

CRITERIA FOR RESEARCH GRANT APPLICATION SUBMISSION

The following items are required as part of the Carl Zeiss Meditec, Inc. (CZMI) grant application process and should be prepared prior to submission:

- 1) **Formal letter on requesting organization’s letterhead of financial, equipment or software request.**
 - a) Letter needs to be on the requestor's letterhead.
 - b) Needs to specify that you are requesting a research grant either in the form of an equipment loan , monetary, or free software;
 - c) Should briefly describe the research study
 - d) Total funds solicited, if applicable
 - e) The type of equipment, if applicable
 - f) Type of software, if applicable
 - g) Specify how the funds, equipment or software will be used.

- 2) **Study Proposal**
 - a) The proposal should describe how the study will add to existing knowledge and/or benefit patient care;
 - b) Description of the study including the following:
 - i. describing the size of the study,
 - ii. The milestones;
 - iii. The study design.
 - c) If a product manufactured by Carl Zeiss Meditec is involved in the research, please describe how it will be used.

- 3) **Needs Assessment**
 - a) State why research on the proposed topic(s) is needed;
 - b) Identify practice gaps in health care performance, specific to the target audience, that will be addressed during the proposed research study;
 - c) Include relevant/current references and be based upon a sufficient level of evidence;
 - d) Include multiple sources (quantitative/qualitative methods).

- 4) **Names of the principal investigator and any sub-investigators**

- 5) **12-Month Time Frame / Schedule of Activities**

- 6) **Signed W-9 Form (or Certificate of Residency, if out of the U.S.) from organization**

- 7) **Study Budget**
 - a) Provide a high level budget for the study, with a description of how the requested grant will be used in the study. For grant requests exceeding \$10,000, a detailed budget expense breakdown and a draft study protocol is required.

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Please Note: The Grants Committee may require additional information in order to make its decision (i.e. final study protocol, detailed budget breakdown, etc.).

Table 1 describes the recommended budget format for a clinical study or registry trial.

Table 2 describes the recommended budget format for a research study.

TABLE 1: Model Budget Expense Report for clinical trials.

Budget Category	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Study setup						
IRB approval						
Steering committee						
Network/database setup						
Other expenses*						
Patient expense						
Cost per Case Report Form (CRF)						
Patient expense based on total CRFs						
Patient follow up						
Patient Tracking						
Other expenses*						
Study monitoring						
Study Coordinator						
Data and Database Management						
Statistical analysis						
Data reporting						
Other expenses*						
Grand Total						

*Please explain additional expenses. Provide an attachment, if needed.

TABLE 2: Model Budget Expense Report for academic research.

Budget Category	Year 1	Year 2	Year 3	Year 4	Year 5	Total
Research Sponsorship						
Research Scientist/Fellow #1 [insert name/title]						
Research Scientist/Fellow #2 [insert name/title]						
Research Scientist/Fellow #3 [insert name/title]						
Other expenses*						
Study expenses						
IRB approval						
Advertising / Recruiting						
Subject Payments						
Data and Database Management						
Data reporting						
Statistical analysis						
Study Coordinator						
Other expenses*						
Grand Total						