

Walker Fund Guidelines 2003

Graduate Students in Insect Systematics:

The "Margaret C. Walker Fund" provides awards similar in intent to Sigma Xi grants, but restricted to insect systematics. In order to apply for this grant, a specific application and format is required. I will include the formal terms of reference below. In previous years, student grants of this kind have been restricted to approximately \$1000. per student per year. Recent grants have been for research costs (collecting or lab costs), travel to meetings, and publication costs. Funds have had to be spent within one year of being awarded.

I encourage each of you to feel free to submit a proposal to the Walker Fund. Please submit it to me by Monday April 28th. Please pass this notice on to any other students in insect systematics.

Rosemary Gillespie

Walker Fund Advisory Committee

Policy for use of the Margaret C. Walker Fund for Teaching and Research in Systematic Entomology written by

J.T. Doyen, K.S. Hagen, E.G. Linsley, and H.V. Daly (Chair)

The Walker Fund is reserved exclusively for support of teaching and research in systematic entomology by faculty and students of the Department of Entomological Sciences, University of California, Berkeley campus and certain other qualified persons sponsored by members of the faculty. The Fund does not relieve the Department of its responsibility to support current and expanding teaching and research needs in systematic entomology. The Fund will be used to support teaching and research in systematic entomology beyond the regular and needed support provided by the Department. The ultimate objective for the expenditure of the Walker Funds is the dissemination of information on systematic entomology by means of publication and teaching.

For the purposes of this policy statement systematic entomology is defined as the study of the speciation, phylogeny, and classification of living and extinct insects, arachnoids, myriapods, and terrestrial crustaceans. Subjects included in the science are: biological nomenclature; descriptions of new taxa and revisions of taxa; collection, preservation, storage, and retrieval of specimens that are available to the scientific community for study; comparison of taxa for the purpose of elucidating their evolutionary relationships and classification; comparison of populations of a species for the purpose of determining their variation, evolutionary relationships, and infraspecific classification; theory of classification and of techniques for classification; application of new methods for analyses and comparisons of taxa, including those based on computer, cytological, biochemical, molecular, and genetic technology; catalogs, indices, faunal inventories, and bibliographies of a systematic nature; biogeographic studies dealing with classification or evolutionary history; and analysis of ecological relations with the physical environment and other organisms that contribute to the classification or evolutionary history of insects.

Walker Fund Guidelines 2003

Administration of the Walker Fund

The income from the estate may be expended for one or more projects each year. The Chair may wish to establish a maximum amount for proposals, however, at the outset we are not recommending what that limit should be. This will depend on the total amount available annually for allocation and some experience with the numbers and magnitudes of proposals. Funds not allocated will draw interest.

A "Walker Fund Advisory Committee" will be appointed by the Chair of the Department of Entomological Sciences to advise on projects to be supported. The Chair or a designated representative will have authority to allocate support to projects. The Funds will be expended under the regulations of the University of California.

Each project must have one and only one Principal Investigator who will be fully responsible for the expenditure of the funds. Principal Investigators will be limited to members of the Department of Entomological Sciences who are ladder-rank members of the Academic Senate or Agronomist series. Exceptions to this rule must be approved by the Advisory Committee and the Chair of the Department. Projects under the supervision of a PI may include support of students and others who are not themselves eligible to serve as PI's.

Preparation of Proposals and Annual Reports

A project proposal will be brief, concise, typewritten and include the following information:

1. Title of project
2. Name and title of Principal Investigator
3. Names and titles of other persons to be supported
4. Brief summary of the purpose of the project
5. Justification for the project and, where appropriate, background information, method of approach, and selected literature references
6. Budget and dates for the duration of the project
7. Total amount requested
8. Signature of PI with date.

The Advisory Committee may recommend full or partial support for a project. Projects may be awarded for up to 2 years and are subject to renewal upon reapplication. The PI for each project will submit a concise, typewritten, signed, annual report, stating the progress to date, publications, expenditures, and balance remaining. The Advisory Committee may recommend withdrawal of support prior to the normal termination of a project if satisfactory progress is not evident.

Acknowledgment of Walker Fund support

Each publication or thesis supported in part by the Walker Fund will acknowledge such support by the statement: "This research was supported in part by the Margaret C. Walker Fund for teaching and research in systematic entomology."

Walker Fund Guidelines 2003

Property Acquired Through a Walker Fund Project

Equipment purchased from the Walker Fund is the property of the University of California at Berkeley and subject to the usual inventory procedures. Books and journals purchased from the Walker Fund for the Entomology Library will carry a suitable stamp or bookplate. Specimens collected during field trips supported by the Walker Fund become the property of Essig Museum of Entomology, unless other arrangements have been approved by the Advisory Committee and Chair of the department.

The Advisory Committee will receive project proposals and information from the Chair on the annual amount of the Funds available for award. The Committee will meet at least once a year or more frequently if needed to review project proposals. A member of the committee who is also a PI on a proposal may present his or her argument in defense of the proposal, but may not rank his or her proposal. After independent study of the proposals, the committee as a whole will prepare a final ranked list of proposals and recommend the amounts to be awarded. This information will be given to the Chair of the department for allocation of Funds.

Examples of Acceptable Projects

1. Support Registered students
 - a. Students who receive support from the Walker Fund must be registered students and have their major adviser serve as P. I. Undergraduates and graduates are eligible to receive support.
 - b. Students may receive support for:
 - i. Non-resident fees
 - ii. Travel expenses for field research, visits to museums, presentation of research papers at scientific meetings, or participation in workshops.
 - iii. Supplies and minor expenses for research
 - iv. Equipment that becomes property of the University
 - v. Expenses to prepare the thesis document for publication after the thesis has been accepted by the Graduate Division in fulfillment of the final requirements for graduate degree.
2. Support of teaching in systematic in entomology
 - a. Funds may be extended for that part of any course which is primarily systematic in content.
 - b. Projects may be submitted to curate or increase the teaching collections of insects, color slides, microscope slides, etc.
 - c. Requests may be made to purchase, install, and maintain special equipment that is not otherwise available, yet needed for graduate education.
 - d. Books and journal subscriptions may be purchased from the Walker Fund if they are not available through the normal library budget, yet needed for faculty and student use in systematic entomology. Such requests may be included in a research or teaching project or submitted individually. The books and journals become property of the Entomology Library.

Walker Fund Guidelines 2003

3. Support of Faculty Research
 - a. Projects similar to those submitted to other granting agencies are accepted. Requests may be made for equipment, supplies, travel expenses, etc., subject to the same regulations that apply to grants. Overhead will not be charged on grants from Walker Funds.
 - b. PI's may submit research projects that include sufficient salary to supplement the reduced sabbatical salary. Salary will not exceed 100% of the PI's normal salary.
 - c. Costs for publication beyond those covered by the Department for a manuscript that is primarily systematic in content. Costs may include preparation of illustrations, wordprocessing, editing for production of camera-ready copy, production of camera-ready copy, extra publication costs for illustrations, page charges, reprint costs, and unusual costs for mailing reprints.
4. Support of Visiting Scientists and Students
 - a. Projects may be submitted by PI's to support the visits by scientists and students from other institutions. Visiting scientists will be expected to contribute to teaching and research in the Department by such activities as interacting with graduate students in systematic, participating in systematic seminars, giving staff seminars, giving guest lectures in courses, or curating and identifying specimens in the Essig Museum. Support for visits will include roundtrip economy travel to Berkeley from the visitor's home and reasonable living expense for up to one month. Depending on the size of the Walker Fund in the future, provision may be made for longer visits and an honorarium or, for visitors on sabbatical leave with reduced salary, supplement of no more than one third of the visitor's annual salary, a salary. Such awards will be subject to standard University accounting procedures.
 - b. Award of publications costs will ordinarily be reserved for authors or coauthors who are eligible to be PI's for Walker Funds or recent graduate from the Department. However, the costs for scientists who are not eligible to be PI's may be considered if the Advisory Committee is convinced that such publication will directly benefits teaching and research of the Department of Entomological Sciences.
5. Support of the Essig Museum of Entomology
 - a. The department of Entomological Sciences should continue to provide critical support for the Museum by purchase of museum cabinets, drawers, unit trays, pins, labels, and similar supplies and should continue to provide part-time positions for at least graduate research assailants and undergraduate assistance.
 - b. Projects may be submitted to curate a taxonomic group, inventory a group, place records of loan or holdings into an information retrieval system, or other similar activity that can not be accomplished with the normal personnel and equipment assigned to the museum.