Net4Mobility+

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

Deliverable No. 3.3

MSCA-COFUND FP Handbook 2019

Issued by: Geraldine Canny & Chiara Loda, Irish Universities Association, IE
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Work Package Leader: Innovation Authority, IL

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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 FP Call for the deadline 26/09/2019. It is therefore NOT a substitute of European Commission Documents, which in all cases must be considered as official and binding. In particular, you must consult the COFUND 2019 Guide for Applicants (GFA) [http://ec.europa.eu/research/participants/data/ref/h2020/other/guides_for_applicants/h2020-guide-appl-msca-cofund-2019_en.pdf] and the MSCA WP 2018-2020: (http://ec.europa.eu/research/participants/data/ref/h2020/wp/2018-2020/main/h2020-wp1820-msca_en.pdf). Both documents are frequently referred to throughout this handbook.

- 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.

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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 26 2019 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.

Single line text boxes contain strengths from Evaluation Summary Reports.

Double line text boxes contain examples of common weaknesses from Evaluation Summary Reports

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, together with the scheme to which you are applying (i.e. DP or FP).

- 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.

    - Evaluators cannot give you positive marks for any omitted information, even for 'obvious points'.

- 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 when possible, as they break up the text. While tables can also help you to save some space (there is no minimum font size, provided that it is legible) they should not be used for the mere purpose of circumventing space limits.
- Use the correct font size (minimum 11), single line spacing and page margins (at least 15 mm) as indicated in the Guide for Applicants (p. 31).
- 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.

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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-2019

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 <u>must follow</u> 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 center/university etc. Consider that your evaluators are very likely to be based abroad, and therefore they need some (synthetic) context.
- 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. Thriving research environment? Industry contacts? International networking at institutional level?

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 fellow (typically 12 to 36 months).
- Describe who is involved in the project (the main beneficiary, recruiting-partner organisations, non-recruiting partner organisations. Consider using a diagram to illustrate the different participants and the relationship between them).
- Describe the COFUND 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)

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

- 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** (PhD or minimum 4 years FTE research experience) and any **mobility requirements** (as per MSCA).

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?
- 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 (and promote) 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 relevant information (working conditions, minimum gross salary, host institution, evaluation process, etc.) will be available on the programme website, together with (downloadable) application materials. Make reference to concrete documents: FAQS, guide for applicants, legalities, promo brochures, 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)
- Application support – PM (and possibly part of the host's operations team) 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).
- Support provided to incoming fellows (visas and migration, relocation support, induction..)

- 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 i.e. number of fellowships on offer, number of calls, types of fellowships and their duration (Modelling it on the MSCA-IF you can decide to open your COFUND to applicants eligible under different panels, such as: 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: Prospective fellows must 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&Enterprise fellowships, these panels allow for a relaxed mobility rule. That means that eligible candidates must 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.
- **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. The supervisor should not be involved in the preparation or validation of the proposal.
- **Secondments requirements**: State that applicants are encouraged to also include elements of cross-sectoral mobility and interdisciplinarity in their programmes such as an intersectoral secondment (recommended minimum duration: three months)

and short visits. If possible, secondment provisions should be included at proposal stage.

- **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 about the selection workflow 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/compiled? 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, minimum three interviewers (and an HR representative), and inclusive of some external members. Might be worth including that the panel should have unconscious bias training.
  (see for example: https://www.leadequalitynetwork.com).
- **Funding Decision**: who will make the final funding decision? Refer to the role of the Steering Committee.
- **Redress Committee**: describe how redress works for applicants.
- **Feedback to applicants**: what will be provided and by whom (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:
> - Say that experts will be selected in compliance with the principles included in the European Code of Conduct for the Recruitment of Researchers.
> - 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, management experience etc. Ideally, experts should be based outside the country.
> - Expert appointment: Will they sign any contract/declaration of commitment? Will they be compensated?
> - Explain the rules for conflict of interest. You should refer to the H2020 rules as described here (adapting them as appropriate).

- 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
> Provide detailed information on:
> - The stages of the selection workflow.
> - The responsible person/committee at each stage of the selection process.
> - Describe how long each stage would take (and the duration of the whole recruitment process).
> - Consider providing a graphic representation of the process (such as the recruitment timeline).

- 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 adapt the criteria for the MSCA-IF (Excellence, Impact, Implementation), adjusting them as needed. They are outlined at page 29 in the [Guide for Applicants 2019](#) .
- 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, you could use 0-5 scoring system for each sub-criterion, include an outline of what a score of 0-5 reflects (e.g. 5=excellent; 4=good..). Adjust it to the COFUND FP's peculiarities. For instance, since COFUND is a mono-beneficiary action, it makes little sense for the peer-reviewer to evaluate the infrastructures at the host's premises.
- Alternatively, if the beneficiary has their own evaluation system/criteria already in place you can use this (possibly, adjusting it as appropriate).
- **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, questions and answers? If possible, include provisions to ensure some standardisation (and objectivity) in the process (for instance, a fixed set of questions, each of them corresponding to a weighted score).
  - 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? (eg 50:50? 70:30?). Bear in mind that an applicant could score very highly in a written application but may perform very weakly at interview.

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. Is there already any ongoing provision that all staff members can benefit from?
- 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 53 in the MSCA WP 2018-2020.
- **International opportunities**-Explain that the programme will be open to any experienced researcher around the world provided they comply with 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.). Say that a gender-balanced postdoctoral cohort might have a long-term transformative power in this regard.
- Career Restart policy -does your programme offer the opportunity for experienced researchers who took a career break 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).
- Refer to 'researchers at risk', i.e. researchers holding the refugee status. The European Commission has 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**.
> - If the beneficiary is a funding organisation, you could refer to the RTD regional ecosystem to show that your regional/national context is particularly suitable to the development of your ERs' cohort(s).
> - Say that the programme underpins on the principle of individual-driven research. 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). If applicable, refer to the career development tools and opportunities provided by secondment partners.

- 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.
>
> Inter-sectoral exposure:
> - Explain the secondments and involvement of the non-academic sector.
> - Provide a list of all the non-academic organisations, known at the proposal stage, specifying their role (training, secondment hosts..)

- 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 relevant to the fellows (linking to section 2.3.1). Will supervisors/industry partners help them to make the most of these opportunities? Emphasise the concrete opportunity to develop long-lasting high-profile networks.

Interdisciplinarity exposure:

- Focus here on the interdisciplinary nature **of the programme and of the** organisation/institution/department/centre. For example, mention already-existing multidisciplinary projects and research areas.
- Outline how fellows will engage with different disciplinary areas. Multi-disciplinarity of projects? Training elements? Multi-disciplinary supervisory panel?
- Say that the experienced researchers will receive training in advanced research skills beyond their own discipline (for instance, during network-wide events).

- 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 pages 11-12 in the [COFUND GFA 2019](#) 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 experienced 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, as well as how the progresses of the fellows will be monitored and their career development promoted and guided.

Suggested Length: ~1.5 pages

Break this section up as follows:

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 submitting the application?). The same goes for the co-supervisors and the non-academic supervisors.
- Remember, the supervisor should not be involved in the preparation of the proposal, as it might be perceived to hinder the principle of 'individual-driven' research.
- 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 supervisors involved in your COFUND. For example, give examples of the journals they publish in (alongside journal Impact Factors).
- In the case of funding organisations/funders, state how the quality of the supervisors will be assessed (for instance, some thresholds in terms of years of experience, past supervision record.).
- 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).

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). Say that all supervisors will be involved in its development and periodical revision. 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 minimum number of developmental objectives the fellow will be expected to achieve per year. How compliance will be assessed?
- 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). Say that it will include each ER's training elements.
> - Include a <u>figure/table</u> 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**:
>   - Scientific and transferable skills through hands on training activities. How fellows will learn something out of carrying on their research? How will they be monitored and supported in this process? Refer to the role of the supervisory panel. What is the added value of having more than one supervisor?
>   - Describe how your training elements will build upon existing programmes already running in your host institution(s) (e.g. other MSCA/H2020 projects, career development modules.). List existing relevant modules (and possibly trainers and timing) in a table.
>   - Intersectoral or interdisciplinary transfer of knowledge (through secondments and short visits). Mention the non-academic partners' contribution to the training of the ERs.
>   - Summer schools/workshops which will include specific courses on research and transferable skills- Give an overview of your COFUND summer schools –

> include details of morning & afternoon sessions over a 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. (minimum target)
> - State that fellows will 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
>   - Gender
>   - Citizen science skills

- Any other relevant point.

> **Number this section:** 1.3.2.3 Any other relevant point.

Excellence Section – Examples of Strengths

- The dissemination of the calls is excellent, as it makes use of international websites and platforms.
- The recruitment process is well articulated. All evaluation and selection steps and criteria are appropriately presented and the profile of the external experts is outlined.
- The composition and organisation of the selection committees is clearly designed, and adequate procedures are in place to select experts, handle ethical issues and oversee the entire process.
- Gender issues are well addressed in the selection of international experts and in the composition of the supervising teams.
- The beneficiary is well committed to ensure equal opportunities during the selection process.
- Included in the provisions of the program is the possibility of gaining experience teaching university courses.
- There is a sound demonstration of supervision arrangements, career guidance and training. The preparation of a personal career development plan is mentioned.
- There is clear evidence in the proposal of adequate supervision mechanisms involving also external project partners and admitting the possibility of a second mentor.

Excellence Section – Examples of Weaknesses

- The selection process is in general well developed, however some aspects of it are not fully clear. For instance, it is not specified how to deal with proposals from the reserve list.
- No clear justification is provided for restricting the access to this programme to postdoctoral researchers up to five years after their graduation.
- The process of matching candidates to host institutions and supervisors is not laid out in details.
- The fact that applications, to be eligible, require an endorsement letter from the proposed academic supervisor creates a potential for internal pre-selection before the peer review evaluation step.
- The fact that applicants are required to develop their project jointly with the prospective supervisor hinders the openness of the programme.
- It is insufficiently clear to what extent will the candidates have an opportunity to formulate their own research proposal.
- The selection criteria for international and external peer-reviewers are insufficiently discussed.
- International peer review remains unclear, as the proposal does not explicitly mention any residency criteria for evaluators.
- The calculation of the final scoring for each application has not been made fully clear.

- The scientific quality of research proposals only accounts for a limited proportion of the final score.
- 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.
- The proposal does not present in sufficient details the international and interdisciplinary dimensions of the programme.
- 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.

2. Impact

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

At researcher level:
- o 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.
- o Forge new mind sets and approaches to research and innovation work through interdisciplinary and intersectoral experience.
- o 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:
- o Increasing the attractiveness of the participating organisation(s) towards talented researchers.
- o Boosting research and innovation output among participating organisations.
- o 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:
- o 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.

- o Supporting the practice of Open Science through targeted training activities.
- o Increase in international, interdisciplinary and intersectoral mobility of researchers in Europe.
- o Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.
- o Strengthening of Europe's human capital base in research and innovation and structuring of a stronger European Research Area.
- o Increase in Europe's attractiveness as a leading destination for research and innovation
- o 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*. Training (research and transferable skills)? Mentoring? Networking?
- • *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. Mention some specific potential employers (if possible, include some of your industry partners). State that the training programme has been developed in conjunction with industry partners, so to ensure the alignment between employers' needs and skills development.
- • 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? Mention it in relation to the enhanced employability of the fellows.

- 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 as a continuation of an existing programme, **explain how the new COFUND action will improve upon your current programme**. Convincingly show how the COFUND action will strengthen your programme and therefore the professional career development of the fellows. Mention networking potential for the various cohorts of alumni of these programmes.

- 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 be *increasing the attractiveness of the participating organisations towards talented researchers* thus building up talent in the region. In regard to this goal, what are the benefits related to training a postdoctoral cohort?
- 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."* How this COFUND will enhance the networking opportunities and the visibility of the host (and partners)?
- Do the objectives of the COFUND programme address any key priorities/needs at a research level? i.e. Why more research in these thematic areas is needed?
- 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

- o Highlight how the programme will impact on the *international, interdisciplinary and intersectoral mobility of researchers in Europe.* How will best practices be transferred to others?
- o 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.
- o 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). Also, refer to the excellent working conditions offered to fellows.
- o 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 Code[1], or the Principles for Innovative Doctoral Training for DPs) at the participating organisations;

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.

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

- 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:

  o *Improvement in the working and employment conditions for researchers in Europe at all levels of their career, starting from the doctoral stage.*
  o *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.*

- If applicable, explain how the COFUND programme excellent working conditions and best practices will spread to the host, the partners and beyond.

- 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, tradeshows, 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 minimum requirements for each fellow.
- State how many dissemination activities the experienced researchers will be required to carry out during their fellowships i.e. <u>minimum</u> number of conferences to attend/articles to submit…
- This table could also be included for the Communication Activities section below.
- 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);

<u>Number this section:</u> 2.3.2 Intellectual Property Rights issues
<u>Suggested Length:</u> ~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 <u>and secondment</u> (specify that weren't an existing agreement already in place, nevertheless an IP agreement would be obligatorily signed before the beginning of each secondment).
- 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.

<u>Number this section:</u> 2.3.3 Any other relevant point.
<u>Suggested Length:</u> ~1/4 page

> Describe how the COFUND programme will support 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 role 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 (restate the support of the outreach officer).
> - Use of the COFUND social media (specifying which accounts will be set up).
> - 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. Say that the PM will be primarily in charge of this aspect.

- Any other relevant point.

Number this section: 2.4.2 Any other relevant point.
- If applicable

Impact Section – Examples of Strengths

- The proposal includes excellent provisions to enhance ERs' career perspectives through a combination of research and transferable skills.
- The multisectoral nature of the programme can be envisaged to have a favourable impact on researchers' career perspectives, both in academia and industry.
- The large international network around the Programme will allow the fellows to develop their own international network giving them new opportunities for their future career.
- Human resource development at regional and European level is appropriately developed in the proposal. The described programme will contribute to enhance the attractiveness of the European Research Area at international level.
- The programme's measures align with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.
- Dissemination of the results is very well organized both at the individual researcher level and at programme level; the open access policy includes data storage and access, as per the FAIR data management principles.
- The communication and public engagement strategy is satisfactorily planned.

Impact Section – Examples of Weaknesses

- The proposal does not elaborate enough on non-academic career paths.
- 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 proposal does not clearly explain improvements of the new programme in respect to the previously funded COFUND programme with the same beneficiary.
- The proposal deals with the host institution's approach on IPR, but it does not include the pertinent rights of ERs.
- 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.

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:
  - 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.

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
Use a figure to outline the organisation and management structure. 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 representatives of fellows) – 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). The Steering Committee (SC) should include both internal and external representatives, all of them qualified enough to bring meaningful input and contribution to the programme. See, as example, the following Steering Committee composition: Project Coordinator, Institutional VP of research, Directors, MSCA NCP or NE, representative from TTO and industry representative.

Outline the responsibilities of the PC versus the PM, and regular 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.

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

3.1.1.3 Gantt Chart
Suggested length: ~1/4 page

Include a timeline or **Gantt chart.** As per the COFUND GFA 2019 (p 38), you should give an overview of:

- 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:
  o Summer schools/training events
  o Information on communication and dissemination activities
  o Programme review
  o PR activities for each call

Post-call comms/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 fellows (i.e: monthly, etc.), and to all the partner organisations of the COFUND project (if applicable, mention intra-institutional agreements).
- 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.

Cost categories	EU contribution (EUR/person-month)	Total cost = EU contribution + own resources (EUR/person-month)
Living allowance	2740 (for ER)*	*The sum of living and mobility allowances must not be lower than EUR 3836 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		

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 the PM, 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 might be estimated eligible for the family allowance. At what stage the eligibility for the family allowance will be determined (i.e. at the call deadline or at the time of recruitment?)? Will be possible to revise it during the lifetime of the project?

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

- **Research training and networking:** State this portion of budget will cover expenses such as consumables, research costs, travel for training/events etc., training, programme workshops, conferences…
- **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 points to cover:
- Human resources (mention the HR Excellence in Research logo).
- EURAXESS and the migration provisions 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 all fellows will be subject to relevant employment laws 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, briefly mention his/her profile and underline 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.

- This section should highlight that the ERs will be offered excellent working conditions.
- Describe the organisations that will be recruiting and hosting fellows. Mention if they will also provide training and financial contribution.
- Describe the organisations who will be hosting fellows without recruiting (for example, non-academic organisations who will be taking fellows on secondments). Mention if they will also provide training and financial contribution.
- 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, social events, 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 fellows 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.

** *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 <u>work packages</u> and <u>pre-filled deliverables</u> 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- Examples of Strengths

- The work plan is well devised as it includes a clear Gantt chart, an accurate timeline and a satisfactory description of tasks, deliverables and milestones.
- Some potential risks are identified, and appropriate mitigation measures are presented.
- The fellows' remuneration is higher than the usual level of the respective hosts.
- Employment conditions align with the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers.
- The beneficiary has a remarkable experience in implementing similar programmes and it's administrative and management track-record is clear.

Implementation Section- Examples of Weaknesses

- The description of tasks and deliverables in each Work Package is not detailed.
- The choice of organizing only one call is not sufficiently explained and justified.
- The risk management does not fully consider the complexity and size of the programme (for instance the potential difficulties related to the recruitment of a large number of fellows via calls separated by only seven months).
- The risk management plan does not deal with conflict during secondment and appropriate contingency plans.
- Even though the appointment conditions align with the MSCA-rules, fellows' salary is close to the minimum set by COFUND-rules.
- The method of the proposed calculation of average salaries of the local experienced researchers is not explained in sufficient details.
- Some aspects of IPR management are vague. For example, the status of the IP brought to the beneficiaries by incoming fellows is not considered.
- Despite the very clear presentation of the financial contribution of the partner organisations, some of the financial aspects of the programme are not well explained.
- 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 assistance available to the candidates during the application phase is insufficiently clarified.

STOP PAGE COUNT – MAX 30 P

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 Union[2] 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.

For COFUND programmes 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.

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[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

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.

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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 fellows without recruiting** (e.g. the organisation will host X number of fellows on secondment for X duration).
  - **Recruiting and hosting fellows** (the organisation will host, supervise and support some fellows).
  - **Providing training/career development opportunities** (e.g. some partners might provide some form of training to all the COFUND's fellows).
    - List the other forms of support that partners might provide to experienced researchers i.e. access to 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-2019

PART B

"PROPOSAL ACRONYM"

This proposal is to be evaluated as:

[DP] [FP]

[delete as appropriate]