**SOA Research Expanding Boundaries (REX)**

**Funding Pool Application Form**

**Please complete the information below. It is suggested to open and save the Word version of the form and complete your responses in Word. You may then copy and paste the responses into the online form when ready to submit. This will help facilitate editing and review of the application prior to submission.**

****

**Questions may be directed to** [**REC@soa.org**](mailto:REC@soa.org)**.**

***Applications will be reviewed by the Research Executive Committee, according to the guidelines posted on the*** [***SOA Research Expanding Boundaries webpage***](http://www.soa.org/Research/Research-Opps/Expanding-Boundaries-REX/default.aspx)***. Please review the guidelines before completing this application. The selection criteria are also listed at the end of this application form.***

**Contact Information**

1. Applicant (entity name) \*
2. Contact Name \*
3. Contact Phone number \*
4. Contact email address \*
5. Brief title of research idea \*

**Funding Details**

1. SOA REX Pool Funding

|  |  |
| --- | --- |
| Funding Entity | Amount |
| SOA REX Pool Funding | $ |
| Other funder (specify name if known) | $ |
| Other funder (specify name if known) | $ |
| Other funder (specify name if known) | $ |
| Other funder (specify name if known) | $ |
| Total funding | $ |

Please provide additional detail on how the budget was developed.

1. Research Description, including any information on expected scope, anticipated deliverables, etc. (Please attach detailed description, which might include background information or an actual proposal )
2. At what phase in the development process is the research?

\_\_\_ Idea generated

\_\_\_ Soliciting for a researcher (RFP issued)

\_\_\_ Considering a specific proposal

\_\_\_ Other (specify)

1. Does the applicant have a qualified researcher in mind? Why is the researcher being recommended?
2. What is the expected length of time needed for the project? What is the expected completion date?
3. Is the completion or funding decision of this research time-sensitive? Please explain.
4. Description of intended audience(s)
5. With which practice area(s) is this most closely aligned?
6. Could the project be considered multidisciplinary?
7. To which country(ies) will the project have the most appeal? Provide any additional comments about this project crossing national boundaries.
8. Are other non-SOA partners involved, either through funding or other support?  If not, are there other organizations who could get involved?

**Criteria for Selection for Funding by the REX Pool**

The REC has established 5 criteria for evaluating applications for funding from the REX Pool (as set out on [*SOA Research Expanding Boundaries webpage*](http://www.soa.org/Research/Research-Opps/Expanding-Boundaries-REX/default.aspx)). Please describe how the application meets each of the following criteria.

1. **Impact:** What is the impact of the proposed research to the actuarial profession? Why will the research be deemed as significant in expanding boundaries for the actuarial profession?
2. **Cost-Benefit:** How is the total budget for the proposed project in line with desired outcomes? How does the research add value to the profession?
3. **Unique:** How unique is the proposed application to meet its objectives?
4. **Viable:** How viable is the proposed project in light of available researchers and data? **At a minimum, this criterion must be satisfied in order for the proposal to receive funding.**
5. **Quality:** What actions have you taken or plan to implement to increase the likelihood that the expected outcome(s) will be of high quality? **At a minimum, this criterion must be satisfied in order for the proposal to receive funding.**