

**Jefferson Science Associates, LLC**  
Managing and Operating the Thomas Jefferson National Accelerator Facility  
for the U.S. Department of Energy

**FY2018 JSA Initiatives Fund Proposal Summary Sheet**

**Proposal title**

**Project Start Date** (month/year)

**Project End Date** (month/year)

New  
proposal

Renewal

**Total funds  
requested**

Total leveraged support / matching  
funds. Details of funds must be  
included in budget proposal.

**To be completed by JSA: Total funds awarded**

**Principal Investigator (PI)**

Institutional affiliation  
Mailing address  
Email / phone #

Co-PI (if more than 1, add  
pages with information)

Institutional affiliation  
Mailing address  
Email / phone #

**Check one category:** If PI is a Lab employee, your identification of the appropriate Associate Director below represents the acknowledgement of that AD with your submittal of proposal. No signature required.

Lab employee: Identify Associate Director (email /  
phone)

Lab user: Identify University affiliation (email / phone)  
Joint appointee: identify University and Lab division  
association (email / phone)

Other: Identify Institutional affiliation (email /  
phone)

**Proposal: Attach file with**

- (1) **Executive summary and technical proposal**
- (2) **Synopsis of scientific, educational, technical, and/or business merits, and alignment with and significance to Lab's current program**
- (3) **Proposed evaluation plan to measure success.** If this is a request for renewal of funds, assessment of prior year performance,

Your proposal may include letters of endorsement and other supporting information (maximum of 12 pages including this summary sheet and budget sheet)

# Budget Proposal

**Proposal Title**

**Principal Investigator (PI)**

**Total funds requested**

**To be completed by JSA: Total funds awarded**

	Item Description		Amount
<p><b>Equipment.</b> Lab users submitting proposals that include equipment to be used at the Lab must review with the appropriate Lab Associate Director. The provision of the name of the AD below represents the AD's acknowledgement. <b>No signature required.</b></p>			
	Associate Director: _____		
	_____	_____	
	_____	_____	
		Subtotal Equipment	
<p><b>Travel Support.</b> Provide break-out of estimates for registration fees, lodging and transportation, catering, and facility charges (room rentals, AV equipment; etc.)</p>			
	_____	_____	
	_____	_____	
	_____	_____	
		Subtotal Travel	
<p><b>Supplies</b></p>			
	_____	_____	
	_____	_____	
		Subtotal Supplies	
<p><b>Consultants/Subcontracts</b></p>			
	_____	_____	
	_____	_____	
		Subtotal Consultants/Subcontracts	
<p><b>Other Expenses.</b> Examples include stipends and honoraria, prizes, awards.</p>			
	_____	_____	
	_____	_____	
		Subtotal Other Expenses	
		<b>Total Budget Proposal</b>	

**Budget Justification:** Include narrative to explain need for each line item in the budget, showing breakdown of calculations used to arrive at the amount in each line of the budget. Note that the JSA Initiatives Fund Program does not support salaries and salary-related expenses, or indirect expenses.

**Leveraged Support/Matching Funds information.** Identify the source, type and amount of dollar funds from each institution. Include **separately** estimated value of in-kind support. Your identification of the authorized representative who has committed institutional support for your proposal represents the acknowledgement of that individual. If support or funds are provided by the Lab, identify the associate director (or equivalent) as the authorized representative. Information may be included on separate page.

#### EXECUTIVE SUMMARY:

The User Group Board of Directors requests these funds to reimburse travel expenses by UGBoD members that are required by or clearly related to the core mission of the User Group, for example:

- 1) Partial support for travel to UGBoD meetings for UGBoD members who incur significant costs to attend (e.g., from outside the country, director representing postdocs who is not stationed at JLab)
- 2) Attending JSA Program Committee Meetings
- 3) Attending meetings of umbrella user organizations (e.g., the National User Facilities Organization, SSURF) to represent JLab users
- 4) Other outreach activities

#### SYNOPSIS:

The requested funds will help increase the visibility of the Lab and its User Group and enhance opportunities for advocacy on their behalf. Furthermore, they will allow younger members of UGBoD to assume a more significant role in outreach efforts. Finally, by making the obligations of members of UGBoD less burdensome financially, we hope to ensure a larger candidate pool for future elections. These funds would make it easier to commit to the significant amount of work UGBoD membership entails, and would reduce any obstacles for less “well-funded” members of the community to serve on UGBoD.

#### EVALUATION PLAN:

The goal of this proposal is to increase opportunities for travel on behalf of the Users Group for the members of UGBoD. Our primary evaluation criteria will therefore be the quantity and importance of such travel that has occurred because of the availability of this funding. So far this year, Board members have managed to find their own funds for travel, except for the Chair’s visit to the LSU JSA meeting in April. We plan to use the remaining funds before the end of the year to support outreach activities and support the Chair or his designate to travel to the JSA Programs Committee meeting. We believe that the modest expenditures incurred so far have therefore been well justified.

#### SUPPORTING INFORMATION:

Members of the UGBoD devote significant amounts of time and effort on many activities in support of the UG mission. Every member of UGBoD is a volunteer who has to maintain his or her own research effort and other duties (teaching, administration, etc.) while taking on this additional burden on behalf of the Users of Jefferson Lab. In this context, it seems both appropriate and helpful if costs incurred in the pursuit of this effort are (partially) provided, in particular for travel which may be required or at least in the clear interest of the User Group and Jefferson Lab. Some members of UGBoD are rather junior (even by design, e.g. the postdoc representative and the graduate student representative) and simply cannot afford major travel expenses. Others (like the UGBoD chair) are expected to attend several meetings (e.g., JSA Program Committee) for which research support (e.g., grant funding) is typically not appropriate. A similar consideration applies to outreach activities, including congressional visits.

Therefore, we ask for continuing JSA support in form of a travel fund as part of the financial support for User Group activities. This travel fund would be administered (like all UG finances) by the Secretary/Treasurer of UGBoD (presently Lorelei Chopard). As a rule, all requests for travel support from this fund by members of UGBoD would have to be presented before travel commences, and agreed to by at least two of the UGBoD Chair-line. The travel fund could only

be used to pay any additional costs for travel in support of UGBoD's mission that cannot reasonably be charged to other sources. As an example, travel to conferences would be excluded, and travel that can be combined with other business would only be charged up to the incremental amount required by UGBoD business. Transportation costs would be capped at the lowest reasonable price for the necessary itinerary, e.g. actual costs for fuel, parking and tolls if a private vehicle is (or could be) used. Similarly, hotel costs should be kept as low as reasonable. No per diem would be reimbursed by this fund. All costs must be documented with receipts and will only be reimbursed after the travel has occurred.

As an example, the present chair of UGBoD typically attends two meetings of the JSA Program Committee, one in conjunction with the Fall SURA Board of Trustees Meeting in Washington, DC, and the other at the spring meeting. In most cases, only partial travel support is provided, and expenses financed from other sources and can be considered "matching contributions". For the UGBoD board meetings, partial support can be made available for board members who incur significant costs to attend board meetings, which typically takes the form of limited support for members travelling from outside of the country.

Extrapolating from previous experiences, we assume that we will be able to match funds paid from this program at least at a 1:1 ratio. We maintain our request at the level of the past 3 years of \$3000 for 2018.