





Winning the MSCA COFUND marathon: Tips for success from application to final report

Dr Andrea Valova, Programme Manager avalova@research.ie

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Agenda

- 1. Introduction
- 2. A winning proposal: CAROLINE Collaborative Research Fellowships for a Responsive and Innovative Europe*
- 3. Winning the marathon: tips for success from an operational best practice point of view

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WE FUND solely on the basis of excellence



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WE FUND
across all
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arts to zoology



WE FUND bottom-up, non-directed research from early-career stage

WE FUND on the basis of individual awards

Previous COFUND programmes

- INSPIRE 2009 2013
 - Outgoing fellowships, STEM disciplines (IRCSET-run programme)
 - Audited in 2014
- CARA 2010 2015
 - Outgoing fellowships, ASSH disciplines (IRCHSS-run programme)
- ELEVATE 2012 2018
 - Outgoing fellowships, all disciplines
 - Participation of co-funding non-academic partners envisaged

A winning proposal: CAROLINE



Why CAROLINE?

"Collaborative Research Fellowships for a Responsive and Innovative Europe"

- First programme in Europe to provide fellowships involving academic institutions, NGOs and IOs working together under the overarching theme of global sustainable development as set out under the United Nations Agenda 2030
- Match with MSCA aims:
 - International mobility
 - Intersectoral mobility
 - Interdisciplinary dimension
- New features compared to previous COFUND programmes

Objectives of the programme

CAROLINE fellows will enhance their career prospect as fellowships will enable them to:

- Undertake research relevant to the overarching theme of global sustainable development as set out under the United Nations 2030 Agenda for shared economic prosperity, social development, and environmental protection
- Engage in international collaboration with suitable non-governmental organisations (NGOs) or international organisations (IOs)
- Experience and benefit from international and intersectoral mobility

Fellowship types

| | Irish Fellowships | International Fellowships |
|--|--|---------------------------|
| Duration | 24 months | 36 months |
| International mobility | Incoming | Outgoing |
| Duration of intersectoral mobility to NGO/International Organisation | 6 – 12 months | 24 months |
| Envisaged total number | 20 | 30 |
| Employing host organisation | Higher education institution/Research performing organisation in Ireland | |

CAROLINE Evaluation Summary Report (1/3)

Excellence – selected STRENGTHS

- Links to relevant IO and NGOs
- Use of existing grants management system
- Information for applicants well structured, comprehensive and complete
- Eligibility criteria well presented for all stakeholders and fully compliant with MSCA
- Organisation of selection process incl. evaluation criteria detailed and comprehensive
- Diversity of research options as demonstrated by collaborative nature of programme
- Mechanisms in place to ensure the triple "I", well-chosen system of secondments

CAROLINE Evaluation Summary Report (2/3)

Impact – selected STRENGTHS

- Excellent alignment with the national Strategy for Science, Technology and Innovation in terms of HR development for building up research ecosystem
- Responding to UN 2030 Agenda in a very timely manner
- Enhancement of researchers' skills in line with the ESF report, emphasis on importance of careers beyond academia
- New features introduced in comparison to previous three COFUND programmes: incoming fellowships element and inclusion of NGOs/IOs
- Dissemination and public outreach strategy

CAROLINE Evaluation Summary Report (3/3)

• Implementation – selected STRENGTHS

- Well-elaborated work packages with comprehensive set of tasks
- Deliverables and milestones follow a feasible timeline and establish a very good framework for proper monitoring of the programme
- Programme budget well justified by fellowship benefits, which meet MSCA standards
- Risk analysis identifies a number of potential issues and relevant contingency measures are present
- Applicant agency very experienced and highly qualified in running funding and fellowship schemes, which includes experience of successful implementation of previous COFUND projects

Winning the marathon: tips for success from an operational best practice point of view

Be ready for a marathon: 11 years from start to finish!

- MSCA COFUND call opening date 14/4/2015
- CAROLINE proposal submitted 01/10/2015
- Grant Agreement signed 16/3/2016
- "Starting date of the action" 02/06/2016
- Duration 60 months => until 01/06/2021
- Final report due by 01/08/2021
- Reviews/audits may be started up to 2 years after the payment of the balance – estimate Oct. 2023
- The beneficiary must keep records and other supporting documentation for a period of 5 years after the payment of the balance – estimate Oct. 2026

Ambitious vs. Feasible

- Delivering on the proposal as submitted to EC
 - Promoting of fellowships, selection process, appeal process, training sessions...
- Keeping with the project plan
 - Preparation of call documentation, building/adjusting application system, sourcing evaluators...
- Verifying eligibility for funding
 - Mobility documentary evidence, family allowance entitlement, eligibility of partner organisations...
- Completing all fellowships within programme's timeframe
 - Impact of award deferrals/suspensions => extensions (visa issues, ill health, maternity leave...)

CAROLINE and **ELEVATE** examples

- NGO/IO partners innovative & ambitious feature BUT:
 - Reduced pool of applicants
 - Partner organisations without prior experience with similar projects and funding scheme requirements
- Secondment/outgoing phase in months 1-24 excellent mobility feature BUT implications for:
 - Induction/training events
 - Obtaining visa
 - Making arrangements for outgoing phase
- Progress reporting to REA:
 - Details of fellows' individual publications and dissemination activity
 - Information about assessors (ELEVATE final report: nationality, residence)

How to win the marathon

- Right balance of ambition and feasibility
- Irish MSCO support
- Know your GA and reporting requirements
- Good planning and forward-looking
- Good recordkeeping from day 1 (or even before!)
- Gather relevant data from researchers under progress reporting
- Engage with REA Project Officer
- Participate in MSCA COFUND PMs group







Questions?



