



Career Development Program Guidelines & Instructions

Special Fellow

Effective dates:
May 1, 2019 - April 30, 2020

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What's New for 2019-2020

Starting this award cycle, applicants who previously held a career development-type award of any amount and duration are eligible to apply for a CDP award. Continuing with recent policy, applicants who currently hold a career development-type award that is lower in total award amount than the CDP award are allowed to apply. Applicants who currently hold a career development-type award that is higher in total award amount than the CDP award are not eligible to apply for a CDP award. The continuing exception to this rule is K99 awardees, who are able to apply for a CDP award.

Starting this award cycle, applicants must be in their Sponsor's lab at the time of full application submission.

In the 2018-2019 award cycle, more than 27% of eligibility requests were rejected. Because of this, the eligibility process has changed with the goal of reducing the number of eligibility rejections. The number of times a rejected applicant can re-submit an eligibility request in any one cycle has also been reduced. To avoid eligibility rejection, read these Guidelines & Instructions carefully and fill out the eligibility form completely. ***The Sponsor (and Co-Sponsor, where applicable) must sign the form, therefore, be sure to start this process early.***

Continuing from last award cycle, the eligibility window for Special Fellow applicants extends from a minimum of 2 years to a minimum of 2.5 years. Those who are between 2 and 2.5 years from their advanced degree are now eligible to apply in the Fellow subcategory. See [Experience/Eligibility Clock](#) section for more details, and, if applicable, see the Fellow Guidelines & Instructions.

The Leukemia & Lymphoma Society is honoring those CDP awardees ending in 2019 who have done the most impactful work. One Special Fellow awardee will be honored with the **CDP Achievement Award**, which includes \$10,000 for Mission-relevant, but otherwise unrestricted use (in an academic setting). This high honor will be given to the Special Fellow who has had the most impactful publication or ASH oral presentation of direct relevance to blood cancer over the course of their Special Fellow funding period. An absolute requirement for consideration is that those publications must acknowledge support of The Leukemia & Lymphoma Society. Since we consider a CDP awardee to always be an awardee while funded, all publications should acknowledge our support, regardless of the aims stated in the original application*. Though not guaranteed, we hope to continue the CDP Achievement Awards indefinitely.

* Use this format when acknowledging The Leukemia & Lymphoma Society: "...was supported by a Special Fellow award from The Leukemia & Lymphoma Society."

The Leukemia & Lymphoma Society is implementing a new rule regarding overlapping aims in grant proposals submitted to LLS. This policy applies to proposals submitted within the same application cycle, which is defined as all LLS calls for proposals – across all grant programs – that open within the same calendar year. An application to any LLS grant program may not have

aims that substantially overlap with the aims of any other application (either to the same program or to a different program) that includes the same investigator(s) as PI(s), Co-I(s), Project or Core Leaders, or collaborator(s). All such duplicate grant proposal submissions with substantially overlapping aims are subject to administrative disqualification, and such proposals will not be reviewed further or considered for funding. Contact researchprograms@lls.org with any questions about this policy or to discuss with LLS scientific staff any questions concerning potential overlap between applications.

2018 - 2019 Update: Application Compliance

In the 2018-2019 cycle, more than 5% of CDP applications submitted (from Fellow, Special Fellow and Scholar subcategories) were triaged without full review based on non-compliance with the Mission Relevance of the application and environment. Carefully read the Mission Relevance and Mission Score sections to determine if The Leukemia & Lymphoma Society's CDP award mechanism best fits your research, mentorship environment, and career goals. The Leukemia & Lymphoma Society has recently taken an active role in making sure that our scarce funding goes to applicants who are most closely aligned with our Mission.

In recent years, approximately 10-15% of all applications had serious administrative/structural flaws. These include non-adherence to page numbers, font size, or missing sections (e.g. a Sponsor Letter or Biosketch). Applications with such flaws run the risk of administrative triage.

Carefully check the final version of your application prior to upload (even if someone else uploads for you).

About The Leukemia & Lymphoma Society, Inc.

The Leukemia & Lymphoma Society, Inc. (LLS) is a national voluntary health agency dedicated to the conquest of hematologic malignancies and relevant premalignant conditions. LLS supports research, patient aid, community service programs, advocacy, and public and professional education.

Description of CDP Special Fellow Award

Through the Career Development Program (CDP), LLS supports talented blood cancer researchers in the early phase of their careers. CDP continues to provide a pool of dedicated researchers to advance the understanding and diagnosis of blood cancer, as well as the development of treatment and prevention options that will ultimately lead to cures for blood cancer patients.

The **Special Fellow** Award is for 2 or 3 years depending on eligibility and supports mentored postdoctoral fellows and instructors who are training for a career in blood cancer research and/or treatment. The intent of the program is to support top performing postdocs who have clearly demonstrated success as postdocs and who need 2-3 years of training to be competitive for an independent position. The emphasis is on "Special" and not simply "senior." Postdocs who are

currently competitive for an independent position and who are actively looking for one should not apply. This award is not intended for those who are within 1 year of their independent academic position as of the award start date.

The maximum award per year is \$67,000.00 and includes the applicant's salary and fringe benefits. A Special Fellow's salary may be supplemented by funds from another source. Indirect costs may be included and cannot exceed 5% of the total direct costs requested in the proposal. The final value of the award may be limited by the applicant's Sponsoring Institution's policy. Expenditures for laboratory costs/equipment, travel, tuition, etc. are not permitted (some exceptions to this rule apply in the case of K99 recipients). The awarded value will be limited to the amount requested in the submitted proposal. It is anticipated that the proposed research will occupy a majority of the applicant's research time, however there are no requirements for a certain percent effort in our budget template.

Eligibility

Special Fellow applicants must...

- Have an appropriate Sponsor:
 - Head of a laboratory at a non-profit institution where applicant's research will be performed
 - Tenure-track, assistant professor or above (or equivalent)
 - Not applicant's thesis advisor or the head of the laboratory where applicant's thesis research was performed
- Be a postdoc in their Sponsor's lab at the time of full application submission.
- Not be in a graduate program at the award start date (July 1, 2020).
- Have a Sponsor with access to adequate funding to support the proposed research:
 - R01-level funding from private foundations or the NIH (Sponsor **must** be the PI or Co-I on any listed grants)
 - In rare situations, substantial and sustained institutional support beyond a startup package when other funding is not available
 - Transitional funding may not be used for eligibility purposes
 - Funding listed must not end prior to the award start date (July 1, 2020)
- Not have any unexplained gaps in training.
- Explain all positions and titles from the end of graduate or medical training the Other Information section. This is particularly critical for training that does not follow the standard US-based training and for unusual position titles.
- Where appropriate, the Eligibility Window Extension section may be used **only** to request expansion of the window of eligibility describing the following:
 - Dates of parental leave
 - Dates of military service
 - Dates related to visa issues caused by governmental delays

Position Title

The Special Fellow award is intended for early stage postdoctoral fellows. Generally, position titles must be “postdoctoral fellow,” “fellow” and, in some cases, “instructor.” Other titles may be acceptable based on institutional rules, as long as the position is equivalent to a mentored postdoctoral fellow and the position is explained in the eligibility form. Applicants whose title significantly differs from the above examples must have a letter submitted by the full application deadline explaining the position and the terminology. This letter must come from the Sponsor. This letter is in addition to the Sponsor Letter required for full application submission.

Citizenship

LLS welcomes applications from US citizens and non-US-citizens, as well as applicants who are performing research outside the United States.

Degree

Applicants must hold a PhD, MD, DVM, or equivalent degree by the full application start date. Applicants may not be in a degree-granting program at the award start date.

Eligibility Outline for 2019-2020 Application Cycle

	Scholar	Scholar in Clinical Research	Special Fellow (2-year)	Special Fellow (3-year)	Fellow
Degree*	MD, PhD, DVM, or equivalent	MD, PhD, DVM, or equivalent	MD, PhD, DVM, or equivalent	MD, PhD, DVM, or equivalent	MD, PhD, DVM, or equivalent
Oral thesis defense date**	N/A	N/A	On or after June 30, 2015	On or after June 30, 2016	On or after June 30, 2017
Independent faculty position required?***	Yes	Yes	No	No	No
Earliest start date of independent position**	On or after January 1, 2012	On or after January 1, 2010	N/A	N/A	N/A
Most recent start date	January 1, 2018	N/A	N/A	N/A	N/A

	Scholar	Scholar in Clinical Research	Special Fellow (2-year)	Special Fellow (3-year)	Fellow
Applicant R01-level funding required?****	Yes	No*****	No	No	No
Sponsor R01-level funding required?****	N/A	N/A	Yes	Yes	Yes

*For Fellows, the degree must be conferred by the Award start date of July 1, 2020

**More details are contained in the Guidelines & Instructions

***Mentored faculty positions (e.g. Instructor) do not count as independent

****Substantial, peer-reviewed funding that extends beyond July 1, 2020; must be the principal investigator on this funding

*****Funding may come from any source; see the Guidelines & Instructions for more details

Experience/Eligibility Clock

Applicants must have had their oral thesis defense at least 2.5 years ago, but no more than 4.5 years ago, at the time of review (January 1, 2020). When there is no required oral thesis defense, other events signaling the end of graduate training will be considered. In these cases, details must be provided in the Other Information section of the eligibility form. In all cases, but typically after a successful oral thesis defense, LLS starts the eligibility clock as soon as an institution considers a former graduate student as having a PhD (officially conferred or not).

For MDs, the eligibility clock starts at the beginning of postdoctoral research training or at the end of clinical training, whichever comes first. Time in clinical training, where applicable, does not start the eligibility clock. Details of this training, with associated dates (including the month and day), must be clearly explained in the eligibility form. *Any research training after medical school, but prior to clinical training, is considered postdoctoral training.*

There should be no unexplained gaps in training.

In some cases, LLS may ask the applicant to provide a letter from any applicable institution confirming date(s).

For those who have spent time in any laboratory as a postdoctoral fellow (or equivalent), the eligibility clock does not start with the start date in your current laboratory.

LLS support for Special Fellows may not extend postdoctoral research training (excluding clinical training) beyond 7 years. Applicants who receive a Special Fellow Award will receive either two or three years of funding to comply with this requirement.

Pauses to the eligibility clock

The following events may be used as a pause in the eligibility clock:

- Parental leave
- Military service
- Visa delays that are caused by governmental agencies

These events, including dates, must be stated in the Eligibility Window Extension section of the form. A letter from your current Sponsor or former advisor stating the nature of the leave or visa delays and the dates should be sent to researchprograms@lls.org by the full application deadline.

There are no other acceptable pauses to the eligibility clock.

Career Trajectory

In general, Special Fellow applicants must have a recent track record that is directly relevant to blood cancer. In some cases, LLS and the review panel may consider Special Fellow applicants with little to no prior blood cancer experience, but there must be clear evidence of a path forward in a career in blood cancer. The Sponsor (or Sponsor/Co-Sponsor pair) must be appropriate for this career path (see [Sponsor Requirement](#) and [Optional Co-Sponsor](#) sections). The Sponsor Letter should detail the training plan for this career path. Special Fellow applicants must be on a clear trajectory to an independent career and must demonstrate a need for continued funding and training to achieve independence. Applicants who are not pursuing a career in blood cancer research should not apply.

Institution Affiliation

Applicants must be affiliated with a non-profit Sponsoring Institution at the time funding commences and for the duration of the award.

Sponsor Requirement

All Special Fellow applicants must have a Sponsor who provides mentorship and research funding support for the proposed project. The Sponsor must be the head of the laboratory in which the applicant is performing, or will be performing, the proposed research. The Sponsor must be at least at the level of a tenure-track assistant professor (or equivalent). The Sponsor must be different from the applicant's graduate advisor and different from the head of the laboratory where the applicant's graduate research was performed.

Optional Co-Sponsor

In some cases, a Co-Sponsor is appropriate. It is critical that this Co-Sponsor has (and/or will have) a significant role in the mentorship of the applicant. Co-Sponsors should not be added for

grantsmanship purposes to add Mission-relevance to an applicant who is not training for a career in blood cancer research and/or treatment.

Appropriate Co-Sponsors fit the following:

- Someone who is committed to a significant role in the co-mentorship of the applicant
- Someone who is willing to attest to this role in annual Co-Sponsor Letters in the awardees' annual Progress Reports
- Though new collaborative relationships between the Sponsor and Co-Sponsor may be acceptable in some cases, it is optimal that there is an already established, demonstrable relationship
- In some cases, a blood cancer Co-Sponsor may be appropriate when the primary Sponsor is not a blood cancer researcher. However, the standards for prior and significant collaboration between the Sponsor and Co-Sponsor are higher.
- The Co-Sponsor Letter in the Full Application must adequately address the role of the Co-Sponsor in the co-mentorship of the applicant as well as the nature of the collaborative relationship between the Sponsor and Co-Sponsor.

Addition of a Co-Sponsor that appears to be solely for the purpose of achieving Mission-relevance of the application will be triaged without full review.

The role of the Co-Sponsor is not to provide an appropriate level of research funding support that is lacking with the primary Sponsor. If the primary Sponsor does not have adequate research funding, the applicant is not eligible.

Co-Sponsors must be declared at the eligibility stage. Addition of a Co-Sponsor after the eligibility due date may result in administrative triage.

Research Support Requirement

Special Fellow Awards generally fund only salary (see the K99 discussion in the [Other Career Development Support](#) section for an exception). Applicants must have Sponsors who are PIs or Co-Is on active grant(s) (peer-reviewed, national-level; R01-equivalent) to support the research proposed in the application (or related research). Sponsors may have transitional awards, but these cannot be used for eligibility purposes; funding cannot be only startup funds. In rare cases, research support may come from substantial and sustained institutional support beyond a startup package when other funding is not available. This funding must be directly earmarked to the Sponsor and must not be general institutional funds that is divided among a number of faculty. The presence of funding will be assessed at the eligibility phase, while the details of the Mission-relevance of that funding will be assessed after full application submission. In cases where funding starts after the eligibility due date, the applicant must send evidence from the funding agency of the award details to researchprograms@lls.org (including funding agency, type, award amount, and start date). This must be received by LLS by the full application date.

Research support that ends prior to the award start date may not be used as evidence of adequate support.

Application Limitations

Applicants may only submit one application. There is a limit of one Fellow application per cycle for each Sponsor, as well as one Special Fellow application per cycle for each Sponsor. A Sponsor may have one Fellow applicant and one Special Fellow applicant in the same cycle. There is no limit to the number of applications submitted from a specific institution, nor is there a limit to the number of Scholar applications from any Sponsor. It is also acceptable for a Sponsor who currently has active Fellow and/or Special Fellow awardees in his/her lab to sponsor a Fellow and/or Special Fellow applicant during another award cycle. ***It is highly recommended to coordinate this with your Sponsor, to be sure that there are no other Special Fellow applications coming from the same lab during this application cycle.***

Other Career Development Support

No other comparable or better career development award (as measured by the total award amount) may be held at the time of the award start date. If a comparable (or better) career development award is activated after receiving a Special Fellow Award, the LLS award must be relinquished. Applicants who have held a comparable career development-type award may apply for a CDP Award.

The exception to this rule is regarding the K99 award. Current K99 awardees may apply for a Special Fellow award, and current Special Fellow awardees may accept a K99 award and keep the CDP Award, pending LLS approval. Certain information, including the aims of the K99 award must be provided to LLS to ensure that the K99-funded research is relevant to LLS's Mission. If approved, funding from the Special Fellow Award may be used for any purpose related to the CDP application/award, whether it be awardee salary, technician salary, or research supplies, pending LLS approval. It is recommended that Special Fellow applicants and Special Fellow awardees notify LLS of any developments in the K99 application process. Contact researchprograms@lls.org for questions about LLS's approval process for holding both awards.

Transfers

The application must be designed from the perspective of where the research will be performed. If a transfer to a different lab (within the same institution or at another institution) is being considered during the application process, the applicant must submit the application based on work that will be performed in the new laboratory and obtain the appropriate signatures from the new destination. Transfers are allowed after the award start date, however, transfers undergo a review, and thus their approval is not guaranteed. In addition, the Special Fellow Award is issued to an individual, and thus is not transferable to another person.

Change in Applicant or Awardee's Status

Applicants who are postdoctoral fellows or mentored faculty (e.g. Instructors) are eligible to apply. However, Special Fellow awardees cannot be independent faculty members and hold the

Special Fellow award within the first year of funding. Awards will not be given to those with independent positions, and those already funded must terminate their award at the time they transition to independence if within the first year of funding. LLS must be notified as soon as any change in status is contemplated. LLS reserves the right to require the return of any funds given after the start of an independent position if this change occurs within the first year of funding. Any funds dispersed after this change in status making the awardee no longer eligible must be returned to LLS.

It is anticipated that Special Fellow applicants will be contemplating applying for independent positions, and LLS encourages this career progression. Special Fellow awardees who have been in their Sponsor's laboratory as a research fellow for one year (after the award start date) are allowed to carry their funding with them should they receive an independent faculty-level position.

Mission Relevance

General

The purpose of LLS's CDP award mechanism is to support scientists who are pursuing a career in blood cancer research. Thus, the research of the applicant must address questions that are directly relevant to hematologic malignancies and/or relevant premalignant conditions/states. Relevance is determined by the experimental approach.

Correlation of a biological phenomenon with blood cancer is not sufficient evidence of relevance to LLS's Mission, unless there are experiments to directly address this correlation.

The proposed experiments must seek to answer questions about blood cancer or normal blood cell function of direct relevance to blood cancer. These experiments must use blood cancer patient samples, blood cancer cell lines, or mouse models appropriate for blood cancer. Research using other model systems must make it clear why those model systems are being used to address questions of direct relevance to blood cancer and why they are better suited than more standard blood cancer models. The environment and expertise provided by the Sponsor must be appropriate to perform the blood cancer-relevant work. There must also be funding support for this research (see [Research Support Requirement](#) section).

Post-Award Adherence to Aims

CDP Awards are selected in part based on the aims in the application. LLS requires any substantial change to aims of funded awards to be approved by LLS in order to continue receiving funding. LLS understands that science does not progress in a direct path, and thus minor changes to the aims need not be approved by LLS (but should be described in annual progress reports). **Changes to the aims that substantially reduce the impact of the research on LLS's Mission will not be approved and funding may be reduced or eliminated.**

Therefore, it is highly recommended that aims be carefully crafted in terms of feasibility and blood cancer relevance. Careful consideration of aims during the application process will

enhance the ability to modify research directions in a Mission-relevant fashion, should the need arise after funding commences.

Key Publications of Sponsor(s) Demonstrating Contributions to Blood Cancer

For applicants with one Sponsor:

Special Fellow applicants must provide a description of publications that best highlight their Sponsor's contributions to the understanding of blood cancer or normal blood biology having relevance to blood cancer. Three to five publications must be presented in the full application document. The Sponsor must have expertise in blood cancer. This information will be used to determine the qualifications of the Sponsor to mentor the applicant's blood cancer-relevant research career.

For applicants with a Co-Sponsor:

Special Fellow applicants must provide a description of publications of their Sponsor ***and*** Co-Sponsor that best highlights the contributions to science that are relevant to the applicant's research and career development. At least one member of the Sponsor/Co-Sponsor team must have contributions to the understanding of blood cancer or normal blood biology having relevance to blood cancer. Three to five publications in total must be presented in the full application document. This information will be used to determine the qualifications of the Sponsor/Co-Sponsor pair to mentor the applicant's blood cancer-relevant research career.

These publications must:

- directly correlate with LLS's Mission Score of 1, 2, or 3
- have the Sponsor (or Co-Sponsor) as the corresponding author on at least one publication; for less experienced Sponsor's, two of the publications may be those on which they are the first author
- be primary research publications

These publications must not:

- have only an indirect relation or no relation to blood cancer
- be review articles
- be manuscripts that are not available online on the full application due date

The applicant should get input from the Sponsor/Co-Sponsor, but this section must be written by the applicant.

Review Process & Applicant Notification

CDP applications are reviewed by an independent, voluntary panel of experts.

Review criteria for **Special Fellow** applications include:

- Prior accomplishments of the applicant (**graduate** research of the applicant need not be blood cancer-based)
- Qualifications of the Sponsor (or Sponsor/Co-Sponsor pair) to mentor the applicant in blood cancer research or normal blood biology that is relevant to blood cancer
- Scientific quality of the proposal
- Access to applicable key materials and models, including patient materials, animal models, drugs, etc., to demonstrate feasibility of proposed experiments
- Clarity of presentation
- Direct relevance of proposed research to blood cancer
- Likelihood of the applicant pursuing a career in blood cancer research
- Clear and robust training plan from the Sponsor (and Co-Sponsor, where applicable)
- Demonstrated need for continued funding with a clear trajectory to an independent career within a few years

Based on these criteria, the application receives a Priority Score based on the NIH scoring system.

Mission Scores

The applicant also receives a **Mission Score** to measure adherence of the application to LLS's Mission of curing blood cancer. CDP Awards must focus on those questions of direct relevance to blood cancer, which may include questions of normal blood biology. ***Research on normal blood biology must have a clear relevance to blood cancer.*** The Mission Score will be assigned based on the overall focus of the application. For example, if most of the aims are focused on established cell lines, but there is a sentence or two describing how results will be verified in patient samples, the Mission Score will be 2.

Proposals that do not have clear relevance to blood cancer will be triaged without full review.

Mission Score of 1: The experimental plan must address mechanisms directly relevant to the pathogenesis, diagnosis, or treatment of hematologic malignancies and/or relevant premalignant conditions/states. In addition, at least some experiments must include patients, patient materials, or the most appropriate animal model system.

Mission Score of 2: The experimental plan must address mechanisms directly relevant to the pathogenesis, diagnosis, or treatment of hematologic malignancies and/or relevant premalignant conditions/states. In addition, at least some experiments must use cell lines and/or animal models that are directly relevant to hematologic malignancies and/or relevant premalignant conditions/states.

Mission Score of 3: The experimental plan must address basic mechanisms directly relevant to normal blood cell development, hematopoietic stem/precursor cell function, or immune responses. These studies must have clear relevance to blood cancer and must use appropriate models to understand these mechanisms in blood cells.

Mission Score of 4: Does not address mechanisms directly relevant to normal blood cell development/function, hematologic malignancies and/or relevant premalignant conditions/states.

Applications with a Mission Score of 4 will not reach the full review committee.

After the review panel meeting, Mission-relevant applications (Mission Scores 1, 2 and 3) will be rank-ordered based on their Priority Score and those within or near the payline will be presented to LLS's oversight committees for approval. Funding status is relayed by email only and is not available by phone. All Priority Scores are confidential and are available only to LLS oversight committees and staff. Brief, anonymous feedback from the review panel may be provided but only when available.

Applicants can see the status of their application on the [LLS Research Portal](#). Up until final decisions are made, the status will be "Under Review." After final decisions are made, the status will either be "Awarded" or "Waitlist" or "Not Funded." Please do not call or email regarding status updates.

Key Dates

Phase	Date
Eligibility Phase: open	May 2019
Eligibility Phase: close	September 1, 2019, 3:00 PM (ET)
Eligibility determination by LLS staff	Rolling: May through September 8, 2019
Notification of eligibility	By September 8, 2019 (typically within 2 business days after submission)
Abstract Phase: open	Immediately after eligibility is approved
Abstract Phase: close	September 13, 2019, 3:00 PM (ET)
Full Application Phase: open	Immediately after Abstract Phase submission
Reference letters due	September 27, 2019, 3:00 PM (ET)
Full Application Phase: close	September 27, 2019, 3:00 PM (ET)

Panel Review Meeting	January 2020
Award Notification*	February/March 2020
Final version of Lay Abstract due	May 1, 2020
Award Start Date	July 1, 2020

*LLS's non-negotiable Grant Agreement Terms & Conditions are available on www.lls.org.

The submission deadlines will be enforced. Please note that all times are Eastern Time (ET). If any date falls on a weekend or US holiday, the deadline becomes the next business day.

It is highly recommended that submissions are done the day prior to the deadline. Internet traffic may be slow near the deadline, which may result in difficulties in submission. In addition, LLS's response time to questions may be delayed by the high volume received near the deadline. Therefore, it is imperative that any questions be posed to LLS as far ahead as possible. The LLS Research Portal automatically shuts down submissions after the deadline has passed. Late submissions due to technical difficulties will not be accepted. Every year, a few applicants get caught with difficulty near the deadline; some are unable to submit because of these issues. The best way to avoid this problem is to submit every phase well ahead of the deadline.

General Application Instructions

The CDP application will be completed in 3 phases: Eligibility, Abstract, and Full Application. Below are step-by-step instructions for applying:

1. Read the Guidelines & Instructions (this document) in full.
2. Log in to the [LLS Research Portal \(lls.fluxx.io\)](https://lls.fluxx.io) and select Career Development Program. Click "Apply to CDP!" to begin the application process (well ahead of the deadline).
 - o If you need a new account or need to reset your password for an existing account, contact researchprograms@lls.org.
3. Familiarize yourself with the LLS Research Portal.
4. Follow the instructions on the LLS Research Portal and this document to complete and submit your Eligibility. Eligibility requires completion of both the web form and the current eligibility form, which should be downloaded from the *Project Document* section of the web form.
5. You will receive an email (within two business days) notifying you of your Eligibility approval status. Once your Eligibility is approved, return to the LLS Research Portal, select "New or Pending" under *Requests* on the left panel and follow the instructions on the site and in this document to submit your Abstract.
 - o You may be contacted by an LLS staff member if the information provided on your eligibility request suggests that you may be better suited for a different award category.

- LLS staff will determine eligibility on a rolling basis using the criteria described in this document.
- 6. Reference letters requests are required during the Abstract Phase. Applicants are responsible for making sure that all required reference letters are submitted by their letter-writers by the Full Application deadline.
- 7. Once you have submitted your Abstract, you may immediately begin your Full Application. Please carefully follow the instructions on the LLS Research Portal and this document. Full Applications require completion of both the web form and the current application template, which should be downloaded from the *Project Document* section of the web form. **Failure to follow all application instructions may result in administrative triage of your application.**
 - Contact researchprograms@lls.org with any questions about the application that are not addressed in the LLS Research Portal or this document.
- 8. Submit your Full Application to LLS prior to the Full Application deadline. **We strongly recommend submitting at least 1 week in advance of the deadline, as site traffic on the day of and days leading up to the deadline will be heavy.**
- 9. Character limitations include spaces. Character and other length limitations are strictly enforced on the web form and the uploaded project description template. If character limits and font restrictions are not adhered to, or the preset margins are altered, the application may not be reviewed.
- 10. To create a fair process to all applicants, these Guidelines & Instructions and information on the LLS Research Portal must be followed. ***Do not ask for exceptions to these policies, including but not limited to exceptions to deadlines or making corrections to your document past the deadline.***

Carefully check every page of your application prior to submission. You are ultimately responsible for this submission, even if someone else submits on your behalf.

You may save your work and return to it at any time by clicking “Save.” Clicking “Submit” will lock your application and prevent further modification at that stage. Contact researchprograms@lls.org if you submit in error (must be at least one hour prior to before the deadline).

At any time during the application process, including after submitting your Full Application, you can check the status of your application by logging in to the LLS Research Portal, selecting your application (under *Requests* in either “New or Pending” or “Submitted”) and referring to the Status in the yellow box at the top of the page.

If you have any technical difficulties with the [LLS Research Portal](#), please contact researchprograms@lls.org.

Detailed Eligibility Phase Instructions

Starting in the 2019-2020 cycle, most eligibility information will be submitted via an uploadable form. Only organizational details and general eligibility information are entered at this phase. Applicants may submit eligibility immediately after the program opens. Eligibility will be evaluated by LLS staff on a rolling basis (see the [Eligibility Review](#) section below). If eligibility

is approved, the applicant may proceed to the next phase of the application. If eligibility is rejected, the applicant may submit one more time if new information is provided and the eligibility deadline has not passed.

All information requested on the eligibility form must be provided.

Since the applicant and Sponsor (and where applicable, the Co-Sponsor) must sign the eligibility form prior to uploading, it is highly recommended that this process is started well before the eligibility deadline.

Submission and Confirmation

You will receive an automated email stating that your information was successfully submitted within 2 business days of submission. If not received within two business days, contact researchprograms@lls.org. It is recommended that you confirm each stage of the application process by checking your application status on the LLS Research Portal at lls.fluxx.io.

Eligibility Review

LLS staff will review eligibility on a rolling basis. Refer to [Key Dates](#) for details. If you have not received notification within this time frame, contact researchprograms@lls.org.

If eligibility is accepted, you will have access to the Abstract Phase.

During the eligibility phase, the applicant should carefully consider who will write reference letters on their behalf and alert them of the due date for these letters (See [Reference Letters](#) subsection in the [Detailed Abstract Phase Instructions](#)). Letters submitted past the deadline will not be accepted. It is therefore beneficial to you to have a backup letter-writer in case one of your original writers is not able to submit on time.

Detailed Abstract Phase Instructions

There are two main aspects of the Abstract Phase:

- Reference Letters
- Project Information

The reference letter information can be added as soon as the application moves to the Abstract Phase. It is recommended to complete the reference letters information before starting the Project Information components, so that the writers get their submission instructions early (more details are found in the next section). Completion of the reference letters section must happen prior to final submission of all Abstract Phase components.

Note: Lay abstracts are not requested during the application process. Lay abstracts will be required of those selected for funding following award notification. ***The lay abstract is essential for LLS to continue successful fundraising to support our current and future grantees.*** Thus, a

well-written lay abstract, with sufficient detail and language suitable for the general public is required post-award.

Reference Letters

The applicant must have reference letters submitted on their behalf. These letters must be submitted directly by the letter-writers to the LLS Research Portal. (See [Initiating Blind Reference Letters](#) below).

It is the responsibility of the applicant to ensure that the letters are submitted in the LLS Research Portal by the deadline. Letters submitted past the deadline will not be accepted.

Reference Letter Policies

- Three letters are required.
- No more than four letters will be accepted.
- Though not required, it is beneficial to have two of the letters coming from outside the Sponsoring Institution.
- Letters are blinded to the applicant and must be uploaded directly by the writer.
- **The Sponsor Letter is separate from the reference letters and therefore is not considered one of the three reference letters. Sponsor information should not be provided in the reference letters section on the LLS Research Portal.**

Initiating Blind Reference Letters

The applicant must contact those who will write their reference letters during the Abstract Phase.

A section called “Request Blind Reference Letters” is available on the LLS Research Portal during the Abstract Phase. For each letter-writer, press the green “+” button on the right side. A pop up window will appear. Copy and paste the first name, last name, and email address of the letter-writer into the designated spaces. After adding this information, press “Create Recommendation.” The pop up will disappear and an email will be automatically sent to the letter-writer. The email will contain a unique link that allows the writer to directly upload the letter to the LLS Research Portal. This process is repeated for each of the letter-writers.

The email may end up in the letter-writer’s spam. Therefore, after the letter-writer’s information is added in the LLS Research Portal, **it is critical for the applicant to follow up with each writer to be sure they received the email.** If they have not received this email within two business days, email researchprograms@lls.org, and the link will be re-sent to them.

The letters will not be viewable by the applicant. However, the applicant can view the letters’ statuses on the LLS Research Portal. Prior to each letter’s submission, a note will be visible to the applicant indicating that no letter is uploaded. After the letter is uploaded, this note will change to indicate that the letter has been submitted.

Project Information

Provide the following after completing the initiation of blind reference letters. All information provided here must remain consistent in the full application. ***Significant divergence between information in this section and that in the full application may negatively affect your funding chances.*** Examples of significant divergence might be stating that the specific disease focus is CLL when your actual focus is normal myeloid development or stating that your model systems include patient samples, but your full application indicates no patient samples (or access to patient samples).

The scientific abstract should accurately reflect the actual research that you are proposing. Though putting your research in a broader context may be important, it is also important to avoid overstating your research beyond what you are actually proposing. Do not use disease names or other terms that are not directly relevant to your research. 1,500 characters maximum.

Submission and Confirmation

After clicking the “Submit” button, you will receive an automated email within 2 business days stating that your information was successfully submitted. If you do not receive the email confirmation of submission, contact researchprograms@lls.org.

Immediately after Abstract Phase submission, you will have access to the Full Application Phase and may proceed with the application.

Changes

Information collected in the Abstract Phase will automatically populate fields in the Full Application Phase. If requested prior to the Abstract Phase deadline, changes may be made with LLS approval. Email researchprograms@lls.org requesting any change and identify the elements to be changed. No changes may be made after the Abstract Phase deadline has passed. Abstract Phase components must accurately reflect the focus of the full application. **Failure to follow these policies may result in disqualification of the application.** See the first paragraph in the [Project Information](#) section.

At this stage, the applicant should follow up with those chosen to write reference letters to remind them of the upcoming deadline for letter submission.

Detailed Full Application Phase Instructions

Some sections of the full application will carry through from the Abstract Phase. Information that carries through must not be modified; changes made to the Abstract Phase components after the Abstract Phase deadline or prior to the deadline without LLS approval, may result in administrative triage of the full application. The remainder of the full application consists of web form components and elements to be uploaded as a ***single PDF***.

All sections in the full application template must use **Times New Roman 12pt. font**, except figure legends, which may use 10pt. font. Margins are pre-set and must not be changed.

Failure to submit as a single PDF in the order below may result in disqualification of the application.

Two sections are required in the uploaded PDF:

Section 1: Project Description Template (downloaded from the LLS Research Portal)

The template consists of the following required elements:

a. Applicant and Project Information

Copy and paste the title and abstract from the Abstract Phase.

b. Key Publications of Sponsor(s) Demonstrating Contributions to Blood Cancer (2 page maximum)

Describe 3-5 research publications from your Sponsor (and Co-Sponsor, where applicable) that best demonstrate their contributions to the understanding of blood cancer. Do not include reviews or publications that are not available online by the full application due date. Your Sponsor must be the corresponding author on at least one of these publications (or Co-Sponsor publications, where applicable); for less experienced Sponsor's, two of the publications may be those on which they are the first author. Use the *Blood* citation format. Follow this with a description of how each publication has directly impacted our understanding of blood cancer (500 characters maximum for each description). **The applicant should get input from the Sponsor/Co-Sponsor for this section, but it must be written by the applicant. Only list publications that clearly fit within either Mission Score 1, 2 or 3. See [Sponsor](#) and [Co-Sponsor](#) subsections as well as the [Mission Relevance](#) section.**

c. Mission Score

Carefully re-read the Blood Cancer Relevance and Mission Score sections of this document before proceeding.

Provide a Mission Score for each aim, followed by a brief description of the rationale for this assignment. ***The Mission Scores must directly reflect the Mission Score wording in the [Mission Score section](#) of this document; Mission Scores must be assigned based on the major focus of the aim.*** Follow this with an overall Mission Score based on the Mission Scores of each aim. Generally, the lowest Mission Score of the aims will correspond to the overall Mission Score. However, there needs to be a clear rationale for how the aims integrate in to the overall Mission Score. For example, an aim focused on gene expression analysis in human clinical trial patient samples will give that aim a Mission Score of 1. (“Gene expression analysis of venetoclax-treated patient samples from clinical trial [NCT number]” would be a fully sufficient explanation for a Mission Score of 1 for an aim). If the other aims have a Mission Score of 2, and are well-integrated in a logical, scientific fashion with the other aim, then the overall Mission Score will be 1.

The applicant-derived Mission Score will be a significant part of the review process. LLS staff and a subset of the review panel will provide the final Mission Score. As long as the applicant provides a reasonable scientific explanation for the score, divergence between the LLS/reviewer-derived and the applicant-derived Mission Score will be considered a difference in opinion and will not negatively affect your application. Divergence that is not supported by logical scientific explanation will negatively affect your application.

d. Sponsor's Role in Research Plan and Career Development

Describe how the experience and expertise of your Sponsor provides you with the appropriate environment to achieve the LLS Mission-relevant aims of your research proposal as well the mentorship to help you achieve your career development goals as a blood cancer researcher.

e. Co-Sponsor's Role in Research Plan and Career Development

Describe how the experience of your Co-Sponsor provides you with the appropriate environment and mentorship to achieve your research and career development goals. *Include an explanation of prior collaborations between you and the Co-Sponsor and/or between your Sponsor and Co-Sponsor. The Co-Sponsor is expected to have a significant co-mentorship role, and therefore the appearance of inclusion of a Co-Sponsor for grantsmanship purposes will negatively affect the applicant's score.*

f. Statement of Need for Continued Training

Describe the need for more time for your project's development so that you will be competitive for an independent position near the end of the Special Fellow Award term (or soon after).

g. Current or Previous LLS Fellow Award (if applicable)

For Special Fellow applicant who are current or former LLS Fellow awardees, include a description of progress you have made on your original aims or how those aims have been modified.

h. Previous CDP Applications

If you have previously submitted a Fellow or Special Fellow application that was not funded, briefly describe the updates that have been incorporated into this new application.

i. Description of Model Systems

This section will provide the reviewers with an easily accessed source to understand the models described in the project (cell lines, mouse models, patient samples, etc.), including names, species, tissue origin, and any genetic or other descriptive information that is important for the project. *All materials mentioned in the text and figures must be described here.*

j. Project Description (7 page maximum, including figures)

The following information should be provided in this order:

- Background; this section may contain unpublished data from others in the lab.*
- Specific Aims.

- Previous Work/Preliminary Data, including figures;** this section may **only** contain data generated by the applicant; in addition, the Sponsor must indicate in the Sponsor Letter that data in this section was generated by the applicant.
- Experimental Design and Expected Outcomes, including figures.**
- Potential Pitfalls and Alternative Approaches.
- Resources and Environment; this section must include a description of access to applicable key materials and models, including patient materials, animal models, drugs, etc.***

Use Times New Roman 12pt font, except figure legends, which may use 10pt font.

*Applicants should provide credit for unpublished data/figures primarily generated by others; **applications without appropriate and clear credit will be reviewed unfavorably and may be administratively triaged.**

** Figure legends should be formatted with a font size equivalent of 10pt. or above; figures should indicate the data source (e.g. preliminary data from the applicant's lab or a publication).

*** *If your lab does not have direct and demonstrable access to materials, access should be confirmed through letters of collaboration/support from the supplier. Lack of clear access to materials may indicate feasibility issues which may negatively affect the review of your application.*

The figure legends and the Experimental Design and Expected Outcomes section must clearly identify the model system(s), using enough description so that the reviewer understands the system. See the Description of Model Systems section for more detail.

Applications that include writing and figures directly from their Sponsor's prior grant submissions will be unfavorably reviewed; the exception are figures in the Background section.

k. References (4 page maximum)

Use the *Blood* citation format. Use Times New Roman 12pt font.

l. Budget

The following information should be provided in the budget template (and on the web form):

- Current salary, wage or stipend.
- Fringe benefit expense.
- Cost of living increases should be included in all out years.

The total amount requested must not exceed \$201,000.00 (\$67,000.00/year). Should the application be funded, the total amount requested will be the amount awarded, even if the total requested amount is less than \$201,000.00.

m. Signature Page

This form must be completed, including the indicated signatures.

n. Sponsor Mentor Table

The Sponsor should complete this table. No mentor table is needed for the Co-Sponsor, if applicable.

o. Access to Non-Commercially Available Reagents

Initial next to the statements certifying you will have access to all reagents necessary for the proposed research.

Section 2: Attachments

The following sections must be attached in this order to the end of the template (from Section 1) to create a single PDF. No other information may be provided in this section.

a. Applicant's Biosketch and Other Support

Use the most recent NIH format found on the NIH website. Include the NIH Other Support Document. Publications submitted and under review should be indicated on the biosketch. An eRA Commons User Name is not required. Do *not* use the postdoctoral fellowship version. Do *not* include undergraduate/graduate courses and their associated grades.

b. Sponsor's/Co-Sponsor's Biosketch and Other Support

Use the most recent NIH format found on the NIH website. Include the NIH Other Support Document. Publications submitted and under review should be indicated on the biosketch. An eRA Commons User Name is not required.

c. Sponsor Letter

The Sponsor Letter must be on institutional letterhead and must contain the following:

- Description of the applicant's position and how the applicant's research is integrated in the overall laboratory
- Brief description of how much of the application was written by the applicant; this should include certification that the "Previous Work/Preliminary Data" section includes **only** data generated by the applicant
- The Sponsor's experience in mentorship, which summarizes the information contained in the Sponsor Mentor Table
- In recent years, LLS has updated the CDP criteria to become more Mission-driven. Therefore, if a Sponsor has formerly been involved with a CDP award and this is mentioned in the Sponsor Letter, the Sponsor must briefly describe how that CDP funding directly impacted our understanding of blood cancer and/or impacted blood cancer patients.
- Source of funding for the applicant's research

- Training plan to develop the applicant into an independent researcher, clinician, or other professional **whose major function will be to directly or indirectly enhance the lives of blood cancer patients. This is an integral component of the review process.**
- Sponsor signature
- The Sponsor Letter is separate from the reference letters; Sponsors may not write a reference letter

If the applicant chose a Co-Sponsor at the Eligibility Stage, there must be a Co-Sponsor letter on institutional letterhead containing:

- Description of the role the Co-Sponsor will play as a co-mentor in the applicant's research and career development
- Description of relevant prior interactions between the Co-Sponsor and the applicant as well as between the Co-Sponsor and the Sponsor
- Co-Sponsor's signature
- The Co-Sponsor Letter is separate from the letters of reference; Co-Sponsors may not write a reference letter.

The Sponsor/Co-Sponsor Letters are not blinded to the applicant.

Applicants must declare the Co-Sponsor at the Eligibility Phase. Addition of a Co-Sponsor after the Eligibility Phase may result in administrative triage.

d. Collaboration/Support Letters (Required where applicable)

When there are significant collaborations, letters of support are helpful. This is critical when access to patient samples, animal models, or specialized equipment outside of the applicant's laboratory or department is necessary for the proposed research. If a company asset is required and is not commercially available from scientific supply companies, such as proprietary drugs, a letter from the company supplying this asset **must** accompany the application. The letters must be signed and on institutional/company letterhead. **Failure to provide this information will negatively affect the review of this application.**

e. Clinical Protocol (Required where applicable)

Provide a brief summary of any clinical protocols essential to the proposed research. Include approval date and compliance number. Indicate if IRB approval is pending and provide a letter from the institutional official regarding IRB status. Full approval must be obtained by the award start date.

f. Assurances (Required)

Human Subjects

Indicate if human subjects will be involved in the proposed research. The status (approved, pending or exempt) of IRB (or equivalent institutional designation) approval must be provided. Documentation of any current or pending approvals must be contained in the full application. There is also a section on the web form that must be completed. An application may be

submitted with IRB approval pending, but IRB approval must be obtained and provided to LLS prior to the award start date.

Laboratory Animals

Indicate if animals will be involved in the proposed research. The status and date of the Institutional Animal Care and Use Committee (IACUC) (or equivalent institutional designation) approval must be provided. The Animal Welfare Assurance number must be included.

Documentation of any current or pending approvals must be provided in the full application template. There is also a section on the web form that must be completed. An application may be submitted with approval pending, but approval must be obtained and provided to LLS prior to the award start date.

Recombinant DNA

Indicate if the proposed research involves recombinant DNA. Documentation of any current or pending approvals must be contained in the full application template. There is also a section on the web form that must be completed.

Biohazard Statement

Indicate if the proposed research involves the use of biohazards. Documentation of any current or pending approvals must be contained in the full application template. There is also a section on the web form that must be completed.

g. Publications (Optional)

Up to three manuscripts that are not online by the full application due date may be provided. Applications with more than three manuscripts, or that include manuscripts that are available online by the full application deadline, may not receive a full review.

h. Applicant's First Author Publications

Using the *Blood* citation format, list all first author publications.

Include:

- First author publications, including multiple first author publications (first authorship must be verifiable on the manuscript)
- Research-oriented publications
- Publications that are available on line by the full application due date

Do not include:

- Non first author publications
- Non research oriented publications (reviews, perspectives, etc.)
- Publications submitted or under review/revision
- Publications that are unavailable online by the full application due date

20% of all applications will be checked by LLS staff for accuracy. Significant deviations from publically available information may result in administrative triage. An example includes, but is

not limited to, the inclusion of a publication where the applicant indicates first authorship, but the manuscript does not indicate first authorship, co/dual first authorship, etc.

Uploading the project document and final submission

Upload the full application components, as a single PDF, in the “Project Document” section on the web form.

All documents must be combined into a single PDF in the order listed above before uploading. Failure to submit as a single PDF in the order above may result in disqualification of the application.

Submission and Confirmation

After clicking the “Submit” button, you will receive an automated email **within 2 business days** stating that your information was successfully submitted. **If you do not receive the email confirmation of submission, contact researchprograms@lls.org.**

Only one application document and one eligibility request document should be present. If extra documents remain after submission and before the deadline, email researchprograms@lls.org and let us know which documents to remove.

Carefully check your PDF prior to submission. If you notice problems with your PDF after you have submitted, email researchprograms@lls.org and we will help you upload the correct document if you are unable to delete the incorrect document. ***This email must be received, with the correct document, prior to the deadline; there are no exceptions to this rule.***

Check the application prior to final submission. The applicant is ultimately responsible for the submission, regardless of who actually is uploading information on the LLS Research Portal. Every year, LLS has a small number of people that notice problems with their application after the deadline. The solution to this problem is very simple and in the hands of the applicant:

- **Check your application prior to final submission.**
- **Submit well ahead of the deadline.**

Once the deadline has passed, only the following updates may be made:

- Significant updates to clinical trials:
 - IRB updates
 - Opening of the trial
 - Patient enrollment
 - Opening of new clinical sites
 - Efficacy and/or safety updates
- Manuscripts that have been accepted for publication; the following must be provided:
 - List of authors

- Title
- Journal
- A copy of the acceptance letter from the journal
- Updates regarding any transfers to a new institution (see Transfers section in [Eligibility](#))