

## **2026 Magistro Family Foundation Research Grant Application Guidelines**

### **1. INTRODUCTION**

The **Foundation for Physical Therapy Research** is the research funding organization for the American Physical Therapy Association (APTA) and is a registered 501(c)(3) not-for-profit organization registered in New York. Our vision is to shape the future of health through physical therapy research. Our mission is fund research and develop researchers to optimize movement and improve the health of society.

Through the generosity of our donors and community of supporters, our sole purpose is to fund physical therapy research and researchers through research grants, scholarships, and fellowships. Through our investments in PhD students and early career researchers, we are creating a pipeline of highly skilled and capable researchers. They are building our knowledge of and evidence about effective and innovative physical therapy practices, tools, guidelines, and education across the spectrum of our professional specialties.

Our growing number of larger grants allows us to fund both emerging and established researchers who have been helping build the physical therapy evidence base in priority areas and help define the value of physical therapy for patients and clients, health care professionals, and payers.

Through the generosity of our donors, we have created a sustained pipeline for future researchers and of research funding to help launch careers and advance the profession's evidence-based practices.

#### **Research Integrity**

The Foundation expects all grant recipients to adhere to the highest ethical standards and to comply with all applicable public laws and regulations when undertaking any type of research we support. We expect grant recipients to demonstrate the following characteristics:

- Be intellectually honest in proposing, performing, and reporting research;
- Be accurate in representing contributions in research proposals and reports;
- Act without discrimination or bias in all aspects of research;
- Be collegial in scientific interactions, such as communication and sharing of resources;
- Be transparent in conflicts of interest or potential conflicts of interest;
- Ensure the protection of human subjects by conducting research in compliance with the Department of Health and Human Services' regulations governing the protection of human subjects, as well as adherence to a project's IRB approval and all the sponsoring institution's research and conduct policies;

- Ensure the humane care of animals by conducting research in compliance with the Public Health Service's policy on humane care and treatment of laboratory animals, if applicable; and
- Adhere to the mutual responsibilities between principal investigators and their research teams.

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*This grant is generously supported through the Magistro Family Foundation Endowment Fund.*

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## **2. GENERAL INFORMATION**

### **Award**

The way that the Foundation will fund this grant has changed, starting with the 2026 funding cycle. The Foundation expects to make one (1) award of **\$200,000** a study that does not require the purchase of data. For studies that will require the purchase of data, up to **\$50,000** in supplemental funds may be awarded and disbursed in the first year to cover those costs. Please see the section on application budget for further details.

The period of performance can be for one, two, three years.

The amount of the award will be the same, regardless of the period of performance. The Foundation reserves the right not to make this award.

All the funded research must be carried out in the United States (U.S.).

The Foundation expects to make research grant awards by the end of November. The start date of the grant period of performance for all research grants will be January 1, 2027.

### **Full Applications are by Invitation-only Based on a Letter of Intent**

#### ***Letter of Intent Application Deadline***

**A Letter of Intent (LOI) must be submitted via the Principal Investigator's account on ProposalCentral by April 21, 2026 at 4:59 p.m. EDT.** Instructions for completing and submitting the LOI can be found [here](#).

#### ***LOI Review***

A Scientific Review Committee subcommittee will score each LOI for importance, relevance of the proposed study to the objectives of this grant, strengths of the proposed study and the team, and high likelihood of successful completion on time and on budget. The Board of Trustees will invite

LOI applicants with qualifying scores to submit a full proposal. The Foundation reserves the right not to extend any invitations.

### ***Invitation to Apply Notifications***

Invitations to apply will be sent out to applicants in May. More information on the timing will be posted on the Foundation website and sent to everyone who signed up for research grant email updates. Applicants not chosen will be informed at the same time. The Foundation reserves the right to extend deadlines if needed. Invited applicants must confirm their intention to submit a full application within one week of notification or the Foundation reserves the right to withdraw and reassign the invitation.

**Note: Applicants who are not invited to submit a full proposal are eligible to apply for one of the \$40,000 grants being offered in this cycle.**

### ***Full Application Deadline for Invited Researchers***

**Invited applications must be submitted no later than 4:59 p.m. EDT on August 31, 2026**, by using the Principal Investigator's account and the Magistro Family Foundation Research Grant application form on ProposalCentral. No exceptions will be made for late submissions unless due to a technical problem verified by ProposalCentral. Any part of whole of an application not submitted through ProposalCentral will be invalid.

### **Eligibility**

This grant has a number of eligibility requirements, which are described below. Please review them carefully before proceeding to start a Letter of Intent.

## **3. FUNDING OBJECTIVE**

The intent of this grant is to fund high-quality, rigorous, and relevant U.S.-based physical therapy cost-effectiveness research that increases knowledge, evidence, and data to support evidence-based, cost-effective, and therapeutically effective physical therapy interventions that improve patient outcomes and that have immediate and real-world relevance to practice, health policy, and further research.

## **4. AREAS OF STUDY**

Applicants will explain how their proposed research addresses one or more of the priority area(s) included in the [APTA's 2023 Research Agenda](#), or a published APTA academy research priority. Successful applications will demonstrate how the proposed study either expands evidence about

the economic value of physical therapy for the condition addressed or that it will help fill an absolute gap in evidence of the economic value of physical therapy for the condition studied.<sup>1</sup>

### **Study Design and Methods**

The proposed study will evaluate the cost-effectiveness of an intervention commonly delivered by physical therapists, as determined by current practice standards. The comparator may include another physical therapy intervention, usual care, or no treatment with appropriate justification. The proposed study will compare the costs, cost-effectiveness, and therapeutic outcomes, even if the funding supporting outcomes comparison is from a different source. Eligible study designs include secondary analyses of data from completed randomized clinical trials, observational studies with sufficient longitudinal outcomes and cost data, and/or use of administrative claims or utilization data.

The proposed study will include a conceptual framework that identifies the main outcomes. Outcomes will include patient-centered outcomes, such as healthcare utilization and patient function, as well as costs. The proposal will explain how the available data will support the study's aims. It will provide a clear rationale for selection of each key variable and demonstrate a robust plan to minimize risks of bias and threats to validity.

### **Cost Effectiveness Analysis**

For the purposes of this grant, cost-effective analysis (CEA) is defined as a rigorous and validated method for quantifying and comparing a defined set of benefits and costs of at least two interventions, programs, or policies. CEA uses clearly defined perspectives (which may be focused only on direct health care costs or be broader to include social or indirect costs). It is implemented using a consistent framework in clinical trials or through use of modeling and provides incremental cost-effectiveness ratios in the results.

The goal of CEA will be to produce real-world, patient-centered, rehabilitation-relevant cost outcomes. The description of the CEA methods should follow published best practices (i.e., the CHEERS checklist) and will include, at a minimum, the following information:

- Perspective(s) (patient, payer, etc.)
- Time horizon (must be the same as the data longitude)
- Description of relative comparator
- How costs will be measured (including avoiding double-counting)
- Discounting

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<sup>1</sup> Applicants may find it helpful to consult the [2023 APTA Economic Value of Physical Therapy in the United States](#) for a list of conditions where cost effectiveness evidence exists and conditions where there are gaps. It is not a requirement to reference this material.

- How effectiveness is measured
- Reporting and design framework (if using clinical trial data)
- Modeling approach (e.g., regression, decision tree, Markov model)
- Sensitivity analyses

## **5. ELIGIBILITY**

In general, the Foundation reserves the right, on the basis of statutory, regulatory, published policy limitations, changes to donor agreements, or decisions by the Foundation Board of Trustees, under certain programs or types of awards, to limit eligibility to, or exclude from eligibility, classes, or types of entities.

### **Principal Investigator**

One Principal Investigator must submit the application, whether they are applying as an individual working with a research team and regardless of whether they are naming co-investigators and do so through the legally registered, US-based sponsoring organization or Institution at which they are employed. The Foundation does not allow co-Principal Investigator.

The Principal Investigator must meet these requirements:

- Hold an academic research doctorate. If the principal investigator does not hold a post-professional, academic doctorate, this eligibility can be met one of two ways: Hold a master's or certificate that required least six credit hours in research methodologies or have an expert on the research team who is explicitly responsible for providing the requisite design and methodological skills and experience.
- Be employed by a U.S.-registered, domestically operating, public or private, non-profit, or for-profit organization or institution that is eligible to receive research grants that agrees to act as the Sponsoring Institution.
- Be a member of APTA<sup>2</sup> at the time of the Letter of Intent submission and for the life of the grant.
- Possess a license to practice physical therapy in the U.S. or in a U.S. jurisdiction **OR**
  - Have met all the requirements for physical therapy licensure in the U.S. or in a U.S. jurisdiction, including having received a passing score on the licensure exam; **OR**
- Possess a physical therapist assistant license in the U.S. or in U.S. jurisdiction **OR**
  - Have met all the requirements for licensure as a physical therapist assistant in the U.S. or in a U.S. jurisdiction, including having received a passing score on the licensure exam.
- **CHANGED:** Be a U.S. citizen **OR** a permanent resident with a valid Green Card for the life of the grant.

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<sup>2</sup> You may become an APTA member [here](#).

- Have a substantive research and leadership role on the study, as well as being responsible for its implementation.
- If a prior Foundation award recipient, the Principal Investigator must be in Good Standing with the Foundation.
- If the Principal Investigator currently holds any scholarship award or research grant from the Foundation, that award or grant must be successfully completed and closed prior to the start of this research grant. **No recipient will hold more than one Foundation award or grant at one time.**

### **Foundation Definition of a Principal Investigator**

The Principal Investigator is the only investigator named on the research grant along with their Sponsoring Institution. They are the only investigator that signs the Letter of Agreement. They have a major ongoing role in the study and provide overall research leadership, have direct oversight of the research process, and are accountable for the quality of the study. They are fiscally accountable to their institution for the funds awarded. They are responsible for submitting all required reports to the Foundation. They are responsible for disseminating the results of the study through a research brief, submissions to peer-reviewed publications, public presentations, posters, and as appropriate, other channels, such as APTA or Foundation publications.

### **Considerations for Physical Therapist Assistant Applicants**

The Foundation only supports intervention studies in which the interventions are provided by physical therapists, or in which selected components of the interventions are provided by physical therapist assistants under the direction and supervision of physical therapists.

### **Research Team Composition and CEA Requirement**

The Foundation expects the applicant to be working with a team that contributes the expertise needed to deliver a successful, high-quality study. The composition of the team should satisfy the reviewers that all skills and expertise needed for the successful completion of the study will be available. One or more co-investigators may be named on a research team, but they cannot be assigned role responsibilities reserved for and expected of the principal investigator. The Foundation does not allow co-Principal Investigators. If the applicant is unsure about team composition and roles, they are advised to contact the Foundation ([info@foundation4PT.org](mailto:info@foundation4PT.org)) prior to submission.

### **Cost-effectiveness Lead (Required)**

The Foundation requires that one team member be an expert in CEA, as demonstrated by their academic qualifications, experience leading at least one CEA, and their publication record.

## **Sponsoring Institution**

The Sponsoring Institution must meet the following requirements:

- Be legally registered in the U.S. as a domestically operating, public or private, non-profit, or for-profit institution or organization;
- Have an OHRP number and have policies and requirements to protect research team personnel and human and animal subjects;
- Not have a conflict of interest;
- Sign the Letter of Agreement; and
- Be accountable for implementation of the research project, as agreed in the Letter of Agreement, including for the appropriate expenditure and accounting for funds according to Foundation requirements.

## **Ineligible Applications**

In addition to ineligibility due to not meeting one or more of the requirements listed above, there are other conditions that would render an application ineligible.

**Academic degree requirements.** Research studies that are to be completed in fulfillment of requirements for an academic degree are not eligible to be funded by this grant.

**Foundation limit on awards or grants.** An applicant is limited to one grant submission per cycle. There can be no overlap of award or grant periods of performance. Any current awards or grants must be completed and closed prior to the start of the period of performance for this grant. This limitation pertains to the principal investigator and not to the sponsoring institution.

**Failure to complete award or grant requirements on an existing Foundation scholarship award or research grant.** The applicant will not be in Good Standing and will not be eligible to apply for any research grant.

**The Principal Investigator cannot be a student.** The applicant must have completed any academic degree work by September 1, 2026 to be considered for this grant. This restriction applies to Principal Investigators who have full-time qualifying employment, but who are also enrolled in a post-graduate degree program that will be ongoing on or after this date.

**Product prototype or pre-commercialization testing studies.** These types of studies are not eligible for Foundation funding.

**The Principal Investigator must be independent and not have a conflict of interest in the design or conduct of the study.** The following examples are indicative and not exhaustive: they should have no restrictions from any source that would compromise the independence of the conduct of the

study and the reporting of all results; neither the PI nor research team members can have ownership rights or have a financial interest (includes salary) in a company that owns a technology being studied itself or used in a study.

## **6. FUNDING LEVELS**

The Foundation expects applicants to apply for \$200,000 if their data use costs do not include purchasing data. If the applicant proposes purchasing data from a qualifying source, (e.g., CMS, Optum, MarketScan, or all-payer claims databases), they may apply for the additional documented costs up to \$50,000 in additional funds that would be disbursed in the first year<sup>3</sup>. The Foundation will review budgets and justifications for supplemental funding as part of the pre-review compliance phase for full proposals. Budget details are not required at the LOI stage. If you have any questions about qualifying for the supplement, please contact the Foundation prior to submission.

## **7. REQUIRED APPROVALS, ASSURANCES AND TRAINING**

### **Institutional Review Board Approval or Exemption**

The Foundation requires all study proposals to be approved or exempted by the Sponsoring Institution's Institutional Review Board (IRB). Should a Sponsoring Institution not maintain an IRB, they may contract with a qualified entity. Foundation funds cannot be used to pay for privately contracted approvals or exemptions. The Sponsoring Institution will be responsible for ensuring that any required IRB approval or exemption is maintained for the life of the research project.

If data used in the study contain identifiable private information that can be linked to human subjects, the plan must include specific procedures for reviewing the protocol and for securing informed consent of subjects in compliance with federal policy on the protection of human subjects.

### ***Standards for Privacy of Individually Identifiable Health Information***

The Privacy Rule is a federal regulation under the 1996 Health Insurance Portability and Accountability Act (HIPAA) that governs the protection of individually identifiable health information from covered entities through collaborative or contractual agreements. Decisions about whether and how to implement the Privacy Rule reside with the Principal Investigator and their institution.

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<sup>3</sup> Applicants should contact the Foundation if wishing to purchase data not listed here and get pre-approved prior to submission.

## **Assurance Agreement**

The Sponsoring Institution must be covered by an assurance agreement indicating compliance with Department of Health and Human Services regulations governing the protection of human subjects.

## **Conduct of Research and Human Subjects Protection Training**

The Foundation expects that the applicant and key personnel will have fully complied with their institutions' conduct of research training requirements. The Principal Investigator and all key personnel involved in the conduct of the study must submit, at a minimum, a certificate of completion for human subjects protection training (initial or refresher). Certificates must be dated within the past three years. **Letters cannot be substituted for certificates.**

## **8. DATA MANAGEMENT AND SHARING**

To ensure that knowledge, including data, produced by the research supported by this grant can be **publicly** accessed, used and built upon, the Foundation supports the goals and approaches taken in the [NIH's 2023 Data Sharing Policy](#). Foundation grant recipients are expected to follow their institution's data sharing policies and reflect them in their application as appropriate. Applicants that do not have any institutional requirements are still expected to include plans to share their data publicly as part of their proposed study. The Foundation does not accept the lack of institutional data-sharing requirements as a reason not to agree to data sharing. The Foundation accepts that there may be data-sharing restrictions imposed by the owners of data sources.

## **9. OVERVIEW OF LEGAL AND ADMINISTRATIVE REQUIREMENTS**

This section covers only the most salient information and is not exhaustive. If a Principal Investigator or their institution have specific questions, they should contact the Foundation at [info@foundation4PT.org](mailto:info@foundation4PT.org).

### **Letter of Agreement**

All Sponsoring Institutions will sign a Letter of Agreement (i.e., contract) with the Foundation on behalf of the Principal Investigator. The Sponsoring Institution will agree to administer grant funds and ensure compliance with all institutional and Foundation requirements.

Indicative terms and conditions include, but are not limited to, use of funds, reporting, payments, changing principal investigators or institutions, changes to approved plans, breach or default, and the rights of the Foundation concerning patents, royalties, and licenses.

Sponsoring Institutions shall not be allowed to refuse any part of whole of any clause or add any whole clause. The Foundation is committed to working with Sponsoring Institutions to reach mutually agreeable text to address legitimate concerns, so long as they will be resolved without undue delay in finalizing the Agreement. The Foundation reserves the right to withdraw a provisional award due to unresolvable disagreements that prevent finalization of the Agreement.

**Subcontracting.** The Foundation understands the need for and allows the Sponsoring Institution to subcontract implementation of parts of the study with certain restrictions and considerations as illustrated but not limited to the following:

- No fringe benefits, administrative fees, or other indirect charges may be part of any personnel rates and payments to individuals, institutions, or organizations operating under a subcontract.
- Subcontracting arrangements (singular or multiple) that exceed 40% of the total budget may be subject to further review and approval as part of compliance checks prior to application reviewing.
- Subcontracting cannot effectively transfer the burden of responsibility and accountability for implementation of the study itself to an institution not a signatory to the Letter of Agreement. The Foundation does not allow multiple institutions to sign the Agreement.

**Applicants are strongly advised to contact the Foundation prior to submission with any questions about subcontracting prior to submission.**

### **Finalizing a Provisional Award**

All awards are provisional until the Foundation receives the following required documents or information:

- Letter of Agreement signed by the Sponsoring Institution and the Principal Investigator;
- IRB or IACUC approval(s) or exemption(s) on letterhead and signed by the appropriate official(s);
- A publicity consent form signed by the Principal Investigator; and
- Information required for the electronic transfer of funds.

The first payment of funds will not be made until all these requirements are fully met.

### **Payment of Funds**

Funds will be sent electronically to the US-based and legally registered sponsoring organization or institution for administration through its financial office. Payments will be made according to a schedule in the Letter of Agreement, which will usually be an initial payment and then every six months. After the initial payment, further payments are conditional upon the timely submission of

progress reports that fully provide requested information about implementation progress and, for 2-year grants, a first-year financial report.

### **Use of Funds**

Funds are available for research done in the U.S. by legally registered U.S. institutions and eligible researchers.

By means of the application budget form, funds may be requested to meet types of expense reasonably associated with the research project, including salaries and fringe benefits (of employees of the sponsoring institution only), subcontracts (no fringe or indirect costs or fee, and subject to overall budget limitations), necessary consultant contracts, purchase (see below) or rental of equipment, supplies, travel to study sites or study-related conferences, publication costs (if incurred during the grant period, printing or postage, and special services, such as computer time, photographic services, and secretarial or research assistant support. Upon finalization of the award, changes of 10% or more to any part of an application budget must be approved by the Foundation in advance.

### ***Limitations on Use***

The following uses of Foundation funds are not permitted under any circumstance:

- **NO INDIRECT (OVERHEAD OR ADMINISTRATIVE) COSTS OR ADMINISTRATIVE FEES ARE ALLOWED. Please make sure your institution and any subcontracted institutions or consultants are fully aware of this restriction before you submit your Letter of Intent. There are no exceptions.**
- No funds may be used for expenses or debts incurred prior to the start of the grant period of performance stated in the finalized, signed Letter of Agreement.
- No award funds will finance cost overruns on the funded project. Unexpended funds must be returned when the grant closes.
- Support for the purchase of major pieces of permanent equipment is limited to **20 percent or less** of the total award unless the Foundation has pre-approved a higher proportion has been given by the Foundation prior to submission.
- Conference travel support is limited to the principal investigator only and subject to travel expense guidelines. Requests for international travel exceptions must be approved in advance.

## **10. EVALUATION OF FULL APPLICATIONS**

### **Overview of the Process**

Guidelines for the distribution of funds and criteria for selecting research grant recipients are established and carried out by the Foundation Board of Trustees. The Scientific Review Committee

is appointed by the Board to review and score applications. The committee uses review criteria similar to the one used by NIH and uses the NIH scoring of 1 being exceptional and 9 being poor.

The committee is comprised of physical therapist researchers and others with experience preparing physical therapists and physical therapist assistants for research careers and with experience conducting successful and impactful research. The Research Committee of the Board considers the review results and recommends an applicant for each grant to be approved by the Board of Trustees to receive it. The Board makes final decisions on all research grant awards. The Board reserves the right not to make an award.

## **10. USE OF ARTIFICIAL INTELLIGENCE**

The Foundation, consistent with NIH policies and standards, does not consider applications that are substantially developed using artificial intelligence (A.I.) to be considered original work. The Foundation expects applicants to submit original ideas in proposing research training or studies. If A.I. use is found to be substantive and undue, the application will be disqualified from review, and the Foundation may declare that applicant to be Not in Good Standing. Applicants Not in Good Standing cannot apply for or hold any Foundation funding. The Foundation is under no obligation to justify its decision, nor will it be subject to discussion, appeal, or any other form of recourse by the applicant. All risk associated with the use of A.I. rests solely with the applicant. If an award has been issued and the Foundation later discovers substantive and undue reliance on A.I. it reserves the right to revoke the award and take legal actions available under the Letter of Agreement.

## **11. QUESTIONS**

Please sign up for the [research grant application FAQs email list](#) to receive important clarifications and updates directly. Please read the application instructions carefully. Please submit any questions you have about these guidelines to [info@foundation4PT.org](mailto:info@foundation4PT.org).

**End of the 2026 Magistro Family Foundation Research Grant Guidelines**