



Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

# BILAT USA 4.0 Bootcamp Playbook

**Strategies and tools for promoting a  
global grant seeking culture**

(A transnational researchers' career program)

<b>WP2: ENHANCING EU-US PARTNERSHIPS IN ESTABLISHED STI PRIORITY AREAS</b>	
TASK 3: Providing guidance to researchers to fully exploit transatlantic funding opportunities	
The Transnational Researchers Career Program: <b>A BOOTCAMP PLAYBOOK (STRATEGIES AND TOOLS FOR PROMOTING A GLOBAL GRANT SEEKING CULTURE)</b>	
PARTNERS	ETH Zurich Harvard University
MINDSET	<p>The BOOTCAMP presents a set of building blocks that are adapted from different training methods specifically for the needs of researchers. It should give the researchers the flexibility to work within their existing constraints while allowing them to explore and expand their understanding of career funding opportunities.</p> <p>The course is meant to serve as a “toolkit,” remaining a constant work in progress that allows the program, the faculty, and the researchers to adjust and improve the content in response to shifting audiences and researcher needs.</p> <p>The program is meant as a live training, with coaches and participants in one location within a pre-defined timeframe. The modules can be repeated and can be complemented by online elements.</p>
PROCESS	<p>The BOOTCAMP intends to put thinking into action.</p> <p>Every challenge requires a different approach and a different set of methods. Do not feel restricted by the steps outlined. You will find out how to best use this first version of the BOOTCAMP. These “instructions for the presenters” are only there to help you use the tools the best way possible. You are very welcome to change them, comment them, reconfigure them, to make them your own.</p> <p>It is an intentional process that is:</p> <ul style="list-style-type: none"> <li>• Empathetic</li> <li>• Collaborative</li> <li>• Optimistic</li> <li>• Exploratory</li> <li>• Dialogic</li> </ul>
DURATION	For each module or building block, the discussion should take between 1 and 2 hours, depending on material to be covered. In general, the course could be structured as a 2.5 days workshop. The intent is for the materials to be customizable to the audience and by the institution. A shorter version could be achieved e.g. by leaving specific modules and/or activities out.



# Bootcamp Plabook

- Building block 01: From here to there: guidelines for your career
- Building block 02: International and national public funding
- Building block 03: From expectation to evaluation
- Building block 04: From assessment to consensus
- Building block 05: Crossing the threshold
- Building block 06: Gaining self-efficacy
- Building block 07: Distinguishing yourself
- Building block 08: Timing, scheduling and processing
- Building block 09: Facts and figures
- Building block 10: Pulling it all together



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*Building block 01*

# BILAT USA 4.0 Bootcamp Playbook

**From here to there:  
guidelines for your career**

# Guidance for the trainer 1/3



All presenter's notes can be viewed by clicking on the 'comment' icon in Adobe Acrobat.

## Preparation:

- Group size 12-20
- Room with flexible seating and enough space (in the room or outside) to do a 'constellation' (icebreaker exercise)
- Timeline on the wall (check whether it is possible to attach a string of 2 to 3 meters lengths on the wall; if not, you can use the floor instead)
- Take the quiz on Euraxess and NIH
- Do a walk-through for the grant portals with a pre-defined key word to familiarize yourself with the portal

## Material:

- String for the timeline and device to attach it to the wall
- Large Post-its
- Flipchart or whiteboard with enough pens
- Camera/smartphone: Take a photo of the Post-its on the timeline, and of the closing exercise (Post-its with first step)



# Guidance for the trainer 2/3

## Documents:

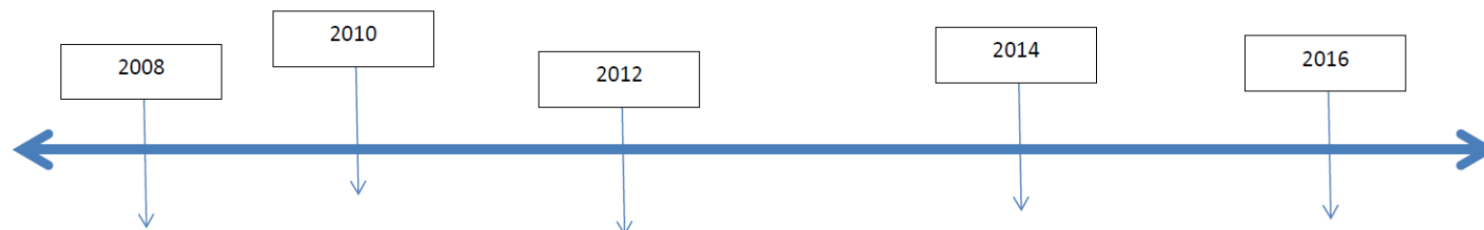
- Research Development Framework (RDF) by Vitae (<https://www.vitae.ac.uk/vitae-publications/rdf-related/researcher-development-framework-rdf-planner-evaluation-pilot-vitae-2013.pdf/@@download/file/Researcher-Development-Framework-RDF-Planner-Evaluation-Pilot-Vitae-2013.pdf>)
- Hand-out *Personal Journey Map* (next slide, for print-out)
- **Optional** content:
  - The filled-in example of the Vitae RDF
  - The Vitae content can be completed with the use of the RDF card set (if available)
  - Homework: Setting up a profile on science careers with the Career Tools by Science
  - <https://myidp.sciencecareers.org>

## Level of interactivity:

- Very high due to several group works

## Personal Journey Map/s

To gain empathy for a person or understanding of one's process through an experience, consider the details of that process to illuminate areas of potential insights. Creating a journey map is an excellent way to systematically think about the steps or milestones of a process. A journey map can be used for your own work, or to communicate your findings to others.



### TASK:

Develop a generic journey map for a researcher to capture his/her skills and "career paths".

- Create templates that capture multiple observations.
- Discuss and note down what needs to be captured:  
Stations? People? Experiences? Skills? Awards? Grants? Achievements? Networks? Conferences? One timeline? Parallel timelines?
- It is important to be **comprehensive within the variables you choose to capture**.
- Organize the data in a way that makes sense: a timeline of events, a number of parallel timelines that allows for easy comparison, a series of pictures, or a stack of cards.
- It is important that the researcher is able to look for patterns and anomalies and question why those themes or events occurred.
- The researcher has to be able to push her/himself to connect individual events to a larger context or framework. It is often the **pairing of an observation with someone else's knowledge and perspective that yields a meaningful insight**.

# Guidance for the trainer 3/3

Activity	Number of slides	Approximate Time (minutes)
<a href="#"><u>Intro and welcome</u></a>	2	5
<a href="#"><u>Icebreaker</u></a>	1	10
<a href="#"><u>Introduction/Where are you now</u></a>	2	20
<a href="#"><u>Your career objectives</u></a>	1	10
<a href="#"><u>Your motivation</u></a>	1	10
<a href="#"><u>Vitae RDF</u></a>	6	10
<a href="#"><u>Your priorities</u></a>	1	10
<a href="#"><u>Mental health introduction</u></a>	2	10
<a href="#"><u>Euraxess Quiz and NIH opportunities</u></a>	2	10
<a href="#"><u>Funding databases and walk-through</u></a>	6	10
<a href="#"><u>Closing and optional homework</u></a>	2	5
<b>Total</b>	<b>24</b>	<b>110 minutes (1.50 hour)</b>



# From here to there: guidelines for your career

- Introduction to personal career planning
- Exploration of Research Career Development tools and frameworks
- Using career objectives to scope appropriate funding opportunities
- Introduction to Funding Search Databases

# Overall aim

- A better understanding and usage of the possibilities existing tools are offering
- Awareness of the importance of being in control of ones own career and updates
- Natural handling of career and career opportunities

## Constellation

- I will ask you a series of questions you will answer by placing yourself in the room. E.g.:
- Where do you come from? (The corners of the room represent North-South-East-West)
- What is your experience in research and innovation programs/seeking funding opportunities? (Form a line from very experienced to no experience at all)

# Introduction to personal career planning

- Identifying your career goals and how to get there
- Career planning worksheets/exercises

# Where are you now?

- Where do you stand now – in your career, and in your life?
- What are your strengths? Who and what helped you to get there?
- What are your skills?
- Where and what do you wish to improve?
- Think outside the box – **not only your academic/research life counts, but also your daily life.**
- Use the hand-out to reflect upon this, and write down a summarizing statement. (15 minutes)
- **Example:** 'I have completed my PhD one month ago. I am good at literature analysis. My supervisor and my parents helped me throughout my career so far. My strength is that I am very persistent. I would like to become better at time management.'
- I recently got engaged, and we're hoping to have children and both pursue our careers in science."

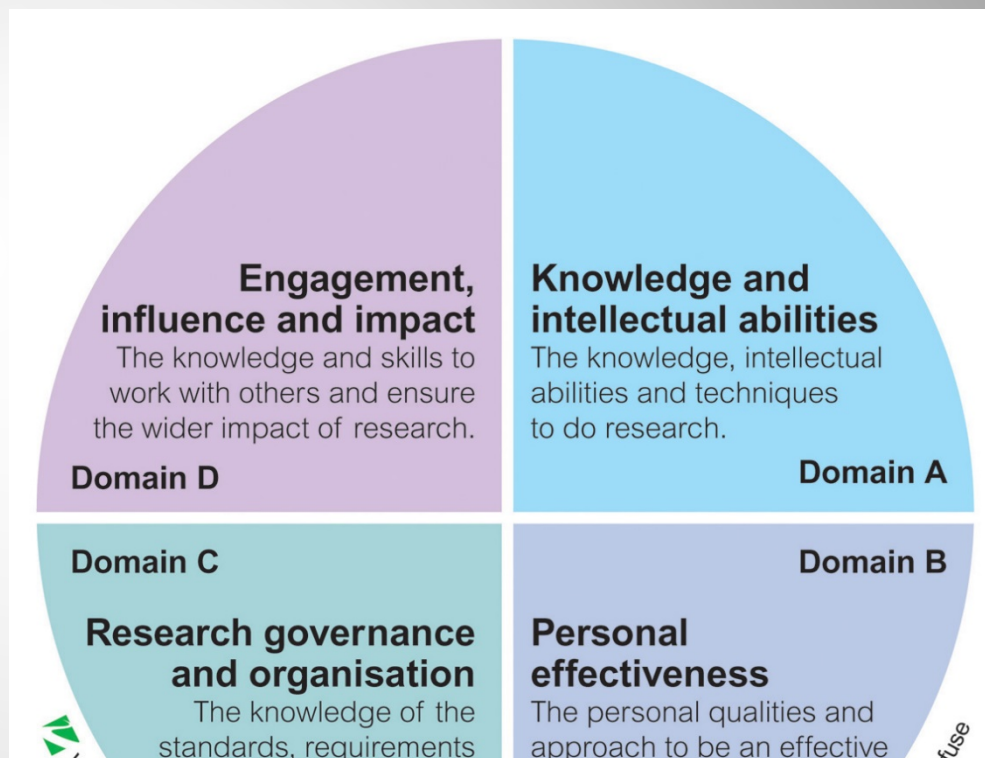
# What are your career objectives?

- Brainstorm about medium-term (after your current position ends) and longer-term career objectives (after your current position/next year, 5 to 10 years from now, until the end of the career)
- **Everyone individually thinks of 2 to 3 career objectives. Write on Post-its and stick them the timeline (10 minutes).**

# What is your motivation?

- Ask yourself: **Why** do I want to achieve these goals?
- Take 5 minutes to reflect upon this, exchange view with your neighbor.

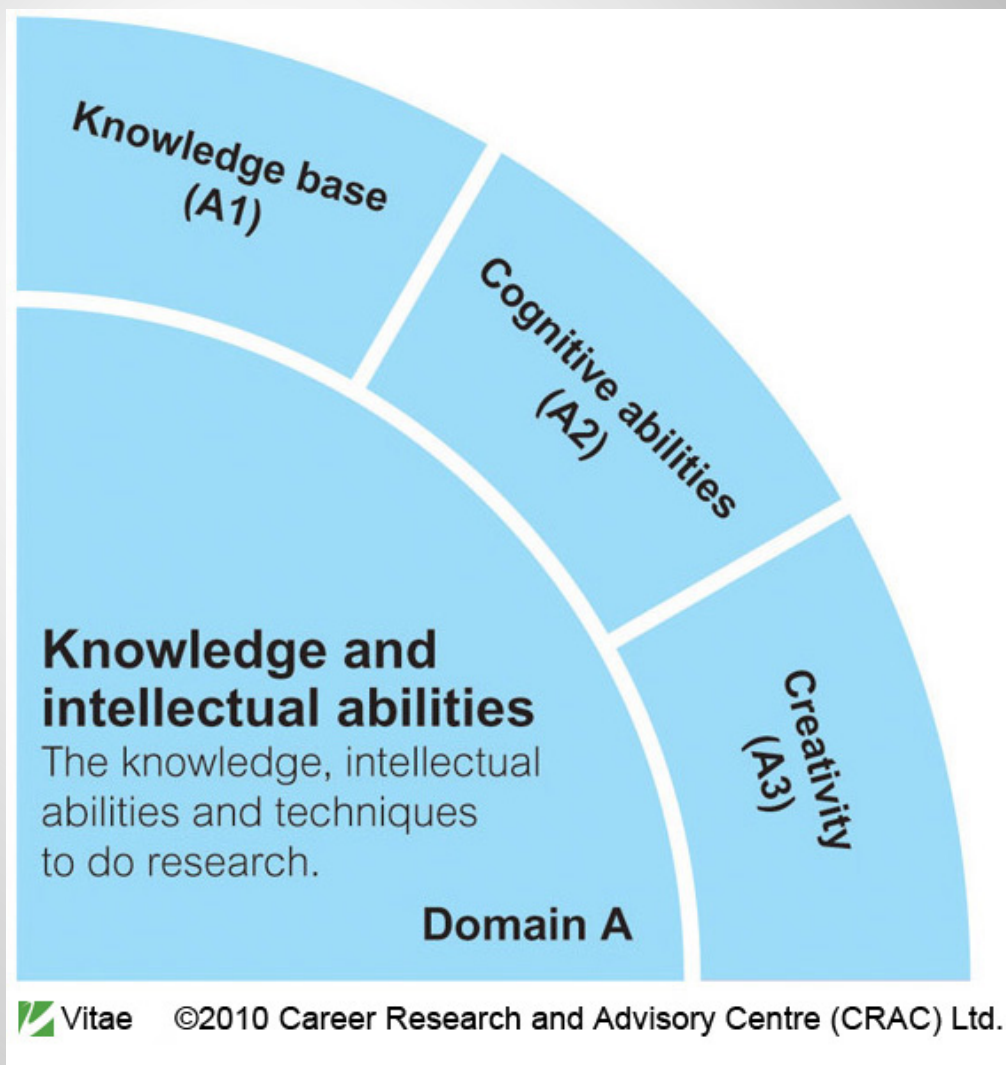
# A personal career development plan



Sub-domains and descriptors	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5
<b>B1 Personal qualities</b>					
<b>5. Self-reflection</b>	Makes time to reflect on practice and experience. Develops strengths and improves on weak areas. Seeks personal feedback. Learns from mistakes.	Has heightened awareness of own strengths and weaknesses. Strives for excellence, seeks and takes personal feedback on performance and acts on it.	Continuously seeks ways to improve own performance and that of less experienced researchers and/or team/department/institution. Encourages self-reflection in others. Leads by example.		
<b>6. Responsibility</b>	Gradually takes complete responsibility for own project and own well-being; develops independence.	Takes responsibility for own and others' projects (students and less experienced colleagues). Delegates responsibly. Alert to the well-being of others.	Accepts and takes responsibility for building/leading research team and developing its members. Engages in and encourages the development of well-being in other researchers/the team.	Has leading responsibility for delivering highly skilled researchers for academic and non-academic professions. Is responsible for leading the discipline/research area nationally and/or internationally. Engages in and encourages the development of well-being in academic and non-academic colleagues.	

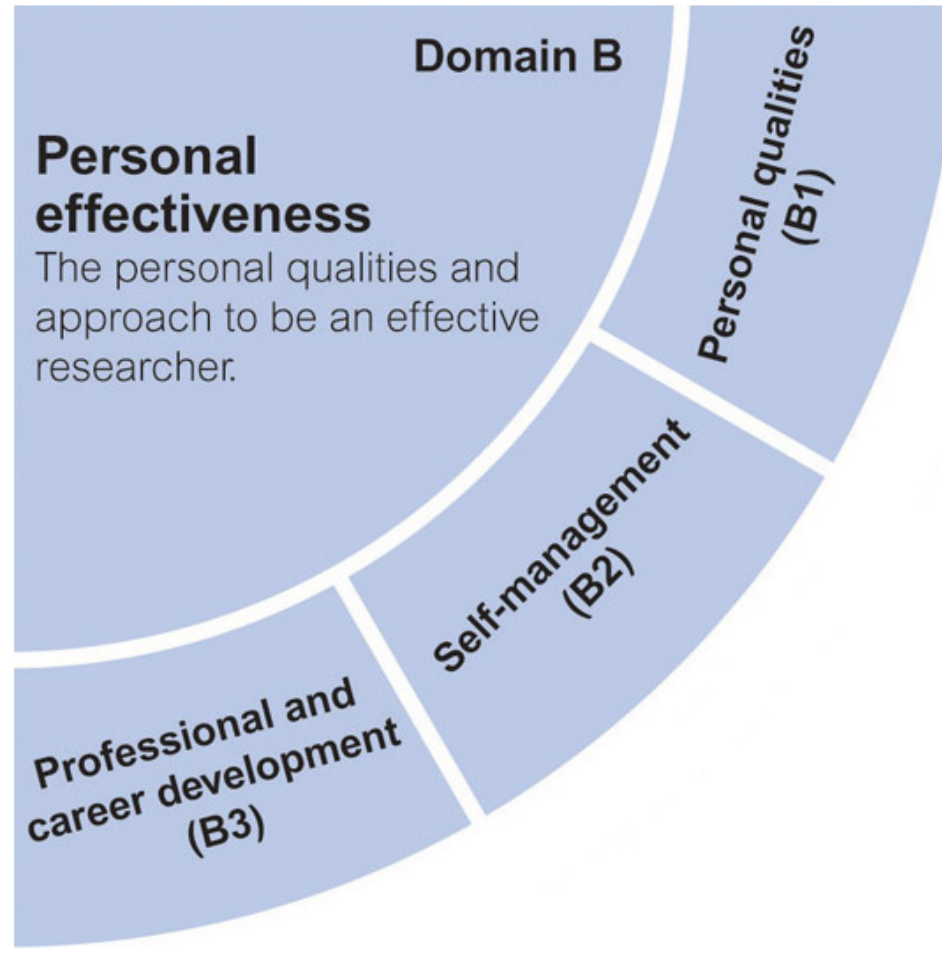


# Domain A



# Domain B

Vitae ©2010 Career Research and Advisory Centre (CRAC) Ltd.

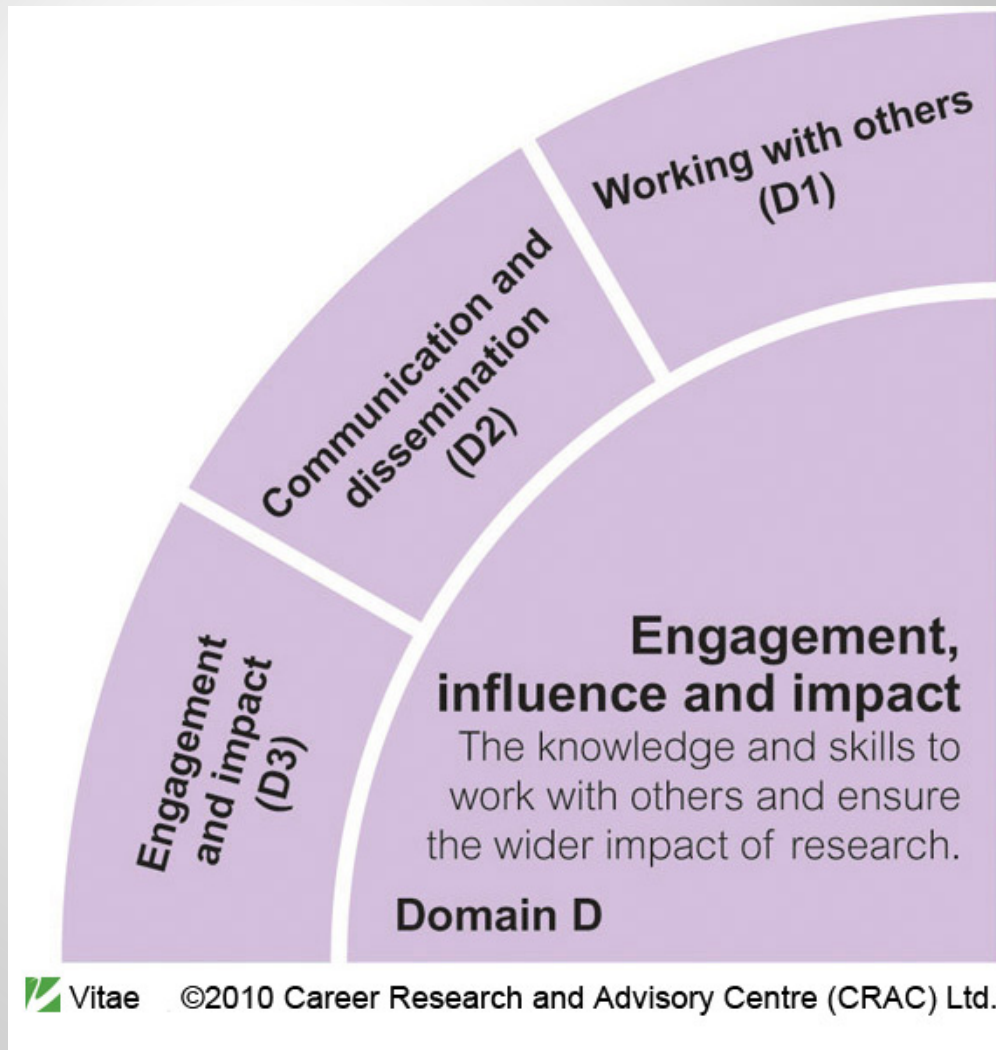


# Domain C

 Vitae ©2010 Career Research and Advisory Centre (CRAC) Ltd.



# Domain D



# RDF researcher profile



**Sandra Hiett:** Senior lecturer/Programme Leader in Art and Design, Faculty of Education, Community and Leisure, Liverpool John Moores University. I have 19 years experience in initial teacher training and active membership of subject associations and action research networks.  
**Career Aim:** Academic Readership within two years  
**Timeframe for development plan:** Five year plan



		Current phase				
Domain A: Knowledge and intellectual abilities		Target phase				
		1	2	3	4	5
<b>A1. Knowledge base</b>	Subject knowledge					
	Research methods – theoretical knowledge					
	Research methods – practical application					
	Information seeking					
	Information literacy and management					
	Languages					
	Academic literacy and numeracy					
<b>2. Cognitive abilities</b>	Analysing					
	Synthesising					
	Critical thinking					
	Evaluating					
	Problem solving					
<b>3. Creativity</b>	Inquiring mind					
	Intellectual insight					
	Innovation					
	Argument construction					
	Intellectual risk					

I currently deliver relevant undergraduate and postgraduate sessions related to research methods with confidence. I would like to give more attention to a broader range of research tools and their application in practice.

I am confident in my use of English within research and publication. I have good knowledge of subject specific and methodological vocabulary through doctoral completion, doctoral supervision and examination, leading research informed teaching projects with colleagues.

The creative arts expect successful people to take intellectual risks - I embrace this as one of the key elements of my subject strengths and something I particularly relish. While I am happy that I fulfil this aspect within my immediate area of responsibility I could embrace challenges that might have more impact/benefit to a wider academic community.



# Your priorities

- **Where do you want to go – what are your priorities?**
- Form a pair with your neighbor on the right and explain your three main goals (5 minutes), then switch. Identify the first three steps you need to take to achieve one selected goal. Be specific, including a timeline. Explain these to the plenum.
- **Example:** 'My long term goal is to become a professor. For this, I need to learn how to tutor and teach students. I will take a didactics course in the next trimester. Within the next five days, I will look up where and when I can take this course.'
- Write this first step down. Exchange phone numbers and text your neighbor once you fulfilled it (optional).

# Take care of yourself: the research edition

- A 2017 study shows that 32 % of PhD students are at risk of having or developing a common psychiatric disorder, especially depression (significantly higher than in comparison groups)
- These disorders can be linked to the work-family interface, job demands and job control, the supervisor's leadership style, team decision-making culture, and perceptions of a career outside of academia.
- What's more, PhD students are increasingly under pressure due to labor-supply demand, an increase in short-term contracts, budget cuts and increased competition for research resources. This feeling tends to be more prevalent among younger academics.
- 'Work organization and mental health problems in PhD students . Katia Leveque, Frederik Anseel, Alain De Beuckelaer, Johan Van der Heyden, Lydia Gisle. May 2017.  
<https://www.sciencedirect.com/science/article/abs/pii/S0048733317300422>

# How to prevent this?

- Remain realistic: Not all PhD holders become professors – and that is fine!
- You are not a failed scientist if you pursue a non-academic career path
- Plan and keep up a sustainable work-life balance
- Tap into existing support services at your institution for career support
- We'll take little 'mental health' breaks throughout our training modules.

## **A little exercise for an immediate shift of perspective: 4-7-8 breathing**

- 1) Let your lips part. Make a whooshing sound, exhaling completely through your mouth.
- 2) Close your lips, inhaling silently through your nose as you count to four in your head.
- 3) For seven seconds, hold your breath.
- 4) Make another whooshing exhale from your mouth for eight seconds.

<https://www.healthline.com/health/4-7-8-breathing#3>



# Using career objectives to scope appropriate funding opportunities

- Matching objectives with funding types
- Euraxess: fill in the online quiz

Career Orientation tool

1/3 Have you reviewed your skills, expertise and experience recently?

- > YES, I HAVE REVIEWED THE SKILLS AND EXPERTISE I HAVE AND THOSE I AM LACKING
- > YES, AND I HAVE ALSO COMPARED THEM TO AN ACCEPTED LIST OF SKILLS OR COMPETENCIES FOR MY CURRENT OR FUTURE AREA OF WORK
- > I HAVEN'T GIVEN IT ANY THOUGHT RECENTLY

# NIH Research Training

OER HOME ABOUT GRANTS FUNDING FORMS & DEADLINES GRANTS POLICY ERA NEWS & EVENTS ABOUT OER

**NIH** National Institutes of Health  
Research Training and Career Development

Division of Biomedical Research Workforce

SEARCH  [Contact Us](#)

About DBRW Career Path Programs Institute/Program Matrix Resources

**NIH programs help to prepare the skilled, creative and diverse biomedical research workforce of tomorrow**

Undergraduate and Postbaccalaureate Education    Predoctoral Training/Clinical Doctorate    Postdoctoral Training/Clinical Residency    Early Research Career Development    Investigator Development and Mentoring

**Recent Announcements**  
Health-professional Education Partnership Initiative (HEPI) (R25 Clinical Trial Not Allowed) **NEW**  
Oct 10, 2018

**NIH Research Training and Career Development Programs**  
NIH programs help prepare individuals for careers in biomedical, behavioral, social, and clinical research.  

- Learn more about how NIH Institutes and Centers may vary in research and training

**CAREER DEVELOPMENT KIOSK**

**RESEARCH TRAINING KIOSK**

**FELLOWSHIP**



# Introduction to Funding Search Databases

- Deciding factors: field of research – career goal – profile – type of project – geographical preference,...
- Pro tip: Do not search yourself – let a database search for you



# Where to search: EU

The screenshot shows the EURAXESS website interface. At the top, the European Commission logo is visible. Below it, the breadcrumb trail reads: European Commission > EURAXESS > Jobs & Funding > Funding Search. The main heading is 'EURAXESS'. A navigation bar contains several menu items: 'JOBS & FUNDING' (highlighted), 'CAREER DEVELOPMENT', 'PARTNERING', 'INFORMATION & ASSISTANCE', 'EURAXESS WORLDWIDE', and 'LOGIN / REGISTER'. There are also search and globe icons. The main content area features a search filter section with the following options: 'FIND MEMBERS', 'FIND ORGANISATIONS', and 'UPDATE YOUR PROFILE'. Below these are 'CAREER STAGE' and 'ORGANISATION COUNTRY' filters. At the bottom of the filter section are two buttons: 'SEARCH' and 'NEED HELP?'. The background of the page shows a woman in a blue shirt looking at a laptop screen. The text 'Funding Search Results (473)' is displayed at the bottom of the screenshot.

# Where to search: EU

**\*Research**Professional [Request a demo](#) [Sign in](#)

**Total Funding Awareness**

**Funding opportunities**  
Totally reliable. Totally relevant

**Funding insight**  
Win more, fail less

**News**  
Trusted intelligence for better decisions

**Personalisation**  
The right information, to the right people,  
at the right time

**Integration**  
Best information + reliable routing  
= success

# Where to search: US

HELP | REGISTER | LOGIN

GRANTS.GOV™  
FIND. APPLY. SUCCEED.®

SEARCH: Grant Opportunities ▾ Enter Keyword... GO

HOME | LEARN GRANTS ▾ | SEARCH GRANTS | APPLICANTS ▾ | GRANTORS ▾ | SYSTEM-TO-SYSTEM ▾ | FORMS ▾ | CONNECT ▾ | SUPPORT ▾

**UPDATED ALERT from SAM.gov:** For your SAM.gov registration, you must submit a [notarized letter](#) appointing the authorized Entity Administrator. The review process changed for the Federal Assistance community on June 11, 2018. Read the [updated FAQs](#) to learn more.

## Search on the Go

Download the Grants.gov Mobile App to quickly search for and subscribe to funding opportunities.

Download on the App Store | GET IT ON Google Play

SEARCH GRANTS | GET STARTED | GRANT POLICIES | GRANT-MAKING AGENCIES | PREVENT SCAMS | COMMUNITY BLOG | TWITTER FEED | YOUTUBE VIDEOS | ONLINE HELP | SUPPORT CENTER

# Where to search: US



## FUNDING OPPORTUNITIES

- Comprehensive global source of funding opportunities
- Billions of dollars in funding and growing



## PRE-POPULATED SCHOLAR PROFILES

- Your institution's profiles matched against funding opportunities
- Find collaborators from among 3 million profiles worldwide



## COLLABORATIVE WORK FLOW

- Connects research development professionals and faculty
- Cultivate essential partnerships and alliances



# Activity

- Give me an example of your research key words





# Closing the session

- Write your next career goal and the first step you're going to take into this direction on a Post-it (can be anonymous)
- Before you leave, stick the Post-it on the door/on the flipchart
- We will have a look at these again at the end of the bootcamp





# Optional homework

- Set up your individual development plan under <http://www.sciencemag.org/careers>





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
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*Building block.02*

# BILAT USA 4.0 Bootcamp Playbook

**International and national public funding**

# Guidance for the trainer 1/3

## Preparation:

- Group size 12-20
- Room with flexible seating and enough space
- For the separation into groups: Put two (for the group work with two groups), respectively more (for the more individualized group work in teams of three) differently colored chocolates (or other goodies) under the seats of the participants. Only put as many chairs as participants.
- Test the video of Stan and Olli with sound

## Material:

- Chocolates or other goodies

# Guidance for the trainer 2/3

## Documents:

- Familiarize yourself with the funding landscape(s) you will present and possibly any related material

## Optional content:

- Make a choice between the exercise with predefined keywords; and the exercise with free career-related keywords. If you wish to implement both, it will take an extra 20 to 30 minutes.

- **Level of interactivity:**

- Medium high (ex-cathedra teaching and group work)

# Guidance for the trainer 3/3

Activity	Number of slides	Approximate time (minutes)
<u>Introduction and welcome</u>	2	5
<u>Icebreaker</u>	1	10
<u>Swiss (and EU) funding landscape</u>	7	15
<u>Mental health break</u>	2	10
<u>US funding landscape</u>	4	15
<u>NGOs, SDGs, Arts,...</u>	1	5
<u>Group work (2 groups) OR</u>  <u>Own project (groups of three)</u>	1/2	20
<u>Optional homework</u>	1	5
<u>Closing (drawing)</u>	1	5
<b>Total</b>	<b>20 / 21</b>	<b>90 minutes (1.30) If both exercises are implemented, add another 20 to 30 minutes.</b>

# International and national Public Funding

- Introduction of the main national funders and funding mechanisms
- **CH:** general overview of Swiss funding landscape
- **Horizon2020**
- **US:** general overview of US funding landscape
- **US:** NIH; NSF
- How to read a call
- Examples
- Non-academic sector

# Overall aim

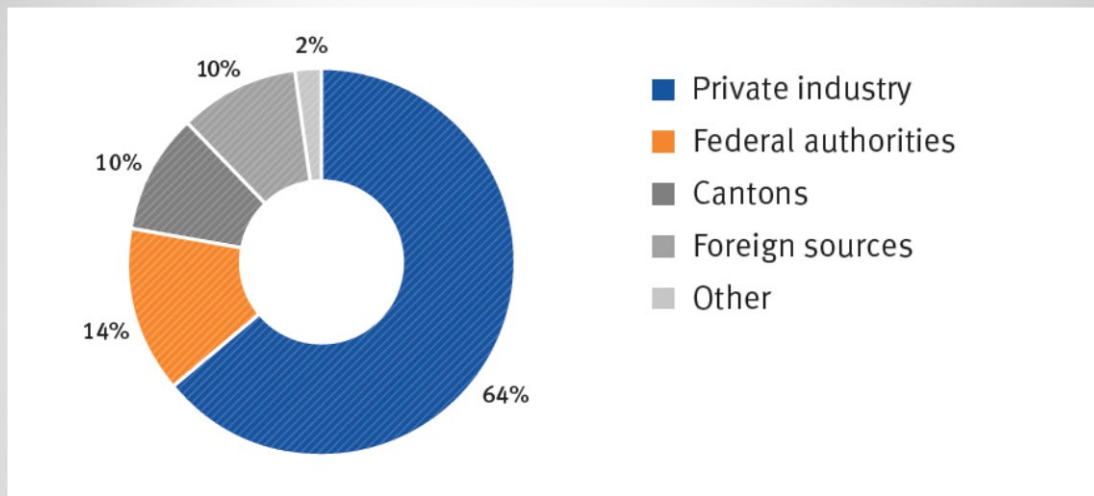
- A thorough understanding of the broad national and international funding landscape
- Tips and tricks for navigating funding databases
- Reading and understanding funding opportunities
- Thinking outside the academic framework (funding for NGOs, the education sector, SDG sector, the arts, etc.)



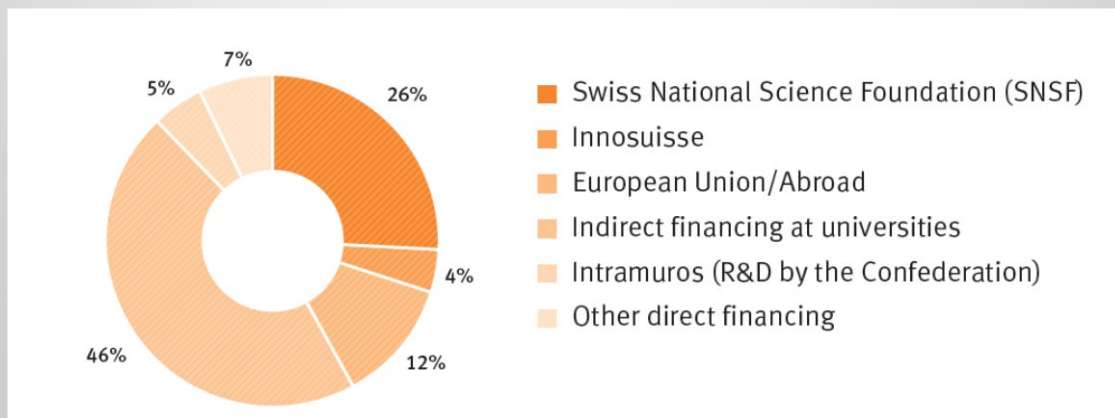
'I am the only one who' ...

Please get up. One after the other, please stand in the middle of the room and make one statement 'I am the only who...' (+ a probably surprising fact about you; e.g. 'knows morse code'). The others can then group themselves in relation to this fact. If you know morse code, too, join the person in the middle. If your father knows morse code, stand close to the person. If you are not interested at all in morse code, stand far away.

# Swiss funding landscape



R&D funding sources of financial support (total CHF 18.5 billion)



Federal funding CHF 3.6 billion

Data: Swiss Federal statistical office, 2015  
Graphics: Research landscape in Switzerland. SNSF, 2018

# SNSF: Swiss national science foundation

- Supports scientific research in all academic disciplines, from history to medicine and the engineering sciences
- Division I: humanities and social sciences
- Division II: mathematics, natural sciences and engineering sciences
- Division III: biology and medicine
- Division IV: programs (National Research Programs and National Centers of Competence in Research)
- Supports also international collaborations with specific programs and collaborations, conferences, and publications
- Supports young researchers
- [www.snsf.ch](http://www.snsf.ch)

- Swiss Innovation Agency (previously: CTI)
- Promotes science-based innovation in the interests of industry and society in Switzerland
- Aim to increase the competitiveness of small and medium-sized enterprises (SMEs) in Switzerland
- Funds innovation projects run jointly by companies and research institutions
- Other training and coaching to encourage an entrepreneurial approach



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

Swiss Confederation

**Innosuisse – Swiss Innovation Agency**

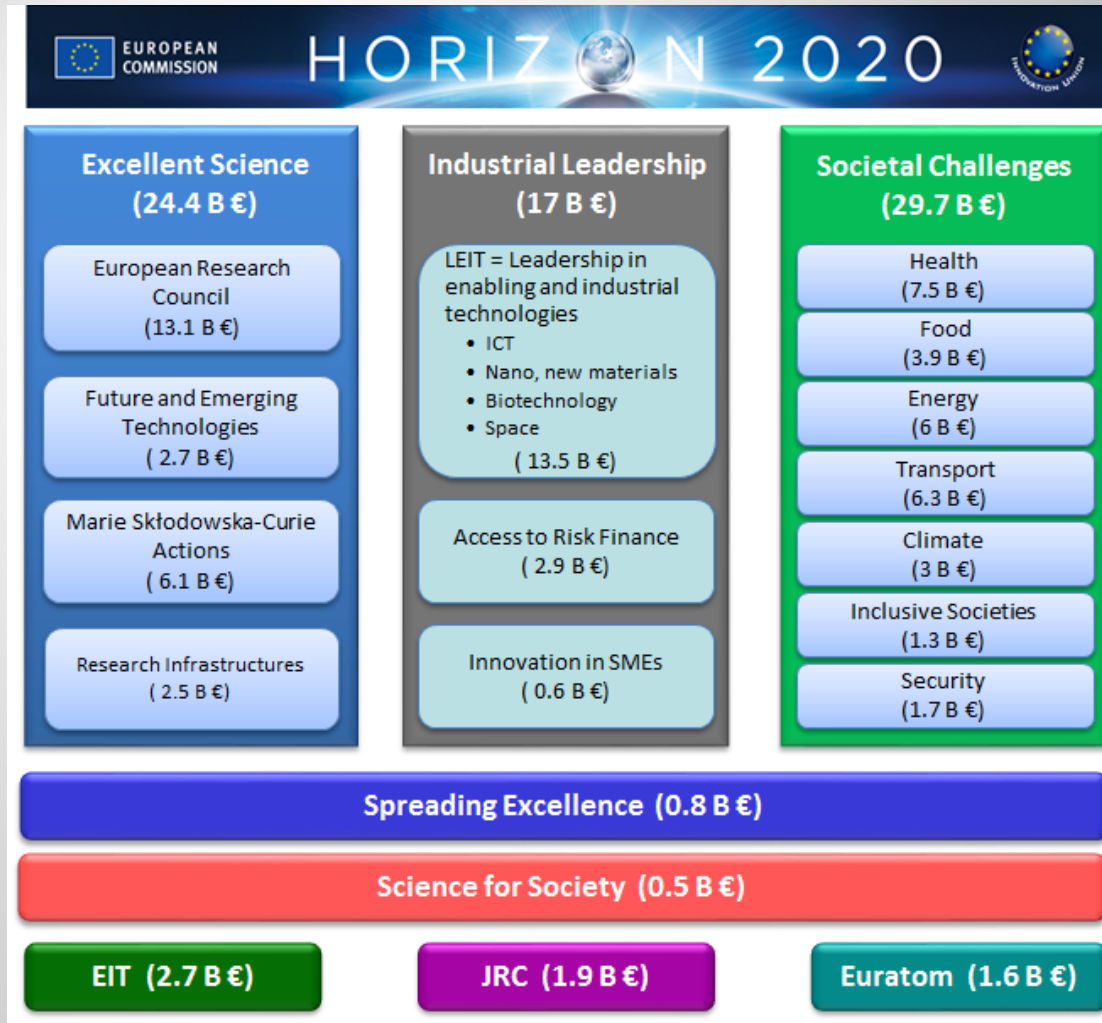


# Horizon2020

- Research funding program by the European Union/European Commission to support and foster research in the European Research Area (ERA).
- Focus is on innovation, delivering economic growth faster and delivering solutions to end users
- Runtime from 2014–2020 (next FP *Horizon Europe* 2021-2027, ~EUR100 billion of funding)
- Provides an estimated EUR 80 billion of funding
- **All research areas** are covered
- EU countries, associated countries (such as Switzerland) eligible for funding; other countries under specific regulations



# Horizon2020 structure



- Funding for the creation of research networks by the European Cooperation in Science and Technology (COST)
- These networks offer an open space for collaboration among scientists across Europe (and beyond)
- COST funding is exclusively dedicated to cover collaboration activities, such as workshops, conferences, training schools,...
- COST is EU funded (via the framework programs)
- <https://www.cost.eu>



- Eureka is an intergovernmental network established in 1985
- Eureka is a leading **facilitator** of innovation, providing a proven platform for international R&D&I cooperation
- EUREKA promotes and supports market-oriented international R&D&I project generation
- EUREKA facilitates access to finance for companies involved in its projects
- Companies (mainly SMEs), research institutions and universities collaborate for market-oriented R&D&I
- <http://www.eurekanetwork.org>





# Reasons for a mental health break

- **Releases endorphins:** Natural chemicals in the body, endorphins promote a sense of well-being and relieve stress.
- **Decreases anger:** When we're in a difficult situation or in a disagreement with another person, seeing the humor in it can help. Specifically, laughter defuses anger, conflict, and self-blame.
- **Eases distressing emotions:** Laughter counteracts feelings of anxiety and sadness. Moreover, it helps us release other intense emotions, such as grief.
- **Relaxes and revitalizes:** Along with reducing stress, laughter also increases our energy levels. Therefore, we can stay focused more easily.
- **Changes your perspective:** Laughter helps us access another point of view. Moreover, we begin to see something in a new, less scary way when we can laugh about it. In addition, humor helps us take things less seriously.
- **Reduces stress:** When we laugh and smile, cortisol levels decrease. Cortisol is also known as the stress hormone, so lower levels are better for our mental health. Therefore, laughter increases our stress resilience.
- **Brings more joy and fun into our life:** This one is self-explanatory!

<https://www.newportacademy.com/resources/mental-health/laughter-good-for-you/>

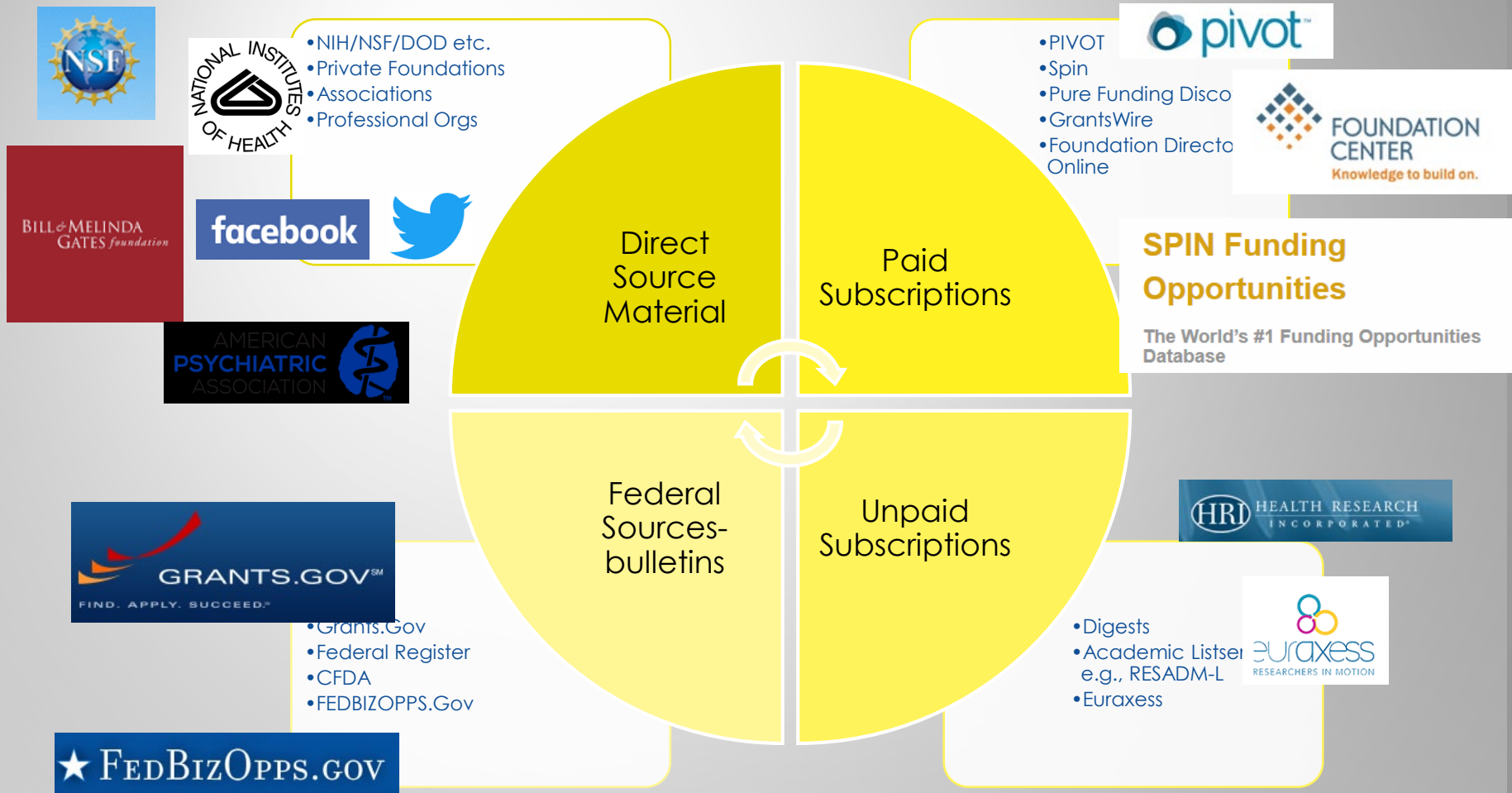
# Stan and Ollie



## A little exercise for a laugh:

- 1) Watch the video
- 2) Imitate Stan and Olli
- 3) Laugh

# General Overview US funding



# Role of US government in R&D funding



# Understanding NIH funding opportunities



- Largest source of funding for medical research in the world
- Robust research policies and funding schemes (R01s, K01s, T32s)
- Funding Opportunity Announcements (FOAs) and Grants.gov
- Funds non-US applicants directly as well as through subawards

# Understanding NIH funding opportunities

## Key funding opportunity for non-US researchers

Parent R01 permits foreign Institutions to apply.

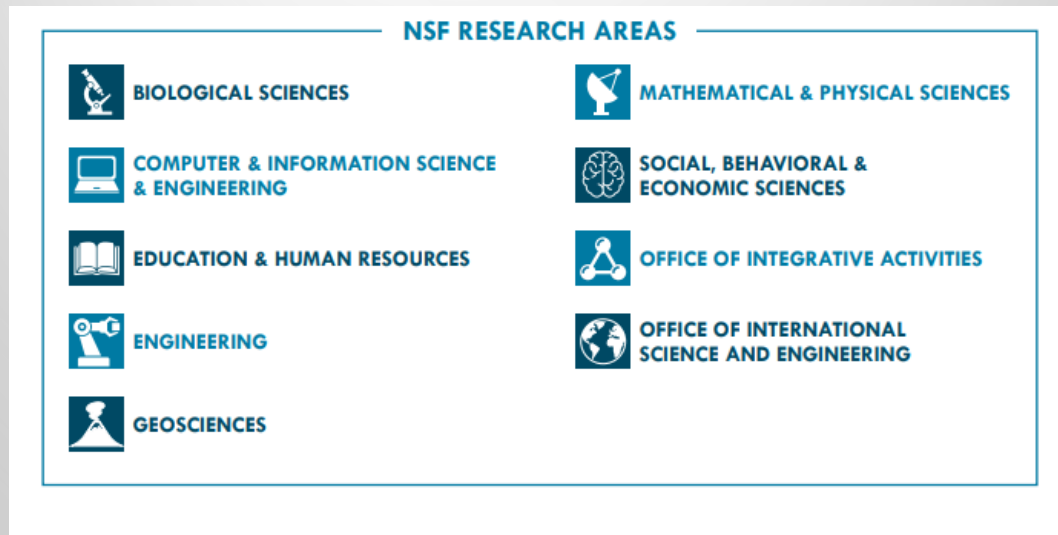


### Foreign Institutions

Non-domestic (non-U.S.) Entities (Foreign Institutions) are eligible to apply.  
Non-domestic (non-U.S.) components of U.S. Organizations are eligible to apply.  
Foreign components, as defined in the *NIH Grants Policy Statement* ([http://grants.nih.gov/grants/guide/url\\_redirect.htm?id=11118](http://grants.nih.gov/grants/guide/url_redirect.htm?id=11118)), are allowed.

# National Science Foundation

- The only federal agency that supports fundamental research in all fields of science and engineering
- NSF's approximate annual budget: USD 8 billion
- 93% of budget committed to research, education and related activities
- Number of awards NSF funds each year: 11,000



<https://www.nsf.gov>

# Funding for ...

## NGOS:

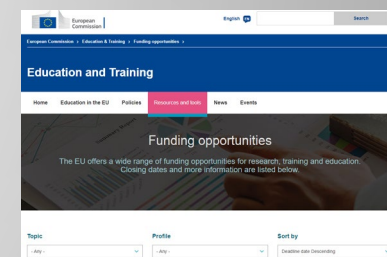
Subscribe to <https://www2.fundsforngos.org>



Education sector: [https://ec.europa.eu/education/resources-and-tools/funding-opportunities\\_en](https://ec.europa.eu/education/resources-and-tools/funding-opportunities_en)

## SDG (sustainable development goals) sector

<https://globalinnovation.fund>



## The arts

<https://www.transartists.org/calls> (Dutch platform with overview about open calls for artists)



<https://www.giarts.org> (US)





# Group work

Form two groups according to the color of the chocolate under your seat

**Group A:** You are Dr. Lise Meitner, freshly awarded PhD holder, and look for suitable funding for your (academical) postdoctoral career. Search for funding on the portal for calls and tenders. Tip: Have a look at the Marie Skłodowska-Curie Actions.

<https://ec.europa.eu/info/funding-tenders>

**Group B:** You are James P. Allison\*. You look for suitable funding for your cancer research project together with a company. Look for suitable funding under grants.gov Tip: Have a look at the opportunities for small businesses.

<https://www.grants.gov>

Present the call(s) and their main requirements to the audience and list the next three steps Lise and James have to take.

\*Nobel Prize in Medicine 2018

# Your project

Search for **your own career trajectory** three (max) calls for applications/proposals

Compare these three opportunities, e.g. in light of

- Their timing
- Their potential impact on your career
- Their implications for your 'daily life'

Form groups of three, present the three calls to each other, and chose one of your main preference.

# Optional homework

Take one of the discussed examples and reflect:

- If I apply to this grant now, what are **the next three steps** to take?
- What do I have to do to take the **first step**?
- What can **be a hurdle in taking this first step**?
- How can I **overcome this hurdle**?



# Closing the session

Come up to the flipchart/whiteboard, and draw a picture of your take home message from today





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 03*

# BILAT USA 4.0 Bootcamp Playbook

**From expectation to evaluation**

# Guidance for the Trainer 1/2

## **Preparation:**

- Group size 12-20
- Room with flexible seating and enough space for the group work

**Material:** Stopwatch or bell to announce the time

**Documents:** Successful proposals (and their evaluation summary reports). Provide these yourself, in time, if necessary anonymized.

## **Optional content:**

- Homework (slide 14)

## **Level of interactivity:**

- High (intensive group work)

# Guidance for the Trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<u>Introduction and welcome</u>	2	5
<u>Icebreaker</u>	1	5
<u>Reading of proposal</u>	1	20
<u>Discussion</u>	1	20
<u>Outcome</u>	1	30
<u>Mental health break</u>	1	5
<u>Evaluation criteria</u>	4	15
<u>Comparison</u>	1	10
<u>Questions</u>	1	5-10
<u>Optional homework</u>	1	5
<u>Closing</u>	1	5
<b>Total</b>	<b>15</b>	<b>125-130 (2.05-2.10)</b>

# From expectation to evaluation

- Group work on evaluated proposal
- Evaluation criteria
- Group work on proposal in light of the criteria





- Internalize the evaluation process and familiarize yourself with the process by developing own criterias.



- Shake hands!
- Before we start, let's take a minute and shake hands with the person sitting on the right to you – 'Hi, how are you?'

# Discussion in groups

- Read the successful proposals (handed out) (20 minutes).
- Pair together with the person/people who read the same proposals as you and compare notes:
  - What do you think was deemed successful in this proposal?
  - What was unsuccessful?
  - Why?
  - Which elements does each person individually consider as crucial and why/to what extent (in relation to the overall score/evaluation)?
  - What is your score – and why?
  - Prepare five key statements

# Outcome of the discussion

- Present your findings to the audience with five key statements on the whiteboard
- Time: 20 minutes discussion/note comparing
- 3 minutes presentation of the key statements to the audience
- 20 minutes open discussion

# Mental health break

## **A good rhythm of work and leisure is important.**

- What do you love doing?
- What activities can you lose yourself in?
- What did you love doing in the past?
- What would you like to try out?

Make a little drawing of this activity. If you want to, share it with the others.

# Evaluation criteria MSCA IF

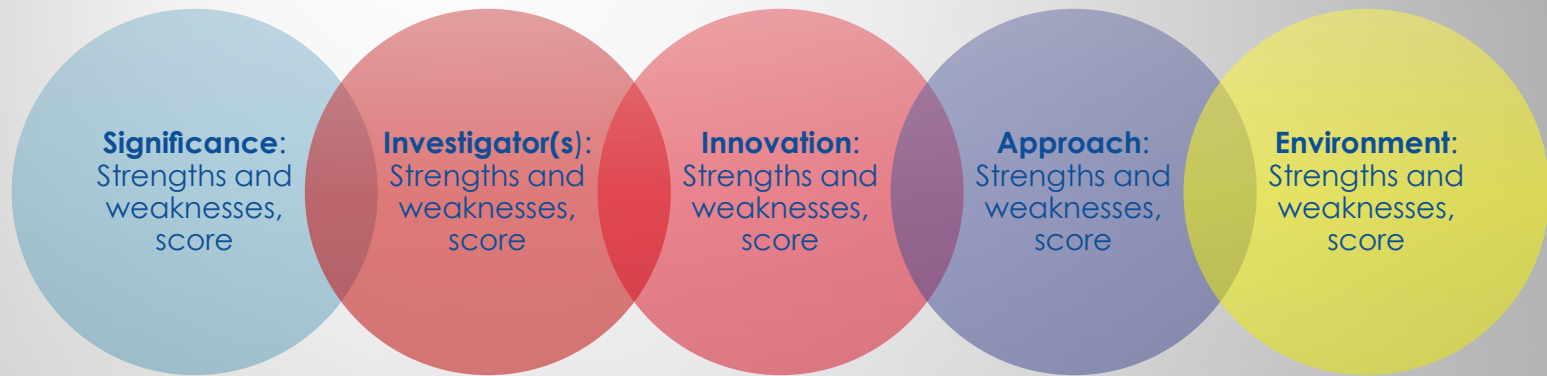
Excellence 50%	Impact 30%	Implementation 20%
Quality and credibility of the research/innovation project; level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects	Enhancing the future career prospects of the researcher after the fellowship	Coherence and effectiveness of the work plan, including appropriateness of the allocation of tasks and resources
Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host	Quality of the proposed measures to exploit and disseminate the project results	Appropriateness of the management structure and procedures, including risk management
Quality of the supervision and of the integration in the team/institution	Quality of the proposed measures to communicate the project activities to different target audiences	Appropriateness of the institutional environment (infrastructure)
Potential of the researcher to reach or re-enforce professional maturity/independence during the fellowship		
Priority in case of ex aequo : 1	Priority in case of ex aequo : 2	Priority in case of ex aequo : 3
NB: An overall threshold of 70% will be applied to the total weighted score.		

# Scoring

- **5.0 - Excellent:** The proposal successfully addresses all relevant aspects of the criterion. Any shortcomings are minor.
- **4.0 – 4.9 Very good:** The proposal addresses the criterion very well, but a small number of shortcomings are present.
- **3.0 – 3.9 Good:** The proposal addresses the criterion well, but a number of shortcomings are present.
- **2.0 - 2.9 Fair:** The proposal broadly addresses the criterion, but there are significant weaknesses.
- **1.0 – 1.9 Poor:** The criterion is inadequately addressed, or there are serious inherent weaknesses.
- **0** The proposal fails to address the criterion or cannot be assessed due to missing or incomplete information.



# Evaluation criteria NIH





## SCORING

Applications scored on five review criteria and Overall Impact using a scale of 1-9.

- Pre meeting all applications should be scored by assigned reviewers - overall impact score and criterion scores.

### SCORE DESCRIPTORS

Overall Impact or Criterion Strength	Score	Descriptor
High	1	Exceptional
	2	Outstanding
	3	Excellent
Medium	4	Very Good
	5	Good
	6	Satisfactory
Low	7	Fair
	8	Marginal
	9	Poor
<b>Other Descriptors for Final Outcome</b>		
<b>AB-abstention CF-Conflict of Interest DF-Deferred ND-Not Discussed NP-Not Present NF-Not Recommended for Further Consideration</b>		

# Comparison

- Compare your own assessment in light of the scoring guides.
- Which differences do you notice?
- Which similarities do you notice?
- **Write the differences (red) and the similarities (green) on the Post-its and stick it to the matrix on the flipchart.**

# Questions?

- Write your question on an A4 sheet of paper and either build a paper plane or make a 'snowball' out of it and throw it (gently! 😊) towards the trainer

# Optional homework

- Read a grant application from your own source (your own, that of a colleague, of your supervisor,...) and evaluate it.
- If possible, compare it to the evaluation score of this grant application.

# Closing the session

- Each attendant please states ONE thing you just learned that was new, took you by surprise, made you wonder,....





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 04*

# BILAT USA 4.0 Bootcamp Playbook

**From assessment to consensus**

# Guidance for the trainer 1/2

## Preparation:

- Group size 12-20
- Room with flexible seating and enough space for the group work
- Contact Evaluator – thorough briefing

**Material:** Stop watch or bell to announce the time

**Documents:** Evaluation Summary Reports of successful proposals

## Optional content:

- Testimonial of an evaluator. In case an evaluator is not available, show e.g. video testimonial <https://erc.europa.eu/news-events/magazine/secrets-poc-proposal-evaluation-process>
- Homework (slide 15)

## Level of interactivity:

- High (intensive group work)

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time in minutes
<u>Introduction</u>	2	5
<u>Icebreaker+debriefing</u>	1	10
<u>Evaluation Summary Reports reading+discussion</u>	3	30
<u>Mental health break</u>	1	5
<u>Evaluation process</u>	4	10
<u>Differences and similarities</u>	1	10
<u>Evaluator Testimonial (Optional)</u>	1	20
<u>Discussion</u>	1	15
<u>Optional homework</u>	1	5
<u>Closing</u>	1	5
<b>Total</b>	<b>16</b>	<b>115 (1.55)</b>



# Program today

- Debriefing Building Block 03 (see statements from previous closing exercise)
- Evaluation Summary Reports (and how to read them)
- Introduction and presentation of evaluation processes (EU and US grants)
  - Timelines, criteria, selection of evaluators etc.
  - Comparisons of differences among funders between evaluation processes and potential impact on proposal development
  - The evaluator's perspective





- Understanding of funders' expectations
- Sense for differences and diversity



# Icebreaker and debriefing

Form pairs

- Answer questions:
    - What is your name?
    - What is your research background?
    - How did you first score the proposal?
    - Which evaluation criteria did you develop / apply?
    - How did these differ from the actual evaluation criteria?
    - What is your conclusion of the mock evaluation exercise?
- (10 minutes)

Each participant: Write down your main conclusion on the (reversed) flipchart. (1 minute)



# Evaluation summary report

- Summary report US Grant

**SUMMARY STATEMENT**  
( Privileged Communication )

PROGRAM CONTACT: [REDACTED] Release Date: 02/27/2017  
Revised Date:

---

Application Number: 1 R01 AH21500-01A1

Principal Investigator  
GORDON, VERNITA

Applicant Organization: UNIVERSITY OF TEXAS, AUSTIN

Review Group: BMBI  
Biomaterials and Biointerfaces Study Section

Meeting Date: 02/15/2017 RFA/PA: PAR16-242  
Council: MAY 2017 PCC: M36  
Requested Start: 05/01/2017

---

**Project Title:** Assessing the roles of biofilm structure and mechanics in pathogenic, persistent infections

**SRG Action:** Impact Score:15 Percentile:1

**Next Steps:** Visit [http://grants.nih.gov/grants/next\\_steps.htm](http://grants.nih.gov/grants/next_steps.htm)

**Human Subjects:** 10-No human subjects involved

**Animal Subjects:** 30-Vertebrate animals involved - no SRG concerns noted

Project Year	Direct Costs Requested	Estimated Total Cost
1	[REDACTED]	[REDACTED]
2	[REDACTED]	[REDACTED]
3	[REDACTED]	[REDACTED]
4	[REDACTED]	[REDACTED]
<b>TOTAL</b>	[REDACTED]	[REDACTED]

**ADMINISTRATIVE BUDGET NOTE:** The budget shown is the requested budget and has not been adjusted to reflect any recommendations made by reviewers. If an award is planned, the costs will be calculated by Institute grants management staff based on the recommendations outlined below in the COMMITTEE BUDGET RECOMMENDATIONS section.

**NEW INVESTIGATOR**



# Plenum discussion

- Let's have a look at the comments/conclusion on the flipchart
- Assess these in light of the actual evaluation criteria

*Time: 20 minutes*

# Mental health break

Take a break! Why? (5 minutes)

- “Movement breaks” are essential for your physical and emotional health.
- Breaks can prevent decision fatigue.
- Breaks restore motivation, especially for long-term goals.
- Breaks increase productivity and creativity.
- “Waking rest” helps consolidate memories and improve learning.

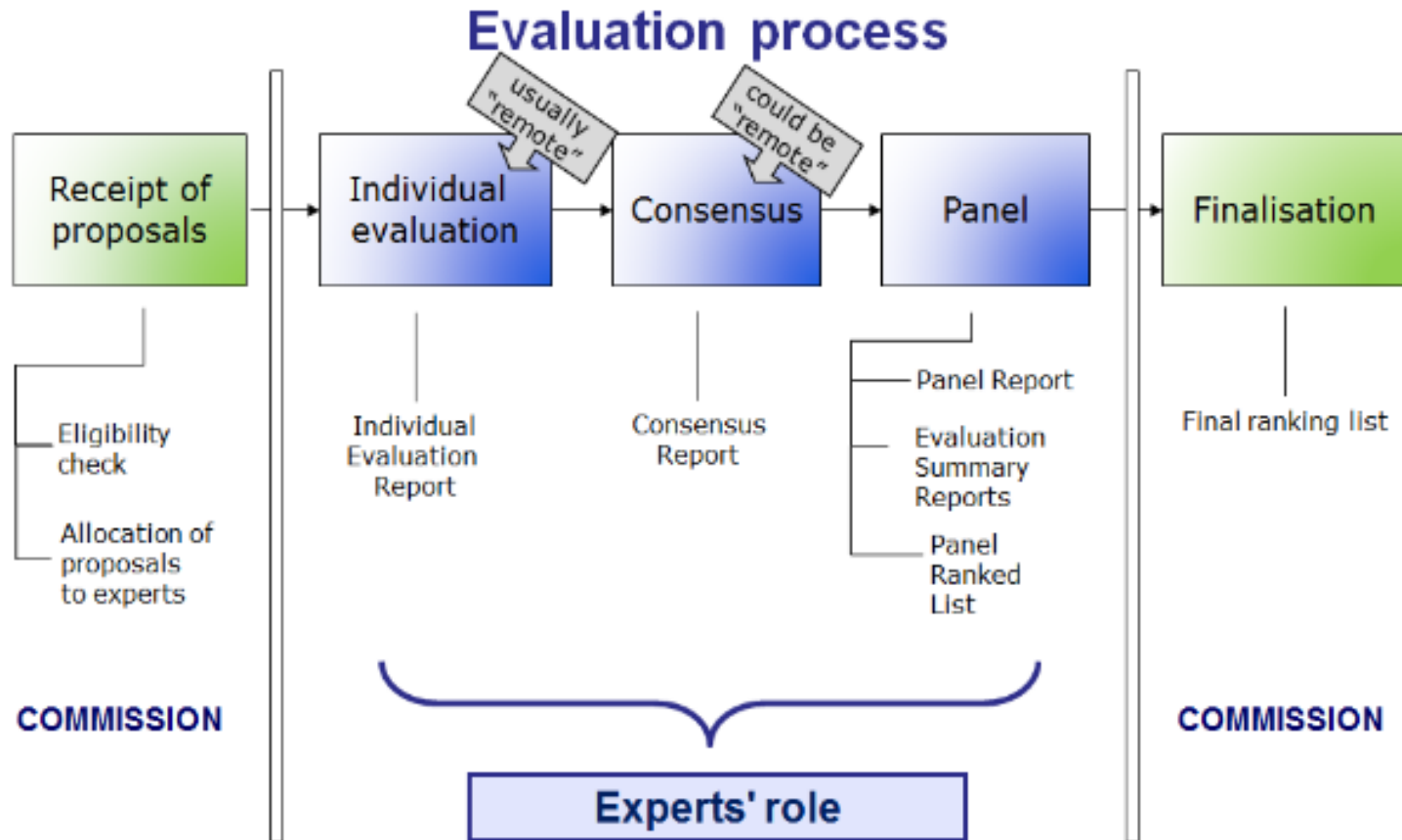
[www.psychologytoday.com/intl/blog/changepower/201704/how-do-work-breaks-help-your-brain-5-surprising-answers](http://www.psychologytoday.com/intl/blog/changepower/201704/how-do-work-breaks-help-your-brain-5-surprising-answers)

## A little exercise to get up and laugh:

- 1) Get up and walk towards a colleague.
- 2) Exchange – while standing up – your favorite joke (it can also be a meme or anecdote).

# Evaluation process EU

The diagram below depicts the main steps of the evaluation process and highlights at which stages the experts intervene.

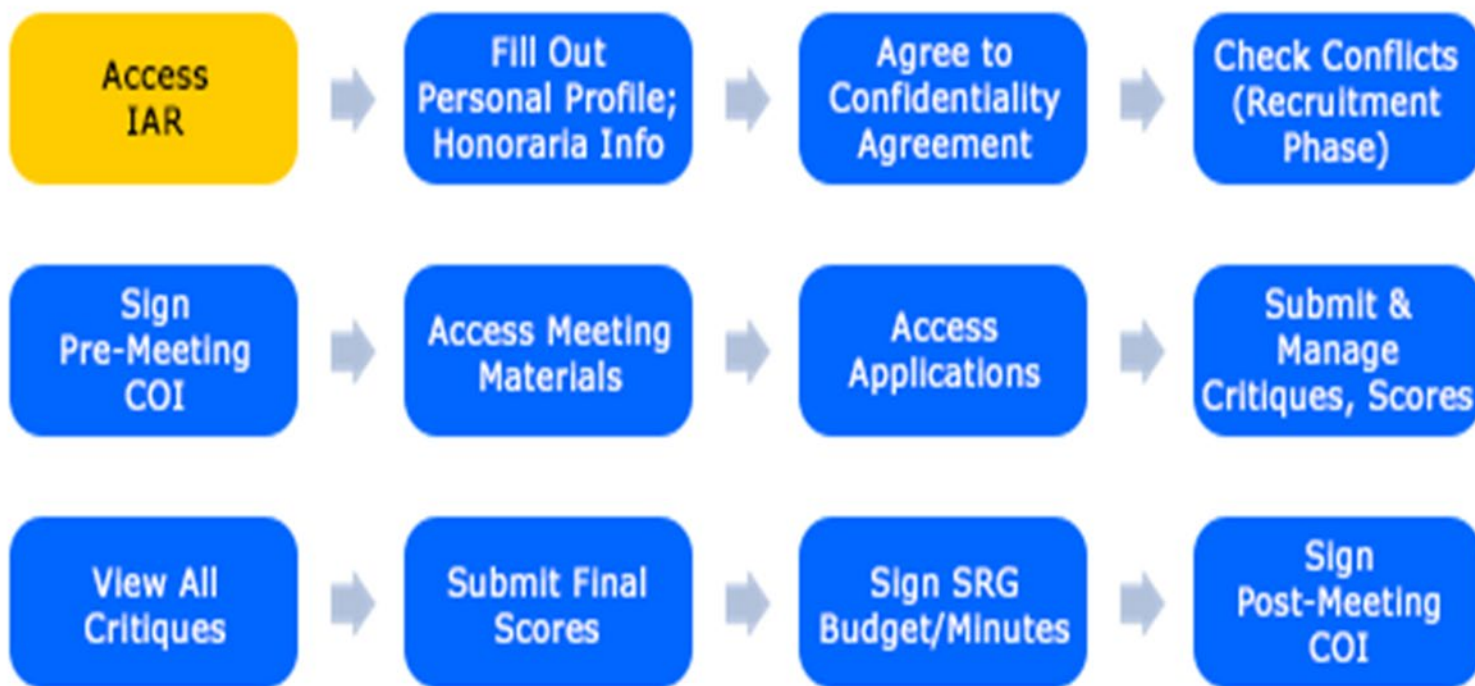




## FULL REMOTE EVALUATION

- **3** evaluators per proposal;
- **2** Vice-Chairs (VCs) of which 1 is rapporteur, and 1 cross-reader;
- **SEP Hands-on** Training for VCs;
- **Improved briefing for experts:** web-briefing (unconscious bias added), Q&A chat sessions, evaluators guide, SEP guidance movie;
- **SEP workflow and functionalities** adjusted to ease the remote consensus discussion;
- **Minority views:** Specific slots for teleconferences will be foreseen in order to solve critical cases remotely, before the central phase.

## For Reviewers



# Criteria and process

- **Peer Review Criteria:**
  - Conformity to goals of sponsor
  - Quality of proposal
  - Soundness of proposal
    - budget
    - program
    - space, resources, personnel
- Probability of accomplishment
- Evaluations are anonymous, and given in summary form to applicant on request
- Reviews usually assign scores, rankings, or categories
- Funding decisions are based on available funds
- Amount of award may be unilateral, or may be negotiated
- See program guides or solicitation for details about review

# Differences and similarities

Form two groups. Develop a table comparing the differences/similarities in the evaluation criteria.

## **How will the character of the evaluation process influence your proposal writing?**

Consider, e.g.:

- Duration of the overall process
- Quantity of evaluators
- Mode of evaluation (meetings, remote, online...)
- Specialists or generalists in the field
- ...

# Testimonial of an evaluator

- Meet an evaluator!
- Get back in your groups: Define a speaker in your group who sums up the evaluator's perspective.
- Does the evaluator's insight change your view? No? Yes? If yes, how much? Why?

# Optional homework

- Note down three specific questions to obtain constructive feedback for your next grant application.

# Closing the session

- Looking back on the take-home message from the first session: How do I translate the insight of the sessions until now into asking for **feedback**?



Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 05*

# BILAT USA 4.0 Bootcamp Playbook

## Crossing the threshold



# Guidance for the trainer 1/2

## Preparation:

- Group size 12-20
- Room with flexible seating and enough space for the group work
- Attach a timeline to the wall
- Attendants need access to the web and their own devices to log into the grant platforms

## Material:

- Prepared cards/ Post-its of exercise with predefined steps in the proposal process

## Documents: -

**Optional content:** Exercise with predefined steps OR own project. You can also do both. **Attention: Homework is NOT optional but needed for the next building block.**

**Level of interactivity:** very high

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<u>Introduction</u>	2	5
<u>Icebreaker</u>	1	10
<u>Platforms and Wiki</u>	6	10
<u>Get started</u>	1	15
<u>Mental health break</u>	1	5
<u>Search for keywords</u>	1	10
<u>Personal timeline</u>	8	15
<u>Exercise (predefined keywords)</u>	1	15
<u>Own project</u>	1	15
<u>Homework</u>	1	5
<u>Closing</u>	1	5
<b>Total</b>		<b>110. Add 10 minutes buffer-time for exercises: 120 (2 hours). Less if you skip one of the exercises.</b>

# Program today

- Crossing the threshold
- Introduction to online grants application portals
- What to know before registering
- Familiarizing yourself with portal specifics
- Timing of portal registration against proposal development





- Getting to know the time consuming administrative necessities



- Line up
- Get up and form a line
  - Birthday: from January to December
  - How much experience do you have with registering to a grant portal?
  - To which portals have you already registered?
    - Upper left corner: none
    - Upper right corner: EU portal for calls and tenders
    - Lower left corner: Grants.gov or another US portal
    - Lower right corner: both / several portals
    - Center of the room: none so far

European Commission | Funding & tender opportunities  
Single Electronic Data Interchange Area (SEDIA)

English EN  
Register Login

SEARCH FUNDING & TENDERS | HOW TO PARTICIPATE | PROJECTS & RESULTS | WORK AS AN EXPERT | SUPPORT

Funding & tender opportunities (the Single Electronic Data Interchange Area) is the entry point for participants and experts in funding programmes and tenders managed by the European Commission and other EU bodies.

Find calls for proposals and tenders

Search calls for proposals and tenders by keywords, programmes...

### Calls for proposals by EU Programme

3rd Health Programme (3HP)	Asylum, Migration and Integration Fund (AMIF)	Consumer Programme (CP)	Creative Europe (CREA)	European Defence Industrial Development Programme (EDIDP)	Erasmus+ Programme
HERCULE III (HERC)	Horizon 2020 Framework Programme (H2020)	Internal Security Fund Borders and Visa (ISFB)	Internal Security Fund Police (ISFP)	Justice Programme (JUST)	Pilot Projects and Pilot Actions (PPPA)

### Create an account

[Help for external users](#)

First name

Last name

E-mail

Confirm e-mail


E-mail language

Enter the code

By checking this box, you acknowledge that you have read and understood the [privacy statement](#)

<https://ec.europa.eu/info/fundingtenders/opportunities/portal/screen/home>





Funding & tender opportunities  
Single Electronic Data Interchange Area (SEDIA)

English **EN**


Register Login

[SEARCH FUNDING & TENDERS](#)
[HOW TO PARTICIPATE](#)
[PROJECTS & RESULTS](#)
[WORK AS AN EXPERT](#)
[SUPPORT](#)


[select programme](#)

## Support overview


### Support by type



GUIDANCE












FAQ



HELPDESKS

H2020 Online Manual guides you through all the main processes on the F&T Portal from proposal submission to grant management and audits. IT HOW TO gives you detailed guidance on the F&T Portal related IT tools.

### Popular support topics

EU Login	<a href="#">Online manual</a> 	How can I acquire roles and access rights for proposals, projects or organisations?	<a href="#">FAQ</a> 
How to change the EU Login account details?	<a href="#">FAQ</a> 	Where can I find more user guidance related to proposal submission?	<a href="#">FAQ</a> 
What is a LEAR (Legal Entity Appointed Representative) and what are LEAR's rights and tasks?	<a href="#">FAQ</a> 	SME Self Evaluation	<a href="#">IT how to</a> 
How to appoint a LEAR	<a href="#">Online manual</a> 	Where can I find the National Contact Points (for Horizon 2020)?	<a href="#">Helpdesks</a> 
Do I have to register my organisation before drafting my proposal?	<a href="#">FAQ</a> 		

The screenshot displays the Grants.gov website interface. At the top, there is a search bar with a dropdown menu set to 'Grant Opportunities' and a text input field for keywords. The navigation menu includes links for HOME, LEARN GRANTS, SEARCH GRANTS, APPLICANTS, GRANTORS, SYSTEM-TO-SYSTEM, FORMS, and CONNECT. A large banner features the text 'Search on the Go' and 'Download the Grants.gov Mobile App to quickly search for and subscribe to funding opportunities.' Below this banner are buttons for downloading the app on the App Store and Google Play. A hand is shown holding a smartphone displaying the mobile app interface. The right side of the page shows the 'REGISTER' section, which includes a 'Quick Search' form on the phone and a 'REGISTER' heading on the desktop. Under 'REGISTER', there are sections for 'Applicants' and 'Grantors', each with a list of steps to follow. A 'Get Registered Now' button is visible. At the bottom, there are links for 'CONNECT WITH US' (Blog, Twitter, YouTube, Alerts, RSS, XML Extract, Get Adobe Reader) and 'HEALTH & HUMAN SERVICES' (HHS.gov, EEOC / No Fear Act, Accessibility, Privacy, Disclaimers, Site Map). A footer section lists 'COMMUNITY' links for USA.gov, WhiteHouse.gov, USAspending.gov, SBA.gov, CFDA.gov, SAM.gov, and DUNS Request.





**Grants.gov Online Help**

**Get Started**

Grants.gov is designed to enable federal grant-making agencies to create funding opportunities and applicants to find and apply for these federal grants. The Grants.gov Online Help provides explanations and step-by-step instructions for both applicants and grantors to complete these processes.

Each page of information is referred to as a "help article," which you can access by clicking the icons throughout Grants.gov and by using the navigation features listed below. For general information about the grants lifecycle and policies, click the **Learn Grants** tab on Grants.gov.

**Navigation in the Online Help**

- Table of Contents:** The primary navigation tool is the table of contents, which is designed to follow the Grants.gov system structure. The help instructions in the Register, Login and My Account, Search Grants, and Connects sections are for all users. The Applicants, Grantors, and Administrators sections pertain specifically to those types of users.
- Glossary:** The online help also features a glossary of terms pertinent to using the Grants.gov system. If you are new to grants or would like a broader range of grant-related terms, the Grant Terminology page on Grants.gov may also be helpful.
- Search:** Type the name of an action, a page title, or any other questions you may have into the search bar. Click the Search icon in the search bar or select the Enter key on your keyboard to return results with the instructions and help you need.
- Index:** The online help also features an index of all the terms and associated topics used throughout the guide. The index sorts these terms alphabetically, then connects them with other terms and topics used in relation to each other.

**Multiple Views of the Online Help**

The Grants.gov Online Help is built with a responsive design to allow for multiple views based on your device and screen size. On computers and devices with smaller screen sizes, the expanded table of contents will not display automatically.

**Desktop or Laptop Computer**

# A tale of two grant systems

EU Term	US Term
Overhead/Indirect Costs	F&A
Eligible Costs	Allowable Costs
In-kind contribution	Cost Sharing
Call Publication	Funding Opportunity Announcement (FAO)
Coordinator	Prime/Pass-Through Entity (PTE)
Legal Entity Appointed Representative (LEAR)	Authorized Organizational Representative (AOR)
National Contact Point (NCP)	Not applicable

bilat-wiki.ethz.ch/wiki/Main\_Page

Amazon eBay Booking.com Bonprix Facebook Erste Schritte

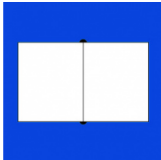


BILAT USA 4.0

Main page Discussion Read View source View




## Main Page

Welcome to the *Terminology MediaWiki*

The *Terminology MediaWiki* is an online platform that aims to explain and juxtapose EU and US funding terminologies. If you know whether you are looking for either the [European Terms](#) or the [US Terms](#) section. Otherwise please consult the [Glossary](#).

Glossary EU-Terms US-Terms

Help How to use FAQ

# Get started

- Create an account for yourself on both platforms (or on another platform of choice) within the next 15 minutes
- When questions arise, share them with your seat neighbour – if questions remain, share them with everybody/the trainer



# Mental health break

- Chocolate break
- **Boost brainpower by treating yourself to a couple of pieces of dark chocolate every few days.** The flavonoids, caffeine, and theobromine in chocolate are thought to work together to improve alertness and mental skills.
- Alternative: almonds

**Feed your brain!**  
**Help yourself to the stash of 'brain food'. Close your eyes and concentrate on the taste.**

# Familiarizing yourself with portal specifics

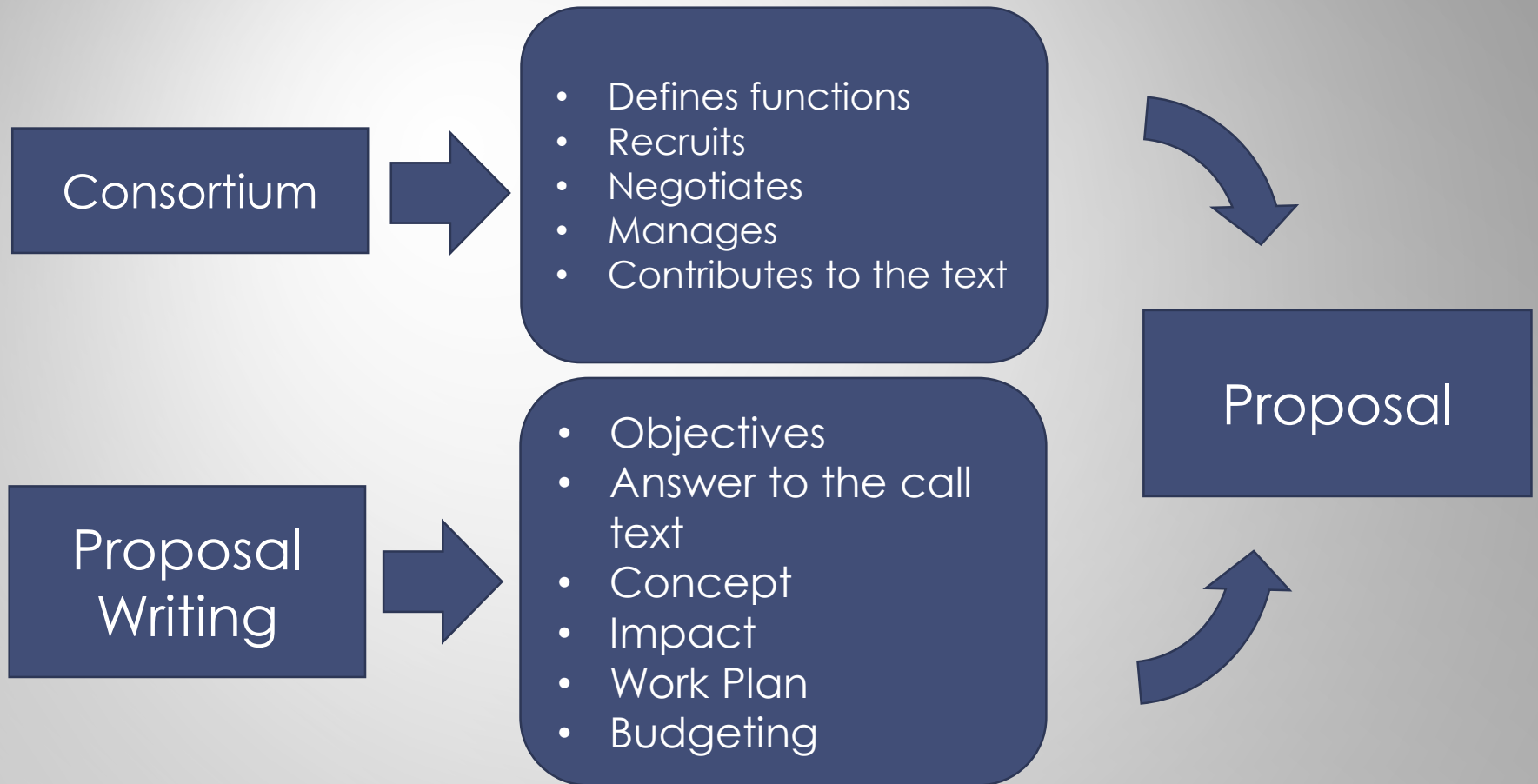
## Search for the following keywords:

- Fellowship
- Quantum Science
- Education

## Answer the following questions:

- What is a Coordination and Support Action?
- What does ERC stand for?
- What is a Cooperative Agreement?

# H2020: your personal timeline



# Your personal timeline

## Prepare the preliminary project summary/abstract –

This summary should be a live, working document, which will help in shaping the project definition and consortium structure.





# Your personal timeline

**List of partners** – Based on the preliminary project summary/abstract work to recruit partners for the project. Don't forget: the partners should take an active role in developing the project proposal.



**Send out the proposal template with instructions** – Once the list of partners is intact, it is time to allocate tasks to the partners and start the writing process. Make sure to use the most updated template for the proposal. Use the official guidelines and add any specific instructions for the partners. From this point on, manage the writing process of this document with the partners until you submit it in the electronic submission system.

# Your personal timeline



**Collect partner profiles** – This is generally a mostly ‘administrative’ task. We recommend not to postpone this to the end of the process. You can indicate the exact role and tasks of each partner, but this might be finalized only at a later stage. This is also a good opportunity to collect budgetary needs from your partners, to help plan the consortium budget.

# Your personal timeline

## Have a first full draft of the proposal –

It is crucial to have a first draft of the full proposal, including all key sections about a month before the call deadline. You will need the rest of the time for fine tuning, final budgeting issues, quality assurance procedures, proof reading, etc.

## Open a submission system in the Participant Portal –

Filling in the details in the electronic system takes time and cooperation of the partners. After setting it up, add the partners into the system and invite them to sign in and fill in their own administrative data. Monitor the process to ensure that there aren't any validation errors.



## Handle any supplementary aspects, such as ethics, security, etc. –

In case the project is subject to any of these aspects, invest the time to finalize them and ensure there are no loose ends. Addressing and answering ethical aspects and requirements may take a long time to handle in the proposal development phase.

# Your personal timeline

**Finalize the budget** – We would like to recommend that you finalize it earlier, but reality and experience show that it is unrealistic in most cases. Finalizing the budget is a process that usually converges only in the very last phase of the proposal development process. It is subject to final negotiations between partners. Sometimes it is also subject to internal approval procedures in large organisations, etc. Make sure to finalize it no later than 2 weeks before the deadline.



**Near-final draft** – Dedicate about a week for final touches and proofreading. At this point it is fine to share these tasks with the partners, but we recommend restricting any new input from them at this point in time. If you do get new input, make sure that it is important enough and examine it carefully before adding it to the text to avoid any imbalance or incoherence in the overall proposal text.



# Your personal timeline



**Final draft and first submission – Do not wait for the last day to submit the proposal.** The system is programmed to allow you to submit multiple versions of the proposal until the deadline, while only the last version submitted is the one that will be accepted. Due to various reasons (system instability, overload on the system due to concurrent submissions, etc.) we highly recommend to submit a first version of the proposal about 3 days before the deadline. **Submitting it will ensure that there are no validation errors**, which is very important (validity errors will not allow you to submit any version of the proposal). After submitting the first version, you can re-submit newer versions of the proposal, as you go, to ensure that the most updated version is in the system.



# Your personal timeline

**Final submission** – Aim at submitting the final version early on the deadline, or on the day before, and go have a rest. You deserve it. Good luck!





# Timing of portal registration against proposal development

Place the following steps in the most logical order on the timeline on the wall:

Identification  
of call  
opportunities

Registration

Check of  
eligibility  
conditions

Proposal  
submission

Writing

Apply for seed  
funding

Information  
meeting with  
support  
experts

Proofreading

Search for  
suitable  
partners

Talk with  
potential/current  
supervisors

Identify seed  
funding call



# Your own project

- Apply the order of the different steps to your identified project/proposal/call
- Write the different steps down on the outline
- Bring a copy of the outline to the next session for the trainer (keep the original one for yourself)



# Homework

- Identify a research project you would like to pursue, and a prospective funder
- Write a short brief – 1 page – describing the project and prepare to present it in the form a plea or sales pitch to colleagues in small groups



# Closing the session

- A little nerdy humor: *Les Horribles Cernettes* 'You only love your collider'





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 06*

# BILAT USA 4.0 Bootcamp Playbook

**Gaining self-efficacy**

# Guidance for the trainer 1/2

## **Preparation:**

- Group size 12-20
- Room with flexible seating and enough space for the group work
- Video cameras for the elevator pitch/participants' own smartphones

**Material:** Postcards/Post-its and a bowl for the icebreaker

**Documents:** -

**Optional content:** 2<sup>nd</sup> elevator pitch

**Level of interactivity: very high**

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<u>Introduction</u>	2	5
<u>Icebreaker</u>	1	10
<u>Building block 05 homework</u>	1	20
<u>Elevator Pitch</u>	2	45
<u>Self-analysis</u>	1	10
<u>Feedback tips</u>	1	5
<u>Mental health break</u>	1	5
<u>Story and truth of a proposal</u>	2	10
<u>2<sup>nd</sup> elevator pitch</u>	1	15
<u>Details (layout, deadline,...)</u>	3	15
<u>Homework</u>	1	5
<u>Closing</u>	1	5
<b>Total</b>	<b>17</b>	<b>150 (allow sufficient time for the video exercise) = 2.5 hours</b>

# Program today

- Introduction to project and proposal development
- Dos and don'ts in proposal writing
- Overview of proposal requirements
- Sweating the details. The importance of formatting, references etc.





- Presenting and shaping own ideas and visions
- Active listening and learning from one another



- Whodunnit?
- Write on a postcard one surprising or funny fact about yourself (e.g. 'I hate eating kale').
- We'll put the postcards into the bowl and draw one by one and read it out loud.
- Let's guess which statement is about whom.



# Your homework from previous session

- Identify a (research) project you would like to pursue, and a prospective funder. Any idea or project is possible.
- Write a short brief – 1 page – describing the project and prepare to present it in the form a plea or sales pitch to colleagues in small groups

# Elevator pitch

- **Guiding thoughts**

- The 'hook': captivating opener, presenting challenge, context
- Your solution to the challenge
- Why does this matter? Why should this project be funded?
- Why are you the best person to implement this project?

- **Fine-tune:**

- Plain language, avoid technical terms/jargon
- KISS: Keep it short and simple
- Practice, practice, practice...

# Group work

- Present your research project to the group in the form of a 5 minutes sales pitch/elevator pitch
- Your colleagues will serve as evaluators and 'advocatus diaboli'
- The sessions will be videotaped (if you agree – use your own phone) and you can self examine your pitch at home.
- (Optional: Tape your pitch once – incorporate the feedback of your peers – tape it a second time. )

# Self-analysis

- How do **you evaluate**? Is your feedback
  - Constructive?
  - Fair?
  - Justified?
  - Specific?
- How do **you take feedback**?
  - Do you listen actively?
  - Do you ask if something remains unclear?

# Mental health break

- Being outside, reconnecting with nature, helps to maintain balance in a hectic schedule
- Open windows, look outside, take a walk (at noon)
- Pet a dog/cat, look at a burning fire, look into the sky or a tree...

**Ten seconds with nature**

# The story behind the proposal

## Key questions to answer before your start writing:

- Why this grant now? Where will this grant lead me in my career?
- What are the funding body's expectations?
- Do I meet these expectations?
- If not, what is missing – how can I fill the gap – how can it be justified?
- If yes, why should the money be used for my project? What is the unique selling proposition?



# The hard truth of the proposal

- Do I meet all the criteria to apply? (Eligibility, budget, age limit,...)
- Do I have all the required documents to start writing?
- What is missing, when will I have the information?
- When will I write the proposal? When will it be proofread, and by whom? (Writing takes always longer than one thinks!)



# 2nd elevator pitch

- (Optional): Pitch your idea once for
- NIH/NSF
- SNF
- MSCA
- A national grant of your choice





# Sweating the details: layout

Specific regions of the periodic table can be referred to as *blocks* in recognition of the sequence in which the electron shells of the elements are filled. Each block is named according to the subshell in which the "last" electron notionally resides.<sup>[26][n 3]</sup> The s-block comprises the first two groups (alkali metals and alkaline earth metals) as well as hydrogen and helium. The p-block comprises the last six groups, which are groups 13 to 18 in IUPAC group numbering (3A to 8A in American group numbering) and contains, among other elements, all of the metalloids. The d-block comprises groups 3 to 12 (or 3B to 2B in American group numbering) and contains all of the transition metals. The f-block, often offset below the rest of the periodic table, has no group numbers and comprises lanthanides and actinides.<sup>[27]</sup>

Specific regions of the periodic table can be referred to as blocks in recognition of the sequence in which the electron shells of the elements are filled. Each block is named according to the subshell in which the "last" electron notionally resides.<sup>[26][n 3]</sup>

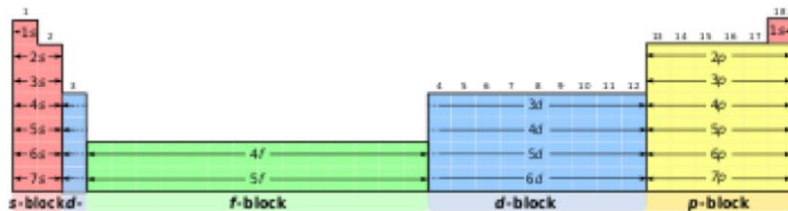


Figure 7 1 Blocks of the periodic table



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## 1.1.2 Aliquam lorem ante, dapibus in, viverra quis, feugiat

- Phasellus viverra nulla ut metus varius laoreet.
- Quisque rutrum.
- Aenean imperdiet.

Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus.

Table 1 Latin words in a table

Phasellus	Aeneas	Ovid
Vita	Aqua	Terr
Puella	Pueris	Mulier

Donec vitae sapien ut libero venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc, orem ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget dolor. Aenean massa. Cum sociis n natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, u nec, pellentesque eu, pretium quis, sem. Nulla consequat massa quis enim. Donec pede illa vel, aliquet nec, vulputate eget, arcu. In enim justo, rhoncus ut, imperdiet a, e, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, e, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus. Donec vitae sapien ut libero venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc,

Heading

List

Table

Justified  
margins

Readable  
font

# Page limit and references

## 3.3.4 Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus.

- Phasellus viverra nulla ut metus varius laoreet.
- Quisque rutrum.
- Aenean imperdiet.

Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus.

Table 1 Latin words in a table

Phasellus	Aeneas	Ovid
Vita	Aqua	Terra
Puella	Pueris	Mulier


Donec vitae sapien ut libero venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo. Sed fringilla mauris sit amet nibh. Donec sodales sagittis magna. Sed consequat, leo eget bibendum sodales, augue velit cursus nunc. Donec ipsum dolor sit amet, consectetur adipiscing elit. Aenean commodo ligula eget orci. Aenean massa. Cum sociis natoque penatibus et magnis dis parturient montes, nascetur ridiculus mus. Donec quam felis, ultricies nec, pellentesque eu, pretium quis, sem. Nullam consequat massa quis enim. Donec pede justo, fringilla vel, aliquet nec, vulputate eget arcu. In enim justo, rhoncus ut, imperdiet a, venenatis vitae, justo. Nullam dictum felis eu pede mollis pretium. Integer tincidunt. Cras dapibus. Vivamus elementum semper nisi. Aenean vulputate eleifend tellus. Aenean leo ligula, porttitor eu, consequat vitae, eleifend ac, enim. Aliquam lorem ante, dapibus in, viverra quis, feugiat a, tellus. Phasellus viverra nulla ut metus varius laoreet. Quisque rutrum. Aenean imperdiet. Etiam ultricies nisi vel augue. Curabitur ullamcorper ultricies nisi. Nam eget dui. Etiam rhoncus. Maecenas tempus, tellus eget condimentum rhoncus, sem quam semper libero, sit amet adipiscing sem neque sed ipsum. Nam quam nunc, blandit vel, luctus pulvinar, hendrerit id, lorem. Maecenas nec odio et ante tincidunt tempus. Donec vitae sapien ut libero venenatis faucibus. Nullam quis ante. Etiam sit amet orci eget eros faucibus tincidunt. Duis leo.

Page 34 for all literature references see annex

Beyond the page limit

Adapted from an actual IF proposal 2017. Final score: 24/100

References wrong (no annex allowed)





Funding & tender opportunities  
Single Electronic Data Interchange Area (SEDIA)

English **EN**


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SEARCH FUNDING & TENDERS ▾ HOW TO PARTICIPATE ▾ PROJECTS & RESULTS WORK AS AN EXPERT SUPPORT ▾

select programme 

clear filter 

## Horizon 2020 Framework Programme (H2020)



*Oct 27, 2017*

## Individual Fellowships

ID: MSCA-IF-2018

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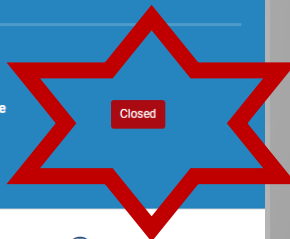
Type of action:

- MSCA-IF-GF Global Fellowships , MSCA-IF-EF-ST Standard European Fellowships , MSCA-IF-EF-SE Society and Enterprise panel , MSCA-IF-EF-RI Reintegration panel , MSCA-IF-EF-CAR Career Restart panel



Deadline Model : single-stage

Opening: **12 April 2018**


Deadline: **12 September 2018 17:00:00 Brussels time**




Horizon 2020


 **Work programme:**  Marie Skłodowska-Curie actions

**Work programme year:** H2020-2018-2020

 [Horizon 2020 Website](#)

 **Call name:** Marie Skłodowska-Curie Individual Fellowships | **Call ID:** H2020-MSCA-IF-2018

[See all topics of this call >](#)

 [See budget overview](#)

## Beware of different time zones!



# Homework for next session

- Bring a copy of your current CV (word format)



# Closing the session

- Snowstorm:

Write down what you learned today on a piece of scratch paper (one sentence) and wad it up. Upon the signal, throw your paper snowballs in the air. Then pick up a nearby response and read it aloud to all of us.

**For next session: Please bring your own laptops for a writing exercise!**



Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 07*

# BILAT USA 4.0 Bootcamp Playbook

## Distinguishing yourself

# Guidance for the trainer 1/2

## **Preparation:**

- Group size 12-20
- Room with flexible seating

**Material:** Participants should have their laptops with them for the CV exercise

**Documents:** Read through the CV templates of the funding agencies

**Optional content:** Exercise of the short CV

**Level of interactivity:** High



# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<a href="#"><u>Introduction</u></a>	2	5
<a href="#"><u>Icebreaker</u></a>	1	10
<a href="#"><u>Debriefing</u></a>	1	10
<a href="#"><u>CV intro explanation</u></a>	6	15
<a href="#"><u>Short CV exercise</u></a>	3	15
<a href="#"><u>Mental health break</u></a>	1	10
<a href="#"><u>CV detailed explanation</u></a>	8	20
<a href="#"><u>CV exercise</u></a>	1	20
<a href="#"><u>Online support</u></a>	1	5
<a href="#"><u>Optional homework</u></a>	1	5
<a href="#"><u>Closing</u></a>	1	10
<b>Total</b>	<b>26</b>	<b>125 (2.05)</b>

# Program today

- Debriefing of Building block 06
- Introduction to writing an academic CV:
  - What to include
  - How to tailor it to different funders: MSCA IF, NIH grant/fellowship
  - Discussion of CV examples
    - of a selection of online suppWhat belongs in a CV
    - What needs to be in a short versus a long CV version?
    - Discussion of good examples and why they are exemplary
    - Presentation ort tools

- Learning to present oneself optimally tailored to the occasion/funder

- Write your biggest fear or worry when it comes to presenting your CV on the reversed flipchart



# Debriefing

- Discussion of any remaining questions from the previous session (10 minutes)



# Introduction to writing an academic CV

- **Length:** Any length is possible, but be reasonable (and check what is common in your field)
- **Structure:** The most important goes at the top
- **Audience:** Focus more on teaching or on research, emphasize publications or third party funding depending on the audience
- **Feedback** from a peer is extremely valuable
- **Readability:** Make it easy to read (clear font, don't overload it, bullet points, chapters,...)
- Be **consistent**
- **Edit** it very carefully
- CV includes the **standard academic and research record**
- CV should show your **track record and major relevant achievements**

# Introduction to writing an academic CV

- For your grant application: Check if there is a **standard template** available and adhere to it
- DO NOT copy and paste from your LinkedIn profile or 'standard CV'
- **Streamline** it to the position/grant you're applying for
- Give evaluators some **context**: How competitive was your recent award? What does an acronym stand for? How many students did you tutor in your group? Etc.

# The structure (general academic CV)

## JOHN SMITH

287 Market Street  
Minneapolis, MN 55404  
Phone: 555-555-5555  
Cell: 555-666-6666  
email@email.com

### EDUCATION

**Ph.D., Psychology, University of Minnesota, 2016**  
Concentrations: Psychology, Community Psychology  
Dissertation: *A Study of Learning-Disabled Children in a Low-Income Community*  
Dissertation Advisors: Susan Hanford, Ph.D., Bill Andersen, Ph.D., Melissa Chambers, MSW

**M.A., Psychology, University at Albany, 2012**  
Concentrations: Psychology, Special Education  
Thesis: *Communication Skills of Learning-Disabled Children*  
Thesis Advisor: Jennifer Atkins, Ph.D.

**B.A. Psychology, California State University, Long Beach, CA 2010**

### TEACHING EXPERIENCE

**Instructor, University of Minnesota, 2013-2016**  
University of Minnesota  
Courses: Psychology in the Classroom, Adolescent Psychology

**Teaching Assistant, University at Albany, 2012-2013**  
Courses: Special Education, Learning Disabilities, Introduction to Psychology

### RESEARCH EXPERIENCE

**Postdoctoral Fellow, XYZ Hospital, 2016-2018**  
Administered extensive neuropsychological and psychodiagnostic assessment for children ages 3-6 for study on impact of in-class technology on children with various neurodevelopmental conditions

### PUBLICATIONS

North, T. and Smith, J. (Forthcoming). "Technology and Classroom Learning in a Mixed Education Space." *Journal of Adolescent Psychology*, vol. 12.

Contact details

Education

Teaching

Research

Publications



# The structure



Willis, A., North, T., and Smith, J. (2016). "The Behavior of Learning Disabled Adolescents in the Classroom." *Journal of Educational Psychology*, volume 81, 120-125.

#### PRESENTATIONS

Smith, John (2016). "The Behavior of Learning Disabled Adolescents in the Classroom." Paper presented at the Psychology Conference at the University of Minnesota.

Smith, John (2015). "Tailoring Assignments within Inclusive Classrooms." Paper presented at Brown Bag Series, Department of Psychology, University of Minnesota.

#### GRANTS AND FELLOWSHIPS

RDB Grant (University of Minnesota Research Grant, 2016)

Workshop Grant (for ASPA meeting in New York, 2016)

Nelson G. Stevens Fellowship (XYZ Research Facility, 2015)

#### AWARDS AND HONORS

Treldar Scholar, 2016

Teaching Fellow of the Year, 2016

Academic Excellence Award, 2015

#### PROFESSIONAL MEMBERSHIPS

Psychology Association of America  
National Association of Adolescent Psychology

#### RELEVANT SKILLS

Programming ability in C++ and PHP  
Extensive knowledge of SPSSX and SAS statistical programs.  
Fluent in German, French, and Spanish

# What and what not to include

What to include	What not to include
Contact details	Irrelevant education experience (primary school)
Current position/most recent one	Irrelevant job experience (15 years or more in the past)
Research experience	Hobbies or other private information (religious beliefs e.g. – <i>for details see next slide</i> )
Teaching experience	‘funny’ contact details ( <a href="mailto:greenfrog@hotmail.com">greenfrog@hotmail.com</a> )
Education experience	Bad grammar, typos,...
Publications, grants, memberships <b>in their context</b>	Short term employments

# How to tailor to different funders?

	US	EU
Purpose	Establishes your identity as a scientist, academic or researcher, and gives employers an in-depth look at your career	Demonstrates how you're qualified for the position you're seeking
Length	No predefined length, but 10 pages can be common	Rather shorter (up to 5 or 6 pages, depending on your career length)
Style	More formal and technical, can include technical details on the research projects	More reader friendly, also targeted towards HR experts
Content	No personal information (photo, gender, marital status...) No mention breaks	Personal information included Career breaks (e.g. due to parental leave, sabbatical, orientation phase) can be included and justified

# Short CV

- One page maximum: an 'elevator pitch' on paper
- **Targeted statements** instead of an extended list of every job / research/ teaching experience
- **Most relevant information** with your best accomplishments and targeted skills
- **Streamlining** is key – impress your readers



# Short CV example

<b>John Smith</b>	
<hr/> 123 Broadway City, State 12345 (000) 111-1111 or (111) 111-1112	
<b>OBJECTIVE</b>	A position in the field of computers with special interests in business applications programming, information processing, and management systems.
<b>EDUCATION</b>	<i>Bachelor of Science</i> , Interdisciplinary Science Rensselaer Polytechnic Institute, Troy, NY, expected December 1990 Concentration: Computer Science Minor: Management
<b>COMPUTER SKILLS</b>	<i>Languages &amp; Software:</i> COBOL, IFPS, Focus, Megacalc, Pascal, Modula2, C, APL, SNOBOL, FORTRAN, LISP, SPIRES, BASIC, VSPC Autotab, IBM 370 Assembler, Lotus 1-2-3. <i>Operating Systems:</i> MTS, TSO, Unix.
<b>EXPERIENCE</b>	<p><i>Business Applications Programmer</i> <span style="float: right;">Fall 1990</span> Allied-Signal Bendix Friction Materials Division, Financial Planning Department, Latham, NY</p> <ul style="list-style-type: none"> <li>• Developed four "user friendly" forecasting systems each of which produces 18 to 139 individual reports.</li> <li>• Developed or improved almost all IFPS programs used for financial reports.</li> </ul> <p><i>Research Programmer</i> <span style="float: right;">Summer 1990</span> Psychology Department, Rensselaer Polytechnic Institute</p> <ul style="list-style-type: none"> <li>• Performed computer aided statistical analysis of data.</li> </ul> <p><i>Assistant Manager</i> <span style="float: right;">Summers 1988-89</span> Thunder Restaurant, Canton, CT</p> <ul style="list-style-type: none"> <li>• Recognized need for, developed, and wrote employee training manual. Performed various duties including cooking, employee training, ordering, and inventory control.</li> </ul>
<b>COMMUNITY SERVICE</b>	Organized and directed the 1988 and 1989 Grand Marshall Week "Basketball Marathon." A 24 hour charity event to benefit the Troy Boys Club. Over 250 people participated each year.
<b>EXTRA-CURRICULAR ACTIVITIES</b>	Elected <i>House Manager</i> , Rho Phi Sorority Elected <i>Sports Chairman</i> Attended Krannet Leadership Conference Headed delegation to Rho Phi Congress Junior varsity basketball team Participant, seven intramural athletic teams





# Activity

- Use this example to write your own short CV.



# Mental health break

- You can strengthen your mental health and prepare for future challenges by vividly remembering positive moments of your past experience.

**A little exercise to remember your shining moment:  
Take a minute and share a 'shining moment' – or a moment that makes you  
smile – of your research/academic career so far.**

# MSCA IF example

## *Part B-2 Section 4 - CV of the experienced researcher*

The CV is intrinsic to the evaluation of the whole proposal and is assessed throughout the three evaluation criteria by the expert evaluators. Ensure that the information provided in Parts A and B is fully consistent. Always mention full dates (dd/mm/yyyy) in your CV.

The CV should be limited to a maximum of 5 pages and should include **the standard academic and research record**. Any research career gaps and/or unconventional paths should be clearly explained so that this can be fairly assessed by the independent evaluators. At a minimum, the CV should contain:

- a) the **name** of the researcher
- b) **professional experience** (in reverse chronological order, using **exact** dates)
- c) **education** (in reverse chronological order, using **exact** dates)

The CV should also include information on:

1. **Publications** in peer-reviewed scientific journals, peer-reviewed conference proceedings and/or monographs of their respective research fields, indicating also the number of citations (excluding self-citations) they have attracted.
2. Granted **patent(s)**.
3. **Research monographs, chapters** in collective volumes and any translations thereof.
4. **Invited presentations** to peer-reviewed, internationally established conferences and/or international advanced schools.
5. **Research expeditions** led by the experienced researcher.
6. **Organisation of International conferences** in your field(s) of research, including membership in the steering and/or programme committee.
7. Examples of **participation in industrial innovation**.
8. **Prizes and Awards**.
9. **Funding** received so far.
10. **Supervising and mentoring** activities.



## Your name, PhD

Updated: March 2018

### PERSONAL INFORMATION

Address  
Phone number (mobile)  
E-mail  
Citizenship  
Google Scholar profile

### EDUCATION<sup>1</sup>

**Doctorate (PhD): Physics and Mathematics – Condensed matter**  
Abbey Road State Technical University  
**Master's degree: Natural Science – Physics (with distinction)**  
Strawberry Fields State Pedagogical University  
**Bachelor's degree: Physics (with distinction)**  
Penny Lane State University

### ADDITIONAL TRAINING

**Master's degree: Organizational management (with distinction)**  
Xxx University  
**Bachelor's degree: Economics (with distinction)**  
xxx Technical University  
**Additional (to the Master's degree) qualification: Lecturer at Higher Education Institutions**  
Xxx University

### WORK EXPERIENCE

**Postdoctoral researcher**  
**Technion – Israel Institute of Technology (Haifa)**  
With some words on what you're doing there  
**Senior researcher**  
**National Research University of Information Technologies, Mechanics and Optics**  
Description  
**Group leader (development and academic affairs)**  
**Electro-Service Inc. (London)**  
Description  
**Manager of the IT department and Lecturer of informatics**  
**XXX State College of Economy and Engineering**  
Description  
**Docent**  
**XXX Technological Institute**  
Supervision of Bachelors' theses. Developing supplying teaching materials.

### CORE RESEARCH SKILLS

More than 10 years of research experience resulted in possession of skills, including the following:

- XXXX
- XXXX

### TEACHING AND SUPERVISION

#### 1. Teaching

**General Physics, Laboratory practicum and Seminars**  
Two semesters/year, undergraduate, up to 25 students per class, XYZ University  
ETC

ETC.

ETC.

### 2. Supervision

**Masters' theses (1): Major – Physics, laser optics**  
Subject, student, grade...  
**Bachelors' theses (6): Major – IT and Computers**  
Subjects/some details

### MAJOR COLLABORATIONS

Topic: State the overarching topic/s of the major collaborations

**Prof. John Lennon**  
Vavilov State Optical Institute, Saint Petersburg, Russia;  
Saint Petersburg National Research University of Information Technologies, Mechanics and Optics (ITMO University), Saint Petersburg, Russia; Ioffe Physical-Technical Institute, Russian Academy of Sciences, Saint Petersburg, Russia  
**Prof. Paul McCartney**  
LUNAM Université, Université d'Angers, Angers, France

Explain what you did / who (e.g. a publication) of this

### JOURNAL REFeree

**XYZ Letters A (Publisher: «Elsevier», Impact Factor: 1.772)**  
**ABC (Publisher: «World Scientific», Impact Factor: 0.617)**

### TRACK RECORD

#### 1. Bibliometric indicators

Publications: 27 (peer-reviewed articles excl. translated versions); Citations: 158; h-index: 7; i10-index: 4 (Google scholar database, 2018).

#### 2. Articles in peer reviewed journals (10 selected) [IF/citations]

1. Complete information  
2. Complete information

#### 3. Peer-reviewed and other conference proceedings (26 in total, 3 selected)

Title  
Conference

#### 4. Lectures (selected)

Title  
Where and when

Dr. XYZ

19.10.2015

### 5. Awards

**XYZ Grant (success rate of 3%; 15 000 Euro)** 2012  
**Student scholarship for excellence, 1% awarded (granted by the Ministry of Education and Science of XYZ)** 1997-2000

### 6. Contribution to externally funded projects

2014-2015

2013-2015

2016-2017

### 7. Selected scientific achievements<sup>2</sup>

- XYZ

### LANGUAGES

English Mother tongue  
German C2  
French B2

### FULL LIST OF ARTICLES IN PEER-REVIEWED JOURNALS

#### 1. Under review and in press

1. ~~XXXX~~

#### 2. Published

1.

2011

<sup>2</sup> See the references in the full list of peer-reviewed articles (page 5)

<sup>1</sup> Educational credentials assessment by Ministry of Education of Israel (2016), and World Education Services (2



# Biosketch example (Grant)

OMB No. 0925-0001 and 0925-0002 (Rev. 09/17 Approved Through 03/31/2020)

## BIOGRAPHICAL SKETCH

Provide the following information for the Senior/Key personnel and other significant contributors.  
Follow this format for each person. DO NOT EXCEED FIVE PAGES.

NAME: Hunt, Morgan Casey

eRA COMMONS USER NAME (credential, e.g., agency login): huntmc

POSITION TITLE: Associate Professor of Psychology

EDUCATION/TRAINING (Begin with baccalaureate or other initial professional education, such as nursing, include postdoctoral training and residency training if applicable. Add/delete rows as necessary.)

INSTITUTION AND LOCATION	DEGREE (if applicable)	Completion Date MM/YYYY	FIELD OF STUDY
University of California, Berkeley	B.S	05/1990	Psychology
University of Vermont	Ph.D.	05/1996	Experimental Psychology
University of California, Berkeley	Postdoctoral	08/1998	Public Health and Epidemiology

### A. Personal Statement

I have the expertise, leadership, training, expertise and motivation necessary to successfully carry out the proposed research project. I have a broad background in psychology, with specific training and expertise in ethnographic and survey research and secondary data analysis on psychological aspects of drug addiction. My research includes neuropsychological changes associated with addiction. As PI or co-Investigator on several university- and NIH-funded grants, I laid the groundwork for the proposed research by developing effective measures of disability, depression, and other psychosocial factors relevant to the aging substance abuser, and by establishing strong ties with community providers that will make it possible to recruit and track participants over time as documented in the following publications. In addition, I successfully administered the projects (e.g. staffing, research protections, budget), collaborated with other researchers, and produced several peer-reviewed publications from each project. As a result of these previous experiences, I am aware of the importance of frequent communication among project members and of constructing a realistic research plan, timeline, and budget. The current application builds logically on my prior work. During 2005-2006 my career was disrupted due to family obligations. However, upon returning to the field I immediately resumed my research projects and collaborations and successfully competed for NIH support.

- Merryle, R.J. & Hunt, M.C. (2004). Independent living, physical disability and substance abuse among the elderly. *Psychology and Aging*, 23(4), 10-22.
- Hunt, M.C., Jensen, J.L. & Crenshaw, W. (2007). Substance abuse and mental health among community-dwelling elderly. *International Journal of Geriatric Psychiatry*, 24(9), 1124-1135.
- Hunt, M.C., Wiechelt, S.A. & Merryle, R. (2008). Predicting the substance-abuse treatment needs of an aging population. *American Journal of Public Health*, 45(2), 236-245. PMID: PMC9162292 Hunt, M.C., Newlin, D.B. & Fishbein, D. (2009). Brain imaging in methamphetamine abusers across the life-span. *Gerontology*, 46(3), 122-145.

## B. Positions and Honors

### Positions and Employment

1998-2000	Fellow, Division of Intramural Research, National Institute of Drug Abuse, Bethesda, MD
2000-2002	Lecturer, Department of Psychology, Middlebury College, Middlebury, VT
2001-	Consultant, Coastal Psychological Services, San Francisco, CA
2002-2005	Assistant Professor, Department of Psychology, Washington University, St. Louis, MO
2007-	Associate Professor, Department of Psychology, Washington University, St. Louis, MO

### Other Experience and Professional Memberships

1995-	Member, American Psychological Association
1998-	Member, Gerontological Society of America
1998-	Member, American Geriatrics Society
2000-	Associate Editor, Psychology and Aging
2003-	Board of Advisors, Senior Services of Eastern Missouri
2003-05	NIH Peer Review Committee: Psychobiology of Aging, ad hoc reviewer
2007-11	NIH Risk, Adult Addictions Study Section, members

### Honors

2003	Outstanding Young Faculty Award, Washington University, St. Louis, MO
2004	Excellence in Teaching, Washington University, St. Louis, MO
2009	Award for Best in Interdisciplinary Ethnography, International Ethnographic Society

## C. Contribution to Science

- My early publications directly addressed the fact that substance abuse is often overlooked in older adults. However, because many older adults were raised during an era of increased drug and alcohol use, there are reasons to believe that this will become an increasing issue as the population ages. These publications found that older adults appear in a variety of primary care settings or seek mental health providers to deal with emerging addiction problems. These publications document this emerging problem but guide primary care providers and geriatric mental health providers to recognize symptoms, assess the nature of the problem and apply the necessary interventions. By providing evidence and simple clinical approaches, this body of work has changed the standards of care for addicted older adults and will continue to provide assistance in relevant medical settings well into the future. I served as the primary investigator or co-investigator in all of these studies.
  - Gryczynski, J., Shaft, B.M., Merryle, R., & Hunt, M.C. (2002). Community based participatory research with late-life addicts. *American Journal of Alcohol and Drug Abuse*, 15(3), 222-238.
  - Shaft, B.M., Hunt, M.C., Merryle, R., & Venturi, R. (2003). Policy implications of genetic transmission of alcohol and drug abuse in female nonusers. *International Journal of Drug Policy*, 30(5), 46-58.
  - Hunt, M.C., Marks, A.E., Shaft, B.M., Merryle, R., & Jensen, J.L. (2004). Early-life family and community characteristics and late-life substance abuse. *Journal of Applied Gerontology*, 28(2), 26-37.
  - Hunt, M.C., Marks, A.E., Venturi, R., Crenshaw, W. & Ratonian, A. (2007). Community-based intervention strategies for reducing alcohol and drug abuse in the elderly. *Addiction*, 104(9), 1436-1606. PMID: PMC9000292
- In addition to the contributions described above, with a team of collaborators, I directly documented the effectiveness of various intervention models for older substance abusers and demonstrated the importance of social support networks. These studies emphasized contextual factors in the etiology and maintenance of addictive disorders and the disruptive potential of networks in substance abuse treatment. This body of work also discusses the prevalence of alcohol, amphetamine, and opioid abuse in older adults and how networking approaches can be used to mitigate the effects of these disorders.
  - Hunt, M.C., Merryle, R. & Jensen, J.L. (2005). The effect of social support networks on morbidity among elderly substance abusers. *Journal of the American Geriatrics Society*, 57(4), 15-23.
  - Hunt, M.C., Pour, B., Marks, A.E., Merryle, R. & Jensen, J.L. (2005). Aging out of methadone treatment. *American Journal of Alcohol and Drug Abuse*, 15(6), 134-149.

- c. Merryle, R. & Hunt, M.C. (2007). Randomized clinical trial of cotinine in older nicotine addicts. *Age and Ageing*, 38(2), 9-23. PMID: PMC9002364
3. Methadone maintenance has been used to treat narcotics addicts for many years but I led research that has shown that over the long-term, those in methadone treatment view themselves negatively and they gradually begin to view treatment as an intrusion into normal life. Elderly narcotics users were shown in carefully constructed ethnographic studies to be especially responsive to tailored social support networks that allow them to eventually reduce their maintenance doses and move into other forms of therapy. These studies also demonstrate the policy and commercial implications associated with these findings.
- a. Hunt, M.C. & Jensen, J.L. (2003). Morbidity among elderly substance abusers. *Journal of the Geriatrics*, 60(4), 45-61.
  - b. Hunt, M.C. & Pour, B. (2004). Methadone treatment and personal assessment. *Journal Drug Abuse*, 45(5), 15-26.
  - c. Merryle, R. & Hunt, M.C. (2005). The use of various nicotine delivery systems by older nicotine addicts. *Journal of Ageing*, 54(1), 24-41. PMID: PMC9112304
  - d. Hunt, M.C., Jensen, J.L. & Merryle, R. (2008). *The aging addict: ethnographic profiles of the elderly drug user*. NY, NY: W. W. Norton & Company.

**Complete List of Published Work in MyBibliography:**

<http://www.ncbi.nlm.nih.gov/sites/myncbi/collections/public/1PgT7IEFIAJBtGMRDdWFmjWAO/?sort=ate&direction=ascending>

**D. Additional Information: Research Support and/or Scholastic Performance**

**Ongoing Research Support**

R01 DA942367 Hunt (PI) 09/01/08-08/31/16  
 Health trajectories and behavioral interventions among older substance abusers  
 The goal of this study is to compare the effects of two substance abuse interventions on health outcomes in an urban population of older opiate addicts.  
 Role: PI

R01 MH922731 Merryle (PI) 12/15/07-11/30/15  
 Physical disability, depression and substance abuse in the elderly  
 The goal of this study is to identify disability and depression trajectories and demographic factors associated with substance abuse in an independently-living elderly population.  
 Role: Co-Investigator

Faculty Resources Grant, Washington University 08/15/09-08/14/15  
 Opiate Addiction Database  
 The goal of this project is to create an integrated database of demographic, social and biomedical information for homeless opiate abusers in two urban Missouri locations, using a number of state and local data sources.  
 Role: PI

**Completed Research Support**

R21 AA998075 Hunt (PI) 01/01/11-12/31/13  
 Community-based intervention for alcohol abuse  
 The goal of this project was to assess a community-based strategy for reducing alcohol abuse among older individuals.  
 Role: PI

# Biosketch example (Fellowship)

OMB No. 0925-0001 and 0925-0002 (Rev. 09/17 Approved Through 03/31/2020)

## BIOGRAPHICAL SKETCH

Provide the following information for the Senior/key personnel and other significant contributors.  
Follow this format for each person. DO NOT EXCEED FIVE PAGES.

NAME: Robertson-Chang, Lailani

eRA COMMONS USER NAME (credential, e.g., agency login): RobertsonL

POSITION TITLE: Graduate Student Research Assistant

EDUCATION/TRAINING (Begin with baccalaureate or other initial professional education, such as nursing, include postdoctoral training and residency training if applicable) Add/delete rows as necessary.)

INSTITUTION AND LOCATION	DEGREE (if applicable)	START DATE MM/YYYY	END DATE MM/YYYY	FIELD OF STUDY
Swarthmore College	BA	08/2008	05/2012	Biology
UC San Diego	PHD	08/2012	05/2018	Molecular Biology

### A. Personal Statement

My long term research interests involve the development of a comprehensive understanding of key developmental pathways and how alterations in gene expression contribute to human disease. My academic training and research experience to date have provided me with an excellent background in molecular biology and microbiology. While in high school I was awarded an NIH Diversity Supplement award to work as a research technician for two summers in Dr. Indira Creative's lab at the University of Hawaii. As an undergraduate at Swarthmore College, I conducted research with Dr. Xavier Factor on the mechanisms of action of a new class of antibiotics. This resulted in a co-authorship publication, as well as an invitation to present a poster at the annual Antibiotica meeting in Denver, Colorado. For my graduate training at UC San Diego, I have moved into the fields of genetics and biochemistry by studying the regulation of transcription in yeast, under Dr. Tanti Auguri. Dr. Auguri is an internationally recognized leader in the field of yeast genetics and has an extensive record for training predoctoral and postdoctoral fellows. Along with giving me new conceptual and technical training, the proposed training plan outlines a set of career development activities and workshops – e.g. public speaking, literature analysis, biomedical ethics, and career options. For my initial project I am currently developing a novel protocol for the purification for components of large transcription complexes which I hope to submit as a first author publication in the next few months. As a native Hawaiian, I am the first in my family to graduate from college so I am excited to keep pushing forward with my education. Overall, I feel that my choice of sponsor, research project, and the training I will get from this fellowship will give me a solid foundation for my long-term goal to become an academic researcher.

1. Robertson-Chang L, Factor X. Testing the ability of antibiotic Gen Y to kill Gram-negative bacteria. Antibiotica annual meeting; 2011 September; Denver, CO.
2. Robertson-Chang L, Auguri T. A tandem affinity purification tag approach allows for isolation of interacting proteins in *Saccharomyces cerevisiae*. Yeast Genetics and Molecular Biology Meeting; 2013 September; Seattle, WA.



## B. Positions and Honors

### Positions and Employment

2007 - 2008	Lab Technician, University of Hawaii
2012 -	Graduate Student Research Assistant, UC San Diego

### Other Experience and Professional Memberships

2007 -	Member, Association for Women in Science
2009 -	Member, Sigma Xi

### Honors

2007 - 2008	Diversity Supplement, National Institutes of Health
2008	Scholarship, Daughters of Hawaii Society
2008 - 2012	Scholarship, National Merit Scholarship Program
2012	Paula F. Laufenberg award for best senior project in the Biology Department, Swarthmore College

## C. Contribution to Science

- High School Research:** I spent two summers doing research in the laboratory of Dr. Indira M. Creative at University of Hawaii, funded by a NIH Diversity Supplement award. Dr. Creative has developed several new anti-fungal drugs that might protect against skin infections. Over the course of two summers I set up in vitro cultures of skin cell lines and conducted a wide range of toxicity assays. We were excited to find that one of the new agents showed almost no toxicity, even at fairly high doses. Dr. Creative is now testing the drug in animals exposed to different types of fungal infections, including *Candida albicans*.
  - Footman B, Eisser JK, Robertson-Chang L, Creative IM. Testing XXH for toxicity in vitro. University of Hawaii Research Symposium; 2008 May; Manoa, HI.
- Undergraduate Research:** I was part of a project in the laboratory of Dr. Xavier Factor at Swarthmore College. Dr. Factor's laboratory studies the mechanisms of action of antibiotics. During my time in his lab I was looking at how a new antibiotic, Gen Y, is able to unravel bacterial DNA. My contributions to this work were included in a publication recently accepted in Cellular and Molecular Biology. The work was particularly exciting because it looks like the mechanism used by Factor Y might be completely novel, making it a potential candidate for treating patients infected with antibiotic resistant organisms. Dr. Factor was recently awarded a patent for this new drug.
  - Nieman PY, Robertson-Chang L, Factor X. Gen Y: a novel antibiotic with DNA unwinding abilities. Cellular and Molecular Biology. In press.
  - Robertson-Chang L, Factor X. Testing the ability of antibiotic Gen Y to kill Gram-negative bacteria. Antibiotics annual meeting; 2011 September; Denver, CO.
- Graduate Research:** My ongoing predoc research is focused on transcriptional gene regulation in *Saccharomyces cerevisiae*. I believe the results from my research will likely be highly relevant to human health as they will provide new details into the workings of complex biological systems, which will allow for further extrapolations into the development of certain diseases and their progression. I am currently developing a novel protocol for the purification of components of large transcription complexes which I hope to submit as a first author publication in the next few months.

- a. Robertson-Chang L, Auguri T. A tandem affinity purification tag approach allows for isolation of interacting proteins in *Saccharomyces cerevisiae*. Yeast Genetics and Molecular Biology Meeting; 2013 September, Seattle, WA.

**D. Additional Information: Research Support and/or Scholastic Performance**

**Scholastic Performance**

YEAR	COURSE TITLE	GRADE
SWARTHMORE COLLEGE		
2008	Cellular and Molecular Biology	A
2008	Foundations of Chemical Principles	A
2009	Organismal and Population Biology	B
2009	Omics	B
2008	First Year Seminar: Nation and Migration	A
2009	Statistics, Probability, and Reliability	A
2009	Calculus I	B
2009	General Physics I	B
2009	Introductory Chemistry	A
2009	Organic Chemistry	B
2010	American Literature	B
2010	General Physics II	B
2010	Organic Chemistry II	B
2010	Microbial Pathogenesis and the Immune Response	A
2010	Introduction to Cognitive Science	A
2010	Biological Chemistry	B
2011	Anthropology of Childhood and the Family	A
2011	Disease, Culture, and Society in the Modern World	A
2011	Human Genetics	A
2011	Senior Project	A
2011	Bioinformatics	B
2012	Cell Biology	A
2012	Physics in Modern Medicine	A
2012	Genomics and Systems Biology	A
2012	Senior Project	A
UC SAN DIEGO		
2012	Seminar in Genetics	P
2013	Statistics for the Life Sciences	P
2013	Ethics in Biological Research	CRE
2014	Seminar in Physiology and Behavior	P

Except for the scientific ethics course, UC San Diego graduate courses are graded P (pass) or F (fail). Passing is C plus or better. The scientific ethics course is graded CRE (credit) or NC (no credit). Students must attend at least seven of the eight presentation/discussion sessions for credit.



# Activity

- Restructure your CV
  - According to the MSCA template
  - According to the Biosketch template

What did you change, how did you change it, and why?



- <https://europass.cedefop.europa.eu>



Curriculum Vitae

**PERSONAL INFORMATION** **Edmond Walshe**

12 Strawberry Hill, Dublin 8 Eire/Ireland  
 +353 12341111 +353 12341112  
 ewalshe@hotmail.com  
 Yahoo! Messenger (YIM) edmond.walshe

Nationality Irish

**JOB APPLIED FOR** **Building electrician**

**WORK EXPERIENCE**

1996 - Present **Building electrician**  
 Walshe Electrical Ltd, 40 Harold's Cross Park, Harold's Cross, Dublin 6.  
 Senior Electrical Technician of a ten person team

**EDUCATION AND TRAINING**

September 1996 - September 1997 **Advanced Certificate Craft - Electrical Instrumentation**  
 FAS, Middle Abbey Street, Dublin 1

- comply with national building regulations, national electrical installation rules and with national legislation related to occupational health, safety and the environment.
- interpret electrical equipment manufacturers' specifications and drawings to determine correct installation, maintenance, test and repair procedures
- interpret project plans, specifications and drawings to determine the location, types and quantities of materials required to install electrical wiring systems, equipment, controls and protective devices
- plan the sequence of operations, select and use materials, hand and power tools and work techniques that are appropriate to a range of electrical installation and maintenance projects
- use test instruments to locate malfunctions in electrical and electromechanical systems and equipment
- work alone or as part of a team to ensure that project deadlines are met

**PERSONAL SKILLS**

Mother tongue(s) English

Other language(s)

	UNDERSTANDING		SPEAKING		WRITING
	Listening	Reading	Spoken interaction	Spoken production	
French	B1	B2	B1	B2	A2

Levels: A1/2: Basic user - B1/2: Independent user - C1/2: Proficient user  
 Common European Framework of Reference for Languages

**Communication skills** I have worked in various types of team projects from rewiring newly built estates to electrical maintenance of various corporate businesses.

**Organisational / managerial skills** I am a senior electrician which also involves organising teams to carry out various work projects.

**Job-related skills**

- knowledge of ETCI regulations governing temporary installations.
- much experience in installing motor control circuit wiring, relays, overload units, protective devices and push button indicators.

# Optional homework

- Prepare a short CV





# Closing the session

- Let's see if your biggest fears/worries have been addressed





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 08*

# BILAT USA 4.0 Bootcamp Playbook

**Timing, scheduling and processing**

# Guidance for the trainer 1/2

## **Preparation:**

- Group size 12-20
- Room with flexible seating

## **Material:** String to attach to the wall

- Camera to take photo of the drawings of the closing session
- Post-its

## **Documents:** Print-out 'failing forward'

## **Optional content:** Homework

## **Level of interactivity:** Medium

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<u>Introduction</u>	2	5
<u>Icebreaker</u>	1	10
<u>Strategy</u>	8	15
<u>Reality check</u>	1	20
<u>Mental health break</u>	1	5
<u>How to read statistics</u>	3	10
<u>CV of failure</u>	1	5
<u>Failing forward</u>	1	15
<u>Alternative career paths</u>	5	15
<u>Scenario planning</u>	1	10
<u>Optional homework</u>	1	5
<u>Closing</u>	1	10
<b>Total</b>	<b>26</b>	<b>125 (2 hours 5 min)</b>

## Failing Forwards

Note down your screw-ups and/or failures. What led to the? What have you learned?

SCREW-UP/ FAILURE	WEAKNESS	GROWTH OPPORTUNITY	INSIGHT



# Program today

- Timing, scheduling and processing
- Overview of submission process
- Expectation management





- Learning to handle throwbacks and to develop honest and productive scenarios for your personal future
- Trusting and relying on others
- Practicing time and career management, experience and knowledge sharing

# Icebreaker

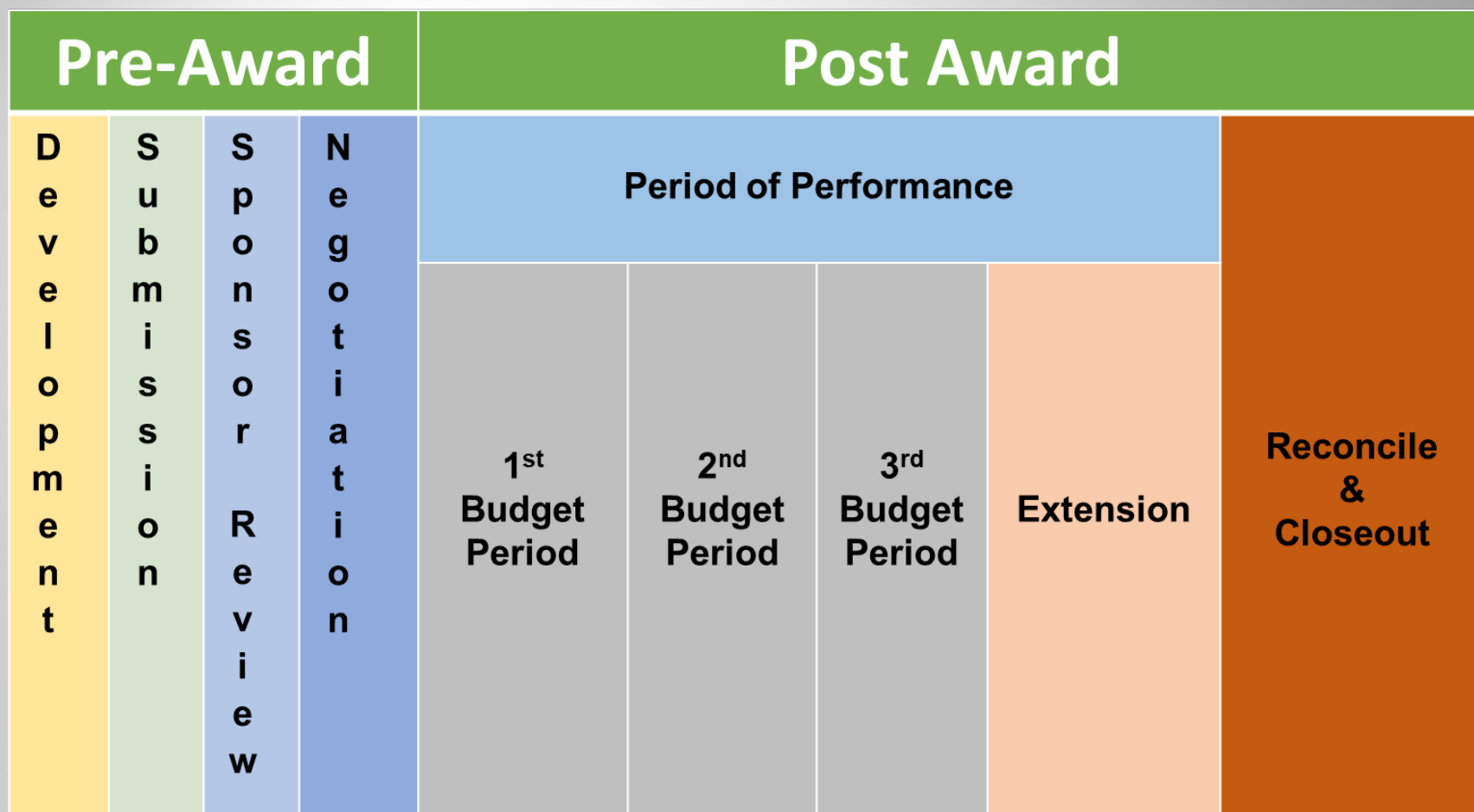
- Divide into 5 groups
- Define in your group what the word SUCCESS means (5 minutes, no Wikipedia checking)
- Write your definition down and hand it to the trainer



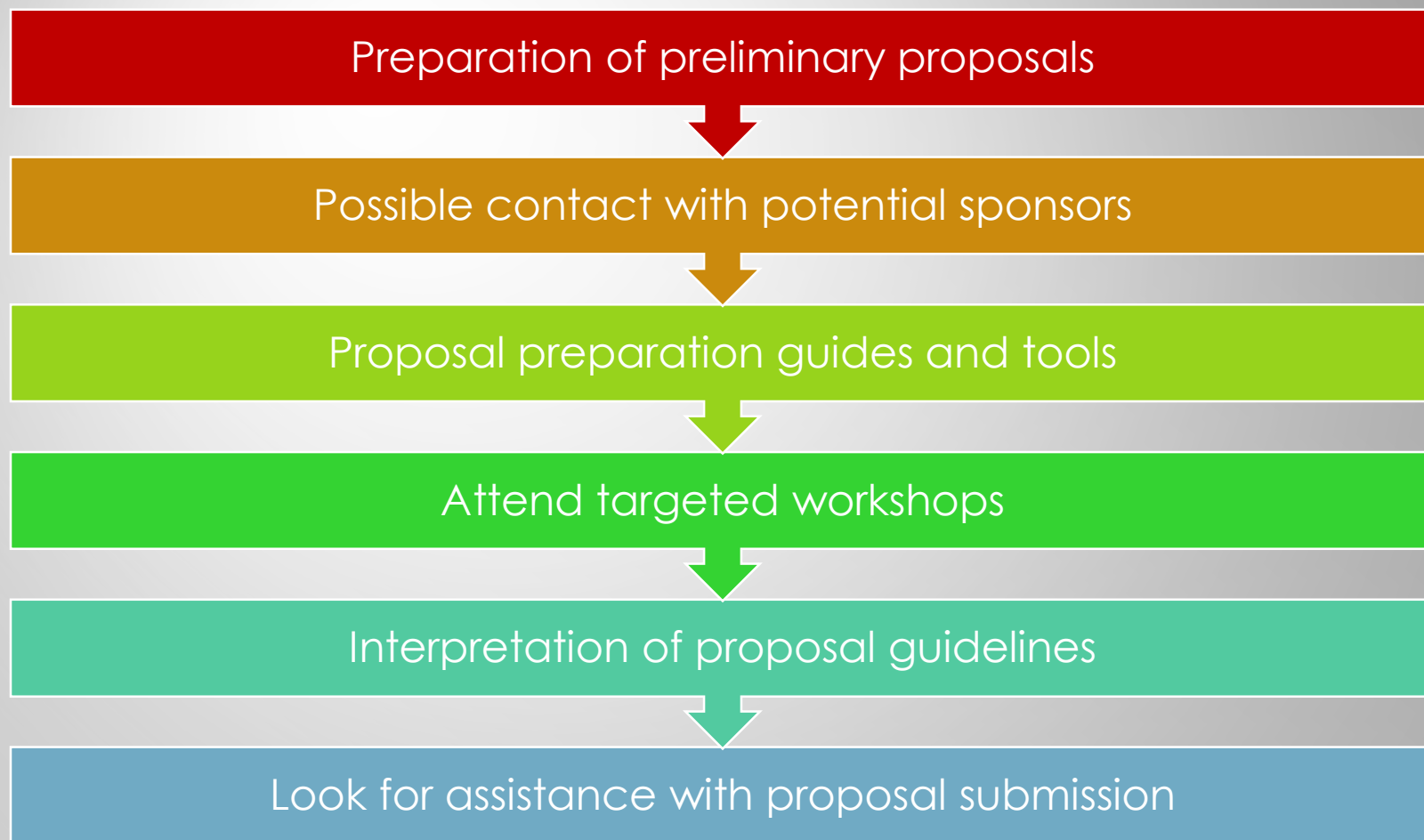
# Your strategy



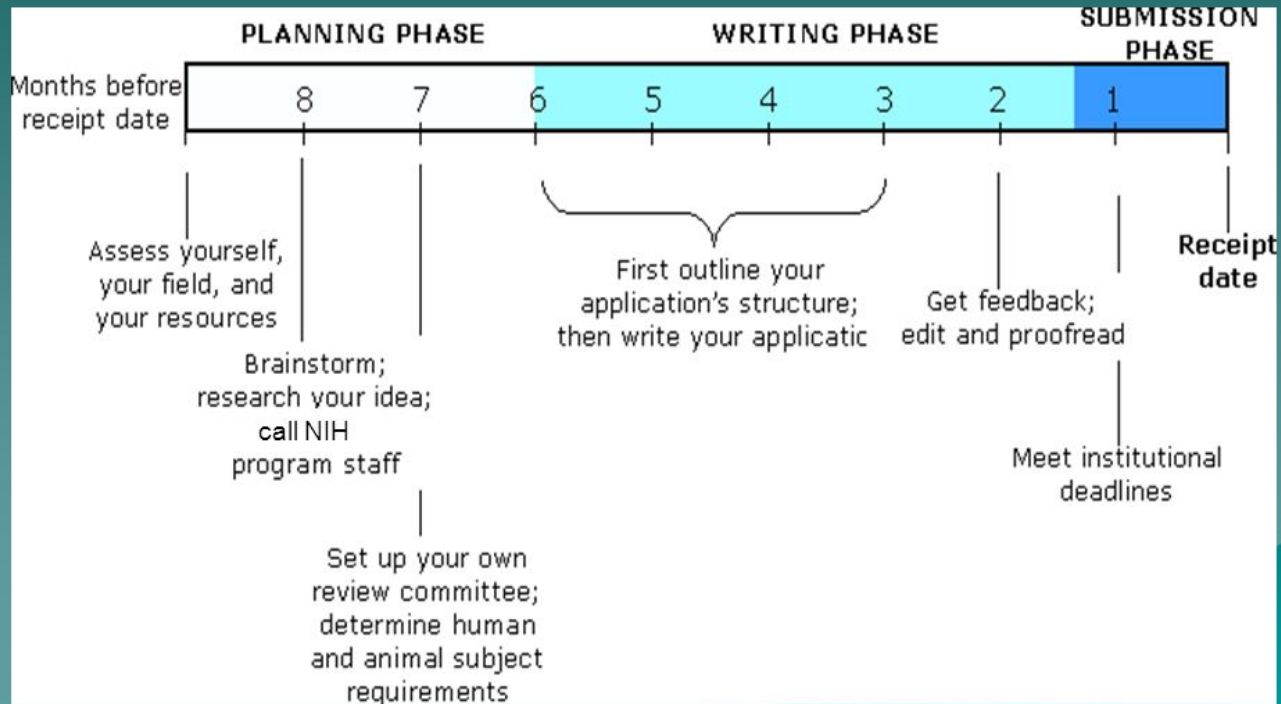
# Pre-award and post-award



# Timing and preparation



## Pre-Submission Planning Timeline



# Timing EU grants (example IF)



# Pre-award: cultivate relationships



13



# Where to get support?



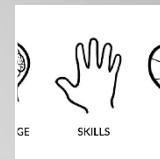
## Individual

- Your supervisor
- Your academic peers
- Your private environment



## Institutional

- Grants support offices
- Supervisor



## National /International

- National experts
- International experts

Personal contact

Documents, videos,  
trainings,....

# Specific sources

- EU Grants Office ETHZ [grantsaccess.ethz.ch](https://grantsaccess.ethz.ch)
- Eursearch [www.euresearch.ch](http://www.euresearch.ch)
- Swisscore [www.swisscore.org](http://www.swisscore.org)
  
- Office for sponsored programs Harvard  
<https://osp.finance.harvard.edu>
- Berkeley Research Development Office  
<https://vcresearch.berkeley.edu/brdo/welcome>
- Helpdesk of NIH  
<https://grants.nih.gov/support/index.html>

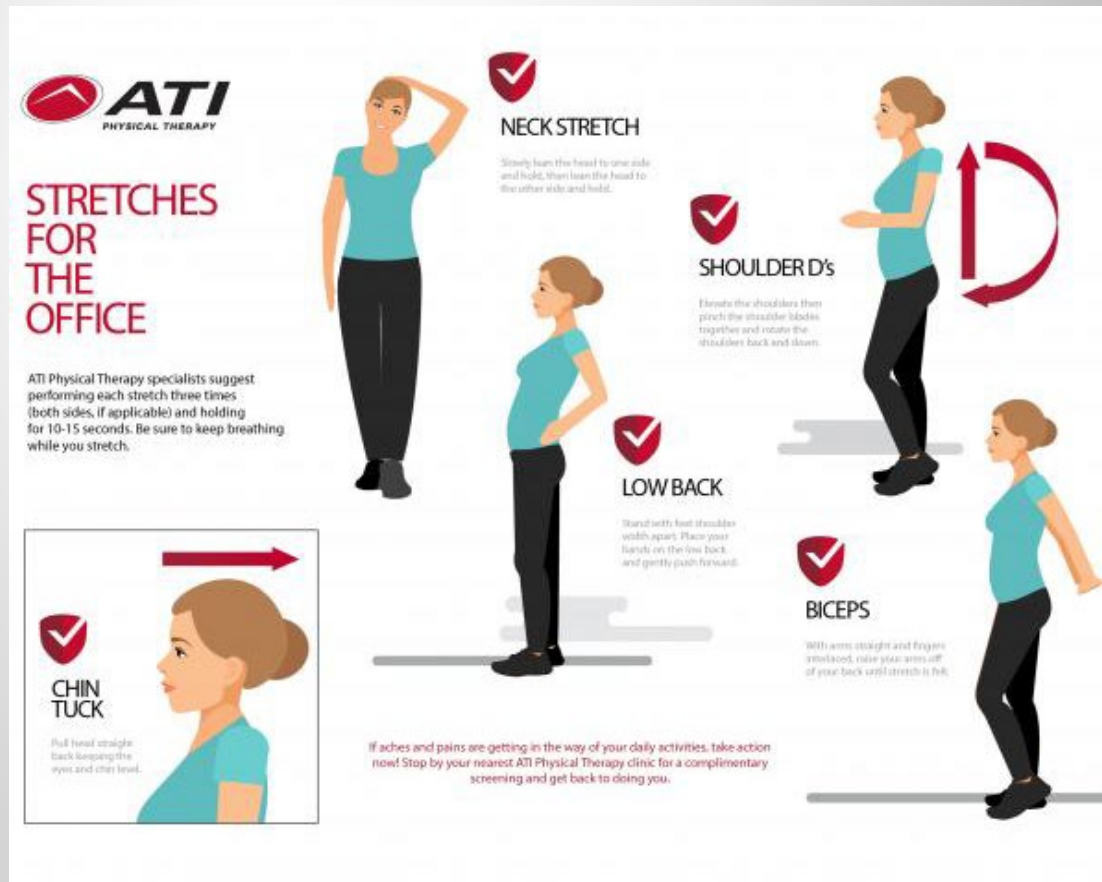
# Reality check

- Build two groups
- **First step:** Which steps do you take to submit a proposal? Write on Post-its
- **Second step:** Sort the Post-its on the timeline in the best order: What to do when? Take into account your daily life.
- **Third step:** For which step will you need which external support? (And define which support and when to contact them?)
- **Fourth step:** How realistic is your planning (consider also how your environment will react – family, colleagues,...)?
- What is your **plan B**?
- Distinguish between factors you can **influence**, and those which you cannot influence.

Present your timeline to the other group and discuss.

# Mental health break

- Muscles tense up when we feel stressed. If we stretch the muscles, it can help to reduce stress and calm the mind.



**Choose an exercise (or two) and stretch!**

# How to read a statistic?

- You want to know how high your chances of success are?
- Typically these success rates are communicated by the funding bodies or related stakeholders
- Usually the **budget is fixed**, and the success rate depends on the **number of competitors**, the **quality** of their proposals, and the **available budget**
- The rates **can vary from call to call** and may depend on a number of socio-economical factors as well (e.g. surge in submitted applications after the economical crises in the EU in 2008 and a subsequent funding shortening on a national basis in Spain/Portugal/Italy). **-you cannot influence these** factors
- What you can influence is the preparation of your own grant application

# Ranking lists

- **«Main list»** = retained for funding
- **«Reserve list»** = may or may not be funded. Patience is a virtue...
- **«Rejected»** = will not be funded in this call round. Check whether a resubmission in the next call cycle is possible, and under which conditions (Are you still eligible to apply? Would your supervisor/research partners still be on board?)

# Average success rates

- **Marie Skłodowska-Curie Individual Fellowships 2018:** 14.5%

[https://ec.europa.eu/research/mariecurieactions/msca-numbers\\_en](https://ec.europa.eu/research/mariecurieactions/msca-numbers_en)

- **Swiss national science foundation Ambizione Grant 2018:** 31 %

[http://www.snf.ch/en/theSNSF/profile/facts\\_figures/statistics/Pages/default.aspx](http://www.snf.ch/en/theSNSF/profile/facts_figures/statistics/Pages/default.aspx)

- **NIH Individual postdoctoral fellowships (F32) 2018:** 27.5%

<https://report.nih.gov/nihdatabook/category/10>

- **NSF: Overall funding rate 2018:** 23%

<https://www.nsf.gov/pubs/2018/nsf18021/nsf18021.pdf>

# What does success mean, and failure?

- CV of failure by Johannes Haushofer

**JOHANNES HAUSHOFER**  
**CV OF FAILURES**

Most of what I try fails, but these failures are often invisible, while the successes are visible. I have noticed that this sometimes gives others the impression that most things work out for me. As a result, they are more likely to attribute their own failures to themselves, rather than the fact that the world is stochastic, applications are crapsshots, and selection committees and referees have bad days. This CV of Failures is an attempt to balance the record and provide some perspective.

**This idea is not mine**, but due to a wonderful article in *Nature* by **Melanie I. Stefan**, who is a Lecturer in the School of Biomedical Sciences at the University of Edinburgh. You can find her original article [here](#), her website [here](#), her publications [here](#), and follow her on Twitter under [@MelanieIStefan](#).

**I am also not the first academic to post their CV of failures.** Earlier examples are [here](#), [here](#), [here](#), and [here](#).

This CV is unlikely to be complete – it was written from memory and probably omits a lot of stuff. So if it's shorter than yours, it's likely because you have better memory, or because you're better at trying things than me.

---

**Degree programs I did not get into**

---

2008    PhD Program in Economics, Stockholm School of Economics

2003    Graduate Course in Medicine, Cambridge University  
 Graduate Course in Medicine, UCL  
 PhD Program in Psychology, Harvard University  
 PhD Program in Neuroscience and Psychology, Stanford University

1999    BA in International Relations, London School of Economics

---

**Academic positions and fellowships I did not get**

---

2014    Harvard Kennedy School Assistant Professorship  
 UC Berkeley Agricultural and Resource Economics Assistant Professorship  
 MIT Brain & Cognitive Sciences Assistant Professorship  
 This list is restricted to institutions where I had campus visits; the list of places where I had first-round interviews but wasn't invited for a campus visit, and where I wasn't invited to interview in the first place, is much longer and I will write it up when I get a chance. The list also shrouds the fact that I didn't apply to most of the top economics departments (Harvard, MIT, Yale, Stanford, Princeton, Chicago, Berkeley, LSE) because one of my advisors felt they could not write a strong letter for them.

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**Awards and scholarships I did not get**

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2011    Swiss Network for International Studies PhD Award

2010    Society of Fellows, Harvard University  
 Society in Science Scholarship  
 University of Zurich Research Scholarship

1

2009    Human Frontiers Fellowship

2007    Mind-Brain-Behavior Award (Harvard University)

2006    Mind-Brain-Behavior Award (Harvard University)

2003    Fulbright Scholarship  
 Haniel Scholarship (German National Merit Foundation)

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**Paper rejections from academic journals**

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2016    QJE, Experimental Economics

2015    AER x 2

2013    PNAS, Experimental Economics, Science, Neuron

2009    AER

2008    Science, Neuron, Nature Neuroscience, Journal of Neuroscience, Journal of Vision

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**Research funding I did not get**

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2016    MQ Mental Health Research Grant

2015    Russell Sage Research Grant (two separate ones)

2013    National Science Foundation Research Grant

2010    University of Zurich Research Grant  
 Swiss National Science Foundation Research Grant

2009    Financial Innovation Grant  
 International Labor Organization Research Grant  
 3ie Research Grant

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**Meta-Failures**

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2016    This darn CV of Failures has received way more attention than my entire body of academic work







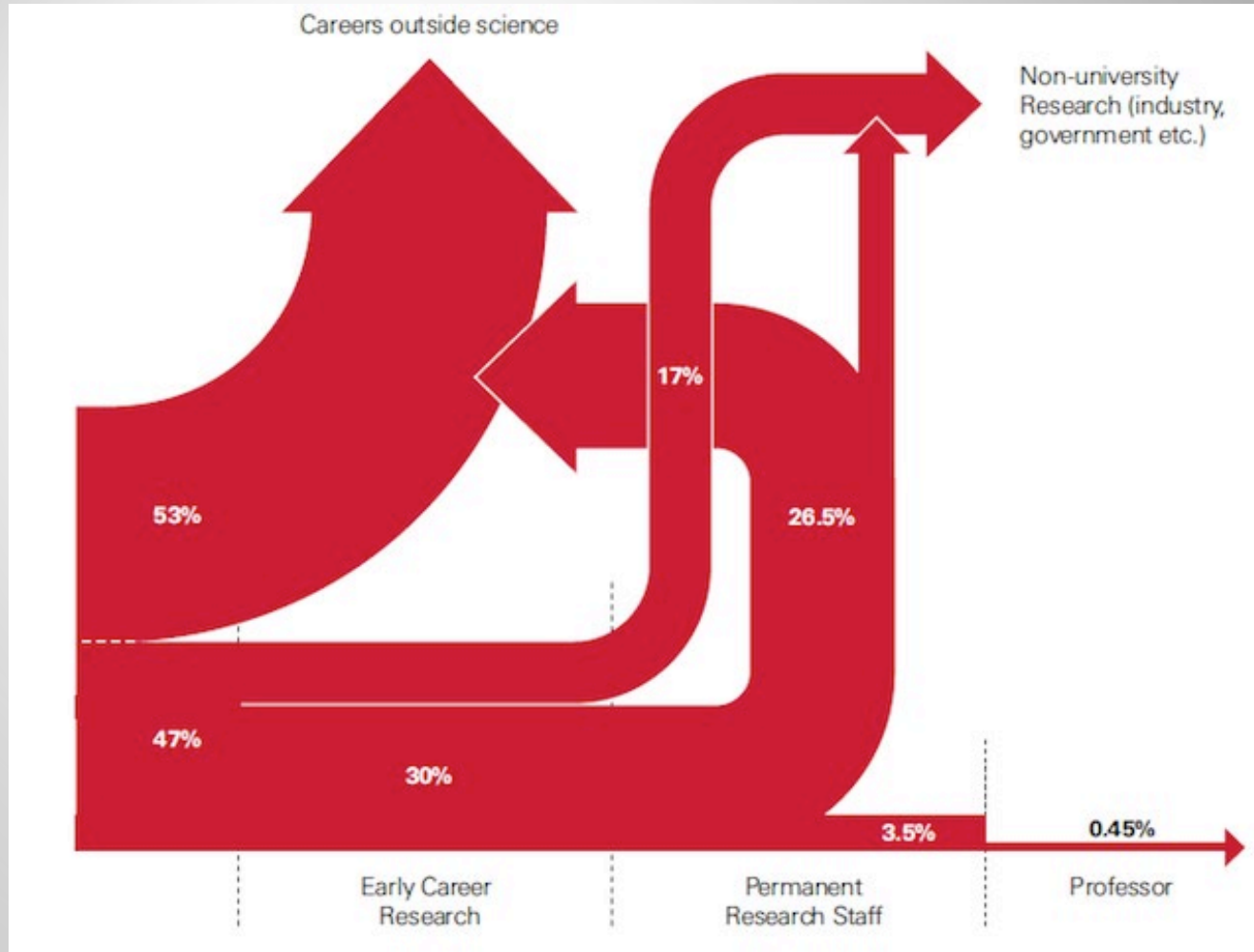
# Failing forward

- Fill in the table (10 minutes) and discuss with your neighbor (5 minutes)

Screw-up/Failure	Weakness	Growth Opportunity	Insight



# The new normal: step outside academia



[https://royalsociety.org/~media/Royal\\_Society\\_Content/policy/publications/2010/4294970126.pdf](https://royalsociety.org/~media/Royal_Society_Content/policy/publications/2010/4294970126.pdf)

# Alternative career paths

- An academic career step teaches you transferable skill sets which are useful in more than one profession, e.g. methodical thinking, language skills, analytical processes, team leadership, thinking outside the box, intercultural knowledge, writing expertise...
- Academia and 'Industry' are not exclusive, and there are many bridges in between them: a PhD in collaboration with industry, an postdoctoral position with a mentor in a company, a research lab lead in a company...

# Academia and industry

## CURRENT RESEARCHERS

We surveyed current 1,004 researchers based in over 47 European countries and this is what we found out:

**78%**  
of current  
researchers want a  
long term academic  
future

**57%**  
would consider  
working outside  
of academia

Of these:

- 70% would still want to do research
- 37% would work in research or grant management
- 35% would work in science/policy or management

However, 65% believe it would be difficult to get a non-research job in business.

Less than 30% believe that businesses value what researchers offer working in non-research roles.

Euraxind 2018 <https://www.vitae.ac.uk/researcher-careers/euraxess-uk-career-development-centre/euraxind/vitae-intersectoral-mobility-web.pdf/view>

# Looking back on academia

## Top reasons for leaving academia:

- Better long-term employment prospects
- More job security, not short term contracts
- Better work/life balance

## Most helpful to supporting the transition beyond academia:

- Personal motivation/confidence/determination (73%)
- Flexibility/adaptability (69%)
- Training in transferable skills/competencies (26%)
- Guidance from careers advisers etc. (11%)

**In their current job 84% said they were satisfied. Only 6% would consider returning to academia.**

**Researchers are still using their research skills. We asked what they do now:**

- 43% conduct research
- 43% use detailed knowledge from their specialism
- 68% evaluate/understand others' research
- 75% draw on experience/competencies developed during HE research

# What are your options? Examples

Academia – Research staff:  
Teaching/lecturing staff  
Postdoc position  
Junior researcher  
Research fellow

Academia – Non-Research Staff:  
Research strategies  
EU officer/director of Research  
Grant officer  
Administrator

NGOs:  
Lobbyist  
spokesperson  
Campaign manager

Business Sectors: Senior Manager  
Pharmaceutical professional  
Business professional  
Statistical professional  
Scientific editor/writer  
Project manager  
Knowledge broker  
Team leader

Higher Education:  
Teaching Staff

Governmental sector:  
Policy officer  
Research council  
Research manager

Consultancies (big or small):  
Environmental protection  
Management  
Finances  
Journalist  
Grant writing

# Scenario planning

- What could be an **alternative career option (non-academic)** for you?
- Where do I want to be in 10 years?
- Where do I want to be?
- Why do I want to be there?
- How do I get there?
- What do I need to do to get there?
  
- Note these points down on the sheet handed to you.

# Optional homework

- Chose one of your alternative career goals and reflect:
- What is the next step I should take to reach this goal?
- Until when should I take this step?
- What do I need to take this step?
- What obstacle could I have to face when taking this step?
- How could I get around/over this obstacle?





# Closing the session

- Let's have a look again at your definitions of 'success' - do you see it differently now?





Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 09*

# BILAT USA 4.0 Bootcamp Playbook

## Facts and figures

# Guidance for the trainer 1/2

## Preparation:

- Group size 12-20
- Room with flexible seating
- Check the video with sound for the TED-talk

**Material:** PEST analysis worksheet print-out

[https://www.mindtools.com/pages/article/newTMC\\_09.htm](https://www.mindtools.com/pages/article/newTMC_09.htm)

- **Documents:** -
- **Optional content:** Homework
- **Level of interactivity:** Medium

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<a href="#">Introduction</a>	2	5
<a href="#">Icebreaker</a>	1	10
<a href="#">Funders' backgrounds</a>	2	5
<a href="#">PEST-analysis</a>	2	20
<a href="#">Mental health break</a>	1	10
<a href="#">Budget exercise</a>	1	15
<a href="#">Budget explanation</a>	6	10
<a href="#">Partner search tools and tips</a>	8	20
<a href="#">Optional homework</a>	1	5
<a href="#">Closing TED talk</a>	1	15
<b>Total</b>	<b>25</b>	<b>115 (1 hour 55 min)</b>

# Program today

- Developing the “big picture”
- Budgeting for your research
- How to build partnerships

- Realistic estimation of the status quo (scientifically as well as culturally)
- Building your community: networking and maintaining networks that can offer advice and serve as a soundboard with your own challenges
- “Give a little, gain a lot”

# Icebreaker

- Speed dating: Meet three of your colleagues for 2 minutes.
- Write a tweet about your colleague on a Post-it.
- Vice-versa.
- Stick all Post-its to the wall.

Let's guess which tweet refers to whom!

# Political/scientific interests of the funder

- Ask yourself: Why should the funding body's money go to my project?
- ...because your project is in line with their goals. These might be politically motivated, socio-economically,...



# Where to find this information?

- Read the work program of the respective action
- Research funding announcements
- Any related background document
- Contact your local/regional/national experts
- Contact – if known – evaluators

# PEST analysis for current research project

- Split in 3 groups
- Each group picks one research idea
- Discuss and fill in the PEST work sheet / flipchart
- Present it to the plenum

# PEST Analysis

## PEST Analysis Worksheet

- For instructions on PEST Analysis, visit [www.mindtools.com/rs/PEST](http://www.mindtools.com/rs/PEST).

	Factor	Opportunity	Threat
Political			
Economic			
Socio-Cultural			
Technological			

© Copyright [Mind Tools Ltd](http://www.mindtools.com), 2006-2015.

Please feel free to copy this sheet for your own use and to share with friends, co-workers or team members, just as long as you do not change it in any way.

# Mental health break

- Try an app! (for example) Headspace

<https://www.headspace.com/meditation-101/what-is-meditation>

WHAT IS MEDITATION?

TROUBLE MEDITATING?

FAQ

## What is meditation?

Meditation isn't about becoming a different person, a new person, or even a better person. It's about training in awareness and getting a healthy sense of perspective. You're not trying to turn off your thoughts or feelings. You're learning to observe them without judgment. And eventually, you may start to better understand them as well.



# How to make a simple budget

- Make a list of everything that you plan to do in the project, and who is going to do it
  - Estimate the cost of each item
  - Put it in a spreadsheet
  - Justify it
- The more details the better!

# The budget for a project



# EU H2020 rules

- **Direct costs** are all those eligible costs that can be attributed directly to the project and are identified by the beneficiary as such, in accordance with its accounting principles and its usual internal rules. The following is a non-exhaustive list of direct eligible costs in EU projects:
- The cost of personnel assigned to the project (temporary or permanent, full-time or part-time).
- Travel costs and related subsistence allowances for people taking part in the project (are eligible if they are in line with the beneficiary's usual practices on travel).
- The purchase cost of durable equipment (in accordance to the depreciation system of each beneficiary).
- The costs of consumables, materials and supplies provided they are identifiable and assigned to the project.
- Cost for subcontracting, when it is indicated in the Description of Action.

# EU H2020 rules

- **Indirect costs** (overheads) are all those eligible costs that cannot be identified and calculated by the beneficiary as being directly attributed to each project.
- They comprise costs connected with **infrastructures** and the general operation of the organizations
  - Examples: **hiring or depreciation of buildings and plant**
  - **Water/gas/electricity**
  - **Maintenance**
  - **Insurance**
  - **Supplies and petty office equipment**
  - Costs connected with horizontal services such as administrative and financial **management, human resources, training, legal advice, documentation**, etc.
- In H2020, the indirect costs are calculated on the basis of a 25% flat-rate of the total direct eligible costs, excluding direct eligible costs for subcontracting and financial support to third parties.



# US definition of direct costs

- **Direct costs** can be identified specifically with a particular sponsored project, an instructional activity, or any other institutional activity; or can be directly assigned to such activities relatively easily with a high degree of accuracy
- **Examples:**
  - Salary of researcher
  - Laboratory supplies purchased for project
  - Technician
  - Associated fringe benefits costs on salaries and wages

# US definition of indirect costs (F&A)

Costs that are incurred for common or joint objectives, and, therefore, **cannot be identified readily and specifically with a particular sponsored project**, an instructional activity, or any other institutional activity

**Examples** of F&A (facilities and administrative) Recovery:

- Salary of department administrator
- Building utility and maintenance costs
- President, Provost, CFOs offices and Sponsored Research offices

# Allowable/eligible costs

- Before you spend the money, double-check: **Are there any budget restrictions?**
- **Eligible costs must be:**
  - Reasonable:** A prudent business person would have purchased this item and paid this price
  - Allocable:** It can be assigned to the activity on some reasonable basis
  - Consistently Treated:** Like costs must be treated the same in like circumstances, as either direct or indirect costs
  - Conform to:** the regulations of the funding body

# Tools to find partners

- Activate your (and your supervisor's) networks
- Attend conferences, network
- Identify authors of papers and contact them
- Use partner search tools such as (see next slides) or brokerage events for researchers on specific topics
- Search for existing collaborations in databases, e.g. via
  - Grant Number
  - Project Title
  - PI Name, e-mail, title
  - Abstract
  - Thesaurus terms
  - Grant start and end dates, etc

# Contacts, relations, networks, partnerships

- **Contact:** a person you meet
- **Relation:** a link to the person you meet
- **Network:** a cluster of inter-linked people
- **Partnerships:** a contact built up to reach a specific goal
  
- Partnerships often stem from networks, but can also be established outside of the network

# How to approach partners

- Ask yourself in preparation: With whom do you **share your research results**, and how?
- Be **clear about what you want to do** – when – in which form – and what your partners can/should do (e.g.: You want to carry out a project in H2020 in the next year and need a partner organization with the expertise of testing a certain methodology. Can this be a company or a university? Can it be anywhere in the world or does it have to be Europe? Etc.)
- **Start small:** Attend in-house networking events, stay a little longer at a conference dinner, join a LinkedIn group on your research topic...

# Networking tips

- Prepare your **elevator pitch**, but **also listen carefully** to what your partner needs and expects from you
- **Communicate clearly, and regularly** (during partner search, but also once you have found your research partners)
- Have your **business cards** ready
- Be present on **electronic networks** with an up-to-date CV (LinkedIn, Xing,...)
- No need to reinvent the wheel: there are **research support** services which also support research partner searches
- Check out **Alumni networks**, information events, conferences,...
- Take into account **cultural differences**.
- Follow-up on personal meetings (LinkedIn contact with a message, email, phone call,...)

# Networking: special edition for introverts

- Not networking – but *relationship building*
- Focus not on quantity but on the quality of relationships you build up
- Ask questions and listen
- Listen to what they're not saying – and what's between the lines
- Follow-up one on one / electronically



# European cross disciplinary platforms

- **EC platform:** <https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/how-to-participate/partner-search2>. Ideal-ist Partner Search
- **EEN:** Enterprise Europe Network  
<http://een.ec.europa.eu/services/going-international>
- **Innovation Place** – Find partners for research and innovation projects <https://www.innovationplace.eu/find-partners-research-projects>
- **LTER** European Long-Term Ecosystem Research Network  
<http://www.lter-europe.net/find-sites-and-or-people>

# European thematic platforms

- **IDEALIST:** <http://www.ideal-ist.eu/partner-search/pssearch>  
(ICT related)
- **NMP:** Partner Search for Nanoscience and Nanotechnologies, Materials and New Production Technologies (NMP): <https://www.nmp-partnersearch.eu/index.php>
- **Health:** Fit for Health 2.0 – Partner search  
<http://www.fitforhealth.eu/user?ReturnUrl=http%3a%2f%2fm.fitforhealth.eu%2fcommon%2fcontactshome.asp>
- **IMI** Innovative Medicines Initiative Partner Search Tool  
<https://cloud.imi.europa.eu/web/eimi-pst>
- **SSH:** NET4SOCIETY – Partner Search Support  
<http://www.net4society.eu/public/pss.php>

# US partner search tools

- **Grant Forward:** <http://www.grantforward.com>
- **SciVal Funding:** <http://www.info.scival.com/>
- **Foundation Directory Online:** <http://fconline.foundationcenter.org/>
- **infoEdSPINFundingOpportunities:** <http://infoedglobal.com/solutions/grants-contracts/spin-funding->
- **IRIS Expertise Service:** <http://iris.library.uiuc.edu/~iris/expertise/>
- **IRIS Database:** <http://iris.library.uiuc.edu/~iris/search.html>
- **Community of Science – Expertise:** <http://expertise.cos.com/>
- **Community of Science - Funding Opportunities:** <http://fundingopps2.cos.com/>
- **RePORTER (Research Portfolio Online Reporting Tool Expenditures and Result):** <http://projectreporter.nih.gov/reporter.cfm>
- **NSF Award Search:** <http://www.nsf.gov/awardsearch/>

# Optional homework

Define what kind of research partner you need, where to look for them, and how to approach them.

Provide a list of up to three names of potential research networking occasions for your future projects. Attention: NOT your current colleagues!

# Closing the session: TED Talk on 'How to network'



Successful Networking the ultimate guide Christopher Barrat TEDxAmRingSalon



Bilateral Coordination for the Enhancement and  
Development of S&T Partnerships between the  
European Union and the United States of America

*Building block 10*

# BILAT USA 4.0 Bootcamp Playbook

**Bringing it all together**

# Guidance for the trainer 1/2

## **Preparation:**

- Group size 12-20
- Room with flexible seating
- Photo of the closing exercise of the first session
- Postcards with postage (one per participant)
- Whiteboard with titles of sessions 1-9 / posters on the wall

## **Material:** Post-its

- Postcards

## **Documents:** -

## **Optional content:-**

## **Level of interactivity:** Very high

# Guidance for the trainer 2/2

Activity	Number of slides	Approximate time (in minutes)
<u>Introduction</u>	2	5
<u>Icebreaker</u>	1	10
<u>Summary Exercise</u>	1	15
<u>Discussion</u>	1	20
<u>Mental health break</u>	1	10
<u>Looking back: Career plans BB01</u>	1	10
<u>Moving forward</u>	1	15
<u>Toolkit material</u>	1	10
<u>Closing</u>	1	10
<b>Total</b>	<b>10</b>	<b>105 (1 hour 45 min)</b>



# Program today

- Summary of topics covered
- Key take-aways
- Introduction of Toolkit materials and additional resources
- Closing remarks/discussion



- Moving forward
- Theory into practice: strategies on how to live the lessons-learned on a daily basis
- How to plan check-ins, how to create your own deadlines

# Pick your favorite icebreaker

...and vote

- Constellation / Line up
- 'I am the only one who...'
- Shake hands
- Whodunnit?
- Define 'success'
- Speed dating with Tweets

# Summary of topics covered

- Write your five key take-away messages of the whole course on the cards
- Stick them to the whiteboard

# Key take-aways

- Our main take-aways are...  
(discussion/summary by trainer)

Which questions remain?

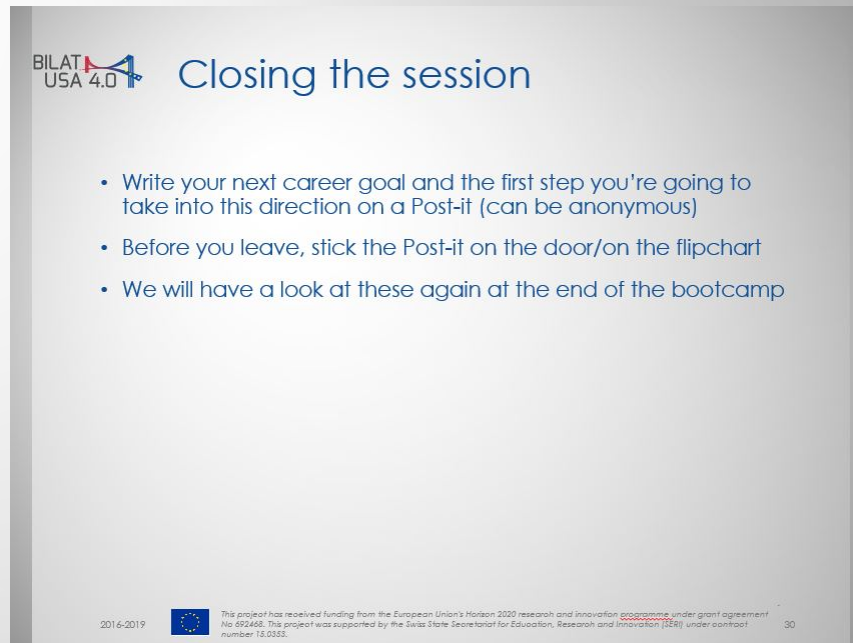
What do you find most challenging?

# Mental health break

- Pick your favorite mental health break and vote:
- 4-7-8 breathing
- Stan and Ollie
- Favorite activity
- Joke telling
- Brain food
- 10 seconds with nature
- Your shining moment
- Stretching
- Headspace (apps)


# Remember?

- Our closing exercise at the end of the first session had this outcome (see whiteboard)



BILAT USA 4.0 Closing the session

- Write your next career goal and the first step you're going to take into this direction on a Post-it (can be anonymous)
- Before you leave, stick the Post-it on the door/on the flipchart
- We will have a look at these again at the end of the bootcamp

2016-2019  This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 692468. This project was supported by the Swiss State Secretariat for Education, Research and Innovation (SERI) under contract number 15.0353. 30

- If you leave the room after the session, what will have changed in your career planning, in your preparation for a next grant, in your CV preparation?

# Moving forward: and now?

- State a specific goal/ to-do for
  - the next month
  - the next half year
  - the next year
- Place these on the timeline

Are these goals realistic?



# Toolkit materials

- Vitae career planner
- Personal journey maps
- CV templates
- PEST analysis tool
- Mental health support tools
- Failing forward outline

# Closing the session and closing the training

Commitment to yourself: Pick a postcard, write your one-month-goal and your address on it – you'll receive it in one month!

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