Charles A. King Trust
Postdoctoral Research Fellowship Program

Bank of America, N.A., Melissa MacGillivray Dane, and Susan Monahan, Co-Trustees

Application Guidelines | Grant Cycle 2025

SUBMISSION DEADLINE	Terms of the Award
Wednesday, March 5th, 2025 2:00 PM, Eastern Time	Application Instructions

Award Summary	
Award Amount:	Ranging from $194,100 to $215,000 total, inclusive of a $25,000 annual flexible expense allowance. See Funding Information for more details.
Award Dates:	October 1, 2025 – September 30, 2027
Eligibility:	**Who:** Senior postdoctoral researchers and mentored clinician-scientists (MD, DO or equivalent). **Where:** Working in Massachusetts. See Eligibility Criteria for more details
Research Focus:	**Basic and Preclinical Science Program:** Basic science research that seeks to increase understanding of the underlying biological processes relevant to human health and disease or move findings from basic research towards clinical application. **Clinical and Implementation Research Program:** Research involving *human* studies including physiological research, behavioral science and health education research, translational research (the application of bench research to patient care), epidemiological research, health services and policy research, outcomes research, and research about healthcare delivery and population health, regardless of specialty or discipline.

HEALTH RESOURCES IN ACTION

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Program Overview and Statement of Purpose

The Charles A. King Trust was established in 1936, to "support and promote the investigation of human disease and the alleviation of human suffering through improved treatment." The primary goal of the Charles A. King Trust Postdoctoral Fellowship Program is to support research that focuses on the causes of human disease with the mission of improving its treatment. The program provides funding to postdoctoral fellows and clinician scientists in the mid to late stages of their research training in basic and preclinical science, and clinical, health services, population health, and implementation research to help them achieve their goals of becoming independent investigators in biomedical research.

The Charles A. King Trust Postdoctoral Fellowship Program is administered by Health Resources in Action (the Administrator), on behalf of the Trustee, Bank of America, N.A. (the Funder). Health Resources in Action (HRiA) is a non-profit organization that partners with individuals, organizations, and communities to transform the practices, policies, and systems that improve health and advance equity.

Sara Elizabeth O'Brien Trust, Bank of America, N.A., Trustee, and the Simeon J. Fortin Charitable Foundation, Bank of America, N.A., Trustee and private foundations also contribute to this Program. Please reference these funds below regarding their research focus and eligibility.

Research Focus

In keeping with the Foundation's mission, the program is designed to support research across biomedical fields that focuses on the causes of human disease with the mission of improving treatment. Additional funding from the Sarah Elizabeth O'Brien Trust and Simeon J. Fortin Charitable Foundation supports research focused on cancer or vision. Applicants in these research areas are highly encouraged due to the availability of these dedicated fellowships.

Applicants may apply under one of the two separate, but linked programs:

The **King Trust Basic and Preclinical Science Award Program** supports scientists in the mid to late stages of their postdoctoral research training. Proposals in the **basic sciences** seek to increase our understanding of the underlying biological processes relevant to human health and disease. **Preclinical sciences** seek to move findings from basic research towards clinical application. The King Trust aligns its definitions of basic sciences and preclinical sciences with the National Institutes of Health.

> Basic Research[1] is defined as a systematic study directed toward greater knowledge or understanding of the fundamental aspects of phenomena and of observable facts without specific applications towards processes or products in mind.
>
> Preclinical Research[2] connects the basic science of disease with human medicine. Scientists may develop model interventions to further understand the basis of a disease or disorder and find ways to treat it. Testing is carried out using cell or animal models of disease; samples of human or animal tissues; or computer-assisted simulations of drug, device, or diagnostic interactions within living systems.

The **King Trust Clinical and Implementation Research Award Program** supports scientists in the early to mid-stages of their research training. Clinical or implementation research funded by this program support *human* studies including physiological research, behavioral science and health education research, translational research (the application of bench research to patient care), epidemiological research, health services and policy research, outcomes research, and research about healthcare delivery and population health, regardless of specialty or discipline. The King Trust has adopted similar, *but not identical*, definitions for clinical research and implementation research from the National Institutes of Health. Research projects involving patient derived tissue, samples, or data; or using cell culture or animal models seeking to understand basic science questions, should be directed to the King Trust Basic Sciences category.

Clinical Research[3] includes research with human subjects that is:

1. Patient-oriented research. Research conducted with human subjects (or on material of human origin such as tissues, specimens, and cognitive phenomena) for which an investigator (or colleague) on the proposed study directly interacts with human subjects. It includes: (a) therapeutic interventions, (b) clinical trials,

[1] *https://grants.nih.gov/grants/glossary.htm#BasicResearch*
[2] *https://ncats.nih.gov/translation/spectrum*
[3] *grants.nih.gov/grants/glossary.htm#ClinicalResearch*

(c) development of new technologies, or (d) mechanisms of human disease that can be directly linked to detection, diagnosis, progression, or severity of disease. Excluded from this definition are *in vitro* studies that utilize human tissues that cannot be linked to a living individual.

2. Epidemiological and behavioral studies.
3. Outcomes research and health services research.

Implementation Science[4] is the study of methods to promote the adoption and integration of evidence-based practices, interventions, and policies into routine health care and public health settings to improve our impact on population health.

For questions regarding basic versus clinical research, please refer to the Frequently Asked Questions document.

Diverse and Inclusive Research

According to the National Academy of Science and Medicine, the cultural diversity of a nation's workforce, including science, technology, engineering, and mathematics (STEM) is a key factor in its ability to innovate and compete in a global economy. To promote and enable diversity in biomedical research, the King Trust is committed to awarding researchers of all backgrounds, including racial/ethnic groups that are underrepresented in science. The National Science Foundation and the National Institutes of Health have shown that individuals from the following racial and ethnic groups are underrepresented in science: Blacks or African Americans, Hispanics or Latinos, American Indians or Alaskan Natives, Native Hawaiians and other Pacific Islanders. Applicants from these groups are encouraged to apply.

The King Trust seeks to support the next generation of scientific leaders who are dedicated to creating a diverse, equitable, and inclusive research environment, and who contribute to the wider research community and promote positive research culture. Such efforts will not only help to advance scientific discovery through diversity of thought but also maximize the impact of biomedical research funding. Applicants and mentors are encouraged to speak to their commitment to promoting diversity, equity, and inclusion, and positive research culture within the application.

Eligibility Criteria

All applicants must meet the following requirements by the funding start date.

Applicant Eligibility:

- By the funding start date (October 1, 2025), applicants must hold a doctoral degree (Ph.D., M.D., D.M.D., M.D./Ph.D., DO, DMD, PharmD, DPT or equivalent) and work in an academic or medical research institution in the state of Massachusetts. Degrees obtained outside the United States must be equivalent.
    - Must be engaged in mentored non-independent research (postdoctoral or equivalent).

[4] *https://cancercontrol.cancer.gov/is/about*

- **Applicants without clinical training:**
    - Must have at least 90% protected time for research
    - Must have completed at least three (3) years and no more than six (6) years of full-time postdoctoral research experience*. Eligible applicants will have begun their full-time postdoctoral work between October 1, 2019 and September 30, 2022;
- **Applicants with clinical training:**
    - Must have at least 70% protected time for research.
    - Must have completed no more than six (6) years of cumulative full-time postdoctoral research experience* since completion of residency (or similar clinical training). Clinicians in fields without formal internship and residency requirements (e.g. PhD Psychologists and PharmD applicants) may have up to six (6) years of cumulative research experience after completion of all clinical education required for licensing. King Trust Award support may not overlap with fellowship support. Clinician-scientists are encouraged to apply for the King Award during the last year of their fellowship program.

***Postdoctoral research experience** is defined as full-time research experience after receiving one's doctoral degree, or completion of residency or equivalent for those with a MD, MD/PhD, PhD, DO, DPT, etc. Experience includes research in a laboratory or similar professional setting either domestically or abroad. Research conducted during research intensive years of clinical fellowship training where time spent on research was greater than 50% effort is counted. In some cases, postdoctoral research may occur after the first doctoral degree but prior to starting residency/fellowship clinical training. All research experience must be documented by the Mentor. For more information on determining completed years of research experience see our FAQs document.

Pauses in Research Experience: For all applicants, if research was interrupted for family or medical leave, or for other extenuating circumstances (including COVID-19, military leave), these months are not considered part of the full-time research experience. Periods of research training in a degree-granting program (i.e., study for a Ph.D., MPH, MSc, or second degree) are excluded. Eligibility extensions for COVID-19 related research disruptions will be limited to a maximum of six months. For questions regarding eligibility, applicants are encouraged to contact program staff at KingAwards@hria.org.

Publications: By the application deadline (March 5, 2025), the Applicant must have at least one peer reviewed research article (review articles are not allowed) from their postdoctoral work.

- The Applicant may be a co-author on the publication, however competitive Applicants typically have a first-author publication from the current postdoc lab.
- Applicants with a publication in press or submitted for review will be considered eligible if the article is publicly available as a preprint (e.g. BioRxiv). For publications in press that are not and cannot be made publicly available, please contact program staff to confirm eligibility.

Mentor(s): By the funding start date, apply under the guidance of a Mentor who is an established investigator with an active research program where the Applicant will be conducting research. Mentors are expected to be involved in the planning, execution, and supervision of the proposed research.

- Only one applicant per Mentor may apply per application cycle; there are no institutional limitations on the number of applicants who may submit applications.

Citizenship: United States citizenship is not required; visa documentation is not required.

Concurrent Funding:

- Applicants **may not** hold a concurrent Career Development Award, including an NIH K, KL2 Award, or equivalent award from private sources, at the time of application or award. For more information on what constitutes a Career Development Award, as well as some examples of awards that would deem a potential applicant ineligible, please visit our FAQ Document.
- To encourage the support of fellows who do not currently have significant funding, applicants **are ineligible if** they are the PI on awards that have a combined federal and non-federal funding totaling more than $100,000 (for applicants without clinical responsibilities) or $150,000 (for applicants with clinical responsibilities) in direct costs, during the first year of the King Award (October 1, 2025 – September 29, 2026). These amounts refer to external funding only, and do not include the King Award itself, or awards designed to support loan repayment.
- Applicants that have an expiring F Award are welcome to apply, however F awards may not be held concurrently with the King Trust Postdoctoral Fellowship Award.
- **Pending Awards:** Applicants with pending applications to the NIH and/or other funders are encouraged to submit proposals to the King Trust. Applicants should check concurrent funding restrictions for existing awards and are encouraged to contact program staff to confirm eligibility.

It is the responsibility of applicants/awardees to contact program staff regarding the following:

- Applicants must withdraw their proposals if, before the funding start date of October 1, 2025, they receive a Career Development Award or equivalent, and/or receive an award that increases direct costs above the allowable limits stated above, during the first year of King Award Funding.
- Awardees may be required to relinquish their award if they receive a Career Development Award or equivalent, and/or a faculty appointment, after the fellowship has been awarded. All outstanding Fellowship funds must also be returned.

For questions regarding eligibility, applicants are encouraged to contact Program staff at KingAwards@hria.org and confirm eligibility before preparing their applications.

Funding Information

The Charles A. King Trust Postdoctoral Fellowship Award is a two-year award that supports salary, 10% fringe allowance, and flexible allowance funds based on the years of relevant research experience since receiving one's doctoral degree, as of the funding start date of October 1, 2025. The funding period is October 1, 2025 – September 30, 2027. The salary for

Year 2 will increase to the next level of support. Examples of how applicants have proposed to use the flexible allowance are listed in the FAQs.

Salary based on Years of Relevant Postdoctoral Research Experience						
Years of Experience	Salary per Year	10% Fringe Allowance	Flexible Allowance per Year	Year 1 Total	Year 2 Total	Two-Year Total
Less than 1	$65,000	$6,500	$25,000	$96,500	$97,600	$194,100
1	$66,000	$6,600	$25,000	$97,600	$98,700	$196,300
2	$67,000	$6,700	$25,000	$98,700	$99,800	$198,500
3	$68,000	$6,800	$25,000	$99,800	$102,000	$201,800
4	$70,000	$7,000	$25,000	$102,000	$104,200	$206,200
5	$72,000	$7,200	$25,000	$104,200	$106,400	$210,600
6	$74,000	$7,400	$25,000	$106,400	$108,600	$215,000
7	$76,000	$7,600	$25,000	N/A	N/A	N/A

Selection Criteria

It is important to note that these are highly competitive awards. **Prior to applying, we recommend that applicants consult with former awardees and faculty advisors to determine if they are likely to be competitive for this award program.** Visit https://hria.org/tmf/King to view a list of past awardees.

The criteria used by the reviewers to evaluate applications include:

Research Proposal	▪ The research will contribute to understanding the causes of human disease to help improve its treatment. ▪ The proposed work is original, creative, and impactful. ▪ The research hypothesis is novel and/or builds on current knowledge and references relevant literature. ▪ The research aims are well conceived and necessary to complete to inform the hypothesis. ▪ The research methodology, data collection, and analytical plan are feasible and appropriate to the proposal's aims. ▪ Resubmitted proposals have effectively addressed past review critiques with appropriate references to changes made to proposal sections. (see Application Instructions for resubmission guidance)
Applicant	▪ The proposed work builds upon the applicant's prior research and has the potential to meaningfully contribute to the applicant's professional training and growth towards becoming an independent researcher. ▪ The career trajectory demonstrates increasing research independence through learning new techniques/methodology/analyses, completing research on new topics, mentoring/supervising laboratory staff, and authorship of publications. ▪ The applicant has demonstrated commitment and contributions to fostering a diverse, equitable, and inclusive environment, promotion of a positive research culture, and contributions to the greater research community.

	▪ The applicant's professional and personal experiences help build a diverse STEM workforce.
Research and Career Development Plan	▪ The plan includes relevant research benchmarks to complete work necessary to address the proposal's aims. ▪ Learning opportunities for methodological skill development, grant writing, publication, public speaking, and laboratory management are included as appropriate. ▪ The mentor's role in the applicant's research and career development is clearly outlined as part of the plan. ▪ Relevant research dissemination, networking, and potential funding application opportunities are outlined and build toward the applicant's goal of becoming an independent researcher. ▪ The applicant will have appropriate opportunities to supervise laboratory staff and trainees.
Mentor	▪ The mentor has experience with mentoring and/or has built a team of mentors to enable the success of the applicant in advancing their career. ▪ The mentor demonstrates commitment to supervise and train the Applicant during the research period and provide the financial support necessary to complete the research. ▪ The mentor demonstrates commitment to supporting the Applicant's career and research development including a clear project ownership plan to support transition toward independence. ▪ The training environment is sufficient in enabling the applicant to complete the proposed research. ▪ The mentor speaks of the importance of the proposed research and how the research will help the applicant in securing an independent role.
Letters of Recommendation	▪ Letters of recommendation attest to the importance of the proposed research, and that the proposed work will complement and build upon the applicant's background in achieving their goals of becoming an independent investigator.

Notification Schedule

Final notification to Applicants will be made in August 2025. If available, critiques of the grant applications will be provided. Applicant ranking in the review process will not be provided.

Historical Success Rate

Historical Statistics		2020	2021	2022	2023	2024
Basic Science	Eligible Submissions	52	77	57	105	126
	Award Recipients	14	10	19	10	8
Clinical Science	Eligible Submissions	10	22	7	25	32
	Award Recipients	2	3	2	2	2

Proposal Writing Tips

Applicants are strongly encouraged to practice and work towards enhancing their grant writing in drafting their applications to maximize their chances of being funded. Mentors should be actively engaged in the preparation of the proposal. *The writing of the proposal will not be directly assessed*; however, it is recognized that clarity of the writing enhances the ability of the reviewers to follow the logical progression of the proposal and assess the impact the work will have on human disease, the applicant's qualifications, ability to conduct the proposed work, and support from the mentor/mentorship team.

The Review Committee is composed of a multi-disciplinary group of researchers with the ability to assess a wide range of proposal topics.

Characteristics of a well-written proposal include the following:

- Funding via non-governmental agencies is different. Make sure the proposal is reflective of the program goals and review criteria.
- Tell the story and *sell* the proposed work; make sure the background outlines and justifies why the proposed questions are important to answer, and the proposed approach is promising.
- The language should be understandable to a general scientific audience. When jargon must be used, it is clearly explained, and complex technical points are put in context.
- The composition and oversight of the mentorship team should be reflective of an applicant's research and career goals.
- Don't fall victim to proposing to complete too much work. Reflect on the timeline of the work to ensure it can be feasibly completed.
- Provide enough time to obtain feedback and allow for proofing prior to submission.

Applicants are encouraged to seek feedback on their proposals within their institutions. Examples of successful proposals can be found in the grant-writing tip sheets for NIH research grants. Institutions and colleagues may also be willing to provide examples of well-written and successful grant applications.

Suggested resources:
Secrets to Writing a Winning Grant: https://www.nature.com/articles/d41586-019-03914-5
NIH grant writing tips:
https://www.nlm.nih.gov/ep/Tutorial.html
https://www.nimh.nih.gov/funding/grant-writing-and-application-process/grant-writing-tips.shtml
https://grants.nih.gov/grants/how-to-apply-application-guide/format-and-write/write-your-application.htm#Important%20Writing%20Tips

Related Documents and Materials

Download and review the following items: www.hria.org/tmf/King

- **Frequently Asked Questions**
- **Application Forms**

Direct any Questions to Program Staff:
KingAwards@hria.org

Continue to the following page for Application Submission Instructions

Application Instructions

Deadline: Wednesday, March 5, 2025 at 2:00 PM, U.S. Eastern Time

Online Portal:

Please use the following links to access the Online Application:

- Begin a New Online Application: https://www.grantrequest.com/SID_738?SA=SNA&FID=35057
- Return to a Saved Online Application: https://www.GrantRequest.com/SID_738?SA=AM

Online Application Form:

The following sections are required within the Online Application:

- ☐ **Institution's Tax ID Number**
- ☐ **Eligibility Quiz:** Applicants must confirm that they meet the eligibility requirements as stated in the Guidelines.
- ☐ **Applicant Data:** This includes Applicant Institution, Contact Information, Demographic and Educational background information, ORCID identification number (if available).
- ☐ **Research Project:** Project Title, Keywords, Project Summary, Non-technical Summary, and Mentor information
- ☐ **Institutional Contact Information**
- ☐ **Statement of Mentor's Commitment to Diversity, Equity, and Inclusion:** Please ask the mentor to include a description of the mentor and institution's commitment to improving diversity, equity and inclusion. This section should be no longer than 250 words. The purpose of this collection is to learn of the current practices of institutions and mentors that support King Trust Fellows and will not be used as part of the review criteria.
    - Please see the University of California, Irvine site for helpful guidance on writing a diversity and inclusion statement: https://ap.uci.edu/faculty/guidance/ieactivities/.
- ☐ **Letters of Recommendation:** Using the online request system, request three (3) confidential letters from 1) your Mentor (Letter of Support), 2) your Thesis Advisor, Residency Director, Fellowship Director, Division/Department Chair, or equivalent who can comment on your training, and 3) your choice. Only one Mentor's Letter is allowed. If applicable, any co-mentor letter must be one of the two additional recommendation letters. Collaboration letters will not be accepted. Updated letters submitted after the deadline will not be accepted. Please see the Instructions for Letters of Support and Recommendation below.

    Please Note: It is the responsibility of the Applicant to obtain these three (3) letters prior to the Application Deadline. Members of the Review Committees give considerable weight to these letters. Please notify your Recommenders early in the application process to allow them sufficient time to prepare your letter. It is advisable that you begin an online application immediately, enter the names and emails of your Mentor and two recommenders and then send each the email request from the online system. Please confirm with your recommenders that they have received your request. For additional instructions

regarding the monitoring and upload of letters, please see the troubleshooting steps below.

- ☐ **Attachments:** A PDF document must be uploaded to the Online Application. Please see further instructions below.
  - Application document (PDF) – please name as "LastName, First Name.pdf"
  - **Download the Application Forms and templates:** www.hria.org/tmf/King

Application Document (PDF)

Instructions: This document includes some of the same information that is submitted in the online form. However, the proposal sections listed below must be combined and converted into one PDF file and uploaded in the online application. This signed pdf document must not be locked for editing. This document does not include the three (3) required confidential letters of recommendation, which will be appended separately by HRiA staff upon receipt. Name this document "LastName, FirstName.pdf" (for example: Smith, Jane.pdf).

The required Application Forms containing templates for the following sections can be found in a separate MS Word document located at www.hria.org/tmf/King

Include all items listed below (#1-12) combined in the following order into ONE PDF document for online upload:

1. **Application Cover Page (template provided):** The Cover Page must be completed and signed by the Applicant, Mentor, and the Office of Sponsored Programs or the Institutional Officer administratively responsible for oversight of the project.

   The acknowledgement of the Applicant and Mentor/Chair/Division Chief on the Cover Page will confirm responsibility for obtaining any required human subjects (IRB), animal use (IACUC), and/or other institutional approvals. In addition, the Mentor's/Chair/Division Chief's and Institutional Officer's acknowledgement will confirm that all eligibility requirements have been met. Endorsement by the Institutional Officer also confirms that the Institution will commit to appropriate oversight if the project is funded.

2. **Table of Contents (template provided):** Follow the Table of Contents and number all pages.

3. **Applicant Eligibility, Research Experience, and Career Trajectory (template provided):** Complete the form according to the instructions. The Career Trajectory section is optional.

4. **Contributions to the Research Community and Promotion of Positive Research Culture (template provided):** Complete the form according to the instructions. Each section should be limited to 200 words or less.

5. **Research Project Title and Summary (template provided):** Complete the form according to the instructions at the top of that page. This summary will be posted on our website if the project is funded *(maximum of 300 words)*.

6. **Non-Technical Summary (template provided):** Prepare a lay-language description of the proposed research that can be understood by the general public *(maximum of 150 words)*.

7. **Project Ownership Plan (template provided):** To support the career development and transition of the applicant into an independent research position, the Mentor and the Applicant should agree upon the ownership for the project and resources generated therein. Complete the form according to the instructions. *(maximum of 350 words)*

8. **Research Proposal** *(maximum of six pages, not including References).*
Research Proposal Format: Arial 11 font and size must be used in the text of the research proposal section. Use single spacing within paragraphs, double spacing between paragraphs, and half-inch margins on all four sides. Any figures, graphs, tables or images may use an 8 point-font size and must be included within the page limit. Supplementary material (e.g. reprints of publications, appendices, additional data, or institutional letters) are not permitted and will be removed. Include the Applicant's name at the top of each page.

   Within the page limit, include the following sections. <u>Headers for each section must be used and included in the order listed below.</u>

   a. **Resubmission Response** (if applicable, maximum of 300 words)
      a. For project resubmissions, please provide a high-level description of the issues that were raised previously by reviewers and how those concerns were addressed in the current proposal. This should not be a point-by-point rebuttal but rather a summary of how the new application addresses key issues raised by the reviewers, including changes to the overall hypothesis, specific aims, and if new preliminary data were added.
   b. **Background**
   c. **Specific Aims**
   d. **Preliminary data** (if available)
   e. **Research design, experimental methods and analytical plan**
   f. **Research limitations and/or potential pitfalls**
   g. **Human Subjects** (if applicable, maximum 3 pages, not included in page limit).
      a. Research involving Human Subjects and/or requiring IRB approval must include the possible risks of the study as well as steps planned to protect patient safety. Justification for the sample size included in the research design must be provided. Consistent with current NIH policies, funded clinical research must include women and minority groups as well as a rationale that speaks to composition of the study population. Any exclusions within the study population need to be described and scientifically justified.
   h. **References** (not included in page limit)

Note: Sections listed should include content that supports the proposed aims.
Example:

a. **Resubmission Response**
b. **Background**
c. **Specific Aims**
d. **Preliminary Data**
    a. **Aim 1**
    b. **Aim 2**
e. **Research design, experimental methods and analytical plan**
    a. **Aim 1**
    b. **Aim 2**
f. **Research limitations and/or potential pitfalls**
    a. **Aim 1**
    b. **Aim 2**
g. **Human Subjects**
h. **References**

9. **Research and Career Development Plan** (maximum of 1 page, not included in Research Proposal page limit): This may include a written narrative and a table that clearly outlines the project goals, timeline, and research milestones; mentor(s) contributions associated with the proposed specific aims; and related research/career development activities such as supervision and mentorship roles, other funding opportunities, job applications, and learning and skill development opportunities (courses, workshops, seminars, conferences, research techniques, etc.).

While there is no set template or ideal career development plan, you can find an example of what is accepted here. Applicants are also encouraged to review suggestions provided by NINDS.

10. Program Budget and Other Support Form (template provided):
Complete the form according to the instructions. The Applicant should provide current total compensation, additional mentor support and justification for the proposed use of the $25,000 flexible allowance for each year of funding. Both the Applicant and Mentor should provide Current and Pending support information.

- Other Support includes all financial resources, whether Federal, non-Federal, commercial, or institutional, available in direct support of an individual's research endeavors, including but not limited to research grants, cooperative agreements, contracts, and/or institutional awards. Prizes or gifts do not need to be included.
- Duplication of funding is not allowable. PI/Applicant and Mentor should list all active and pending support, addressing potential overlap (if any) associated with the current proposed specific aims. If the research project is supported by other funding sources, a plan must be provided outlining how duplication of funding will be avoided.
- Effort devoted to projects must be measured as a percentage and indicated for each project.
- If applicable, please also provide grant overlap for co-investigator's/key personnel.

11. **Applicant Biosketch:** Use the current NIH Biographical Sketch form (non-fellowship format). We recommend using SciENcv software to generate the biosketch (http://www.ncbi.nlm.nih.gov/sciencv/). *(maximum 6 pages)*

12. **Mentor's Biosketch and List of Trainees:** Use the current NIH Biographical Sketch form. A maximum of 3 mentor biosketches will be allowed (primary mentor and two co-mentors). Biosketches should include a listing of previous trainees with their current positions. *(maximum 6 pages each, including trainee list)*

13. **Letters of Recommendation:** (submitted confidentially online)

THREE (3) confidential letters are required and must be submitted through the online system. They must be from 1) your Mentor; 2) your Thesis Advisor, Residency Director, Fellowship Director, Division/Department Chair, or equivalent who can comment on your training; and 3) your choice.

It is the responsibility of the Applicant to obtain these three (3) letters prior to the Online Application deadline. **Members of the Review Committees give considerable weight to these letters.** Please notify your Recommenders early on in the application process to allow them sufficient time to prepare your letter. It is advisable that you begin an online application immediately, enter the names and emails of your Mentor and two recommenders and then send each the email request from the online system. For additional instruction regarding the **monitoring and upload of letters**, please see the Requesting Letters of Recommendation page of this document.

Primary Mentor's Letter of Recommendation *(maximum of three (3) pages and submitted confidentially through the online application system)*:

All mentors **must confirm** the following within their Letter of Support:

- **Eligibility:** Confirm the Applicant meets all eligibility requirements for the award as stated in the Guidelines; that they have completed the required amount of postdoctoral (or equivalent) research experience and/or completed clinical training by the award start date and can commit the expected time to research. Please explain if anything other than full-time experience is being considered in fulfillment of these requirements. If the Applicant has indicated any pauses to research experience, the mentor should comment and confirm, if applicable.
- **Applicant Qualifications:** Describe the Applicant's career trajectory and/or prior training, research ability/potential, self-reliance/independence, and critical thinking skills. If applicable, Mentors must also confirm an applicant's degree(s) obtained outside the United States are equivalent to the Ph.D., M.D., D.M.D., or other doctoral degree.
- **Publication and publication history** will be used as criteria to judge the applicant's demonstrated ability to complete scientific research and their contributions to the field. The Mentor must comment on the applicant's publication record.
- **Mentorship Plan:** Referencing the Research and Career Development Plan, the plan must specify the mentor's allocated time and effort in training and

supporting the applicant. In alignment with the Research and Career Development Plan, this should include activities that support the applicant's proposed project and their transition toward independence. This may include statements regarding developing data presentations, grantsmanship, funding guidance, laboratory management, and shaping their research narrative for job searches. State why the mentor has taken on this role for the applicant and how the Mentor will use their professional and scientific knowledge to support the Applicant to further develop their independence and promote their scientific career.

- **Mentorship Team:** If the applicant has a mentorship team overseeing their research project, roles of each member of the mentorship team should be described in this section. Provide assurance that appropriate time and support will be available for any proposed mentor(s) and/or other staff.
- **Research Environment:** Provide a description of how the research environment (department and laboratory environment) supports diversity and inclusion, and a positive research culture to advance science.
- **Institutional Support:** Include a brief description of the institutional support available that confirms the candidate will have access to sufficient office and laboratory space, equipment, and other resources and facilities (including access to clinical and/or other research populations) to carry out the proposed research plan.
- **Financial Support:** The King Trust funding may not cover all research-related costs. The mentor should provide a statement regarding funding available for research related supplies, equipment, personnel, and publication related fees. It is encouraged that the mentor support costs that may otherwise prohibit or limit the applicant's ability to perform independent research.
- **Project Ownership:** The King Trust seeks to support those researchers that are nearing their transition toward independence. Mentors must include a statement that describes the portion of the project for which the applicant will be responsible and have ownership to take to an independent research position. The applicant may use this project to pursue additional grant funding, and that the mentor will not compete with the applicant on the project that is "owned" by the applicant.

Two Additional Letters of Recommendation *(maximum of two (2) pages per letter and submitted confidentially through the online application system).*

- Recommenders should describe their association with the Applicant and comment on the following: the Applicant's current research and how it may inform the research field and spur future research endeavors, trajectory toward independent research, and critical thinking skills.
- For Ph.D. applicants, a letter of recommendation is required from the thesis advisor or someone able to comment on the Applicant's training during their doctoral studies.
- For M.D. applicants, instead of a thesis advisor letter, a letter of recommendation is required from the Residency Director, Fellowship Director, or Division/Department Chair who can comment on their training.

- **Co-Mentor Letters:** If applicable, any co-mentor letter must be one of the two additional recommendation letters. Extra letters are not allowed for multiple co-mentors, however a joint letter may be submitted.
- Collaboration letters, or letters of support, will not be accepted, however the Primary Mentor may speak to such support as outlined below.
- Updated letters submitted after the deadline will not be accepted.

Bias in Recommendation Letters

We are all working to reduce bias, and letters are sometimes biased in ways that systematically disadvantage people based on race and/or gender. As letters are being prepared, we have provided a table that provides suggestions for letter writing to help avoid bias as modeled after the University of Arizona's guidance on this topic.

Mention research & publications	Letters of reference for men are more likely to mention publications and to have multiple references to research. Put these critical accomplishments in every letter.
Don't stop too soon	On average, letters for women are shorter and more likely to make a minimal assurance ('she can do the job') rather than a ringing endorsement ('she is the best for the job').
We all share bias	Unconscious gender bias isn't exclusively a male problem. Research shows that women are as susceptible to these common pitfalls as men.
Keep it professional	Avoid gratuitous references to personal life and make sure you use formal titles and surnames for both men and women.
Stay away from stereotypes	Do not invoke negative stereotypes even indirectly (she is not emotional'). Be careful evoking even positive gender stereotypes (caring', 'compassionate', 'helpful'), as even these can potentially hurt a candidate.
Be careful raising doubt	Honest letters are crucial, but negative or irrelevant comments, such as 'challenging personality' or 'I have confidence that she will become better than average' are twice as common in letters for female applicants. Don't add doubt unless it is strictly necessary.

IMPORTANT: It is the Applicant's responsibility to monitor the status of the online recommendations prior to the application deadline. Applicants will not be able to complete the application process if the letters are not submitted. See the information below on how to request Letters of Recommendation and troubleshooting steps for using our online system.

We are available to ensure the timely submission of your application and can help with any questions or concerns. Late submissions will be rejected.

HRiA is committed to making our resources accessible to everyone. If you require an accommodation or service to access our resources, please contact Program Staff.
Direct any Questions to Program Staff:
KingAwards@hria.org

(12.2024)

Requesting Confidential Letters of Recommendation

THREE confidential letters

1) Your Mentor,
2) Thesis Advisor, Residency Director, Fellowship Director, Division/Department Chair, or equivalent,
3) Your choice for one additional Recommender (or co-mentor)

- Applicant sends email via the online application system to each Recommender
- The Recommenders must use the link provided in the email request to upload the confidential letters
- Recommenders provide official letters recommendation
- Application is ready for submission

Instructions for Sending an Email Request to each Recommender:

- On the "Recommenders" page of your application, input the Recommenders names and emails.
- Check the "Write and Send Email" box for the specific individual you are contacting. (Note: the form default is to have all the "Send Email" boxes checked so make sure you uncheck the others until you are ready to draft each individual message).
- Click on the "Send" button.
- This will bring you to the "Notify Selected Recommenders" page. Customize the subject line and draft your email message for each Recommender with your request.
- Click on the "Email and Send" button again. This will send the email to your selected Recommender. Included in the sent email is an automatically generated link that will allow him/her to upload their confidential letter.
- After sending your email, you will be redirected back to the "Recommenders" page.
- The Recommenders must use the link provided in the email request and log in using the email address to which your request was sent.
- Letters must be in PDF format on institutional letterhead and not password protected.
- When the Recommenders submit their letters, they will become part of your application. You may log into your My Account page (https://www.grantrequest.com/SID_738/?SA=AM) to view the status of these letters. The files will appear on this page, but you will not be able to open or read them.
- Notify your Recommenders to expect the email request. If you experience any issues or your Recommenders do not receive the email(s) from the online system within the same day as the request, or have difficulty uploading the letters, refer to the troubleshooting steps below as a first step before contacting Program Staff.

Troubleshooting steps:

- Remove and re-add Recommender email to generate new link. Recommender should check their Spam or Junk Folder for the email link.
- Safe list the system email - Mail@grantapplication.com - to prevent the email from looking like Spam or Junk mail. Helpful link regarding Safe listing: http://email.about.com/od/outlooktips/qt/et092904.htm
- Re-send the request utilizing a personal email (non-institutional) for the recommender.
- Return to your Account link to see that letters have been uploaded and you are ready to submit: https://www.grantrequest.com/SID_738?SA=AM

If the troubleshooting steps above do not work, please contact Program Staff at: KingAwards@hria.org

Terms of the Award

Charles A. King Trust
Postdoctoral Research Fellowship Program

Bank of America, N.A.,
Melissa MacGillivray Dane, and Susan Monahan, Co-Trustees

Terms of the Award – 2025 Grant Cycle

Overview: The Charles A. King Trust Postdoctoral Fellowship Award Program is administered by Health Resources in Action. Health Resources in Action (HRiA) is a nonprofit organization in Boston that advances public health and medical research. Funds are provided by the Charles A. King Trust, Bank of America, N.A., Co-Trustees or other foundation donors.

In order for Bank of America, Private Bank, as Trustee of the Charles A. King Trust (the "Funder"), and The Medical Foundation at Health Resources in Action (the "Administrator") to carry out our legal responsibilities, we must ask the award recipient (the "Recipient") and the Recipient's institution (the "Institution") as identified in the Application, to read and acknowledge this award agreement (the "Agreement") for Recipient's proposed project submitted to the Administrator (the "Project"). The Agreement specifies the Recipient's and Institution's obligations for the duration of this award as identified above.

Award Amount and Funding Period:
Awards are made according to the stated schedule. Recipients may postpone the start date for up to three (3) months without an approval, but the revised date must be noted either on the signature page of this Agreement or by an email notification to the Administrator. Longer delays must be approved by the Administrator. A delayed start date will not reduce the total award period; the end date will be adjusted to include the entire period.

Awards are made to non-profit academic, medical, non-governmental or research institutions in the Commonwealth of Massachusetts on behalf of the Recipients. The Institution is responsible for the administrative and financial management of the Project, including any subcontracts, and maintaining adequate supporting records and receipts of expenditures.

The Charles A. King Trust Postdoctoral Fellowship Award is for salary, 10% fringe allowance, and flexible allowance funds based on the number of years of relevant experience since receiving one's doctoral degree, as of the funding start date of October 1, 2025. The salary for Year 2 will increase to the next level of support. Funds are provided by the Funder or other foundation donors.

Salary based on Years of Relevant Postdoctoral Experience						
Years of Experience	Salary per Year	10% Fringe Allowance	Flexible Allowance per Year	Year 1 Total	Year 2 Total	Two-Year Total
Less than 1	$65,000	$6,500	$25,000	$96,500	$97,600	$194,100
1	$66,000	$6,600	$25,000	$97,600	$98,700	$196,300

2	$67,000	$6,700	$25,000	$98,700	$99,800	$198,500
3	$68,000	$6,800	$25,000	$99,800	$102,000	$201,800
4	$70,000	$7,000	$25,000	$102,000	$104,200	$206,200
5	$72,000	$7,200	$25,000	$104,200	$106,400	$210,600
6	$74,000	$7,400	$25,000	$106,400	$108,600	$215,000
7	$76,000	$7,600	$25,000	N/A	N/A	N/A

Research Disturbances: Upon award funding recommendation notification, the Recipient or recommended principle investigator ("PI") if not the Recipient and the Institution shall confirm that the Recipient's laboratory (and any laboratories/facilities/staff included in the proposed Project) will be operational, and able to start the work described in the Project's research proposal by funding start date or within the standard three (3) month delayed start timeframe. Start dates beyond the three (3) month timeframe will be considered with assurances from the Institution.

Institutional Assurances: Recipients must adhere to all federal, state, and local regulations regarding the use of human subjects, animals, radioactive or hazardous materials, and recombinant DNA in this Project. It is the responsibility of the Recipient's Institution to ensure that all approvals (IRB, IACUC, other) are in place prior to releasing any award funds. The confirmation of the representative of the Institution on the application forms confirms this oversight.

Liability: Each party shall be responsible for its negligent acts or omissions and the negligent acts or omissions of its employees, officers, agents, or directors, to the extent allowed by law.

Funding Provider and Not Sponsor: The Recipient and Institution acknowledges that the Administrator and Funder are solely a provider of certain funding for the research to be performed under an award and are not a sponsor of the research. The Recipient and Institution agrees that it will not make any statement, written or oral, alleging that the Administrator and/or Funder is a sponsor of the research under the award.

Indemnity: To the extent permitted under the applicable federal, state, and local laws and regulations which govern the Recipient and Institution, the Recipient and Institution (the "Indemnifying Party") shall indemnify and hold the Administrator and Funder, as well as their respective directors, officers, employees, and assigns (the "Indemnified Parties") harmless from and against any and all costs, losses, or expenses, including reasonable attorneys' fees, that the Indemnified Parties may incur from any third party claim arising out of or in connection with the Award to the extent caused by the Indemnifying Party's or its directors', officers', or agents' acts or omissions, or failure to comply with the terms of this Agreement.

Research Misconduct: Institution certifies that it has established administrative policies as required by Public Health Service Policies on Research Misconduct, 42 CFR § 93, and will comply with the policies and requirements (collectively, the "Policy") set forth therein. In the unlikely event that a Recipient is involved in an investigation of research and/or financial misconduct directly related to the Project, he or she will be subject to the procedures in place at the Institution as applicable. According to the Policy, research misconduct is defined as the, "fabrication, falsification, or plagiarism in proposing, performing, or reviewing research, or in reporting research results. It does not include honest error or difference of opinion."

To the extent legally permissible, the Institution must notify the Administrator of a finding of research and/or financial misconduct related to the Project and may affect the Recipient's continued eligibility for support for the Project.

Anti-Harassment: The Institution shall have in place adequate controls and systems for assuring safe research environments carried out under the supervision of the Principal Investigator so that research is conducted in an environment free of all form of discrimination, harassment, intimidation, threat, and retaliation, expressly including those based on gender, sexual orientation, race, religion, national origin, disability or age. The Institution represents and assures the Administrator that (a) the Institution has in place adequate policy(ies) and procedures for reporting, investigating and addressing allegations of unlawful harassment or discrimination brought to its attention, (b) no member of the Recipient's research team has been determined to have violated its policy(ies) against unlawful harassment or discrimination, and (c) it is not aware that Recipient or anyone on the research team has been convicted or adjudicated as violating harassment or discrimination laws.

The Institution will notify the Administrator (d) if the Recipient or a member of the research team is placed on administrative leave or if any administrative action has been imposed on the Recipient or a member of the research team relating to any finding/determination or an investigation of an alleged discrimination, harassment, and/or retaliation, and (e) it will promptly report to the Administrator any determinations that any member of the Recipient's research team has violated its applicable anti-harassment or antidiscrimination policy(ies).

The Administrator will review the finding/determination and/or administrative action, and determine the Institution's, Recipient's, and the research team's continued eligibility for support for the Project. Based on the Administrator's review, the Administrator reserves the right to take disciplinary action up to and including termination of the award.

Other Funding: Neither the Institution nor the Recipient will accept funding from another source which will result in an overlap of funding for this Project, or result in greater than 100% effort of the Recipient or Key Personnel. The Institution and the Recipient are responsible for determining whether acceptance of this award will jeopardize support they may receive from other sources and ensuring that the Recipient has the capacity required to perform the Project within the proposed timeline. The Recipient will immediately report to the Administrator any additional funding available for activities related to this Project.

Use of the Award Funds: The laws of the United States place certain restrictions on the way funds awarded by charitable trusts and foundations may be expended. **Award funds and any interest earned may be used only for the research project and budget as submitted in the Recipient's Project proposal.** Funds may not be expended for any other purpose without the prior written approval of the Administrator.

The Recipient Institution must exercise proper stewardship over award funds and ensure that costs charged to the award are allowable, allocable, reasonable, necessary, and consistently applied in line with the Project's accepted proposal and budget. The Institution shall be liable for reimbursement to the Funder of any award funds associated with any inappropriate or unauthorized expenditures or fraudulent or improper conduct involving the use of award

funds. The grant monies which have been awarded, including any interest earned therein, may only be used for the purposes stated in this Agreement.

The Charles A. King Trust Award is for salary, 10% fringe allowance, and flexible allowance funds. At the discretion of the Award Recipient, up to $25,000 of the annual award amount is designated as an Expense Allowance for research supplies and may be used as flexible funding to cover activities and items such as equipment, health insurance, childcare, publication of scientific data, and travel to scientific meetings that is the sole financial obligation of the Award Recipient. The Award Recipient and Mentor may elect to use the $25,000 or a portion of it to supplement the Award Recipient's salary. The grant monies which have been awarded, including any interest earned thereon, may only be used for the purposes stated in the Terms of the Award. The Institution is responsible for administering the salary, which includes a $25,000 expense allowance per year, and maintaining adequate supporting records for training-related expenses. This Expense Allowance or any portion of it may **not** be used for institutional overhead. Institutions may not automatically deduct any fees from this allowance without the Award Recipients' approval. The allowance will be incorporated equally across the award payments. Any unused expense allowance in Year 1 may be carried over to Year 2 without a formal request.

Although awards are made for two consecutive years, funding of the second year is not automatic and is dependent upon a satisfactory review of first-year progress by the Scientific Review Committee.

The Administrator does not withhold any amount for income tax purposes. It is the responsibility of the Recipient to contact the Internal Revenue Service or the Institution's fiscal office to determine the tax status of the Award.

Funds may not be used for new construction, the renovation of existing facilities, fundraising projects, or endowments. Funds may not be used for any political activity, accumulated deficits, or for any other purpose prohibited by the Internal Revenue Service Code. Funds awarded for the direct costs of the project may not be used for general operating costs. Research-related expenses not directly related to the Project, general office supplies, individual institutional administrative charges in addition to indirect costs (e.g., telephone, other electronic communication, IT network), professional membership dues, and pre-award charges are **not** allowable expenses.

Indirect costs (institutional overhead): Indirect costs may not be charged against the Award.

Supplementation of Fellowship: Because the fellowship salary may not cover total institutional compensation, supplementation by the Institution is permitted and encouraged. The total of all competitive fellowship awards plus any institutional supplementation cannot, however, exceed the annual salary or total compensation for the Recipient's position as determined by the Institution. The Award is for salary only and will not change the use of funds to accommodate any supplementation. It is not acceptable to concurrently hold a named fellowship from another source that supports a full salary.

Career Development Awards, an NIH K Award (i.e. K08, K23, K99/R00), F, KL2, R01 or equivalent grant, awarded to the Recipient, cannot supplement the fellowship. In all circumstances, the Administrator must be notified of the receipt of additional funding at

least 30 days prior to that Award's start date. If such a grant is received prior to the start of funding, the application must be withdrawn and if the grant is awarded during the fellowship period, the Funder reserves the right to terminate the fellowship on a case-by-case basis. In the case of fellowship termination, any unexpended funds remaining from the Award must be returned to the Administrator or the Funder.

Re-Budgeting: Expenditures are expected to be within reasonable range of the Project budget as accepted by the Administrator. All requests for re-budgeting or reallocation of flexible allowance funds over $5,000 must be submitted a minimum of thirty (30) days prior to requested effective date of change. Re-budgeting requests should be clearly justified in the annual financial report or conveyed in an update to the financial report to the Administrator. The request must include the current allocation of resources along with specific detail and reason for the reallocation. If the Institution makes a request for re-budgeting or reallocation outside of the annual progress reporting process, Institution must contact Program Staff to obtain the required forms.

Financial Responsibilities of Award Recipient Institution: The Institution will keep systematic records of all expenditures relating to the Project. Vouchers consisting of bills, invoices, cancelled checks, receipts, etc. will be retained by the Institution for three (3) years after the close of the award period and will be available for inspection by representatives of Funder during normal business hours and upon reasonable notice throughout this period. The Funder may, at their expense, examine, audit, or have audited the records of the Institution insofar as they relate to Project activities supported by this award.

Carryover of Funds: Funds remaining at the end of Year 1 of the two-year Award may be carried over to the next year and incorporated into that year's budget. All requests to carry forward unspent funding from one year's budget to the next must be clearly justified in the annual progress report. Carry forward requests may be disallowed if adequate justification is not provided.

No-Cost Extension: A no-cost extension ("NCE") for up to twelve (12) months may be granted upon receipt and approval of an NCE request. The NCE request form must be submitted between 30 and 90 days prior to the end of the award period. Incomplete forms will not be processed. The NCE request form includes a section for justifying the extension, the unexpended balance, and a timeline for expenditure of the remaining funds. A final scientific report is due at the completion of the extension period. Any portion of the award not expended at the conclusion of the extended period must be returned to the Administrator, within sixty (60) days. ***NCEs will only be granted in exceptional circumstances.***

Change in Award Status: Any changes in the Project's research design including changes to/omission of specific aims described in the Recipient's accepted Project proposal require a formal written request and prior approval before implementation. Changing of Project plans without prior approval may result in the suspension of payments, early termination of the award, and/or reimbursement to the Funder of any expended or unexpended funds. Any change in percent effort of the Recipient, or other personnel providing a substantial intellectual contribution to the Project (collectively, the "Key Personnel") requires prior written request and approval. Requests should include the reason for the change and a description of how the change will affect the scope of work, implementation, and timeline of the Project. All requests for changes to the Project design, aims, or percent effort of the Recipient or Key Personnel must

be received by the Administrator at least thirty (30) days prior to the desired effective date of the change.

The Recipient and the Mentor must notify the Administrator of any change in the Recipient's academic or employment status in a timely manner and usually not less than thirty (30) days prior to such change. The Funder reserves the right to terminate the Award in the event of a significant change in the Recipient's academic status, including promotions conferring independent faculty status or its equivalent. The receipt of additional funding through other awards or promotion must also be reported to the Administrator and the return of unexpended funds will be assessed on a case-by-case basis. In the case of fellowship termination, any unexpended funds remaining from the Award must be returned to the Administrator or the Funder.

Transfer or Termination of Fellowship: Awards are made to the Institution where the named Recipient is conducting research. If the Recipient or Mentor plans on moving to another non-profit academic, medical, non-governmental or research institution during the award period, the Recipient will notify and seek approval from the Administrator to continue the Project at the Recipient's new institution. If approved, the Institution will return unexpended Project funds, subject to allowable costs and non-cancelable obligations, to the Administrator to coordinate the transfer of unexpended funds to the new institution.

In the event of early termination of the Award Agreement, for any reason, Institution will be reimbursed for allowable costs and non-cancellable obligations incurred prior to the date of termination.

If the Recipient is not continuing the Project in another nonprofit research setting, the award will be canceled, and unused funds must be returned within sixty (60) days. Transfer of the award to another PI, if applicable, is not permitted. Disposition of and title to any equipment purchased by the Recipient with award funds will be evaluated on a case-by-case basis. If the Project is terminated for any reason, any unused funds, subject to allowable costs and non-cancelable commitments incurred in the performance of the Project but not yet paid for, must be made payable to the Funder, in care of the Administrator within sixty (60) days. Performance under this Agreement may be terminated by either party upon thirty (30) days written notice to the other.

Unused Funds and Reversion: Should any of the following events occur, the Administrator, on behalf of the Funder, may demand repayment of all unexpended portions of the award; moreover, all unpaid installments may be cancelled. The Institution is also required to give written notice if there is a change in the Institution's status as noted below.

- A determination, preliminary or otherwise, is made by the United States Internal Revenue Service that the award does not constitute a qualifying distribution.
- The Institution fails to perform any of its duties, in the judgment of the Funder, the Administrator, or its Scientific Review Committee, required by the Application Guidelines and this Agreement. In such cases, the Administrator shall provide no less than thirty (30) days termination notice in writing to the Institution, upon which the Institution shall have an additional thirty (30) days following receipt of such notice within which to cure any deemed failures.

- The Institution ceases to be exempt from income taxes under the Internal Revenue Service Code or becomes a private foundation.
- There is a material change in the purpose, character, or method of operation of the Institution such as to jeopardize its tax status.

Unexpended Funds: Any funds remaining at the close of an Award Period (extended via NCE or otherwise) must be returned to the Administrator within sixty (60) days.

Medical and Family Leave: The Recipient may continue to expend any award funds allocated to salary during medical or parental leave consistent with the Institution's policies.

Reporting Requirements and Payment Schedules: Acceptance of this Award includes a commitment to provide both Progress and Final Scientific and Financial Reports. Final scientific and financial reports are due sixty (60) days following conclusion of the award period. Progress reports are due annually in June, regardless of award start date. The Mentor is required to complete a section of the Recipient's Progress Report that addresses the Recipient's research and training plans during the second year of funding. The Recipient will receive access to the required online report forms by email approximately three (3) weeks prior to their due dates. It is the responsibility of the Recipient to email the Financial Report Form to the Institution's Financial Officer and ensure that the Administrator receives this completed form. The Funder and Administrator reserve the right to place a hold on funds where the Recipient is non-compliant with these reporting requirements.

Second-year funding will be approved upon the satisfactory completion of the Scientific and Fiscal Progress Report as determined by the Scientific Review Committee. The Mentor is also expected to summarize the Recipient's research accomplishments and plans for the future as part of the Recipient's Final Report. Final scientific and financial reports are due sixty (60) days following conclusion of the award period.

Requests for no-cost extension or re-budgeting should be made to the Administrator thirty (30) to sixty (60) days prior to requested effective date of change. In cases where an extension has been granted, Recipients may be required to file an interim status report.

Patents, Copyright and Intellectual Property: The Recipient should follow the Institution's policies regarding discoveries or any other intellectual property that results from research conducted under this Project. Neither the Administrator nor the Funder of this Project will retain any rights to intellectual property including patents, copyrights, trademarks, or other proprietary rights that result from the Project.

Confidentiality and Third-Party Release: Application materials as well as scientific progress and final reports are considered confidential. The Administrator engages third parties who have the necessary expertise to review the submitted materials and evaluate each project. Although the Administrator endeavors to protect the confidentiality of the reports by requiring reviewers to sign confidentiality agreements, confidentiality cannot be guaranteed. The Administrator and the Funder are not responsible for any consequences resulting from the disclosure of the content of these materials to such third parties.

The Administrator and the Funder reserve the right to public acknowledgement of Project information (Recipient Name, Institution, Project title and research summary). This information

will be made available through the website of the Administrator (www.tmfgrants.org/King) and may be posted on other affiliated organization websites, publicly accessible databases of privately funded awards, or published in print form or other media. As noted in the application guidelines, the Project summary submitted with the application will be posted on the Administrator's website if the Project is funded.

Scientific Poster Sessions and Events: The Recipient is expected to share research findings in a timely manner through professional meetings and/or publications.

Acknowledgements: Professional publications or presentations resulting from Project work supported by the award must acknowledge**,** the **Charles A. King Trust Postdoctoral Research Fellowship Program, Bank of America, N.A., Co-Trustees.** In some cases where a specific donor has supported the fellowship, the donor should also be acknowledged. If the fellowship is supported by a named donor, the Recipient is expected to send a brief note of appreciation to the donor at the beginning of the fellowship.

Post Award: Recipient shall make good faith efforts to respond to the Administrator's reasonable requests for information on his/her research progress, new position, affiliation, or contact information (especially email address) following the award period. The Recipient may be requested to provide a current Biosketch or update information in an online database. The Recipient understands that this obligation survives the award period.