MSC
Individual Fellowships

Dr. Jennifer Brennan

National Contact Point

National Delegate
Marie Skłodowska-Curie Actions

During webinar please email queries to
mariecurie@iua.ie

Presentation and Q&A report will be available online

Irish Marie Skłodowska-Curie Office

Sponsored by the **Irish Research Council**

- **Promote** the Actions to Irish researchers and research organisations

- **Support** researchers in preparing funding applications

- Contribute to the **development** of the MSCA

Staff members:

- Dr. Jennifer Brennan (NCP & National Delegate)

- Dr. Suzanne Miller-Delaney (Programme Officer -SFI Centres)

- Grace McCarthy (Part-time: Research Officer – MSCA & EURAXESS)

How the MSC Office can help

Information

- Email Distribution List (mariecurie@iua.ie)
- Marie Skłodowska-Curie Office Ireland on Linkedin
- Dedicated website www.iua.ie/mariecurie
- YouTube channel MarieCurieActionIre
- Twitter @mariescurie_ire

Support

- Training Webinars (recordings on website and YouTube)
- Advice on whether your concept 'fits' the Call
- Proposal writing workshops for IF http://www.iua.ie/proposal-preparation-training-for-individual-fellowships-call-2016-webinar-workshops/
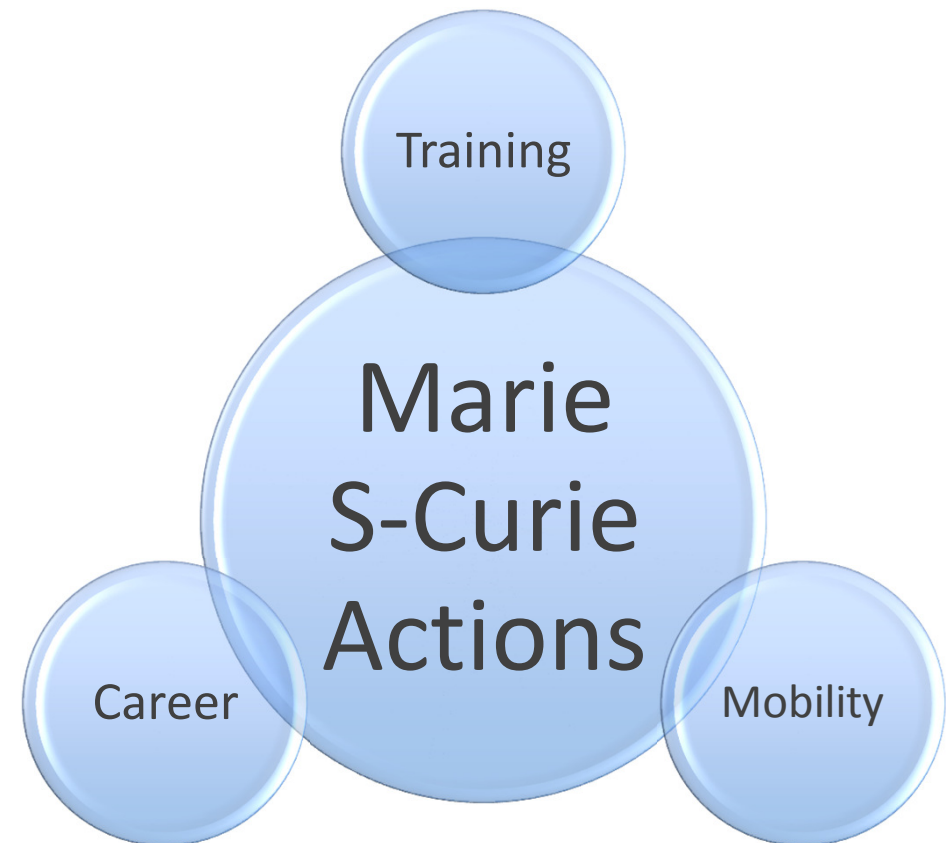
Marie Skłodowska Curie Actions in Horizon 2020:

€6.2 billion budget

In the **Excellence Science** Pillar

Funds **ALL RESEARCH AREAS**
(no thematic calls or priorities)

Implemented via Annual
Calls for Proposals

Training

Marie
S-Curie
Actions

Career

Mobility

Funding for PIs/Research Orgs

RISE	• Research & Innovation Staff Exchange
ITN	• Innovative Training Networks
COFUND	• Co-financing fellowship or doctoral programmes with transnational mobility
NIGHT	• European Researchers' Night
IF	• Individual Fellowships (14th Sep deadline)

http://www.iua.ie/irish-marie-curie-office/funding-calls/

Individual Fellowships

- A personal fellowship to support a period of mobility
- For Experienced Researchers
  - Post-PhD or equivalent
  - No upper age or experience limit
- Fully-funded fellowships
  - Salary, research costs etc.
- Academic or non-academic host

IF – European and Global

European Fellowships

1 – 2 years

Global Fellowships
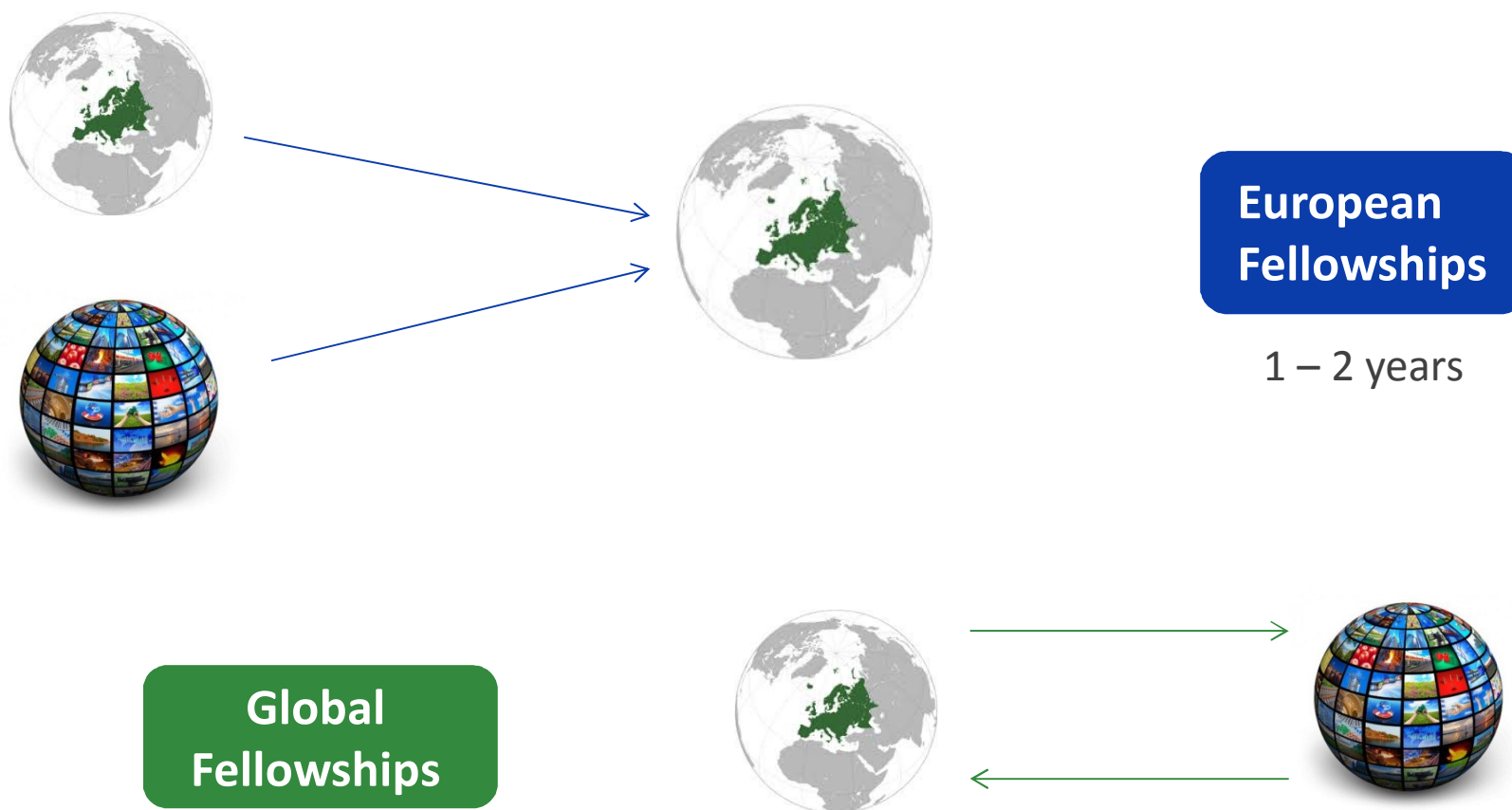
2 – 3 years (incl. 12 months back in Europe)

"Europe" = 28 Members States plus Associated Countries e.g. Norway, Turkey

European Fellowship – Four Panels

Standard EF

- For those coming to or moving within Europe
- **Mobility Rule:** Can only apply with a host in a country where you have lived for no more than **12 months** in the **3 years** before the call deadline (14th September 2016)

Career Restart

- For those coming to or moving within Europe
- For people who have taken a career break (any reason) for at least 12 months before call deadline
- Can only apply with a host in a country where you have lived for no more than **3 years** in the **5 years** before the call deadline

Reintegration

- For those who wish to (or recently have) relocated to Europe from outside
- Must be a European citizen or previous long-term resident ($\geq$ 5 years of research work in Europe)
- Can only apply with a host in a country where you have lived for no more than **3 years** in the **5 years** before the call deadline

New!! Society & Enterprise

- For those coming to or moving within Europe
- The host must be a non-academic organisation e.g. a company, an NGO, a voluntary organisation,……
- Can only apply with a host in a country where you have lived for no more than **3 years** in the **5 years** before the call deadline

Global Fellowship

Global

- For those who wish to spent time outside Europe and return afterwards
- Must be a European citizen or long-term resident ($\geq$ 5 years of research work in Europe)
- Can only apply with a host in a non-European country where you have lived for no more than **12 months** in the **3 years** before the call deadline – time spent in the European country is not relevant

Important!

Can only submit one application per Call: cannot apply for EF and GF in the same Call

If you are eligible for more than one EF panel (Std, Car, Reint) then pick the one that mostly closely matches your situation

Secondments

- During the IF, can be seconded to any host organisation in Europe
- Ideally should take place in a different sector, i.e. academic to non-academic or vice-versa
- Non-academic = industry, NGO, CSO, museum, archive………

Fellowship Duration	Maximum Secondment Duration
< 18 months	3 months
> 18 months	6 months

- The secondment can be split into several shorter periods
- If you can't specify the precise host organisation for the secondment in the proposal, must at least specify the sector (academic or non-academic), the timing and the purpose of the secondment

More than just a research project; a career development fellowship

- Training through research (individual project)
- Additional scientific skills (new techniques, instruments etc.)
- Transferable skills (e.g. communication, IPR, entrepreneurship etc.)
- Interdisciplinary/inter-sectoral transfer of knowledge (**secondments**)
  - Can spend up to 6 months (in total) working in another organisation (ideally in another sector) in Europe.
  - Opportunity to link with industry, NGO, public sector, national archive etc.
- Research and financial management of the fellowship
- Organising and taking part in events (including public engagement)
- Training in gender and ethics issues

Must be managed by a Career Development Plan

CDP

2016-2017 MSCA Work Programme:

"A Career Development Plan should be established jointly by the supervisor(s) and the researcher. In addition to research or innovation objectives, this plan comprises the researcher's training and career needs, including training on transferable skills, planning for publications and participation in conferences"

Don't include a CDP in application but do describe how it will be used during the fellowship to monitor the progress of the research, training and all other fellowship activities

MSCA – Opening up new career options

Careers outside science *or* not in labour force

68.8%

Non-university research (industry, government, etc)

14.5%

31.2%

16.7%

1.8%

Early career research

Permanent research staff

Professor
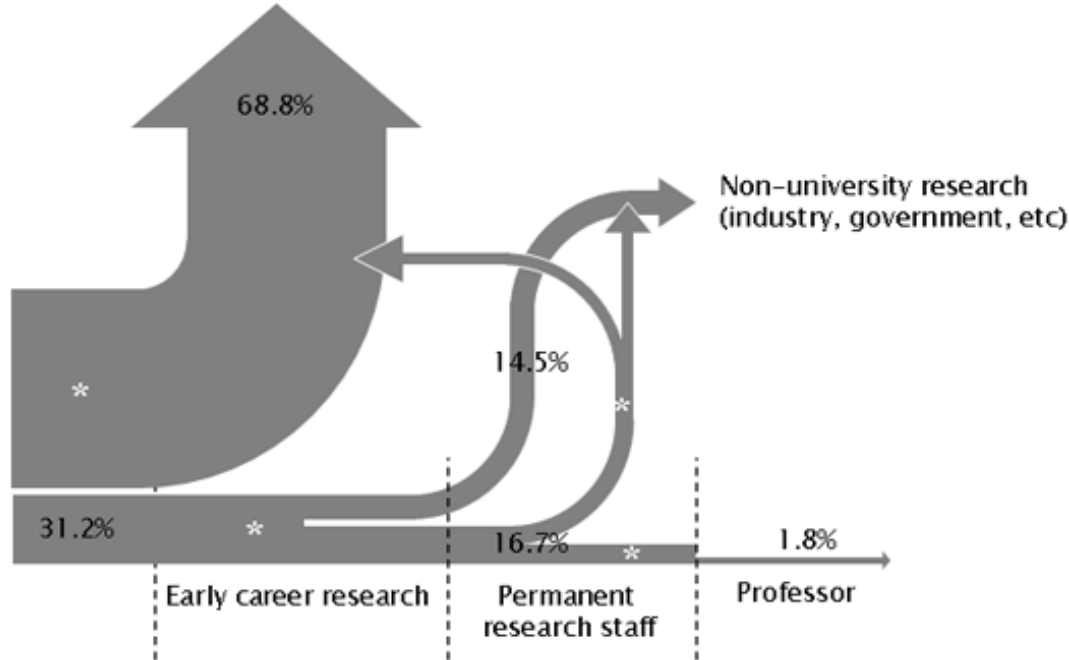
"10% of PhD Graduates from the University of Cambridge secure a permanent academic post"

Innovation Union: *"Europe will need 1 million extra researchers by 2020, mostly in the private sector"*

MSC Fellowships want to prepare researchers for careers in a range of sectors

http://ec.europa.eu/research/innovation-union/index_en.cfm

Funding Model

Categories of eligible costs	Costs of researcher PER MONTH			Institutional costs PER MONTH	
Marie Skłodowska-Curie action	Living allowance (a)	Mobility allowance (b)	Family allowance (c)	Research, training and networking costs (a)	Management and indirect costs (b)
IF (100%)	4 650	600	500	800	650

- Fellow's Salary = Living Allowance + Mobility Allowance (+ Family Allowance)
- Rates in table are inclusive of employers' costs (e.g. employer's PRSI, pension contribution)
- A country coefficient applies to the Living Allowance (e.g. 113.5 for Ireland, 68.3 for Romania)
- Estimated Gross Salary (prior to employee's tax, social security and pension deductions)
  - €55,000 p.a. (no family allowance)
  - €60,000 p.a. (with family allowance)

How to apply

Application/Contractual Process

European Fellowships

Researcher applies with European host → Host signs contract with EC → Host employs researcher

Global Fellowships

Researcher applies with European host → European host signs contract with EC → European Host employs researcher

+

Supported by non-European host

Non-European host signs agreement with European host

Researcher seconded to non-European host

Online Application

Part A - Administrative Forms

- Completed online
- Visit Call page on Participant Portal
- ECAS Account Login
- Need PIC (Participant Identification Code) to submit
- Call deadlines are Brussels time!

Proposal "Part B"

- Download template from inside online system
- Complete and save as PDF
- Upload to online system
- Multiple submissions possible – submit early and often!

http://ec.europa.eu/research/participants/portal/desktop/en/opportunities/index.html

Part B - Proposal Content

Part B1 (13 pages)

- Start page (1 page)
- Table of contents (1 page)
- List of Participants (1 page)
- 1. Excellence
- 2. Impact
- 3. Implementation (including Gantt chart)

**10 pages total
No section
page limits**

**Evaluators will disregard any excess
pages above the 13-page limit**

Part B2 (no overall page limit)

- 4. CV of the Experienced Researcher (5 pages)
- 5. Capacities of the Participating Organisations (tables)
- 6. Ethical Aspects
- 7. Letters of Commitment

**Uploaded to online system as two separate PDF files:
Cannot submit one without the other**

Evaluation

Scientific Panels

The MSCA uses eight scientific panels for evaluation.

- Chemistry (CHE)
- Physics (PHY)
- Mathematics (MAT)
- Life Sciences (LIF)
- Economic Sciences (ECO)
- ICT and Engineering (ENG)
- Social Sciences & Humanities (SOC)
- Earth & Environmental Sciences (ENV)

Must choose one of these when setting up the proposal in the online system

Descriptors (Keywords)

Can add up to five (minimum three) descriptors **in order of importance**:

- The **1st** and **2nd** descriptors must be chosen from the list provided for the scientific panel you have chosen
- The **3rd** (4th and 5th) descriptor(s) can be chosen from any of the eight scientific panels

These descriptors will help with matching your proposal to evaluators with appropriate expertise

A list of Descriptors can be found at the back of the Guide for Applicants

Evaluation Criteria

Criterion	Weighting	Priority (ex-aequo)
Excellence	50%	1
Impact	30%	2
Implementation	20%	3

Overall threshold of 70% - but the cut-off score for funding is much higher

Median cut-off score EF 2015 91.1%
Median cut-off score GF 2015 93.7%

Proposal template matches this table

Excellence (50%) Priority 1	Impact (30%) Priority 2	Implementation (20%) Priority 3
Quality and credibility of the **research/innovation;** level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the potential and future **career prospects** of the researcher	Coherence and effectiveness of the **work plan**
Quality and appropriateness of the **training** and of the two-way **transfer of knowledge** between the researcher and the host	Quality of the proposed measures to **exploit** and **disseminate** the research results	Appropriateness of the allocation of tasks and resources
Quality of the **supervision** and the **integration** in the team/institution	Quality of the proposed measures to **communicate** the project activities to different target audiences	Appropriateness of the **management** structures and procedures, including risk management
Capacity of the **researcher** to reach or re-enforce a position of professional maturity/independence		Appropriateness of the institutional **environment** (infrastructure)

The "Charter and Code" and
Human Resources Strategy for Researchers (HRS4R)

Embedded in Evaluation Criteria for all MSCA

- **Charter**: researchers' career management
- **Code**: open and transparent recruitment and appraisal
- If institution has endorsed the **C&C**, include in proposal
  (List at http://ec.europa.eu/euraxess/index.cfm/rights/index)

HRS4R: mainstreaming **C&C** in institutions

- Awarded the right to use "HR Logo"
- Many Irish HEIs are awardees
  (list at http://ec.europa.eu/euraxess/index.cfm/rights/strategy4ResearcherOrgs)
- If applicable, should be included in proposal

HR EXCELLENCE IN RESEARCH

IF Call 2016

CALL	Opening Date	Closing Date
H2020-MSCA-IF-2015	12-Apr-2016	14-Sep-2016

- **Results in Feb 2017**
- **Can start Fellowship in May 2017 or defer for up to 18 months (tbc)**

Results 2015	IE Submitted	IE Funded	IE Success Rate	EU Success Rate
Global Fellowship	5	30	16.7%	11.3%
European Fellowship	25	149	16.8%	14.2%

Writing a good proposal:

Advice from evaluators and the Net4Mobility Network of MSCA NCPs

http://www.net4mobility.eu/

General Points

- Use a self-explanatory title and a memorable acronym
- Diagrams, Charts, Tables or Figures are easier to evaluate than text and save space too – **font size can be decreased in tables**
- For resubmissions, don't just use Evaluation Summary Report from previous submission to help revise
  - Look at the proposal as a whole to find room for improvement
  - Remember that the standard increases each year and your new proposal is not being evaluated in comparison with last year's
  - Evaluators will have access to last year's ESR after they have marked this year's application
- Be aware of the overall weighting of each criterion
  - Need to score well in all sections in order to be funded – don't spend all your time writing the 1.1 Research section (12.5% of the marks)!

Layout of Proposal

Not evaluated but it makes life easier for the evaluators

Template

- Use the Correct Template
- Use the Template sub-headings (provides good structure)
- Provide a Table of Contents with page numbers
- Use the Full Page Limits
- Put the proposal acronym in the Header
- Put Page Numbers (format Page X of Y) in the Footer

Format

- Use charts, diagrams, tables, text boxes, figures.
- Use appropriate font size, line spacing, page margins
- Ensure any colour diagrams etc. are understandable when printed in black and white
- Use highlighting where appropriate (bold, underline, italics) but don't overdo it!
- **Literature references in footnotes, font size 8 or 9**

Language

- Avoid jargon
- Explain any abbreviations
- Simple clear text
- Avoid long sentences
- Get rid of repetitions (refer to other parts of proposal if necessary)
- Don't copy text from other documents or websites
- Be consistent with language (UK/US English)
- **Can use either 1st (I, me) or 3rd person (the researcher) but be consistent**

Gender in H2020

- Gender now explicitly mentioned in the evaluation sub-criteria for research/training for all MSCA

- In your proposal, describe

  - **Gendered Innovations**: any gender aspects in relation to the research e.g. cardiovascular research, crash-test dummies
    http://www.yellowwindow.be/genderinresearch/index_downloads.html
    https://genderedinnovations.stanford.edu/

  - **Gender Training:** training in gender issues/gendered innovations

  - **(Gender balance:** equality in decision making, secondments, participation in project events)

- Ireland joined up to Athena SWAN Gender Equality Charter

  - http://www.ecu.ac.uk/equality-charter-marks/athena-swan/

  - TCD and UL first Irish Athena SWAN awardees

WRITING SECTION 1: EXCELLENCE

1.1 Quality of R&I action

- Educate the Evaluator
  - The majority of evaluators will not be expert in the specific subject area of the proposal so....
  - Write in a style that is **accessible to the non-expert** using figures/tables/charts/diagrams to illustrate where appropriate
- Research objectives/questions
  - Make them clear, focused and up front
  - Relate them to the state-of-the-art and make sure the 'state of the art' is up to date
  - Include a list of bibliographic references (**in footnotes**)

1.1 Quality of R&I Action- 2

Suggested structure:

- Start with one paragraph that describes the application, e.g. general research theme, host organisation(s) and names of supervisor(s), brief information on secondment if appropriate.

- Outline your research objectives/questions.

- Describe the state of the art and how the objectives relate to it.

- Describe in detail <u>how</u> you will explore the objectives/questions in your research programme (methodology). Break the work up into discrete blocks ("work packages").

- Explain why all this is original, innovative and timely compared to the state-of-the-art. Include <u>gendered innovations</u> if appropriate.

- Explain how the research is interdisciplinary, if appropriate.

- Explain how this research programme will be good for your career and open up new collaborations for the host(s).

1.2 Quality of Training/Transfer of Knowledge

**Proposal Template refers to a
"two-way transfer of knowledge"**

1) From host(s) to researcher (training)
2) From researcher to host(s) (ToK)

1.2 Quality of Training/Transfer of Knowledge

1. Carry out a skills audit to see what **skills** you need to learn (relevant to your short and long term career goals)

2. Devise a short list of **training objectives** from the results of the skills audit – include this list at the start of this section

3. Describe a **training plan** to acquire those skills during the fellowship

   • Clearly describe what you are trying to achieve (**what – why- when**)

   • Include a training schedule with well-defined timeframe (use the mandatory Gantt chart)

   • Must include the preparation and use of a **Career Development Plan**

   • If a secondment or other opportunities for exposure to other sectors (industry, charity, national archive etc.) is included, be specific about **why** and **when** these will happen

   • If your host has a **staff development programme**, then spell out precisely how you will incorporate relevant aspects of it into your personal training plan

1.2 Quality of <u>Training</u>/Transfer of Knowledge 2

- Need to demonstrate potential acquisition of three kinds of skills:

  1. Research Skills core to your research project
  2. Additional Research Skills (to diversify your competencies)
  3. Transferable & Complementary Skills (also consider skills useful in non-academic careers)
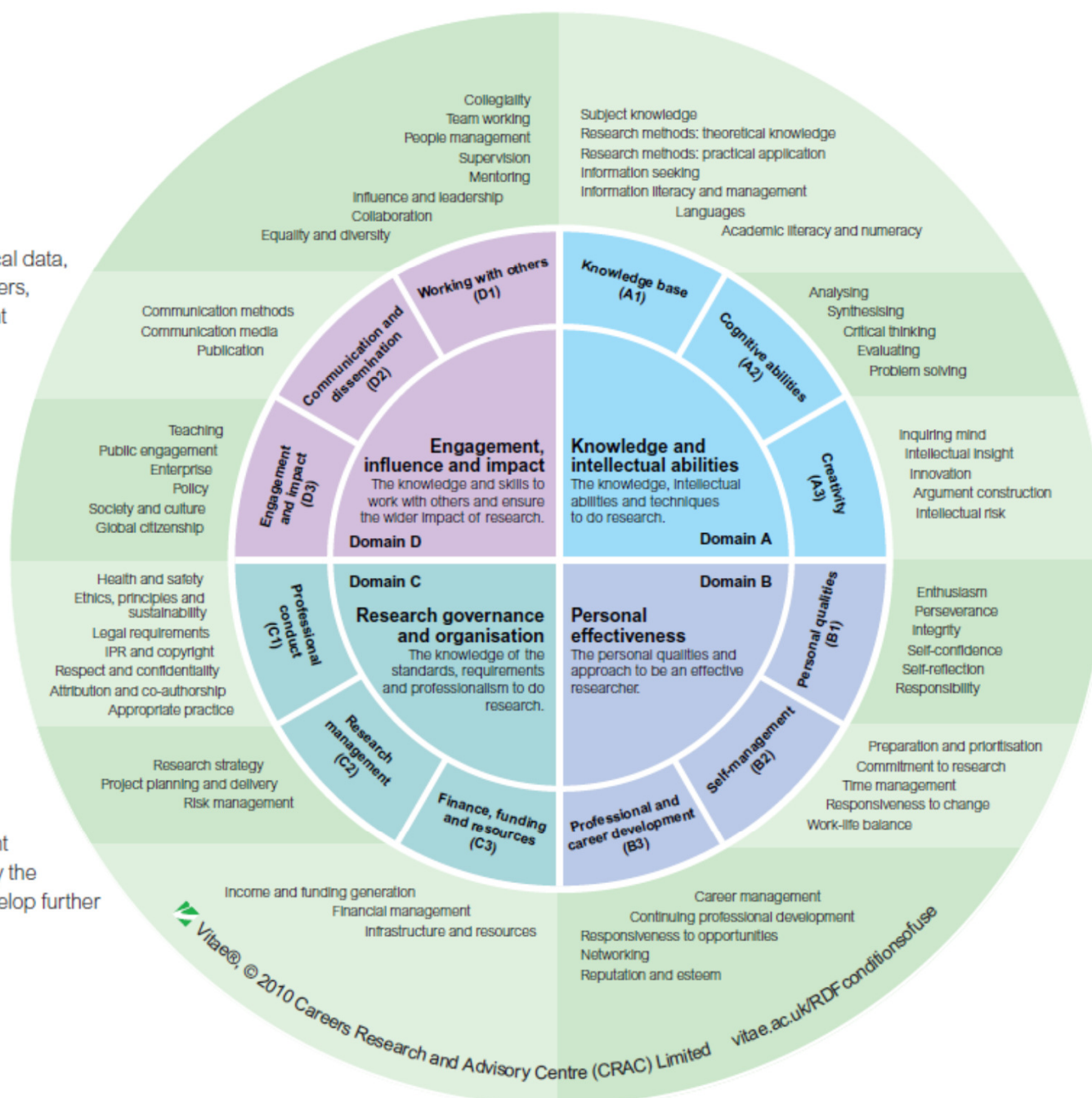
- Acquired through training courses and "on the job"

The **VITAE Researcher Development Framework**
is a useful resource

Structure

The RDF has been created from empirical data, collected through interviewing researchers, to identify the characteristics of excellent researchers expressed in the RDF as 'descriptors'. The descriptors are structured in four domains and twelve sub-domains, encompassing the knowledge, intellectual abilities, techniques and professional standards to do research, as well as the personal qualities, knowledge and skills to work with others and ensure the wider impact of research. Each of the sixty-three descriptors contains between three to five phases, representing distinct stages of development or levels of performance within that descriptor.

The RDF has been incorporated into a downloadable Professional Development Planner to enable researchers to identify the areas in the framework they want to develop further and to create an action plan.

Collegiality
Team working
People management
Supervision
Mentoring
Influence and leadership
Collaboration
Equality and diversity

Subject knowledge
Research methods: theoretical knowledge
Research methods: practical application
Information seeking
Information literacy and management
Languages
Academic literacy and numeracy

Communication methods
Communication media
Publication

Analysing
Synthesising
Critical thinking
Evaluating
Problem solving

Teaching
Public engagement
Enterprise
Policy
Society and culture
Global citizenship

Inquiring mind
Intellectual insight
Innovation
Argument construction
Intellectual risk

Health and safety
Ethics, principles and sustainability
Legal requirements
IPR and copyright
Respect and confidentiality
Attribution and co-authorship
Appropriate practice

Enthusiasm
Perseverance
Integrity
Self-confidence
Self-reflection
Responsibility

Research strategy
Project planning and delivery
Risk management

Preparation and prioritisation
Commitment to research
Time management
Responsiveness to change
Work-life balance

Working with others (D1)

Knowledge base (A1)

Cognitive abilities (A2)

Communication and dissemination (D2)

Creativity (A3)

Engagement and impact (D3)

Engagement, influence and impact
The knowledge and skills to work with others and ensure the wider impact of research.
Domain D

Knowledge and intellectual abilities
The knowledge, intellectual abilities and techniques to do research.
Domain A

Personal qualities (B1)

Domain C

Domain B

Professional conduct (C1)

Research governance and organisation
The knowledge of the standards, requirements and professionalism to do research.

Personal effectiveness
The personal qualities and approach to be an effective researcher.

Research management (C2)

Self-management (B2)

Finance, funding and resources (C3)

Professional and career development (B3)

Income and funding generation
Financial management
Infrastructure and resources

Career management
Continuing professional development
Responsiveness to opportunities
Networking
Reputation and esteem

Vitae®, © 2010 Careers Research and Advisory Centre (CRAC) Limited   vitae.ac.uk/RDF conditionsofuse

1.2 Quality of Training/Transfer of Knowledge

- Describe the skills and knowledge that you will transfer to the host(s)

- Particularly important for
  - Global Fellowships (ToK between host outside Europe and host in Europe)
  - Reintegration European Fellowships (ToK into Europe from outside)

1.2 Quality of Training/Transfer of Knowledge 2

- Precisely what knowledge will be transferred
  - Provide a bulleted list or a table of objectives – easy for the evaluators to follow

- **How** will you transfer it?
  - What specific measures will you use to embed this knowledge into the host organisation and the wider Europe
  - Examples: mentoring students, delivering workshops, attending conferences, networking, building collaborations with other European research organisations.

1.3 Quality of the supervision/integration

Supervision:

- Clearly demonstrate, with hard evidence, the quality of the supervisor(s) with regard to supervising researchers
    - Include e.g., numbers of postdocs mentored, PhDs supervised, number of Marie (S)Curie Actions they participated in
    - Remind the evaluator that some of this information can be found in the Capacities Tables in Section 5
    - Don't forget to include details of the secondment supervisor (if relevant)
- Demonstrate that the supervisors are experts in the research area. Give brief info on publications, patents, grants, awards etc. (Tip! Cite their publications in section 1.1)
- If the researcher will be co-supervised/mentored by other members of the team, spell out their role and experience (capacities table)
- Explain the role of the supervisor in the fellowship (e.g. monitoring research progress, assistance with **career development plan**)
- There is no room to write a lot about the supervisor(s). Keep it concise.

1.3 Quality of the supervision/integration

Integration in the team/institution

- Outline the quality of the research group(s)/environment as a whole
- Explain clearly how the researcher will be integrated into this research group(s)/environment and the wider host institution(s)
- Explain the international networking opportunities offered by the host(s)
- Don't forget the secondment host if relevant!

Aim is to show that all parties will gain the maximum benefit from the fellowship

1.4 Capacity of the researcher

- Think of it as a "personal statement" - overall objective is to show that you have high potential for a successful research career in the sector of your choice

- Tell the evaluator what your career goals are, then explain how your past experience plus this fellowship will help you to achieve those goals
  - Highlight your major research achievements
  - Provide evidence of leadership skills and independent thinking
  - Explain the match between your research experience and the proposed project, and how it will add to your experience
  - Briefly mention how the career development plan will ensure that your goals are achieved

- No letters of reference so you have to "sell yourself"

4. CV

- Use the full 5 pages – if you have space, describe your three major research achievements (1 paragraph each)

- Need excellent track record appropriate to career stage, discipline and sector (academic/non-academic)
  - E.g. publications/conference participation, granted patents, monographs, book chapter, examples of leadership in industrial innovation
  - Include bibliographic information for publications e.g. impact factor, number of citations, journal ranking in the field.
  - If you are not the first or lead author on publications, briefly explain your contribution

- Include all relevant experience (e.g. teaching, consultancy, supervision, event organisation, public outreach)

WRITING SECTION 2: IMPACT

Expected Impact 1

From the MSCA Work Programme 2016-2017

At researcher level:

- Increased set of skills, both research-related and transferable ones, leading to improved employability and career prospects both in and outside academia
- Increase in higher impact R&I output, more knowledge and ideas converted into products and services
- Greater contribution to the knowledge-based economy and society

At organisation level (i.e. the host organisation(s)):

- Enhanced cooperation and stronger networks
- Better transfer of knowledge between sectors and disciplines
- Boosting of R&I capacity among participating organisations

Expected Impact 2

At system level (i.e. the research system in Europe):

- Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe

- Strengthening of Europe's human capital base in R&I with more entrepreneurial and better trained researchers

- Better communication of R&I results to society

- Increase in Europe's attractiveness as a leading destination for R&I

- Better quality research and innovation contributing to Europe's competitiveness and growth

Tips!

1. **Try to address each of these expected impacts when writing the Impact Section**

2. **In all sections, be specific: provide details of how the impact will be achieved.**

2.1: Enhancing the researcher's career

Explain the impact of the research and training on your career, e.g.

- New competencies (e.g. research skills, transferable skills) acquired

- Exposure to non-academic/academic sector (secondments or other), if applicable

- How it will help you to achieve/work towards your career goals, including what you plan to do immediately after the fellowship and how this fellowship will help you to get to that point

- Explain how the new competencies acquired will help the research to have a strong future impact on European society and/or the economy – can link to importance of the research area here

Bonus points alert!

- Use our Research Policy Brief (available after the webinar) to identify EU policies relevant to researcher careers.

- Make a tangible link between your fellowship plans and those policies

2.2: Dissemination and Exploitation

1. Dissemination strategy

- Target audience: Other researchers, potential users and the wider research and innovation community
- Describe the activities to ensure that this audience learns about the research activities e.g. publications, conferences, workshops etc.
- Describe the potential **impact** of disseminating to them

2. Intellectual Property Rights & Exploitation

a. How are the research results useful to business?
   - Outline plans to exploit any IP/commercial potential arising from the programme
   - For GF: how have you decided to "allocate" IP between the two hosts? Rules simplified at https://www.iprhelpdesk.eu/FS_IP_management_in_MSCA-H2020
   - Describe the potential **impact** of exploiting commercial potential/IP

b. How are the research results useful to the wider society?
   - Describe the activities to ensure that relevant societal actors (community, voluntary sector, policy makers etc.) will benefit from your project.
   - Explain how your research could have an impact on undergraduate teaching, if applicable
   - Describe the potential **impact** of societal exploitation of the results

2.3: Communication and Public Engagement

EU places great emphasis on communicating research outputs to the public

Guidelines document* describes difference between communications and public engagement

- **Communication** is two-way from sender to receiver e.g. an article in a newspaper or on TV or radio
  - Describe how you will try to get media coverage about the activities of the project – work with communications staff at your host
  - Describe the potential impact of media coverage
- **Public engagement** is meant to engage a large audience and to bring knowledge and expertise on a particular topic to the general public.
  - Describe what activities you will undertake to engage the general public about the activities of the project
  - Plan a few activities (social media, specific events) targeted at multiple audiences
  - Join in with local events e.g. Pint of Science, SFI Discover, Researchers' Night. Talk to experts at your institution.
  - Describe the potential impact of engaging the public

Tips for 2.2 & 2.3

1. Include quantifiable targets for measuring the effectiveness of dissemination, exploitation, communication and public engagement activities

2. Social media can be used for Dissemination, Communication and Outreach

WRITING SECTION 3: IMPLEMENTATION

3.1: Workplan

Essentially consists of a Gantt chart (within the page limits)

- Describes the timing of the proposal activities and the overall work plan

- Can use the template provided (modify it) or use another template

Month	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36
																									Global Fellowship only											
Work package												■				■								■												
Deliverable																		■						■												■
Milestone																																				
Secondment														■	■	■	■																			
Conference								■							■						■								■							
Workshop																																				
Seminar				■							■																									
Dissemination														■						■	■	■											■			
Public engagement															■	■																				
Other									■																							■				

3.1: Workplan

What to typically include in the Gantt Chart

- Work package Titles:
  - Between 2 and 4 Research WPs is typical – can run sequentially or concurrently and can be interconnected
  - Include a WP for Management, Training and Transfer of Knowledge
  - Include a WP for Dissemination/Exploitation and Comms/Public Engagement
- Deliverables: a distinct output of the programme e.g. a report, a document, a piece of software, a prototype,……
- Milestones: control or checkpoints used to chart progress e.g. completion of data collection, final review of CDP.
- Secondments (if applicable)
- Conferences, Workshops, Dissemination tasks/events, Public Engagement, other

3.2: Tasks and Resources

- Give a brief description of the Work Packages (maybe use a table)

- Typical to include a short list of Tasks to be undertaken in each WP
  - Management tasks can include meetings with supervisor(s) and standard reports to EU (financial and technical reports at end of fellowship)
  - Diss/Exploi/Comms/Engage tasks or events should match the details Section 2. Ditto for Training/ToK tasks – match section 1

- Describe how the work packages, their timing and the workload make sense.

- Explain why the length of the fellowship (the number of person months) is appropriate to complete all the work foreseen in the work packages.

- Aim to highlight the strengths and feasibility of the work plan.

3.3: Management Structure & Procedures

- Explain how the work plan will be managed & monitored

- Supervisor(s) are the main managers – assisted by the host organisation(s) structures and the researcher

- Tasks include:

  - Progress monitoring (research, training, transfer of knowledge, dissemination, career planning) – explain how the supervisor(s) will help with progress monitoring (include frequency of meetings)

  - Financial management – explain who will help manage the money (host research finance office or other – describe their experience)

  - IPR management (if applicable) - explain the role of the Technology Transfer Office or similar in any commercialisation efforts

  - Include a table of risks and contingency plans (for the research and the overall fellowship), e.g. interconnected workpackages

3.4: Infrastructure & Institutional Environment

Describe the main role of all organisations involved in the fellowship and affirm their commitment to it, i.e.;

- European Host

- Non-European Host (for GF)

- Secondment Host (if applicable)

For GF, need a Letter of Commitment from the Non-European Host

- Ensure that the content of the letter matches what is written in the proposal

3.4: Infrastructure & Institutional Environment 2

Underline their commitment by describing the research and training/hosting infrastructure that the host(s) will provide in order to <u>successfully</u> implement the fellowship

- Remind the evaluator that lists of research infrastructure/equipment can be found in the tables in Section 5 (Capacity of the Participating Organisations) – don't duplicate the information.

- Infrastructures = technical and other such as office/lab space, access to library and IT facilities, researcher/staff development programmes, HR, finance offices etc.

- Outline the relocation assistance for the researcher (EURAXESS can help) e.g. new researcher orientation etc.

- Add C&C endorsement and/or HR logo details here

- Don't forget to include secondment hosts , if applicable

5: Capacities Tables

- One per organisation (including secondment hosts)
- Maximum one page per organisation

Information Requested	Suggested Content
General Description	Include HR logo and/or Athena SWAN logo
Role and commitment of key persons (supervisor)	% time commitment. Role of other persons apart from supervisor.
Key Research Facilities, Infrastructure and Equipment	Relevant to the research to be carried out in the IF
Independent Research Premises?	Yes / No answer. Explain where the research premises are located. Example: spin-out company who has R&D space in an academic institution.
Previous involvement in research and training programmes	e.g. FP7 or FP6 Marie Curie, Erasmus, Structured Doctoral Programmes……
Current involvement in research and training programmes	As above
Relevant publications and/or research/innovation products	Relevant to the research to be carried out in the IF

6: Ethics Issues

- All proposals will be checked (but not scored) for ethics issues

- If necessary, a separate **Ethical Review** will take place

- Ethics Table is in the Administrative Forms

- If you indicate Ethics Issues in the Table, in the Part B you must:

  - Clearly describe how Ethical Issues will be managed

  - How does the proposal meet national legal and ethical requirements of the host country?

  - Who will oversee the project's ethical aspects? E.g. institutional ethics committee, Data Protection Officer

  - Provide sample consent forms etc.

  - There is no page limit, so provide as much relevant information as possible

- Consult the H2020 ethics guide:
  http://ec.europa.eu/research/participants/data/ref/h2020/grants_manual/hi/ethics/h2020_hi_ethics-self-assess_en.pdf

Most important tip!

Answer the question that is asked!

Questions?

Please email your queries to
mariecurie@iua.ie

All material will be made available for download afterwards

Join our Linkedin Group
Marie Skłodowska-Curie Office Ireland