TIPS AND TRICKS FOR A WINNING PROPOSAL

Dr Brian Cahill,

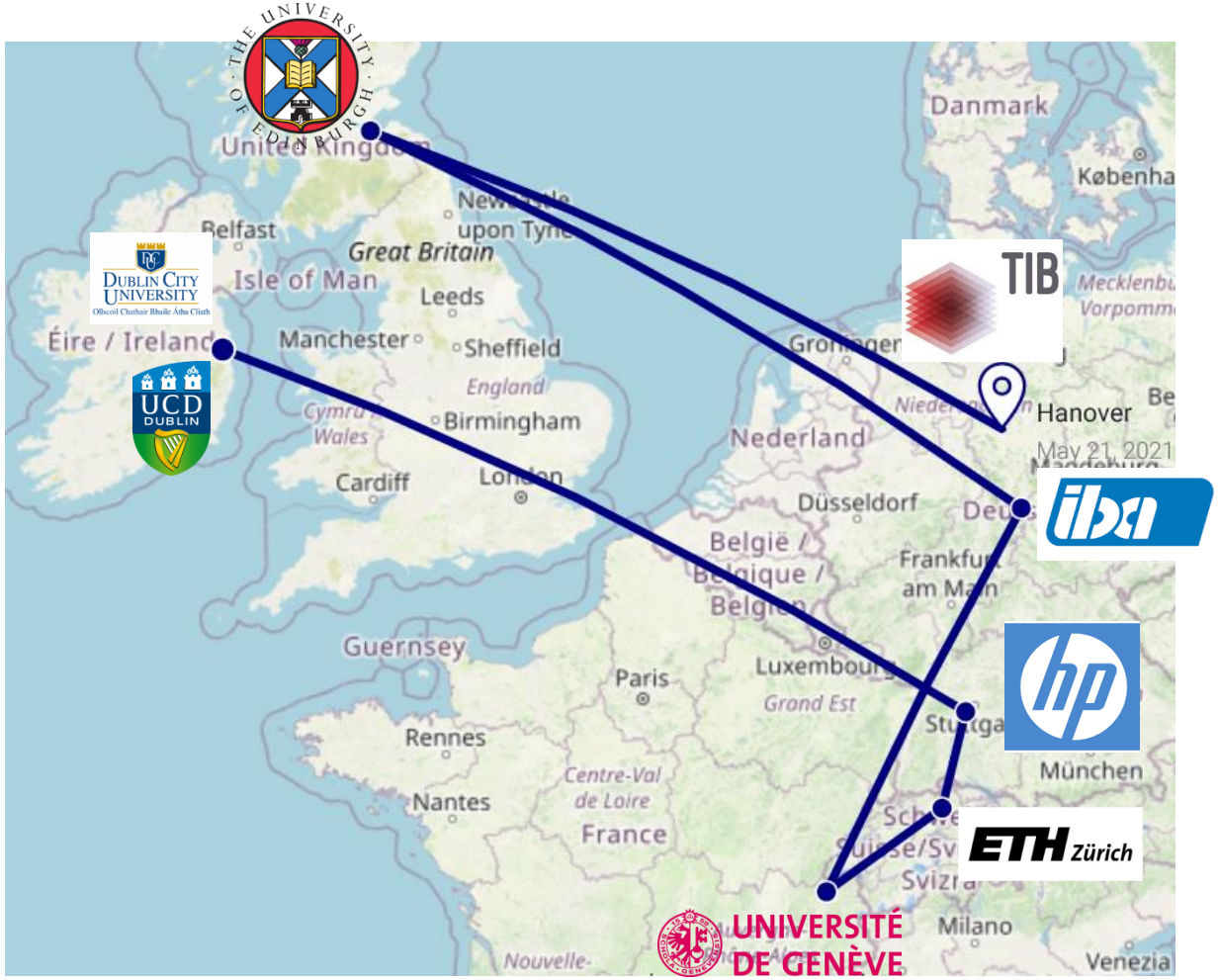
Learning and Skills Analytics Group,
Technische Informationsbibliothek / Leibniz Information Centre for Science and Technology
Hannover, Germany

brian.cahill@tib.eu **Twitter: @b_p_cahill**

My International Mobility

1991-8: Engineering Studies in Dublin
1998-2000: Hewlett-Packard in Böblingen
2000-4: PhD in Nanotechnology at ETH Zurich
2005-7: Postdoc in Chemistry at Uni. of Geneva
2007-12: MSCA Fellow at iba Heiligenstadt
2013-8: Group Leader at iba Heiligenstadt
2018-9: Project Manager of MSCA COFUND at University of Edinburgh
2020+: Project Manager at TIB Hannover

2015: Chair of MCAA German Chapter
2016-8: Chair of MCAA
2018+: Board Member of EuroScience
2019+: Evaluator MSCA IF Calls
2021: Board Member of SciLink Foundation



Submission Tips

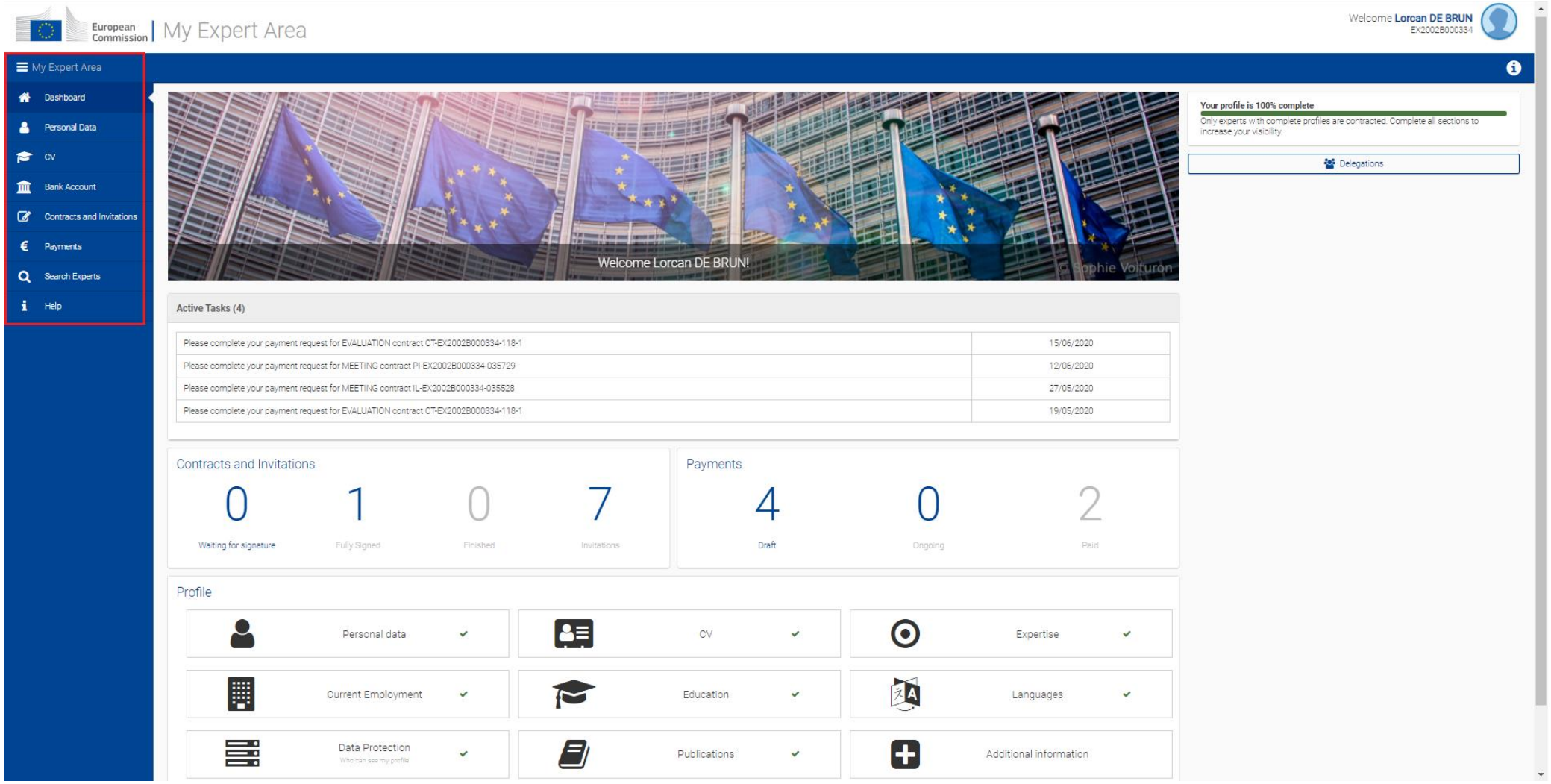
- Give yourself plenty of time to write the proposal.
  Proposal isn't finished until deadline: **submit often** and **revise often**

- Read the Call text and Guide for Applicants carefully, **details matter.**

- MSCA Postdoc Fellowship has a high focus on the fellow: Show that **you** personally are worth **investing** in.

- Ask many people for feedback on the proposal:
  - Your supervisor is the project PI: work together very closely
  - People with less direct experience of the research topic may pick up on the same things that evaluators will not understand.
  - Talk to the EU grant support office at your host institution

Work as an Expert Evaluator for the EU

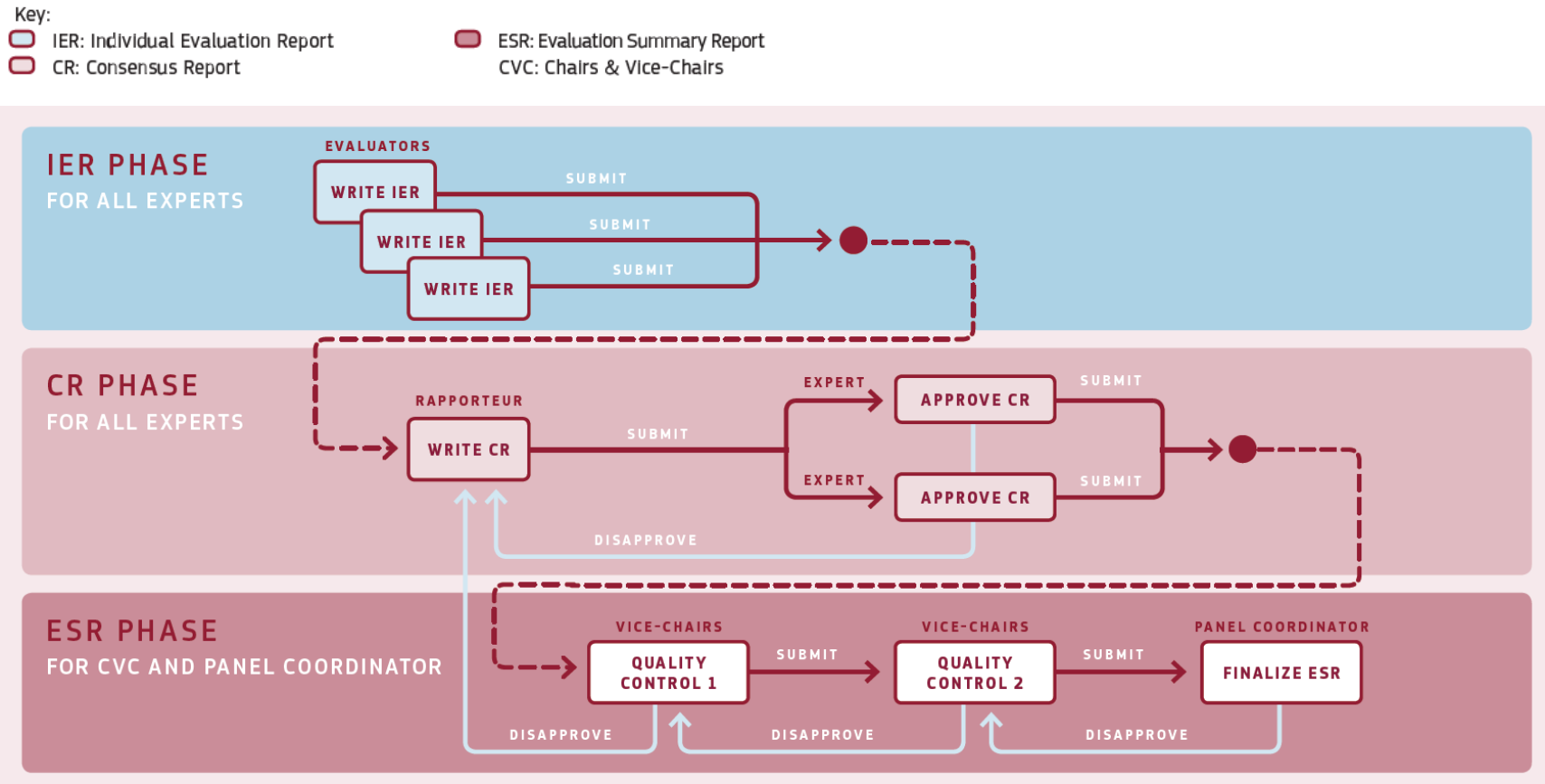


Register on the EU Funding and Tenders Portal
https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/work-as-an-expert

Evaluation

- Evaluators are paid for 4 hours work to evaluate one proposal and generally have between 5 and 15 proposals to review in 3-4 weeks
- Evaluators are chosen based by searching for keywords on the Commission Experts Database
- Evaluators are often not experts on your specific research topic
- For interdisciplinary research: experts may only be expert in one of the disciplines covered by your research
- The evaluator wants to see you demonstrating that you are the expert
  - Communicate the novelty and relevance of the work very clearly

Evaluation Process



Call closure	12 SEPTEMBER 2018
Proposals allocation (only Vice-Chairs)	24-27 SEPTEMBER 2018
Expert contracting	28 SEPTEMBER - 5 OCTOBER 2018
Video-briefing & Guide for Evaluators	5 OCTOBER 2018
Remote evaluation: IER phase & CR phase (all experts)	5 OCTOBER - 2 DECEMBER 2018
Quality check and panel ranking (only Vice-Chairs)	3-6 DECEMBER 2018

From MSCA-IF Evaluation Step By Step Manual for Evaluators 2018
https://ec.europa.eu/info/sites/info/files/msca_if_2018_manual_for_evaluators.pdf

Make it easy for the Evaluators

- Make your text **interesting** and **easy to read**.
- Have your **English checked** before submitting.
- Be sparing with **references** – they take up space and evaluators are unlikely to read them. Choose only the most important ones.
- Use **bold**, *italic* and <u>underline</u> to highlight important points.
- Demonstrate that your chosen host and mentor will provide the **right environment** for **you** to be successful.
- **Be specific** about your supervisor, host institution and external partners. Describe why they are most suited to hosting your project and how they will **support** it. For example, access to infrastructure, IP support, training, institutional seminars, science communication support and so on.

Make it easy for the Evaluators

- The first pages should be **exciting**. State of the Art must be very closely linked to pitching your ideas and answering the questions ‘why is this research important’ and ‘how will your research ideas solve the problem?’
- A good abstract pitches the idea and creates **curiosity** and **excitement**.
- **Cover all the criteria** in the proposal template.
- A poorly structured proposal is difficult for evaluators to understand.
- Every word/sentence counts. **Don’t waste space** on anything irrelevant.
- **Clear** and **convincing** objectives.
- **Graphics** often illustrate concepts more clearly than words.
- Make sure you get **layout** and **readability** right.

Tips for clear concise writing

- **Be Clear About Your Meaning**. Choose unambiguous words.
- Be **direct** and straight to the point
- **Eliminate Unnecessary Words** and Phrases
  - there is, very, totally, completely, currently, actually, really
- Pitch the information at the **right level**: not too simple or too complex
- **Use the Active Voice** unless there's a good reason to choose passive voice
- Don't repeat yourself too much
- Write positively and reduce negativity
- **Avoid complexity**

Evaluation Criteria

Excellence	Impact	Quality and efficiency of the implementation
Quality and **pertinence** of the project's **research and innovation objectives** (and the extent to which they are ambitious, and go beyond the state of the art)	**Credibility** of the measures to enhance the career perspectives and employability of the researcher and contribution to his/her skills development	**Quality** and **effectiveness** of the work plan, assessment of risks and appropriateness of the effort assigned to work packages
Soundness of the proposed methodology (including interdisciplinary approaches, consideration of the gender dimension and other diversity aspects if relevant for the research project, and the **quality** of open science practices)	**Suitability** and **quality** of the measures to maximise expected outcomes and impacts, as set out in the dissemination and exploitation plan, including communication activities	**Quality** and **capacity** of the host institutions and participating organisations, including hosting arrangements
Quality of the supervision, training and of the two-way transfer of knowledge between the researcher and the host	The **magnitude** and **importance** of the project's contribution to the expected scientific, societal and economic impacts	
Quality and **appropriateness** of the researcher's professional experience, competences and skills		
50%	**30%**	**20%**

Assessment Grid (from Evaluator's Manual)

INDIVIDUAL FELLOWSHIPS 2018 - ASSESSMENT GRID	PROPOSAL NUMBER/ACRONYM: _____	ASSESSMENT					
		Fail	Poor	Fair	Good	Very Good	Excellent
EXCELLENCE	**1**						
Quality and credibility of the research/innovation project, level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	**1.1**						
Are the state-of-the-art, specific objectives and an overview of the action provided and relevant?	1.1						
Is the proposed research methodology and approach credible (in view of the type of research / innovation activities proposed)?	1.1						
Is the planned research original and innovative? Will the action contribute to advance the state-of-the-art within the research field (i.e. new concepts, approaches or methods)?	1.1						
Where applicable, are there interdisciplinary aspects to consider?	1.1						
Where applicable, is the gender dimension in research content well addressed (i.e. in research activities where human beings are involved as subjects or end-users)?	1.1						
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	**1.2**						
Is the two-way transfer of knowledge between the researcher and the host institution oultined and credible?	1.2						
For Global Fellowships only, does the proposal explain how the newly acquired skills and knowledge will be transferred back to Europe?	1.2						
Are training activities described and relevant? [NOTE: do NOT penalize the proposal in case there is no Career Development Plan]	1.2						
Quality of the supervision and of the integration in the team/institution	**1.3**						
Are the qualifications and experience of the supervisor well described and adequate, taking into account their level of experience on the research topic and their track record of work (e.g. main international collaborations, experience in supervising/training especially PhD, postdoctoral researchers)?	1.3						
Do the hosting arrangements allow for a good integration of the researcher in the team/institution to maximize knowlegde and skills generated from the fellowship? Are the nature and the quality of the research group/environment as a whole outlined? Are international networking opportunities offered?	1.3						
For Global Fellowships only, are the hosting arrangements at the partner organisation adequate to accomodate the researcher?	1.3						
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship	**1.4**						

Research Proposal: Excellence
Sample Evaluator Comments

- The proposal **clearly** defines the current state-of-the-art, the research topic and objectives for the project.
- The innovative and multidisciplinary aspects are **very well described**.
- The two-way transfer of knowledge between the host and the researcher is **clearly demonstrated**.
- **High quality** of scientific and complementary training is provided by the host consistent with the researcher's background and expertise.
- The main supervisor is a **top-level scientific manager** at the host and has a very good profile for guiding the research.
- The hosting environment is **ideal** to guarantee the integration of the researcher and support to the project.

- The originality and innovative aspects of the project are **not sufficiently demonstrated**.
- The reasoning of why the interdisciplinary nature of the proposal is essential to provide excellence is **unclear and insufficiently substantiated**
- The gender dimension is **not sufficiently integrated** into the approach.
- How the training will be gained and knowledge transfer achieved is **not clear**, notably ways in which the researcher and applicant will interact.
- The training objectives for the researcher are **not sufficiently discussed**, it is **not clear** from the proposal what significant additional knowledge the researcher will learn at the host group.
- Integration of the researcher into the host institution is **not clearly elaborated**.

Report on evaluator comments: https://h2020.org.tr/sites/default/files/u387/n4mif_2017_esr_analysis_se.pdf

Research Proposal: Impact
Sample Evaluator Comments

- The positive impact on the researcher's career development is **convincingly argued**.
- Dissemination is **properly conceived** via publications, presentations and other activities of good impact.
- The commercial exploitation of the results and their protection will be **carefully and appropriately managed**. Patent applications are highly likely.
- The range of measures to communicate the research activities **properly addresses** various audiences with well-designed actions
- The existing networking structures of the beneficiary institution will be used to communicate to different target audiences.

- The career strategy is **not elaborated in detail** to translate the potential in a concrete path to enhance the future career prospects.
- There is **no clear strategy** for dissemination. The measures proposed only consider participation in a few conferences in the field.
- The IPR and exploitation issues are **not sufficiently considered**; this is highly inappropriate in view of the targeted commercialization of the device.
- Communication activities are **generic and basic**. No active measures are presented and the proposal lacks any concrete strategy for wider communication.

Report on evaluator comments: https://h2020.org.tr/sites/default/files/u387/n4mif_2017_esr_analysis_se.pdf

Research Proposal: Implementation
Sample Evaluator Comments

- The milestones are **well elaborated** and come at the right place in the plan.
- The work plan is very **thoughtfully designed** to reach the objectives aiming at a high impact results.
- Deliverables and milestones are **well listed** on the Gantt chart
- The allocation of tasks and resources is very **appropriate** for the execution of the project
- All technical tasks are **clearly defined** and well elaborated.
- The organization and management structures are **convincing and very well designed**.
- Possible risks are **well identified**. The mitigation measures are **convincing**.

- The WPs **lack the necessary detail** concerning when the analysis of results from the fieldwork would take place.
- Lists of milestones and deliverables are presented in **generic** fashion.
- The Gantt chart is very **poorly designed** and **not sufficiently** informative.
- Allocation of tasks and resources has **not been properly detailed**. There is no sufficient indication of specific person-months allocation to most activities proposed
- Risk management related procedures have been addressed to a **very limited extent** and a list of sound contingency plans **is missing**.
- The management structures and procedures are addressed to a very limited extent, a sound comprehensive description **is lacking**

Report on evaluator comments: https://h2020.org.tr/sites/default/files/u387/n4mif_2017_esr_analysis_se.pdf

Receiving Results of your Evaluation

- If the proposal is accepted, you proceed to the Grant Agreement Stage. Congratulations!

- If the proposal is not funded, there are other opportunities more suited to you and your background.

- If the proposal is not funded, you may have the option to learn from the negative comments on the proposal and resubmit
  - Example of an MSCA fellow, who improved proposal on resubmission https://shannonchance.net/2020/08/03/msca-abstract/

- Widening Fellowships/Seal of Excellence are alternative routes to funding.

Thanks for your attention!

Dr. Brian Cahill,
brian.cahill@tib.eu
Twitter: @b_p_cahill

https://scilink.eu/

http://remo-network.eu/