

TIAA-CREF INSTITUTE RESEARCH GRANT PROGRAM

The mission of the TIAA-CREF Institute is to foster and conduct objective research, build knowledge, demonstrate and support thought leadership, and enhance understanding of strategic issues that impact higher education and lifelong financial security.

The TIAA-CREF Institute Research Grant Program provides financial support for applied research related to the Institute's fields of study:

- Pension and retirement issues
- Funding retiree health care
- Higher Education Challenges and Trends
- Individual savings strategies

Supported projects are generally expected to be completed within one year of the date of the grant. Multi-year timetables will be considered, but first consideration is given to well-conceived, well-designed, specific projects that can realistically be accomplished in one year or less.

DEADLINE: In order to be considered in the first cycle of our 2005 grant program, proposals need to be submitted by **Monday, October 17, 2005**.

PROGRAM REQUIREMENTS

Grantees are expected to complete a draft research paper or other detailed document summarizing results of their research within one year of receiving a grant. All draft and published papers should acknowledge the support provided by the TIAA-CREF Institute. In addition, grantees are required to provide the TIAA-CREF Institute with a final report upon completion of the project. The final report should be non-technical in nature and should be roughly 5,000 words and contain a 1-2 page executive summary. A version of this report and/or summary may appear in TIAA-CREF Institute publications, on the TIAA-CREF Institute web site, or possibly in TIAA-CREF publications, at the discretion of TIAA-CREF and the TIAA-CREF Institute. Draft papers may appear on the TIAA-CREF Institute's web site, at the discretion of the Institute.

Finally, the Institute reserves the right to require grantees to make an oral presentation of their research results for TIAA-CREF Institute audiences as deemed appropriate and useful. Funding for any travel necessary as a result would be provided by the TIAA-CREF Institute.

A timetable for fulfillment of each of the grant program's requirements should be included in the research proposal.

FUNDING LEVELS AND BUDGET

Priority is given to proposals with overall budgets of less than \$40,000, and for partial support of projects with higher budgets. The grant program supports only the direct costs of research and does not fund overhead or indirect costs.

Proposals are expected to include a detailed and complete budget, separately itemizing costs for at least the following expenses:

- 1) Personnel, including salary and benefits for the principal investigator and any co-investigators or research assistants (each separately itemized)
- 2) Equipment, materials, and other expenses, including the itemized costs, if any, of obtaining data, postage or printing.

FORMAT OF PROPOSALS

Proposals should include the following items:

- 1) A completed grant application form
- 2) A detailed budget, including the items described above
- 3) Complete resumes/CVs of the primary investigator(s)
- 4) A detailed timeline describing the anticipated progress of the research and the expected dates of fulfillment of each of the grant program requirements
- 5) A narrative 3-5 page description of the project that includes the following section headings:
 - a. Project motivation
 - b. Project goals
 - c. Research plan
 - i. Analytical framework
 - ii. Data sources (if any)
 - iii. Sensitivity analysis
 - d. Potential implications or conclusions
 - e. List of references cited in the proposal

HOW TO APPLY

To request funding through the TIAA-CREF Institute Research Grant Program, you must submit by email a complete proposal to Dr. Jennifer Ma, Senior Research Fellow, at jma@ttaa-cref.org.

EVALUATION OF PROPOSALS

The proposals will be reviewed for scholarly merit, emphasis on the stated priority areas shown in this announcement, and importance to higher education and lifelong financial security. The following criteria will be used in the evaluation of all applications:

- 1) Clarity of purpose, sophistication, and appropriateness of the research design and proposed research techniques
- 2) Unique nature of the research question(s), methodology, and/or approach

- 3) Potential practical/policy implication of the research
- 4) Qualifications of the applicant(s)
- 5) Cost effectiveness
- 6) Schedule for deliverables

QUESTIONS?

Applicants with questions concerning the TIAA-CREF Institute Research Grant Program should contact Dr. Jennifer Ma, Senior Research Fellow by e-mail: jma@tiaa-cref.org; FAX: 212 916-6849; or by mail: TIAA-CREF Institute, 730 Third Avenue (730/19/60), New York, NY 10017-3206.

TIAA-CREF institute

Grant Program Application Form

Name: _____

Position: _____

Employer/Research Affiliation: _____

Address: _____

City/State/Zip: _____

Phone: _____ Fax: _____

Email: _____

Home Address (optional): _____

City/State/Zip: _____

Phone: _____ Fax: _____

Title of Proposed Research:

Please complete this form and submit with all required grant proposal documentation, as described in the section titled *Format of Proposals*.

The complete grant proposal package should be emailed to:

Dr. Jennifer Ma
Senior Research Fellow
jma@tiaa-cref.org