

Net4Mobility⁺



Net4Mobility+

Network of the Marie Skłodowska-Curie Actions National Contact Points for the mobile scientific and innovation community

Deliverable No. 3.3

MSKA-COFUND Fellowship Programme Handbook 2018

Issued by: Geraldine Canny & Grace McCarthy, Irish Universities Association

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1. Disclaimer and Acknowledgements

Disclaimer:

This is an UNOFFICIAL document prepared by the Irish Marie Skłodowska-Curie Office as part of the EU-funded Project “Net4MobilityPLUS” of National Contact Points (NCP) for the Marie Skłodowska-Curie Actions (MSCA).

- The information contained in this document is intended to assist and support, in an unofficial and practical way, anyone submitting a Proposal for the MSCA-COFUND Call for the deadline 27/09/2018. It is therefore NOT a substitute of European Commission Documents, which in all cases must be considered as official and binding.
- You should note that this document is susceptible to data corruption, unauthorised amendment and interception by unauthorised third parties for which we accept no liability. All reasonable precautions have been taken to ensure that this document neither contains nor transmits any viruses and we recommend that you ensure that your anti-virus programmes and procedures are up to date.
- This document may NOT be considered in any way as deriving from and/or representing the views and policies of the European Commission and the Research Executive Agency. Likewise, it may NOT be considered in any way as a document deriving from and/or representing the views and policies of the entities which are Beneficiaries to Net4Mobility+.

Acknowledgements:

- We thank Colleague-NCPs from the NCP-Project H2020 “Net4Mobility+” as well as EC / REA Staff and External Experts/ Scientists who acted as Evaluators for their valuable insights.

2. How to use the MSCA-COFUND Handbook

This MSCA-COFUND handbook can be used to **assist and support** applicants submitting a proposal for the September 27 2018 deadline. This Handbook should be **used in conjunction with the Part B templates** downloaded from the [Participant Portal](#) as the information in this document complements the information in the Part B templates.

Orange text boxes contain additional suggestions & information for each section of the proposal. We have not removed or replaced any information in the original Part B templates which are contained in the grey boxes.

Double line text boxes contain examples of common weaknesses from Evaluation Summary Reports of unfunded applications which were on the reserve list.

3. Key tips for the proposal template and layout

The following information is important to familiarise yourself with as it will make the review process for the evaluator easier. It covers; 1. general points, 2. proposal template, 3. proposal layout and 4. language.

1. General Points

- **Acronym:** Use a self-explanatory title and a memorable acronym.
- Ensure that the Acronym is short, easy to pronounce, easy to remember by the Evaluators, and that it cannot be construed as inappropriate in English or in another language.
- The proposal acronym and the COFUND type should be used as a header on each page.
- Be aware of the overall weighting of each criterion. You need to score well in all sections in order to be funded.

Section	Weighting
1. Excellence	50%
2. Impact	30%
3. Implementation	20%

2. Proposal Template

- Use the proposal template provided including the exact sub-headings:
 - It matches the evaluation template and helps you to put the right information in the right place for the evaluators to find it.
 - Some evaluators use a “checklist” approach to marking – if the information is not in the correct section, they will give you “zero” for that sub-criterion.
- Put Page Numbers (format Page X of Y) in the Footer

3. Proposal Layout

- Use charts, diagrams, text boxes, figures to explain aspects of the project. Do not just use blocks of text.
- Use tables as often as possible. These break up the text and also save space (font size 8).
- Use the correct font size, line spacing and page margins as indicated in the Guide for Applicants.
- 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.

4. Proposal Language

- Avoid jargon. The evaluators might not be experts in your research area.
- Explain any abbreviations.
- Use simple clear text.
- Avoid long sentences.
- Avoid too much repetition. Sign-post to other parts of the proposal if necessary.
- Do not copy and paste information from other documents/websites. Instead tailor information to fit with your proposal.

4. Part-B Template

Annex 5 – Part B template

START PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

**Co-funding of regional, national and
international programmes (COFUND)**

Call: H2020-MSCA-COFUND-2018

PART B

“PROPOSAL ACRONYM”

This proposal is to be evaluated as:

[DP][FP]

[delete as appropriate]

Table of Contents

Include a full table of contents with sub-headings and page numbers.

In drafting PART B of the proposal, applicants **must follow** the structure outlined below.

0. GENERAL DESCRIPTION OF THE PROGRAMME (Maximum 2 pages)

INFORMATION ON THE BENEFICIARY

START PAGE COUNT

1. EXCELLENCE

2. IMPACT

3. QUALITY AND EFFICIENCY OF THE IMPLEMENTATION

STOP PAGE COUNT

4. ETHICS ASPECTS

5. LETTERS OF COMMITMENT FROM PARTNER ORGANISATIONS

NB: Applicants must ensure that sections 1-3 do not exceed the limit of 30 pages.

Please note that the principles of the European Charter for Researchers and Code of Conduct for the Recruitment of Researchers promoting open recruitment and attractive working conditions are recommended to be endorsed and applied by all the funded participating organisations in the MSCA. Some of these principles are reflected as obligations in the Grant Agreement and are therefore contractually binding.

0. General description of the programme (Maximum 2 pages, not evaluated)

Although this is not evaluated, it is crucial to setting the scene for the evaluator.

Describe the beneficiary and partner organisation structure

- Describe the beneficiary and the partner organisations (if any). Be clear what type of beneficiary is leading the project. For example, government funding organisation; research centre/university etc.
- Provide a general statement on the beneficiary strengths (research and innovation strengths; funding achievements; industry collaboration; main RTD outcomes; etc). If appropriate, references to the regional or national research and innovation ecosystem could be included.
- Mention if the research carried out **by the project** or the beneficiary aligns with specific research disciplines based on national or regional Research and Innovation Strategies for Smart Specialisation (RIS3 strategies).
- Demonstrate how the beneficiary is the most suitable/best entity to run the programme.

Outline the programme and its structure.

- **Introduce the size immediately**-duration of the programme (36-60 months), how many fellows will be recruited, how many calls, the duration for each researcher (typically 12 to 36 months).
- Describe who is involved in the project (the main beneficiary, layout of the COFUND, partner organisations, a diagram is useful here).
- Describe the COFUNDs Programme aims and objectives.
- Describe the need and potential impact of the COFUND programme.

INFORMATION ON THE BENEFICIARY

Name of Beneficiary	Beneficiary short name	Country	Academic (Y/N)

START PAGE COUNT

Under each sub-criterion it is advised to develop at least the following points:

1. Excellence**1.1 Quality of the selection/recruitment process for the researchers (transparency, composition and organisation of selection committees, evaluation criteria, equal opportunities)****1.1.1 Demonstrate the transparency of the selection process of the researchers**

- Dissemination of the calls in appropriate ways;

Number this section: 1.1.1.1 Dissemination of the calls in appropriate ways

Suggested Length: ~2 pages

Start with a statement reminding the evaluator about the layout of the COFUND (How many researchers will be recruited, how many calls there will be over the duration of the programme and where the host organisations could be).

- If applicable, state whether a programme manager (PM) will be appointed (full-time/part-time) upon signing of the Grant Agreement.
- Describe that the PM will set up a PR, dissemination and public outreach strategy for the promotion of the programme and its calls. State the start month and the end month of these activities.
- Comment on the PMs role in monitoring interest in the calls and adapting PR strategy where necessary.

Describe the Dissemination Strategy

- Mention and if available mention the programme logo. Describe that the programme logo & MSCA logo will be used on a dissemination material for the call.
- Describe the central services / offices / expertise of the beneficiary and partner organisations will be made available to the programme e.g. Research office, communication office, marketing, international affairs and what experience do they already have in H2020 or MSCA?
- Describe the **target group** of the programme and that the PR strategy will be tailored to them. Include a definition of the **experience necessary** and any **mobility requirements**.

1.1.1.1 Dissemination of the calls in appropriate ways continued...

Describe the dissemination activities that will be used. Make sure to provide specific details to show the numbers that will be reached:

- Programme website-this is a key resource for highlighting the details of the programme;
- Programme launch event-where will this take place, what key audiences will be invited, what material will be developed etc.;
- Other websites-list all the websites where the information of the calls will be detailed (beneficiary organisations, partner organisations etc.);
- Programme social media-will the programme have a Twitter, LinkedIn etc. account;
- Other social media-list the followers on the beneficiary organisations, partner organisations social media;
- Promotion via networks of people and organisations involved (EU projects with large consortiums etc);
- Name relevant conferences, exhibitions, professional networks, journals (scientific, industry) where calls could be advertised;
- Job advertisement websites;
- Use of the [EURAXESS website](#);
- Include how you will take into account the gender balance when advertising;

- Information provided to the candidates (e.g. conditions of the fellowship, host institution, evaluation process, results, review/appeal, etc.);

Number this section: 1.1.1.2 Information provided to the candidates

Suggested Length: ~2 pages

Suggested paragraphs:

- Information on the background to the programme.
- Information on the host organisations and of the potential supervisors.
- Information on the conditions of the fellowship. State that all needed information to prepare applications (conditions, host institution, evaluation process, etc.) will be downloadable from the programme website could be added. Make reference to concrete documents: FAQs, guides, legalities, promo brochure, application forms, etc.
- Information on the application, evaluation and selection process (link to section 3.3.2 for application documents).
- Provide details on an online application system (if applicable)
- COFUND support – PM and helpdesk through dedicated email address – technical support for application.
 - Feedback provided to applicants (link to section 1.1.2.1).
 - Redress procedure (link to section 1.1.2.1).

- Eligibility criteria and application requirements;

Number this section: 1.1.1.3 Eligibility criteria and application requirements

Suggested Length: ~1 page

- Provide a short introduction paragraph outlining criteria for the fellowships- number of fellowships on offer, number of calls, types of fellowships and their duration (Based on the MSCA-IF you can decide what types you want to include as part of your COFUND programme Standard fellowships, Career Restart fellowships, Reintegration fellowships, Society and Enterprise fellowships, Global fellowships).

Provide paragraphs of the following:

- Eligibility of applicants-Outline the information that will be provided to applicants in regards to their research and mobility requirements:
 - Research Experience: applicants must at the date of recruitment or the deadline of the co-funded programme's call, be in possession of a doctoral degree or have at least four years of full-time equivalent research experience.
 - Mobility requirements: Researchers may not have resided or carried out their main activity (work, studies, etc.) in the country of the host organisation for more than 12 months in the 3 years immediately before the co-funded programme's call deadline(s) or the date of recruitment. For Fellowship programmes supporting reintegration in Europe, career restart opportunities and Society and Enterprise fellowships researchers may not have resided or carried out their main activity (work, studies, etc.) in the country for more than 3 years in the 5 years prior to the application deadline.

1.1.1.3 Eligibility criteria and application requirements continued....

- **Eligibility of supervisors** – will there be mandatory supervisor training? Also use this section to briefly introduce the development of a personal career development plan.
- **Application requirements** – State that applications must be based on “individual-driven mobility”, which means that the applicants will be able to freely choose a research topic and the appropriate host organisation and supervisor fitting their individual needs.
- **Secondments requirements**: State that applicants are encouraged to also include elements of cross-sectoral mobility and interdisciplinarity in their programmes such as secondments (of X duration) and short visits. State that a mandatory letter of commitment from a secondment supervisor at the proposed secondment organisation and capacity of secondment table must be included in their application.
- Ethics requirements (link to section 1.1.2.1 for the ethics committee details).

- Any other relevant point.

Number this section: 1.1.1.4 Any other relevant point

1.1.2 Describe the organisation of selection process

- Composition of committees involved in the different stages of the process (i.e. eligibility check, evaluation, selection, appeal);

Number this section: 1.1.2.1 Composition of committees involved in the different stages of the process (i.e. eligibility check, evaluation, selection, appeal);

Suggested Length: ~1.5 pages

- Begin with a reference to the [Charter and Code](#) for the recruitment and selection of researchers.
- Include a figure which is an overview of the selection process and the committees involved.

Describe the composition of the committees involved in each stage of selection:

- **Eligibility check** – PM with Programme Coordinator (PC).
- **Ethics committee** – for example, the host Research Ethics Committee.
- **External international peer-review panel:** refer to Code of Conduct and link to section 1.1.2.2. How will a list of international peer reviewers be obtained? How many experts per proposal?
- **Establish Ranking-** consensus meeting (remote where necessary via teleconference), mention who will chair it, measures for extreme differences in scores. Explain how similar ranked proposals will be decided on.
- **Interview Panel** – Describe the interview panel: It should be gender balanced, how many individuals will be on it?
- **Funding Decision:** who will make the final funding decision?
- **Redress Committee:** describe how the redress works for applicants.
- **Feedback to applicants:** what will be provided and by who (via the Programme Manager and Human Resources).

- Selection of experts;

Number this section: 1.1.2.2 Selection of experts

Suggested Length: ~1 page

Provide paragraphs on:

- Criteria for the selection and balance of experts: include expertise as evidenced by research outputs, geographic and gender balance, reviewing experience, experts based in the non-academic sector, involvement in policy etc.
- Expert appointment: e.g. requirement to conform to the European Code of Conduct for the Recruitment of Researchers.
- Explain the rules for conflict of interest – could use the H2020 rules as described [here](#).

- Fellows/Researchers' selection workflow and powers entrusted to the different actors;

Number this section: 1.1.2.3 Fellows/Researchers' selection workflow and powers entrusted to the different actors

Suggested Length: ~1/2 page

Demonstrate:

- The stages of the selection workflow.
- The responsible person/committee at each stage of the selection process.
- Describe how long each stage would take.

- Any other relevant point.

Number this section: 1.1.2.4 Any other relevant point

1.1.3 List the Evaluation Criteria

- Criteria/sub-criteria for the selection of researchers;

Number this section: 1.1.3.1 Criteria/sub-criteria for the selection of researchers

Suggested Length: ~1/2 page

- Outline the evaluation criteria that will be used by the evaluators to score the proposal.
- It is recommended to use and adapt the criteria for the MSCA-IF (Excellence, Impact, Implementation) as shown on page 24-25 in the [Guide for Applicants 2018](#).

- Any other relevant point (scoring, thresholds, etc.).

Number this section: 1.1.3.2 Any other relevant point (scoring, thresholds, etc.).

Suggested Length: ~1 page

- **Scoring:** Keep it simple and easy for the reviewer to understand! It would be advisable to use the MSCA scoring thresholds. For example, a scoring of 0-5 for each sub-criterion, include an outline of what a score of 0-5 reflects.
- Alternatively, if the beneficiary has their own evaluation system/criteria already in place you can use this.
- **Threshold:** Include a table showing the threshold, weightings and ex-aequo priority order. Those for MSCA could be adopted.
 - Refer to any overall threshold which must be met to be placed on the ranked list. Make reference again to the consensus meeting of reviewers (may be remote).
 - How many individuals will be called for interview from the list? (for example, 3 times the number of fellowships on offer?)
 - Outline the structure of the interview: in English, oral presentation, question and answers session?
 - Include a table outlining the interview award criteria, sub-criteria and scoring (may be aligned with previous description of scoring 0-5).
 - How will the final mark for the applicant be calculated? i.e. What percentage for written proposal: interview?

Bear in mind that an applicant could score very highly in a written application but may perform very weakly at interview and vice versa.

1.1.4 Ensure equal opportunities

Equal opportunities should be understood in its widest sense. While it is not possible for an applicant to describe fully its potential actions, its equal opportunity policies and those of its partner organisations should be summarised. The independent experts will be asked to scrutinise how these provide equality of opportunity to the researchers, equality of treatment during the selection process and equality of support, during their fellowships, to the successful researchers.

Number this section: 1.1.4 Ensure equal opportunities

Suggested Length: ~1 page

Suggested paragraphs:

- Refer to any **equal opportunities policy** within your organisation.
- Provide information on how **researchers with disabilities** are supported by the programme. The MSCA Special Needs Allowance provides financial support for the additional costs entailed recruiting researchers with disabilities whose long-term

physical, mental, intellectual or sensory impairments. For more information, see page 49 in the [MSCA WP 2018-2019](#).

- **International opportunities**-Explain that the programme will be open to any experienced researcher around the world provided they stick to the mobility rule described in section 1.1.1.3.
- **Gender equality in research and innovation** (link back to section 1.1.1.1).
Refer any gender equality plan here for your institution if it exists—they are developed for the institution a part of Athena Swan - refer to its objectives and any actions that will be taken as part of the plan.
- If the research area is taken up by mainly one gender then how will the programme ensure to attract more of a gender balance (call advertisement, gender balanced committees etc.).
- Career Restart policy -does your programme offer the opportunity for researchers who took a career breaks to return to research? If so they should be allowed a relaxed mobility rule (no more than 3 years in host country in the last 5 years).
- Include the development of a RESEARCHERS AT RISK policy. The European Commission have also recently launched the initiative [Science4Refugees](#) to help refugee scientists and researchers find suitable jobs that both improve their own situation and put their skills and experience to good use in Europe's research system.

1.2. Quality of the research options offered by the programme in terms of science, interdisciplinarity, intersectorality and level of transnational mobility

- Excellence of the research programme;

Number this section: 1.2.1 Excellence of the research programme

Suggested Length: ~1 page

- Provide a paragraph outlining strength of the host organisations **and/or regional/national RTD ecosystem**.
- In the case where government funding organisations explain the RTD regional ecosystem to show that that territory is the best place for the fellows to foster their career.
- Explain if the programme has a bottom-up or top-down approach. If applicable, outline the research areas and relate them to entity or to the national or regional strengths. Relate also the research areas to the RIS3 initiatives.
- Name possible supervisors, if known in advance.
- Provide information on secondment options. Refer to section 1.2.2 where the intersectoral aspects of the project are described.
- Finish the section with a very short paragraph mentioning training and career

development (linking to section 1.3.2). Mention the possibility of secondment host training where of benefit.

- Quality of the research options in terms of interdisciplinary research options, intersectorality (mobility between the academic and non-academic sector) and international networking;

Number this section: 1.2.2 Quality of the research options in terms of interdisciplinary research options, intersectorality (mobility between the academic and non-academic sector) and international networking

Suggested Length: ~1 page

Break this section into three headings:

International mobility:

- Reference to mobility requirements for applicants applying to the COFUND fellowship programme.
- Explain if there are possible international secondment hosts, short visits and opportunities for international networking and collaborations.

1.2.2 Quality of the research options in terms of interdisciplinary research options, intersectorality (mobility between the academic and non-academic sector) and international networking continued...

Inter-sectoral exposure:

- Explain the secondments and involvement of the non-academic sector.
- If known provide a list of all the non-academic organisations that will be involved.
- Mention training in non-academic specific transferable skills as part of the formal programme training programme (link here to section 1.3 where this training should be described).
- Mention industry networking events where appropriate that the researchers will be able to attend (linking to section 2.3.1).

Interdisciplinarity exposure:

- Focus here on the interdisciplinary nature of the **of the programme and of the organisation/institution/department/centre** for example describe whether it is made up of multi-disciplinary researchers.
- Outline how researchers will be working with many disciplines within their host.
- Describe that researchers will receive training in advanced research skills beyond their own discipline.

- Any other relevant point

Number this section: 1.2.3 Any other relevant point

- Open Science in MSCA-COFUND is a key priority as indicated on page 11 in the [COFUND GFA 2018](#) and in the COFUND Expected Impacts.
- Include a section here on Open Science. You could mention the Open Science policy of the programme here and that the researchers will receive training in Open Science as outlined in section 1.3.
- Redirect the evaluator to section 2.3.3 for more detailed information.

1.3. Quality of career guidance and training, including supervision arrangements, training in transferable skills

1.3.1 Describe the supervision arrangements

- Supervision arrangements, quality and experience of supervisors should be described (especially for DPs), as well as how progress of the fellows will be monitored and their career development promoted and guided.

Number this section: 1.3.1.1 Supervision arrangements, quality and experience of supervisors should be described (especially for DPs), as well as how progress of the fellows will be monitored and their career development promoted and guided.

Suggested Length: ~1.5 pages

Break this section up as follows:

Describe the supervision arrangements

- Describe the number of supervisors required per applicant. i.e. each fellow should have 2-3 supervisors: 1 primary supervisor at the host, 1 co-supervisor and 1 non-academic supervisor based in the secondment organisation.
- Include when the supervisor will be identified by the applicant (during the application process? before submission of an application?)
- Mention synergies and coordination with the co-supervisor in the non-academic sector if applicable.

Quality of supervisors

- Provide a collective statement on the experience of the main supervisors. For example, give examples of the journals they publish in (alongside journal Impact Factors).

- In case of funding organisations, how you will assess the quality of the supervisors.
- If possible, include a table outlining the supervisors, numbers of publications, H-index, numbers of postgraduates and postdocs mentored in the past and current postgraduates and postdocs (current mentees).

1.3.1.1 Supervision arrangements, quality and experience of supervisors etc. continued...

Role of the supervisor

- Outline the role of a supervisor. Use this section to briefly introduce and expand further on the Personalised Career Development Plan (PCDP). What is the ultimate goal of the PCDP?
- Introduce any career development support services present at the host organisation(s). This should include training in transferable skills.
- Detail the number of developmental objectives the fellow will be expected to achieve per year.
- How often will the PCDP be reviewed and by whom? Mention monitoring and corrective measures. Could add something about to whom and how frequently the supervisor team will report about the fellow – to the PM team or to the Advisory Board or similar. Will the fellow be required to submit annual progress reports?

- Any other relevant point.

Number this section: 1.3.1.2 Any other relevant point

- If applicable

1.3.2 Describe the training

- Training on research skills within the appropriate discipline(s) and/or to gain new skills;

Number this section: 1.3.2.1 Training on research skills within the appropriate discipline(s) and/or to gain new skills.

Suggested Length: ~1.5 pages

- Begin with an overview on the main objectives of a training programme.
- Who will coordinate the training programme? Role of the project management team / supervisory board or in the case of a larger COFUND programme a specific research career development manager? (link to section 3.1.1).
- Describe how the training programme has been designed to meet the research &

transferable skills needs of these fellows and the needs of the sector and to allow the rapid ascent of fellows to key leadership positions in the field.

- Mention the PCDP again (link to section 1.3.1.1).
- Include a figure/table here as an overview of the **research skills (core and advanced)** training fellows will receive. Use graphics to highlight several research training areas.
- Include elements of the training on **research skills**:
 - Describe how it will build on training programs for other MSCA projects or existing career development training in the institutions involved in the programme.
 - Supervised inter-disciplinary research project-provide a table summarising the discipline-specific research training provided by each supervisor – include name, supervisor responsible and training site.
 - Scientific and transferable skills through hands on training activities.
 - Intersectoral or interdisciplinary transfer of knowledge (through secondments and short visits).
 - Summer schools/workshops which will include specific courses on research and transferable skills- Give an overview of programme summer schools – include detail of morning & afternoon sessions over couple of days. Mention the transferable skills training they will receive but expand on the training in the next section 1.3.2.2

- Support and/or additional training in non-research oriented transferable skills (i.e. grant writing, project management, IPR, entrepreneurship, training for job interviews), 'open science skills' (i.e. learn researchers how to open access to their publications, manage and share their research data, be trained in ethics and research integrity, on gender balance in teams and research content, learn to communicate with the general public and to even integrate citizens in research design and processes including through citizen science);

Number this section: 1.3.2.2 Support and/or additional training in non-research oriented transferable skills

Suggested Length: ~1 page

- Describe in more detail the key transferable skills training that the fellows will receive. This should be listed in the previous section 1.3.2.1
- Outline any requirements of the fellows in this area – how many modules must they complete etc.
- Evaluators will want to see that the researchers receive transferable skills in:
 - Grant writing
 - Project management
 - Intellectual Property Rights (IPR) management

- Entrepreneurship skills
- Training for job interviews
- CV writing
- Open science skills (i.e. researchers should learn how to open access their publications, manage and share their research data)
- Public engagement & communication skills
- Citizen science skills

- Any other relevant point.

Number this section: 1.3.2.3 Any other relevant point.

Excellence Section 1: Common weaknesses in unfunded applications

- Supervision arrangements and monitoring and career guidance of fellows are not described with sufficient detail (e.g., experience and qualifications of PIs to support the fellows in preparing a research plan), considering the diversity of research projects.
- It is insufficiently clear to what extent will the candidates have an opportunity to formulate their own research proposal.
- The Postdoc Program Committee has an insufficient representation of external experts and the approach to management of conflicts of interest is unclear.
- The eligibility criteria are insufficiently explained in the proposal.
- It is not clear whether the outgoing fellowships are only available to researchers employed at the beneficiary institution, suggesting a serious restriction of the programme, which is not justified.
- The limitation of establishing the "up to 15 years of FTE" eligibility criteria for researchers is not sufficiently and convincingly justified.
- There is inconsistency between the evaluation criteria and the affirmation present in the proposal, stating that the sole criterion for the selection is scientific excellence.
- It is unclear how the fellow's project is matched to the capacity of the host.
- The procedure for the reviewers' selection does not ensure a selection process that is fully transparent.
- The calculation of the final scoring for each application has not been made fully clear.
- The priorities of criteria marks in the case of equal marks are not considered.
- During the selection process, the use of averages in the case of divergent scores rather than consensus does not convince.
- The interview panel lacks an independent external expert.
- It is not clear if there is a redress procedure after the final interview.

2. Impact

In this section take into account the **COFUND Expected Impact** as outlined in the: [MSCA Work Programme 2018-2020](#):

At researcher level:

- Augment and diversify the set of skills, both research-related and transferable ones, that will lead to improved employability and career prospects both in and outside academia.
- Forge new mind sets and approaches to research and innovation work through interdisciplinary and intersectoral experience.
- Enhance networking and communication capacities with scientific peers, as well as with the general public, that will increase and broaden the research and innovation impact.

At organisation level:

- Increasing the attractiveness of the participating organisation(s) towards talented researchers.
- Boosting research and innovation output among participating organisations.
- Strengthening of international, intersectoral and interdisciplinary collaborative networks that will reinforce the organisation's position and visibility at a global level, but also at a regional/national level by helping them become key actors and partners in the local socio-economic ecosystems.

At system level:

- Aligning of practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), enhanced implementation of the Charter and Code and the EU Principles for Innovative Doctoral Training at regional, national or international level.
- Supporting the practice of Open Science through targeted training activities.
- Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe.
- Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.
- Strengthening of Europe's human capital base in research and innovation and structuring of a stronger European Research Area.
- Increase in Europe's attractiveness as a leading destination for research and innovation
- Better quality research and innovation contributing to Europe's competitiveness and growth, including by supporting regional or national smart specialisation strategies when appropriate.

2.1 Enhancing the potential and future career prospects of researchers; strengthening human resources on regional, national or international level

The information provided in *Italics* below relates to the expected impact outlined above. It is important to show how these Expected Impacts are achieved through the programme.

- Describe how the potential and future career perspectives of selected researchers will be enhanced;

Number this section: 2.1.1 Describe how the potential and future career perspectives of selected researchers will be enhanced

Suggested Length: ~1 page

- **Enhancing skills** (*research-related and transferable ones*) – What aspects of the programme will allow the researchers to enhance their existing skills to *improve their employability in and outside academia*.
- **Career prospects** – state the potential employers of the fellow's post-programme and how participating in this programme will improve their attractiveness towards these employers. State that the training programme developed will be based on the need for employers for researchers with these skills.
- How will the programme **enhance networking and communication capacities** with scientific peers, as well as with the general public, that will increase and broaden the research and innovation impact?
- How will the **intersectoral and interdisciplinary aspects** of the programme impact on the researchers' careers (e.g. *forge new mind sets and approaches to research and innovation work*).
- In case you are submitting a COFUND project for an existing programme, explain how the new COFUND action will improve upon your programme. Convincingly show how the COFUND action will strength your programme and therefore the professional career development of the fellows.

- Outline how the proposed programme will impact on strengthening research human resources on regional, national or international level;

Number this section: 2.1.2 Outline how the proposed programme will impact on strengthening research human resources on regional, national or international level

Suggested Length: ~1 page

Break into 2-3 sections:

Regional level/ National level

- Describe how the programme will increasing the attractiveness of the participating organisations towards talented researchers thus building up talent in the region.
- Describe how “strengthening of international, intersectoral and interdisciplinary collaborative networks that will reinforce the organisation's position and visibility at a global level, but also at a regional/national level by helping them become key actors and partners in the local socio-economic ecosystems.”
- Do the objectives of the COFUND programme address any key priorities/needs at a research level.
- How does the COFUND programme meet the needs at a national level? For example, does the COFUND programme align with the national policies/strategies such national Research and Innovation Strategies for Smart Specialisation (RIS3 strategies)?

International level

- Highlight how the programme will impact on the *international, interdisciplinary and intersectoral mobility of researchers in Europe*.
- Describe how the programme will strengthen *Europe's human capital base in research and innovation and structuring of a stronger European Research Area* where knowledge, technology and researchers circulate freely.
- Describe how the programme will increase *Europe's attractiveness as a leading destination for research and innovation* (provide specific information in relation to the research field).

Describe how the programme will impact on better *quality research and innovation contributing to Europe's competitiveness and growth* and or address a European societal challenge.

- Any other relevant point.

Number this section: 2.1.2 Any other relevant point.

- If applicable

2.2 Aligning practices of participating organisations with the principles set out by the EU for human resources development in research and innovation

- Describe how the programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I (such as Charter and Code¹, or the Principles for Innovative Doctoral Training for DPs) at the participating organisations;

¹ https://euraxess.ec.europa.eu/sites/default/files/brochures/am509774cee_en_e4.pdf

Number this section: 2.2.1 Describe how the programme will contribute to the implementation of principles set out by the EU for the human resources development in R&I at the participating organisations;

Suggested Length: ~1 page

- Include information here if your institution has been awarded the HR Excellence in Research Logo.
- Outline how the programme aligns with the “practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), the Charter and Code etc.
- Mention alignment with national regulations and provisions concerning social security and pension, provision for maternity/parental leave.
- Mention again how gender issues / researchers at risk have been considered in working conditions. Refer back to 1.1.4.
- Remind the evaluator that the proposed programme will contribute to achieving the expected impact of COFUND:
 - *Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.*
 - *Aligning of practices and policies in the context of the EU Human Resources Strategy for Researchers (HRS4R), enhanced implementation of the Charter and Code and the EU Principles for Innovative Doctoral Training at regional, national or international level.*

- Any other relevant point.

Number this section: 2.2.2 Any other relevant point.

- If applicable

2.3 Quality of the proposed measures to exploit and disseminate the results

- Describe plans and procedures for exploitation and dissemination of results towards the research and innovation community and other relevant stakeholders (e.g. industry, other commercial actors, professional organisations, policy makers) in order to achieve and expand potential impact of the programme. This includes the strategy to be adopted to ensure open access to publications and to research data (when appropriate) as well as promoting FAIR data management;

Number this section: 2.3.1 Describe plans and procedures for exploitation and dissemination of results towards the research and innovation community and other relevant stakeholders

Suggested Length: ~1/2 page

- Describe who are the target audiences for the dissemination of the research results and progress of the COFUND projects. Provide specific examples-types of research fields (internal and external to the beneficiary and partners), industry, commercial actors, policy makers etc.
- Describe the types of dissemination activities will be used (conferences, workshops, events, tradeshow, social media etc). Give examples for all the dissemination activities.
- A table could be included in this section indicating the specific activities, the target groups, the channels and who is the person responsible (fellow, supervisor...) and requirements for each fellow.
- This table could also be included for the Communication Activities section below.
- State how many dissemination activities the researchers will be required to carry out during their fellowships.
- Mention if the fellows will receive training for dissemination and communication skills (refer back to the training section 1.3.2.1 for more information).
- Describe the strategy to ensure open access to publications and to research data (when appropriate) as well as promoting FAIR data management.

- Intellectual Property Rights issues (if relevant);

Number this section: 2.3.2 Intellectual Property Rights issues**Suggested Length:** ~1/4 page

- State that IPR will follow MSCA guidelines.
- State it will be in line with any national IP protocols.
- If IP agreements are already in place with industry partners mention this also.
- State that the IP policy will apply during the fellows stay at the host and secondment (specify that where an existing agreement is not already in place, an IP agreement must be in place before the secondment can start).
- Mention the support of the highly experienced institutional technology transfer office and host dedicated support. State how often the research projects will be reviewed to look for potential IP.
- Mention that the fellows will receive training on IP management through carrying out their project and also through structured training.

- Any other relevant point.

Number this section: 2.3.3 Any other relevant point.

Suggested Length: ~1/4 page

Describe how the COFUND programme will supporting the practice of *Open Science* which in line with the Expected Impact of the COFUND programme.

Outline the programme's OPEN SCIENCE policy in detail in this section.

2.4 Quality of the proposed measures to communicate the results to different target audiences

- Communication and public engagement strategy of the programme; in particular the approach envisaged to create awareness among the general public of the research work performed under the programme and its implications for citizens and society should be described.

Number this section: 2.4.1 Communication and public engagement

Suggested Length: ~1 page

- Mention the support of the host institution's Education and Outreach support staff.
- Specifically mention training in communication, public engagement and education as part of the fellows training programme and direct the evaluator back to section 1.3.2.
- Mention specific kinds of activities fellows will take part in to communicate their results / interact / educate the general public – link to existing outreach and education programmes at the host organisations.

Some activities a fellow might part-take in could include:

- Open Door communication: Students/public visit the fellow's institution/lab etc. to discuss project activities.
- Visit schools, universities, community organisations to promote their research.
- Public/societal engagement events (For example, European Researchers' Night Event).
- Articles in a newspaper about the fellows' activities and the overall COFUND programme.
- Use of the COFUND social media.
- Fellows writing blogs to publish on host website and COFUND website.
- Press release by the COFUND PM.
- Brochures about the project.
- E-newsletters.
- Multimedia releases (video clip via YouTube explaining the fellows' work).

- Apart from communicating the research results, there is also the aspect of communicating the results of the overall programme, i.e. the outcomes of calls and the fellows themselves. For example, press releases about call results with details of the funded fellows, disseminating short video interviews of the fellows talking about their work.

- Any other relevant point.

Number this section: 2.4.2 Any other relevant point.

- If applicable

Impact Section 2: Common weaknesses in unfunded applications

- Enhancing the potential and future career perspectives of researchers is not presented in a completely convincing manner.
- The impact of the programme on strengthening human resources in research beyond the country's universities and research communities is not sufficiently justified.
- The research data management policy is not outlined and no central repository of research results is foreseen.
- The quality of the proposed measures for dissemination, from the perspective of the broader scientific community, is only described in a short, less detailed way. The added value from the new partners' community, regarding dissemination aspects, was not explicitly presented.
- A systematic procedure for monitoring exploitation and dissemination is not described.
- Plans to support fellows through the steps for exploiting the research product results are not sufficiently addressed.
- It is not specified whether there will be any support for the fellows in dissemination and exploitation activities during their secondments.
- Outreach activities are only encouraged, but they are not compulsory and clearly measured.
- The proposal does not clearly explain improvements of the new programme in respect to the **previously funded** COFUND programme with the same beneficiary.

3. Quality and efficiency of the implementation

3.1 Coherence, effectiveness and appropriateness of the work plan

- Describe the management plan of the programme and the resources; define the work packages and deliverables; include a timeline or Gantt chart giving an overview of at least the:

Number this section: 3.1.1 Describe the management plan of the programme and the resources; define the work packages and deliverables; include a timeline or Gantt chart.

Break up into 3 headings:

3.1.1.1 Management Plan

Suggested length: ~2 pages

Outline the organisation and management structure with the aid of a figure. Refer to the Gantt chart for the call timeline. Suggested organisation (but others may be appropriate):

- Programme Coordinator (PC).
- Programme Manager (PM).
- Host operations Team (Finance, grant management, research office, TTO/commercialisation, HR etc).
- Supervisory Board (including both supervisors and fellows representation) – tasked with monitoring progress of the research programme, gender equality, progression issues or disputes, IPR, Communication and dissemination and risk management.
- Steering Committee- tasked with oversight and governance (see section 1.1.2.1 for composition – Project Coordinator, Institutional VP research, Directors, MSCA NCP or NE, representative from TTO and industry representative.

Outline the responsibilities of the PC versus the PM, and weekly meetings between the two. Explain the responsibilities of the various committees (could link back to 1.1.2.1 Composition of committees involved in the different stages of the process).

Outline the frequency of meetings of the various committees and the decision-making processes.

1.1.1 Describe the management plan of the programme and the resources; define the work packages and deliverables; include a timeline or Gantt chart continued...

3.1.1.2 Work packages & Resources

Suggested length: ~1.5 pages

- For ease of reading, move the WP tables (provided on the last page of B1) up into this section, before the Gantt chart, instead of having them at the end.
- Add two more work packages:

- WP 5-Dissemination, exploitation and communication.
- WP6-Training in research and transferable skills.

3.1.1.3 Gantt Chart

Suggested length: ~1/4 page

Include a timeline or **Gantt chart** giving an overview of at least the:

- Expected start and end date of the action (number of months);
- Number of calls;
- Opening/Closing date of the call(s);
- Number of fellowships offered per call;
- Evaluation timeline;
- Expected/planned start/end date of researchers' appointments.

Also include:

- Summer schools/training events
- Programme review
- PR activities for each call

Post-call communications/dissemination activities of the programme.

- Financial management and risk management/contingency plans of the programme;

Number this section: 3.1.2 Financial management and risk management/contingency plans of the programme

Suggested Length: ~1/2 page

3.1.2.1 Financial management

- Start with an introductory paragraph stating that financial management will follow REA regulations and guidelines on the financial implementation and management of MSCA awards and is the responsibility of the PC.
- Explain how the beneficiary is well able to manage the project due to its experience in managing other financial resources (other mobility programmes, FP7 and Horizon 2020 projects; national projects, own programmes, etc).
- Refer to section 3.2.1 for the budget table and for the justification of the costs.
- Describe how the funding will be distributed to the researchers (i.e: monthly, etc.), and to all the partner organisations of the COFUND project (if applicable).
- Name the support offices which will give their expertise.

3.1.2.2 Risk management/contingency plans

- Include a table outlining the risks within the work package that would affect the implementation of the programme. Make sure there is a contingency plan for each risk.

Risk & Contingency Plan Table			
Risk	Work package	Risk level (low, med, high etc.)	Contingency

- Any other relevant point.

Number this section: 3.1.3 Any other relevant point.

- If applicable

3.2 Appointment conditions of researchers

- Amounts that will be provided for the benefit of the researcher (e.g. living, mobility, travel and family allowances) and for the organisation that is hosting the researcher (contribution to research, training and networking costs, indirect costs) (Table 1);

Number this section: 3.2.1 Amounts that will be provided for the benefit of the researcher and for the organisation that is hosting the researcher

Suggested Length: ~1 page

Insert the budget table here.

Discuss the amounts for the following cost categories and why they are appropriate for the COFUND programme. Make sure to provide an estimation of the costs that would be needed (e.g. the salary of a PM for 1 year, price of promotional activities etc.). Evaluators need to see that the costs indicated in the budget table make sense:

Amounts for the benefit of the researcher

- Living allowance
- Mobility allowance
- Family allowance-what is this based on (e.g. 50% of fellows will be eligible for the family allowance).

Amounts for the benefit of the host organisation (s):

- **Research training and networking:** State these costs proposed will be used to fund (consumables, research costs, travel for training/events etc, training, programme workshops, conferences) – mention the fellow discretionary training budget here also if you have included that idea in your programme).
- **Management and indirect costs:** state these costs will be used for the PM salary, peer review costs, website, advertising, call dissemination costs etc.

- Working conditions, institutional administrative support, and available services/facilities;

Number this section: 3.2.2 Working conditions, institutional administrative support, and available services/facilities

Suggested Length: ~1 page

Suggested subtitles:

- Human resources (mention the HR Excellence in Research Logo).
- EURAXESS and the [hosting agreement](#) for non-EU researchers.
- Using a table outline all the support services / facilities in all the organisation locations.

- Employment conditions, including statutory working practices, social security coverage and social benefits;

Number this section: 3.2.3 Employment conditions, including statutory working practices, social security coverage and social benefits

Suggested Length: ~1/2 page

- Describe the work contracts that will be provided to fellows.
- Describe statutory working practices, social security coverage and social benefits (sick leave, maternity/paternity and parental leave).
- Highlight that the fellowships will be subject to relevant employment law e.g. equal status act, employment equality acts, disability act.

- Compare the proposed working conditions proposed through the programme with the regional and/or national and/or sectoral ones;

Number this section: 3.2.4 Compare the proposed working conditions proposed through the programme with the regional and/or national and/or sectoral ones

Suggested Length: ~2-3 paragraphs

- Particularly highlight any area where the programme will go beyond national legislation requirements e.g. full maternity pay (topping up the state maternity payment).

- Any other relevant point.

Number this section: 3.2.4 Any other relevant point.

- If applicable

3.3 Competence of the participant to implement the programme

- Description of how the administrative, technical and human resources will be used to implement the programme.

Number this section: 3.3.1 Description of how the administrative, technical and human resources will be used to implement the programme.

Suggested Length: ~2-3 paragraphs

- Give the experience of the PC and other steering committee members in FP7, H2020 and MSCA funding – take care to highlight in particular the EU funding and project management experience of the PC.
- Outline the experience required for the role of PM – if you have already identified a PM, list their brief profile and relevant experience.
- List by name every other host organisation institutional staff who will support the PM e.g. finance officers, HR staff, education/outreach managers, business development managers, TTO staff, marketing team etc.

- If known, description of partner organisations hosting and training the researchers and contributing financially to the programme (if applicable);

Number this section: 3.3.2 If known, description of partner organisations hosting and training the researchers and contributing financially to the programme (if applicable);

Suggested Length: ~1-2 paragraphs

Refer to the overview of all the identified Partner Organisations in **Table 2** and the Letters of Commitment in Section 5.

- Describe the organisations that will be recruiting and hosting fellows. Mention if they will also provide training and contributing financially.
- Describe the organisations who will be hosting researchers without recruiting (for example, non-academic organisations who will be taking researchers on secondments). Mention if they will also provide training and contributing financially.
- Describe any other involvement of partner organisations.

- Support offered to candidate researchers during the application/recruitment/implementation;

Number this section: 3.3.3 Support offered to candidate researchers during the application/recruitment/implementation

Suggested Length: ~1/2 page

Explain the support offered to the fellows at each stage of the selection and implementation process:

Application process-refer back to all the information provided to applicants (1.1.1.2), helpdesk, support provide from supervisors and the host institutions.

Recruitment process-what support services and process will be used upon recruitment. The researchers will be moving to the host country so what support will they receive to integrate into their host country (e.g. EURAXESS services to support researchers).

Implementation process- what support will be offered to fellows once they are appointed (induction day, supervisory support, communication platforms etc).

- Any other relevant point.

Number this section: 3.3.4 Any other relevant point.

Suggestion:

- It is important to include how the projects and the researchers will be monitored. For example, explain the monitoring of the individual projects and how the programme will be assessed.

Table 1. The following table (or similar) should be used to detail the financial aspects of the programme. Please note that the amounts for the living allowance and for the mobility allowance must be specified individually:

Cost categories	EU contribution (EUR/person-month)	Total cost = EU contribution + own resources (EUR/person-month)
Living allowance	1 935 (for ESR)* 2 740 (for ER)*	***
Mobility allowance**	N/A	***
Family allowance**	N/A	
Travel allowance**	N/A	
Research costs**	N/A	
Other (training, etc.) **	N/A	
Management costs	325	
Indirect costs**	N/A	
Number of fellows		
Number of fellow months		
Total amount		

*Choose the applicable rate, and delete the other. ESR = Early Stage Researcher, ER = Experienced Researchers.

** If applicable, delete otherwise. Other lines can be included for categories not shown in the template above.

*** The sum of living and mobility allowances must not be lower than EUR 2709 for ESR and EUR 3836 for ER.

The following work packages and pre-filled deliverables are mandatory, and constitute a minimum requirement (you are welcome to add work packages and to enhance these deliverables and to add additional ones).

Work package number	1	Start date or starting event:	
		Final date:	
Work package title	Management		

Deliverables D1.1 Progress Report
--

Work package number	2	Start date or starting event:	
		Final date:	
Work package title	Dissemination of the Programme and its Calls		

Deliverables D 2.1 Report/s on communication and dissemination activities D 2.2 Inform for each call the Project Officer by sending the link to the EURAXESS website where the Call has been published
--

Work package number	3	Start date or starting event:	
		Final date:	
Work package title	Evaluation and Selection		

Deliverables D3.1 Report for each call on evaluation and selection ...

Work package number	4	Start date or starting event:	
		Final date:	
Work package title	Ethics Issues		

Deliverables D.4.1 Report for each call on ethics issues

Implementation Section 3: Evaluation Summary Report Common Weaknesses

- The choice of organizing only one call is not sufficiently explained and justified.
- The description of tasks and deliverables in each Work Package is not detailed.
- The method of the proposed calculation of average salaries of the local experienced researchers is not explained with sufficient detail.
- The role of partner organisations regarding hosting the fellows lacks clarity, since no partner organisation will employ or host any fellow during the programme.
- The operational management is more personalised than institutionalised.
- Details on how the administrative human resources will be used to implement the programme are not sufficiently provided.
- The risk analysis is insufficient for a programme of this level of complexity; for example, risks relating to the execution of the evaluation process and the implementation of fellow' projects are not considered.
- The risk management is not comprehensive enough, e. g. it does not include risk impact and insufficient internal risks have been identified.
- For the special case that the supervisor is not sufficiently present, no risk mitigation action is foreseen.
- The assistance available to the candidates during the application phase is insufficiently clarified.

STOP PAGE COUNT – MAX 30 PAGES

4. Ethics Aspects

All research activities in Horizon 2020 must respect fundamental ethics principles, including those reflected in the Charter of Fundamental Rights of the European Union² and the relevant ethics rules of H2020. These principles include the need to ensure the freedom of research and the need to protect the physical and moral integrity of individuals and the welfare of animals.

Ethics is important for all research domains. Informed consent and confidentiality are as important for a sociological study as they are for clinical research.

In this context, please be aware that it is the applicants' responsibility to identify any potential ethics issues, to handle the ethics aspects of their proposal, and to detail how they plan to address them.

COFUND programmes often follow a bottom-up approach and it is often not known in advance if the fellowships to be funded will raise ethics issues. Therefore, it is important to describe how the proposal meets the European as well as the national legal and ethics requirements of the country or countries where the tasks raising ethics issues are to be carried out. In particular, applicants should take care to describe the ethics procedures that they will enforce in the execution of the programme (at application phase, selection and evaluation phase, monitoring and follow-up of projects, and the trainings on ethics). A report on ethics issues will be produced by the beneficiary for each call it organises.

In practice, this means that the successful COFUND programmes, when opening their calls for proposals, will have to detail the procedure to be followed for addressing proposals raising ethics issues.

5. Letters of Commitment from Partner organisations

Please fill in the overview of all the identified Partner Organisations in **Table 2**.

Please use this section to insert scanned copies of the letters of commitment from the partner organisations.

The partner organisations identified in the proposal must provide a letter of commitment specifying their precise role in the programme, as well as the amount of their financial contribution if any.

² Charter of Fundamental Rights of the European Union, 2000/C 364/01.
See also http://www.europarl.europa.eu/charter/default_en.htm

5. Letters of Commitment from Partner organisations

- Make sure to provide the organisation logo.
- The organisation should provide the specific detail of their role in the COFUND as indicated in Table 2 below:
 - **Hosting researchers without recruiting** (e.g. the organisation will host X number of researchers on secondment for X duration).
 - **Hosting researcher with recruiting** (the organisation will host, supervise and support the fellows).
 - **Providing training/career development opportunities** (e.g. the organisations will provide training in X for all fellows recruited into the COFUND).
- List the additional support they will provide for the researcher (s) i.e. use of equipment, training in new techniques etc.

Table 2. The following table should be used to list and detail the role of the partner organisations (if known), including their financial contribution to the programme (when applicable):

Partner organisation name	Partner organisation short name	Country	Academic (Y/N)	Role			
				Hosting researchers WITH recruiting (Y/N)	Hosting researchers WITHOUT recruiting (Y/N)	Providing other training or career development opportunities (Y/N)	Financial contribution in EUR (if applicable)

Note that:

- Any relationship between different participating organisations or individuals (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff, etc.) **must** be declared and justified;
- The data provided relating to the financial capacity of the beneficiary will be subject to verification during the grant preparation phase.

END PAGE

MARIE SKŁODOWSKA-CURIE ACTIONS

**Co-funding of regional, national and
international programmes (COFUND)**

Call: H2020-MSCA-COFUND-2018

PART B

“PROPOSAL ACRONYM”

This proposal is to be evaluated as:

[DP] [FP]

[delete as appropriate]