SAMS/BAM Research and Capacity Building Grant Scheme 2025

Guidance for Applicants

SECTION 1: GENERAL GUIDANCE

Introduction

These guidance notes apply to the Society for the Advancement of Management Studies and British Academy of Management (SAMS/BAM) Research and Capacity Building Grant Scheme 2025 which is aimed at UK-based researchers who want to boost their research capacity and/or network within and beyond academia by:

- extending or adding a new dimension to a substantial existing research project.
- undertaking a substantial new research project highlighting the social value of management research on their own or with a small team of co-investigators.
- connecting with other scholars across disciplines to produce collaborative outputs or build an interdisciplinary and/or international investigator team as a foundation for further research.

We particularly welcome applications
- from interdisciplinary and/or international investigator teams; investigator teams involving members from underrepresented ethnic groups, countries, or regions; and investigator teams involving practitioners.
- for which other funding (at least in-kind) from the Principal Investigator's host institution and/or a third party has been secured.
- in which a long-term trajectory of research is apparent.

Applicants are encouraged to register for the optional online information session and must ensure that they have read this guidance, including the financial guidelines, and Terms and Conditions before applying to this Scheme.

Timeline for funding

This fourth round of funding is launched in September 2024
- Thursday 3rd October 2024 – application form and call documents available
- Date tbc November 2024 – optional information session – a recording will be available for anyone who cannot attend
- Thursday 9th January 2025 - Optional deadline for pre-submission application administrative check (by email). It is anticipated that feedback will be provided within 2 weeks of this deadline
- **Thursday 30th January 2025 at 17:00 (UK time) Deadline for applicants to submit their application for Head of Department/School/Institutional approval**
- Thursday 6th February 2025 at 17:00 (UK time) Deadline for nominated Heads of Department/Schools or other institutional approvers to approve the application in the BAM grants portal
- Interviews are planned to be held in May/June 2025. Dates will be confirmed nearer the time

- The earliest project start date is September 2025 and the latest project start date is December 2025. One grant will be awarded in this fourth funding round

Applicant eligibility

** Current members of BAM Executive, SAMS Council and/or the Grant Award Committee are not eligible to apply as Principal Investigators or be named as Co-Investigators **

Eligible Principal Investigators must be resident in the United Kingdom, have a doctorate, and be employed at a UK university or other research institution (including museums and galleries) at the time of application and for the duration of the award. They must have a track record of research excellence, demonstrated through their previous academic work and public engagement activity.

Early Career Researchers must demonstrate the potential to deliver a research project of this scale and are expected to be formally mentored by a more experienced researcher in their institution.

All applicants should also demonstrate the potential for outstanding qualities of intellectual and academic leadership, especially through their track record of willingness to connect, collaborate and network. They must have shown talent and imagination in researching issues of global significance and be able to demonstrate their ability to engage a broad non-academic audience.

IMPORTANT: Only one application as Principal Investigator is permitted per UK institution in each funding round. Please note that an institution refers to the legal institution, and not an individual business school or department. An institution can be involved as a Co-Investigator on an unlimited number of proposals. International co-investigators and/or industry or third-sector collaborations are possible as part of this grant scheme.

Principal and Co-Investigators can only be named on one proposal across the following 2025 schemes with the exception of being named as a mentor:
- SAMS/BAM Research and Capacity Building Grant Scheme 2025
- BAM Grant Schemes 2025 (Transitions 1, Transitions 2 and MKE)
- BAM and Partner Grant Schemes 2025 (ANZAM, IAM, SIMA)

Previous applicants and BAM Grant holders

Previously unsuccessful applicants may not submit an application that is substantially the same as any previously submitted applications. Proposals should be substantially different in terms of project concepts, proposed methodology and fundamental research questions. The only exception is applications that were desk-rejected as part of the administrative checks and that were not subject to academic desk reject, peer review or interview.

Previous holders of a BAM Transitions, MKE or Collaborative Research Award Grant wishing to apply to the scheme with a new proposal must have completed their previous project before the deadline for the current round of schemes. They must also have satisfactorily

submitted an end of grant report and supporting financial evidence, which was accepted by BAM and presented a conference paper relating to their research in accordance with the requirements relating to their funding round.

Previous holders of a SAMS/BAM Capacity-Building Grant wishing to apply to the scheme must have completed their previous project at least 2 years (24 months) before the deadline of the current funding round. They must also have satisfactorily submitted an end of grant report and supporting financial evidence, which was accepted by BAM.

Summary requirements for successful applicants (grant holders)

Grant Holders are required to fulfil the following key conditions upon being awarded the grant:

The Principal Investigator and any Co-Applicants based in schools of management and business must:

- Be a BAM Member at the time of application and maintain valid BAM Membership for the duration of the project.
- Acknowledge SAMS and BAM's support for the project in any publication (written or electronic) that arises as a direct result of the project.
- Inform SAMS and BAM of further research and/or impact that arises as a result of the project.
- Submit a six-monthly 'Interim Project and Financial Report'. This is to ensure that the project is proceeding as planned and to update SAMS and BAM regarding how much of the funding has been spent or committed. Lists of transactions under each of the key budget headings included in the application will be required. The agreed budget is included within Annex 1 of the contract.
- Submit an 'End of Grant Project and Financial Report' of no more than 3,000 words within two months of the completion of the project.
- **Present at least one full paper on the research outcomes at the BAM Annual Conference during the life of the project or within one year of completion of the project.** If there is any reason that this is not possible, the Principal Investigator must notify BAM and SAMS in writing and explain the circumstances. Costs for attendance at the conference cannot be claimed against the grant.
- Submit a lay person's summary of the research and key findings to be used on the BAM website and social media communication.
- Grant holders may be expected to report to the BAM Chair of Research Grants and/or the BAM Vice Chairs: Research and Publications Subcommittee to discuss research progress.
- The Research Office of the Principal Investigator's organisation (host institution) is responsible for monitoring the conduct of the award and ensuring that ethical standards are met. In cases where the research is not completed or ethical standards are not met, the host institution will not be eligible for any future funding through all BAM grants schemes.

Remit of applications

Applications are expected to align with one or more of the BAM Special Interest Groups (SIGs)

- Corporate Governance
- Cultural and Creative Industries
- e-Business and Information Systems Management
- Entrepreneurship
- Financial Management
- Gender in Management
- Human Resource Management
- Identity
- Innovation
- Inter-Organisational Collaboration: Partnerships, Alliances and Networks
- International Business and International Management
- Knowledge and Learning
- Leadership and Leadership Development
- Management and Business History
- Marketing and Retail
- Operations, Logistics and Supply Chain Management
- Organisational Psychology
- Organisational Transformation, Change and Development
- Performance Management
- Project Experiences
- Public Management and Governance
- Research Methodology
- Strategy
- Sustainable and Responsible Business

SECTION 2: Preparing and submitting an application

Application process and key dates

- **Online application form and call documents available (Thursday 3rd October 2024)**

Applications must be submitted electronically via the BAM grants portal. You can register on the grants portal at any time. The grants portal is available here:
https://bam.grantplatform.com/

It is currently not possible for more than one person to edit the same application in the grants portal.

It is recommended that you draft your application in a separate Word document using the Application Form Questions for Reference template available on the [SAMS/BAM 2025 call information page](#) before inputting your answers in to the [BAM grants portal](#).

Please note that there is no requirement to anonymise your application. Please include PI and Co-I names and institutions when drafting your application.

- **Optional information session (November 2024 – date to be confirmed)**

To support applicants, there will be a free information session (webinar). Registration for this information session is optional for submission of an application to this scheme. A recording of the information session will be made available via the BAM Grants webpages for applicants who are unable to attend the event. Details of the event will be advertised and can be booked via the BAM webpages.

- **Pre-submission administrative check (Thursday 9th January 2025)**

There will be an optional pre-submission check to ensure that an application meets the necessary threshold for administrative checks, particularly in relation to applicant eligibility, updates to previously submitted applications, budget eligibility, and requirements for attachments are met. **Applications requiring a pre-submission administrative check must be sent to Stuart Hull at grants@bam.ac.uk by the date outlined above.** It is anticipated that feedback will be provided within 2 weeks of the pre-submission deadline outlined above.

- **Application deadline for applicants (Thursday 30th January 2025 at 17:00 UK time)**

Applications must be submitted by Principal Investigators in the [BAM grants portal](#) by the above date and time.

You are strongly advised to submit your application before the deadline day in case of any technical issues. Applications will not be accepted after the deadline. Unsubmitted draft applications will not be considered.

- **Deadline for institutional approval Thursday 6th February 2025 at 17:00 UK time)**

The Head of Department or other nominated institutional approver named in your application form will receive an email asking them to approve the application in the grants portal. This must be completed the date and time outlined above. Approvers do not need to have a registered account in the grants portal.

Application requirements

The online application form on the [BAM grants portal](#) includes text boxes for all the details about the project that are required for peer review. In particular:

- Abstract and/or layperson's summary
- Aims and objectives
- Detailed research questions
- Proposed research methodology
- Existing data and any new data to be collected
- Data analysis to be carried out
- Potential problems and risks and how they will be mitigated
- Proposed outcomes and outputs
- Ethical issues and how these will be addressed

- Justification of resources and budget
- Mentoring and other support available within the institution
- Project workplan with key milestones
- Publication and dissemination plan
- Engagement and impact plan
- Engagement with SAMS/BAM Community
- Commitment to EDIR in project design and implementation
- Focus and reach of the project
- Motivations for applying for this Funding Scheme
- References

Each text box has a word limit that must be observed. All essential information (including the applicants CVs and institutional support letter) will be collected through the online application form.

Attachments

Attachments are only required and permitted in the following circumstances:

For early career researchers: *Mentor Statement* - If a mentor is required, the Principal Investigator must provide a letter of recommendation and support from the mentor, confirming their willingness to participate in the project and detailing their role therein.

For applications involving international co-investigators: *International Co-Investigator Head of Department/School Statement* – If the project involves international co-investigators, a letter from their Head of Department/School should be submitted for each International Co-Investigator that has been named in the application.

For applications involving a non-academic collaborator: *Collaborator Letter(s) of Support* - Collaborators' Letters of Support should be submitted for each non-academic collaborator that has been named in the application.

If any of these attachments required for these types of projects is missing from the application, it will be rejected at the initial administrative review stage. For further advice, please contact Stuart Hull on grants@bam.ac.uk.

We encourage applicants' research offices to make use of the optional pre-submission check which will be offered for the first time this funding round.

Use of Artificial Intelligence in applications

Artificial Intelligence Generated Content (AIGC) tools—such as ChatGPT and others based on large language models (LLMs)—cannot be considered capable of initiating an original piece of research without direction by human actors. They also cannot be accountable for research design or published work. Therefore—in accordance with COPE's position statement on AI—these tools cannot fulfil the role of, nor be listed as, an applicant on a research grant application. If an applicant has used this kind of tool to develop any portion of an application, its use must be described, transparently and in detail, in the Methodology section. The applicant is fully responsible for the accuracy of any information provided by

the tool and for correctly referencing any supporting work on which that information depends. Tools that are used to improve spelling, grammar, and general editing are not included in the scope of these guidelines. The final decision about whether use of an AIGC tool is appropriate or permissible in the circumstances of a submitted grant application lies with the grant awarding panel in collaboration with SAMS Council and BAM Executive.

Review criteria

Applications will go through an administrative and academic desk reject process. Any incomplete applications, applications that do not meet the eligibility criteria, or applications that are not sufficiently developed will be rejected at this stage. Applicants whose proposals were desk rejected will be notified within 6weeks of the application deadline. Notifications will be sent via email from the BAM Grants Portal. Please add sender@app.goodgrants.com to your safe list of email addresses.

Complete and developed applications will be peer-reviewed by two subject and/or methodological experts drawn from the British Academy of Management's Peer Review College and/or reviewers appointed by SAMS against the following criteria on a scale of 1 to 5 for each criterion:

Quality of project (50% of overall assessment)
1.1 Does the application demonstrate sound knowledge of the field including literature(s) relevant to the project?
1.2 Are the proposal methodology, research design and method of high quality and original?
1.3 Are the project and the project workplan viable?
1.4 Does the project have potential to contribute to the field (i.e., Conceptual originality and relevance to the wider management and business community)?
1.5 Have the implications of the project on ethics and EDIR been appropriately investigated and considered in the application?

Engagement with the SAMS and BAM communities (20% of overall assessment)
2.1 To what extent does the project fit with the Grant Scheme remit?
2.2 To what extent is the project aligned with one or more BAM Special Interest Groups or the BAM Management Knowledge and Education group as well as SAMS and/or BAM's Mission and one or more of BAM's Strategic objectives (see http://www.socadms.og.uk and https://www.bam.ac.uk/about-bam/strategy-2024.html for details)?

Publication, dissemination and impact plans and value for money (30% of overall assessment)
3.1 Is the project publication and dissemination plan to academic audiences ambitious, specific and aligned with the Grant Scheme remit as set out in Section 1 (introduction) of the guidance for applicants?

3.2 *Is the project impact and engagement plan with non-academic audiences ambitious, specific and aligned with the Grant Scheme remit as set out in Section 1 (introduction) of the guidance for applicants?*

3.3 *Does the project offer value for money?*

Summary criterion: Do the proposed outcomes justify the funding requested? This system---generated score represents an average of the reviewers' assessments of the above criteria.

SECTION 3: FINANCIAL GUIDANCE

The SAMS/BAM Research and Capacity Building Grant Scheme Awards Committee will evaluate applications submitted based on the following financial principles and funding criteria. SAMS/BAM is committed to funding one project this funding round, to a maximum value of **£75,000 for one project over a grant period of 18 months (minimum) to 24 months (maximum).**

IMPORTANT: Please check the financial guidelines carefully for eligible and ineligible costs.

1.1 The Grant cannot support full economic costing of projects, given SAMS/BAM's position as Registered Charities but costs for teaching replacement (to be calculated at the lowest lecturer scale) of up to 25% of the total funding requested (up to a maximum of £18,750) can be requested to enable the Principal Investigator and/or any Co-Investigators to dedicate time to the project.

1.2 Any individual non-staff cost that is more than 10% (£7,500) of the total funding available, must be clearly justified in terms of value for money.

1.3 The Grant will be contracted between SAMS/BAM and the Principal Investigator's organisation (host institution). The host institution is responsible for putting in place any collaboration agreements or subcontracts, and for distributing any funds received.

1.4 The host institution will issue an invoice to the BAM Grants Administrator to claim the first £60,000 of the grant. A balancing invoice of up to £15,000 will be submitted after acceptance by SAMS and BAM of the final report and expenditure statement. Any underspend must be returned.

1.5 The Grant holder(s) must not commit any expenditure prior to the contract being issued and the period of grant having commenced. All expenditure must have taken place within the dates of the project and been accounted for within two months of the project end date.

1.6 Priority will be given to applications that demonstrate value for money and financial clarity.

Eligibility of costs under the Grant Scheme

2. **Staff costs (research salaries and project support): The following items _may be covered_ under the Grant Scheme**

2.1 Salaries, employers' NI and Pension costs associated with additional teaching replacement required to enable Principal Investigators and Co-Investigators to carry out the project *(nb – must be costed at the lowest lecturer scale, and be no more than 25% / £18,750 of the total funding budget)*

2.2 Directly Incurred Research Assistants and other research staff to enable delivery of the project

2.3 Directly Allocated or Directly Incurred Project administration

3. **Travel, Accommodation and Subsistence (including conference attendance): The following items _may be covered_ under the Grant Scheme with sufficient justification.**

   3.1 **Accommodation, Travel and Subsistence**
   Applicants should provide estimates of, and justification for all accommodation, travel and other subsistence costs directly relating to the project.

   3.2 **Accommodation:** Applicants should obtain reasonably priced hotel accommodation in accordance with their own institution's travel and subsistence policy.

   3.3 **Travel:** Travel should be by the most economical means of transport, taking in to account any specific accessibility needs. Applicants should book early and take advantage of cheaper advance tickets, where possible. SAMS/BAM expect that travel will be at the lowest available fare, which should normally be economy/standard travel.

   3.4 **Conference attendance:** SAMS/BAM may consider expenses relating to conference attendance if the following criteria apply:

       3.4.1 The theme and subject of the conference is of direct and particular relevance to the application; and

       3.4.2 There are no other sources of funding available to the applicant.

4. **External services (transcription, translation, data collection, other subcontracts)**

   4.1 Assistance in transcription, translation, data collection and data inputting may be funded from the grant if the following conditions are met:

       4.1.1 The costing must be based on an established costing method used within the lead institution, or based on a quote from an official source, such as a professional transcription service that is used by the lead institution.

       4.1.2 The application must include details of how the estimated number of hours has been calculated.

5. **Consumables and materials: The following items _may be covered_ under the Grant Schemes if sufficient justification is provided:**

   5.1 Stationery

   5.2 Computing consumables (e.g. physical or cloud-based storage), equipment rental charges and software fees or purchases specifically required for the project

   5.3 Specialist publications that cannot be obtained through the host institution

6. **Equipment and hardware: The following items _may be covered_ under the Grant Scheme with sufficient justification:**

6.1 Laptops for field research can be requested where these are necessary for the research, and not already provided by the institution for research staff on continuing contracts.

6.2 Digital recorders

6.3 Camera and video equipment

7. **Other research costs: will be considered on a case by case basis.**

Exceptional Items: The following items _may be covered_ on an exceptional basis under the Grant Schemes if sufficient justification is provided:

7.1 Subject/interviewee incentives

7.2 Cost of microfiche records

7.3 Specialist reprographic services

7.4 Copyright permission fees

8. **Ineligible costs:**

8.1 FEC estates and indirect overheads cannot be claimed under the Grant Scheme

8.2 Costs relating to the mandatory attendance at a BAM Conference within the project duration are NOT eligible. Applicants will need to secure funding from their institution to fulfil the grant requirement of presenting one full paper at a BAM Conference during the award or within one year of project completion.

8.3 Laptop or desktop computers that would be provided as standard for existing or new employees will not be covered.