if there are any questions.

Unexpended Funds: Any unexpended funds remaining at the end of each award year may be carried over to the next year only upon approval by the Society. Unexpended funds remaining at the termination of the award must be returned to the Society.

Change of Mentor: If the mentor becomes unable to continue the supervision of the fellow's training, a replacement may be named by the sponsoring institution pending approval by the Society.

Personnel Policies: Fellows are not considered employees of the National Multiple Sclerosis Society but rather of the institution where the training is provided. Beginning in 2020, fellows funded by the National MS Society may use funds for maternity/parental leave as outlined in the During the Award Period section above; otherwise, the fellowship is to be administered in accordance with the prevailing policies of the sponsoring institution, including vacations, sick leaves, holidays, etc.

Participation in Society Educational Programs: In addition to following the training plans outlined in the application, funded fellows are also expected to attend and participate in the educational programs organized by the Society staff for clinical fellows. New fellows will receive communication from Society staff about the schedule.

Other Activities: The Institutional Clinician Training Award is intended to support specialized MS clinical training and not for the completion of internship and/or specialty board certification. Similarly, postdoctoral fellowships cannot be used to provide support for individuals whose primary responsibility is research, teaching and/or service, although fellows are encouraged to spend up to twenty percent of their time in research and/or teaching if appropriate.

PROGRESS REPORTS

Over the term of the award, the Society requires several different types of progress reports from recipients:

Annual Progress Reports: The mentor must submit every twelve months an acceptable report of progress and recommendation for continuation. This report is due following each anniversary date during the term of an award. Prior to the anniversary date, the Society will provide forms and detailed instructions for completing the progress report. If applicable, attached to the report should be a PDF file of all published reports and preprints of all reports in press or submitted but not yet published of the results of any work accomplished under the fellowship. Manuscripts will be respected as privileged communications.

Award payments to the institution will be discontinued after each twelve-month period pending receipt of such reports, unless the Society receives prior notification of an acceptable reason for the delay of such reports. When such reports become overdue by one month, the fellowship grant will be terminated automatically as of the date when the report was due. Grants so terminated will not be reactivated.

Final Progress Report: The mentor is expected to submit a final report of progress to the Society within 15 days following the termination of the award. Approximately one month before the termination date, the Society will provide forms and detailed instructions for completing the progress report. The final report must include a summary of work conducted during the final year of support; and a statement describing the overall benefits of the training experience and future plans. To assist the Society in keeping track of our former fellows, we request that the Society be notified of changes in their professional email and address.

COMMERCIAL RESEARCH/FAST FORWARD AWARDS

See Introduction for general policies, procedures, and obligations related to applying for and receiving awards.

INTRODUCTION AND GOALS OF THIS AWARD

The National MS Society invites proposals from commercial organizations and academic institutions to establish research partnerships with Fast Forward to accelerate and support development of therapeutic and diagnostic strategies for MS.

ELIGIBILITY

Fast Forward provides funding to U.S. and non-U.S. commercial organizations. Funding to not-for-profit research institutions will also be considered if a majority of the work is conducted at reputable Contract Research Organizations with appropriate expertise. Fast Forward typically only considers opportunities responsive to annual requests for proposals (RFPs); however, applicants whose projects do not fall within the scope of the annual RFPs should contact Fast Forward staff to determine eligibility for other funding.

APPLICATION PROCEDURE

Each year, RFPs are distributed via email and posted on our website, with an invitation to prospective applicants to submit an application. Applications undergo review by a panel comprised of National MS Society staff as well as external scientific and business advisors. On this basis, only those projects found to have suitable scientific merit and commercial development feasibility will be invited to full due diligence.

PREPARATION AND REVIEW OF APPLICATIONS

For program details, including priority areas, application deadlines, available funds, timeline and evaluation criteria see <http://www.nationalmssociety.org/For-Professionals/Researchers/Society-Funding/Commercial-Research-Funding>.

Unless otherwise noted in the RFP, general categories of expenditures and other budgetary parameters for a Fast Forward award are the same as those stated in the “Research Grants” section of the policies and procedures document.

Review Process: The review of applications will be conducted by the Scientific and Business Advisory Committee (SBAC). The SBAC is composed of outside experts selected based on the thematic direction of each RFP and typically includes individuals with backgrounds in drug discovery and development and the targeted areas of MS research. Selected applicants will be invited to participate in a teleconference with Fast Forward staff and members of the SBAC to discuss their application. Applicants that do not advance to teleconference stage of the review process will still receive a summary of comments provided by the SBAC.

Funding decisions will be made by the Fast Forward Board of Managers and will be based on the recommendations of the SBAC. Each award will be provided pursuant to a Sponsored Research Agreement (SRA) between recipients and the Society that covers project support through Fast Forward and terms of the financial return.

Notification: Applicants will be notified of final funding recommendations. A final funding decision by Fast Forward requires the following:

- a) availability of funds; b) conversion of the proposal to a work plan, a process requiring modifications that reflect recommendations by the SBAC and contains defined milestones and deliverables, and c) negotiation and execution of an SRA with Fast Forward. Any distribution of funds will be contingent on successful conclusion of these steps and approval by the Fast Forward Board of Managers.

CONDITIONS OF AWARD

Details concerning the conditions of a Fast Forward award can be found in the SRA, which will describe the recipient's responsibilities, milestones and deliverables associated with the funded project. This agreement will also

describe the form and amount of the financial return that Fast Forward will receive from the recipient of the funding. The SRA will include certain terms and conditions, including, but not limited to the following:

Research Plan: The SRA will include a jointly negotiated research plan which details the milestones and deliverables associated with the funded project. Release of funding will generally occur in a stepwise fashion associated with the achievement of performance-based milestones. In the event the funding recipient is unable to achieve a performance-based milestone in a timely manner, Fast Forward reserves the right to work with the funding recipient to modify the research plan to address the concerns causing the delay or to terminate further funding if, in the opinion of Fast Forward and its advisors, the concerns jeopardize the viability of the funded program.

Financial Return: The Society seeks to participate in the success of projects funded through Fast Forward. As such, the SRA shall contain well-defined provisions for revenue sharing. Financial return to the Society is based upon achievement of significant commercial milestones in order to minimize financial impact to the funded entity.

Conduct of the Research Plan: For each funded project, details regarding conduct of the Research Plan will be governed by the SRA.

Reporting Requirements:

Progress Reports: Progress reports are generally due every three months and are coincident with quarterly meetings held by teleconference. Reports will be submitted online via MS Grants. Progress reports will provide an update on progress and results of the Research Plan. Awardees are also expected to provide Fast Forward a comprehensive final report describing the results of the work conducted under the Research Plan within three months of a program's completion. Successful achievement of milestones will be used to determine continued funding. Funded investigators are expected to meet scheduled milestones and provide deliverables on time. Failure to meet milestones, furnish scheduled deliverables, including any reports, or to comply with the terms of the SRA may serve as a basis for termination of funding by Fast Forward at any time during the funded research term.

Financial Reporting: Awarded organizations are expected to account for the funds expended under any Fast Forward SRA; any funds spent either not in accordance with the approved project or prior to pre-approval of any material change in the project may be (i) recoverable by and subject to restitution by the awarded organization to Fast Forward and (ii) may be cause for immediate termination of funding by Fast Forward. Each year of the SRA until the end of the work covered under the SRA, awarded organization will advise Fast Forward whether it holds any unspent portion of the funding, and if so, how much.

STRATEGIC INITIATIVES

See Introduction for general policies, procedures, and obligations related to applying for and receiving Society awards.

INTRODUCTION AND GOALS OF THIS AWARD

The Strategic Initiative (SI) award program provides funds for investigator-initiated research to address exceptional, high-priority research directions outside of the Society's traditional Research Grants program cycle. These initiatives must strongly align with the National MS Society's [research priorities](#) as well as the [Pathways to Cures Roadmap](#). Additionally, these proposals should ideally leverage and expand upon existing clinical trials and funded research studies. The scope, budget, and duration of award request can be determined by the applicant. The proposal should reflect the applicant's unique expertise, and the optimal use of resources to address the proposed research question.

ELIGIBILITY

Academic Institutions, Principal Investigator: It is expected that the person indicated as the Principal Investigator in an application for a grant is the one who is personally and actively responsible for the conduct of the research and who is considered eligible by his or her institution to apply for a research grant. The Principal Investigator must hold an M.D., Ph.D. or the equivalent at the time of submission. Postdoctoral fellows, residents, and other trainees are not eligible to apply; fellows are encouraged to apply for one of the Society's research training programs. The Principal Investigator need not be a United States citizen.

Please note, for applicants with existing Society grants, applications may be declined if the applicant has any overdue progress reports and/or new awards might not be executed until the applicant is compliant on existing grant reporting.

PREPARATION AND REVIEW OF APPLICATIONS

Timing: Strategic Initiative are evaluated on an ad hoc basis. Proposals can be submitted at any time throughout the year.

Application Preparation and Submission: The Society requires personal contact with a program officer and discussion of possible ideas for proposals prior to submission. Following discussion of the proposal, the program officer may invite the applicant to apply online through our online MS Grants portal. The application should be completed in the style of the traditional Research Grant application. Refer to the [Introduction](#) and [Research Grants](#) sections for categories of expenditures and budget policies.

Application Review: Upon receipt, a member of the Research Programs staff will review the application to ensure the proposal (1) is appropriate for the Strategic Initiatives award program, (2) fulfills the research mission of the Society, (3) meets all of the criteria for a complete application, and (4) can be funded by the Society if it is found meritorious. Following a determination by the Society Research team that the application meets all four conditions, a special committee will be convened to evaluate the proposal based on its scientific merit and relevance to multiple sclerosis.

CONDITIONS OF AWARD

Academic Institutions: Refer to the Introduction for general information about conditions of Society awards. Refer to the During the Award Period section within this document for information on annual progress and financial reporting.

SPECIAL PRIZES AND AWARDS

THE JOHN DYSTEL PRIZE FOR MULTIPLE SCLEROSIS RESEARCH

In conjunction with the American Academy of Neurology, the National Multiple Sclerosis Society established the John Dystel Prize for Multiple Sclerosis Research in 1994 for the purpose of recognizing outstanding contributions to research in the understanding, treatment or prevention of multiple sclerosis. The prize recognizes significant and exciting work that has changed the way we think about multiple sclerosis. This Prize is not meant to be a lifetime achievement award.

All investigators who are actively engaged in fundamental or clinical research related to multiple sclerosis are eligible for nomination for this prize. The annual award will be made in the amount of \$40,000, to be used at the discretion of the winner. The selection of the prize winner will be in the hands of a special joint committee of the National Multiple Sclerosis Society and the American Academy of Neurology. The award will be presented at the annual meeting of the American Academy of Neurology, during an MS research symposium that will include a 20-minute presentation by the winner on their research. Full recognition of the award will be made in Society publications and to the media.

All nominations must be submitted by late October annually. Details about the nomination/application procedure and information about previous award winners are available on the [Society's website](#). The Prize winner will be notified by February 1, annually.

BARANCIK PRIZE FOR INNOVATION IN MS RESEARCH

The Barancik Prize for Innovation in Multiple Sclerosis Research recognizes an exceptional scientist or a team of scientists whose work in MS research has demonstrated outstanding innovation and originality. This annual prize, made possible by the generosity of the Charles and Margery Barancik Foundation, is \$100,000 to be used at the discretion of the recipient.

The goal of the prize is to recognize innovation in scientific research in the field of multiple sclerosis. Nominations must be submitted on behalf an individual, or team of individuals, by one or more colleagues or mentors. Self-nominations are not permitted. Nomination letters should include current institution and contact information of the nominee, and should address the nominee's scientific accomplishments with an emphasis on citing the innovative and impactful aspects of the nominee's work. A selection committee comprised of leaders in science, medicine, and MS advocacy will review nominees.

The committee will evaluate:

- Exceptional innovation and originality in scientific research relevant to MS
- Impact and potential of the research to lead to pathways for the treatment and cure for MS
- Scientific accomplishments that merit recognition as a future leader in MS research

Eligibility: Any investigator(s) active in MS research is eligible for the prize, and the nominee(s) may be from any institution or organization— public or private, government, as well as commercial entities. The award is intended for early to mid-career MS researchers. Nominees should have no more than 20 years of experience as an independent investigator or team leader to be eligible. There are no specific requirements for residency or citizenship. Nominees need not be current or past grantees of the National MS Society.

Nominations/Deadline: Nomination letters should be sent to barancik.prize@nmss.org by an announced deadline for consideration for the annual prize. Nominees that exhibit qualities outlined in the prize criteria will be invited to submit a final application that will include an interview by the selection committee. Notification of the recipient shall occur by fall, followed by a public announcement and in-person presentation of the prize and prize lecture at ACTRIMS Forum in spring of the following year.

THE RALPH I. STRAUS AWARD FOR MULTIPLE SCLEROSIS

The Ralph I. Straus Award for Multiple Sclerosis was established at the National Multiple Sclerosis Society in 1973 "...to be given to that scientist, or those scientists, of any nationality whatsoever, whose published research shall have resulted in the development of an effective and specific method of preventing or arresting multiple sclerosis in man." The donor of funds to create this award, the late Mr. Ralph I. Straus, was a well-known New York City philanthropist who was president of the National Multiple Sclerosis Society from 1948-1952.

In a statement at the time of his gift, Mr. Straus indicated that "the intent of the Award is to speed the conquest of multiple sclerosis through the enhancement in a realistic manner of the needed awareness of the vast social values inherent in the conduct of research in the biomedical sciences."

The award, when made, will be in the amount not less than the most recently awarded Nobel Prize in Physiology or Medicine. Recipient(s) of this award will be determined by a special committee appointed by the National Multiple Sclerosis Society, at a time deemed appropriate. Special criteria for the Ralph I. Straus Award for Multiple Sclerosis, consistent with the terms of Mr. Straus's wishes, have been developed by the National Multiple Sclerosis Society. Individuals interested in receiving a copy of the criteria for this award may contact the Research Programs team at the National Multiple Sclerosis Society, 733 Third Avenue, New York, NY 10017.

APPENDIX: List of Substantive Changes for the March 22, 2024 Update

1. Clarified that while the awardee institution must be a not-for-profit institution and the principal investigator must have an appointment with the awardee institution and be authorized to submit an application under the terms of the awardee institution, otherwise principal investigators may have dual appointments; location: page 5
2. Added language to clarify that principal investigators performing or coordinating research at multiple sites should be prepared to coordinate that research through the main awardee institution within their institutional policies; location: page 5
3. Updated policy on other expenses to allow up to \$3,000 per year for publication fees, except the first year, and anything over needs to be justified and approved by the Society; location: page 9
4. Added and clarified language on rebudgeting in the introduction and within each all fellowship, junior faculty, and training programs; location: 13, 26, 33, 36, 40, 43, 45, 49, 52, 55, and 58
5. Updated language to reflect that beginning in 2024 Sylvia Lawry Physician Fellowships will not need to submit IRB documentation with their application; location: page 15 and 49
6. Clarified individuals in mentored positions are not eligible to apply for a Research Grant; location: page 20
7. Clarified that principal investigators or institutions that meet the eligibility requirements to apply for a Research Grant (or RFA unless otherwise specified) are allowed to submit more than one application for different ideas within the same deadline; location page 20 and 23
8. Added language to clarify requirements for resubmissions applications within the individual programs; location: 20, 23, 25, 28, 34, 38, 42, 44, 48, 51, 54, and 57
9. Clarified relevant expertise for Biostatistics program includes artificial intelligence and machine learning; location: page 25
10. Updated eligibility for Biostatistics program to seven years from completion of terminal degree; location: page: 25
11. Clarified that Career Transition applicants may not dually submit an application for a Research Grant in the same year; location: page 28
12. Updated eligibility requirements for Clinician Scientist Development Awards to remove the requirement that applicants have completed their residency in the U.S. and clarify that applicants must obtain their license to practice medicine in the United States prior to the start of the fellowship and not prior to applying; location: page 34
13. Clarified that annual mentor evaluation letters are required for all funded fellows including Clinician Scientist Development fellows, Postdoctoral fellows, and Sylvia Lawry Physical fellows; location: pages 35, 46, and 49
14. Clarified eligibility requirements for Clinical Care Fellows to indicate license to practice medicine in the United States is required prior to the start of the fellowship and not prior to applying; location: page 50 and 53
15. Updated policies for Clinical Care Fellows and Institutional Clinician Training Awards to indicated that beginning in 2024 Institutions will not be able to have an Institutional Clinician Training Award at the same time as any individual Clinical Care Fellowship awards; location: page 50, 53, and 56
16. Clarified throughout that language on subcontracts also applies to subawards; location: throughout
17. Removed language from Clinical Care Fellows allowing fellows to apply for a second year of funding
18. Removed language and section for Pilot Research Grant Awards program that was previously discontinued