## Proposal Part B Template

**DOCUMENT 1**

**START PAGE**

MARIE SkŁodowska-CURIE ACTIONS

**Individual Fellowships (IF)**

**Call:** **H2020-MSCA-IF-2016**

PART B

“PROPOSAL ACRONYM”

**KU Leuven commented template**

The information and advice in GREEN has been added by the KU Leuven Research Support Team and is intended to assist in writing a successful proposal.

**This proposal is to be evaluated as:**

**[Standard EF] [CAR] [RI] [SE] [GF]**

**[Delete as appropriate]**

Part B - Page X of Y **TABLE OF CONTENTS**

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

***DOCUMENT 1 (13-PAGE LIMIT APPLIED)***

**START PAGE (1 page)**

**LIST OF PARTICIPATING ORGANISATIONS**

**Start page count (MAX 10 PAGES SECTIONS 1-3)**

**1. EXCELLENCE** recommended +/- 5 pages

**2. IMPACT** recommended +/- 1-1.5 pages

**3. QUALITY AND EFFICIENCY OF THE IMPLEMENTATION** recommended 3-4 pages

**STOP page count (MAX 10 PAGES SECTIONS 1-3)**

***DOCUMENT 2 (NO OVERALL PAGE LIMIT APPLIED)***

**4. CV of the experienced researcher**

**5. Capacities of the PARTICIPATING ORGANISATIONS**

**6. Ethical aspects**

**7. Letter of commitment of PARTNER ORGANISATION (GF only)**

*Please note that:*

* *Applicants must ensure that document 1 does not exceed the total page limit of 13 pages. The Start Page must consist of 1 whole page. The Table of Contents must consist of 1 whole page. The List of Participating Organisations must consist of 1 whole page. Section 1 must start on page 4 of the document. Expert evaluators will be instructed to disregard any excess pages above the 10 page limit. Such excess pages will be watermarked.*

Part 1-3 should be limited to 10 pages, part 4 should be limited to 5 pages. We strongly recommend that you do not exceed these page limits and the instructions above as evaluators indeed do ignore any additional pages!

* *No reference to the outcome of previous evaluations of a similar proposal should be included in the text. Experts will be strictly instructed to disregard any such references.*

**List of Participating Organisations**

Please provide a list of all participating organisations (both beneficiaries and, where applicable, partner organisations[[1]](#footnote-2)) indicating the legal entity, the department carrying out the work and the supervisor.

If a secondment in Europe is planned but the partner organisation is not yet known, as a minimum the type of organisation foreseen (academic/non-academic) must be stated.

For non-academic beneficiaries, please provide additional data as indicated in the table below.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Participating organisations** | **Legal Entity Short Name** | **Academic (tick)** | **Non-academic (tick)** | **Country** | **Dept./**  **Division /**  **Laboratory** | **Supervisor** | **Role of Partner Organisation[[2]](#footnote-3)** |
| Beneficiary |  |  |  |  |  |  |  |
| Katholieke Universiteit Leuven | KU Leuven | X |  | Belgium | *Name of the Dept./ Division / Laboratory* | *Name of your supervisor* |  |
| Partner Organisation |  |  |  |  |  |  |  |
| - NAME |  |  |  |  |  |  |  |

**Data for non-academic beneficiaries**

This table should only be included if a non-academic partner organisation participates in your project.

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Name** | **Location of research premises**  **(city / country)** | **Type of R&D activities** | **No. of full - time employees** | **No. of employees in R&D** | **Web site** | **Annual turnover**  **(approx. in Euro)** | **Enterprise status (Yes/No)** | **SME status[[3]](#footnote-4) (Yes/No)** |
|  |  |  |  |  |  |  |  |  |

**Please note that:**

* Any inter-relationship between the participating organisation(s) or individuals and other entities/persons (e.g. family ties, shared premises or facilities, joint ownership, financial interest, overlapping staff or directors, etc.) **must** be declared and justified **in this part of the proposal**;
* The information in the table for non-academic beneficiaries **must be based on current data, not projections**.

**Start page count – MAX 10 PAGES**

General comments

* We recommend to follow the prescribed paragraphs and required sub-headings. These are also the criteria and sub-criteria that the evaluators will assess. You may choose to add (or remove) sub-headings as long as you address the required information.
* Structure your proposal well (use headings, no long blocks of text) so that evaluators can easily find the essential information.
* Include all the required tables.
* Write all parts with your own words, do not copy paste from others and modify text examples. Changes in style are easy to spot and give a very negative impression.
* You may choose to write in first person (I, me, my, we, our) or in third person (the fellow, he/she, his/her). We recommend to use first person as it makes your proposal more personal and convincing. Choose what you feel most comfortable with and stick with this choice throughout the text: do not switch between first and third person as this also gives a very negative impression.
* The minimum font size is 11 points. References should be listed in footnotes, font size 8 or 9 and are included in the page limit. Top, bottom, left and right margins should be at least 15 mm (not including footers and headers)

**1. Excellence**[[4]](#footnote-5)

**1.1 Quality and credibility of the research/innovation action (level of novelty, appropriate consideration of inter/multidisciplinary and gender aspects)**

Keep in mind that the evaluators are most likely not experts in your area or have only partial expertise!You should prepare your proposal for both expert and non-expert evaluators, with a good balance between sufficient detail for the expert and making your point clear to the educated non-expert. You should not assume that the evaluators will understand the originality and novelty of the research nor the inter/multidisciplinary aspects just by reading your proposal, you need to tell them!

You should develop your proposal according to the following lines:

* Introduction, state-of-the-art, objectives and overview of the action
* The brief introduction (one paragraph) should ‘set the scene’ and state the overall aim of your project
* Relevance of the project: why is this research important?
* Illustrate the need for your research project with facts and figures
* Relate to European policy objectives in your research domain
* Short overview of the State-of-the-art, including literature references
* Define concrete and specific objectives
* Introduction of all work packages (WPs)

We recommend that you introduce the WPs here (but you elaborate on them in your work plan in section 3.1). As a guideline, your project should have one or more (maximum 3-4) WPs that are related to the research project. As a general rule each research objective corresponds to one WP. In addition, you may add WPs dedicated to training, management, and communication, dissemination and exploitation.

* Research methodology and approach: highlight the type of research / innovation activities proposed
* Describe your methodology and approach.
* Originality and innovative aspects of the research programme: explain the contribution that the action is expected to make to advancements within the action field. Describe any novel concepts, approaches or methods that will be employed.
* What is new or unconventional in terms of objectives and/or methodology (equipment, methods, technologies, unique data or resources, unconventional combination, …)
* How will the project contribute to and progress beyond the State-of-the-art, how will it advance your field of research?
* The gender dimension in the research content (if relevant)
* If your research has a gender dimension (e.g. the subjects of your study are all female, …) you should here explain this gender dimension. If the gender dimension is not relevant for your research, you should include one brief sentence stating this.
* The interdisciplinary aspects of the action (if relevant)
* Explain how the high-quality, novel research is the most likely to open up the best career possibilities for the *experienced researcher* and new collaboration opportunities for the host organisation(s).

**1.2 Quality and appropriateness of the training and of the two way transfer of knowledge between the researcher and the host**

Describe the training that will be offered.

* Write a specific, concrete and convincing training plan that starts from your own needs and explain how the training will assist you in becoming an independent researcher.

*Example: You have little or no experience in teaching and in your research domain, it is crucial to have teaching experience to be appointed as a professor. In this case, you may consider to include teaching in your training plan, e.g. by teaching part of a course of your supervisor. But be specific, and do NOT write ‘I will be teaching part of a course at KU Leuven’. Do write (for example!) ‘Teaching will be one of my training objectives as I do not yet have teaching experience despite the fact that this is crucial for obtaining a permanent position. Therefore, I will co-teach the ‘History of science’ course module together with my supervisor, which will include planning, designing and teaching 4 of the course lectures, formulating exam questions and correcting exams …’*

* The training plan may include:
* ‘Training through research’: this is your main training which you obtain by executing your own individual research project (as described in section 1.1) under guidance of your supervisor and potentially also other staff members at the host institution.
* Hands on training, new techniques, …
* Structured training courses
* Exchanging knowledge through (intersectorial) visits and secondments
* Invitation of visiting researchers
* Involvement in the organization of activities or organizing your own activity, e.g. scientific/training/dissemination/communication/outreach events, exhibitions, …
* Taking part in the research and financial management of your project
* Attendance of international conferences and workshops
* Training dedicated to gender issues
* Teaching
* Supervision of BSc, MsC and/or PhD students
* Transferable skills training: it is a must to include so-called ‘transferable skills training’ (e.g. entrepreneurship, proposal preparation to request funding, patent applications, management of IPR, project management, task coordination, supervising and monitoring, take up and exploitation of research results, communication and outreach skills, …) in your training plan. Again, be specific and start from you own needs!

*Example: Do NOT write ‘The YouReCa programme at the KU Leuven offers transferable skills training to young researchers. I will benefit from this by participating in one or more courses’. Do write (for example!) ‘Dissemination of and communication about the results is a crucial and integral part of this project. I have outlined a dissemination and communication strategy (see sections 2.2 and 2.3) but I have little experience with this. My training will therefore include modules on the use of social media and speaking for non-expert audiences, offered by KU Leuven during their yearly ‘Let’s talk Science Summer School’ (*[*www.letstalkscience.be*](http://www.letstalkscience.be)*) ...’*

|  |
| --- |
| **Transferable skills training and career development @ the KU Leuven**  Through the YouReCa (“Young Researchers’ Careers”) programme (see below), KU Leuven’s young researchers can participate in a broad spectrum of activities that are related to training and education, career development and the improvement of career prospects, and strengthening the international orientation of researchers’ careers, for example:   * Workshops on competitive proposal writing as well as personal support for individual proposals, covering general proposal writing skills as well as funding opportunity-specific advice, including EU projects; this includes support and advice on research management and valorisation aspects (including intellectual property issues); workshops on management of research projects, including financial and personnel management * Personal support and advice on business and intellectual property issues (by KU Leuven Research and Development, one of the oldest European technology transfer offices), which covers working with business, creating effective interactions & successful collaborative research, protecting and commercialising innovation & inventions   <https://lrd.kuleuven.be/en/technology-transfer-office>   * Infomeetings and workshops on writing skills for research publications, including good publication practice guidelines and bibliometric analyses; * Infomeetings and workshops on career opportunities and development for postdocs; individual career coaching through the YouReCa Career Center; development of competence profiles for postdocs, assisting with preparing and managing (future) postdoc career, both in- and outside of the university   <http://www.kuleuven.be/personeel/careercenter/youreca-career-center/yourecaENG/indexeng>   * Courses on presenting research orally; communicating research to non-specialists [www.letstalkscience.be](http://www.letstalkscience.be) * Training in academic English; language courses <http://ilt.kuleuven.be/english/> * Training in statistics and methodology <http://www.flames-statistics.eu/> * Courses on leadership skills, coaching, time and self-management, assertive communication, collaborating with colleagues and supervisor, networking, … |

* We strongly recommend that you set up a Personal Career Development Plan together with your supervisor(s) at the beginning of your fellowship, and that you mention this in your proposal. The PCDP comprises your training and career needs, together with the research objectives. A KU Leuven template is available on request.

**Text example PCDP**

‘A Personal Career Development Plan will be established by me and my supervisor prior to the start of the project in order to aid in the provision of the research training programme and scientific objectives that best suits my needs. This plan will act as a reference for me and my supervisor to monitor the progress of the project in terms of research, training and professional development, and to take corrective action when needed.’

Outline how a two way transfer of knowledge will occur between the researcher and the host institution(s):

* Explain how the *experienced researcher* will gain new knowledge during the fellowship at the hosting organisation(s)
* Outline the previously acquired knowledge and skills that the researcher will transfer to the host organisation(s).

For Global Fellowships explain how the newly acquired skills and knowledge in the Third Country will be transferred back to the host institution in Europe (the beneficiary) during the incoming phase.

* Make sure to explain the two-way transfer of knowledge in detail, clearly stating what you will learn from your supervisor, your research group, your stay at KU Leuven in general and your collaborators (if any). Also explain what they will learn from the (research) expertise that you already have. Do not be general, be as specific as possible!

**1.3 Quality of the supervision and of the integration in the team/institution**

* Qualifications and experience of the supervisor(s)

Provide information regarding the supervisor(s): the level of experience on the research topic proposed and their track record of work, including main international collaborations, as well as the level of experience in supervising researchers. Information provided should include participation in projects, publications, patents and any other relevant results.

* This section should be complementary to section 5, you may refer to part 5 e.g. for the most important publications to avoid duplication.
* Mention MSCA projects that your supervisor is involved in (if any).
* Other relevant information may be the h-index, …
* Hosting arrangements[[5]](#footnote-6)

The application must show that the experienced researcher will be well integrated within the team/institution in order that all parties gain the maximum knowledge and skills from the fellowship. The nature and the quality of the research group/environment as a whole should be outlined, together with the measures taken to integrate the researcher in the different areas of expertise, disciplines, and international networking opportunities that the host could offer.

* Examples of ‘measures taken to integrate the researcher’: you participate in weekly/monthly meetings of the research group and/or in weekly/monthly journal clubs; you supervise BSc, MSc or PhD students; for your research you collaborate with an international partner of your supervisor; …

For GF both phases should be described - for the outgoing phase, specify the practical arrangements in place to host a researcher coming from another country, and for the incoming phase specify the measures planned for the successful (re-)integration of the researcher.

**1.4 Capacity of the researcher to reach or re-enforce a position of professional maturity/independence**

Applicants should demonstrate how the proposed research and training will contribute to the further professional development as an independent/mature researcher.

Describe **briefly** how the host will contribute to the advancement of the researcher's career.

Therefore, a complete **Career Development Plan should not be included in the proposal**, but it is part of implementing the action in line with the European Charter for Researchers.

Convincingly demonstrate that your experience so far combined with the experience that you will gain during this project will contribute to reaching a position of professional maturity.

* Start by demonstrating that you are talented as shown by your ideas and track record, taking into account your level of experience.
* Describe your major achievements so far and explain how they will be important for this project.
* Point out mobility during your PhD, important publications (impact factor, citations, explain briefly why they are important in your field), teaching experience, demonstrate independent thinking and leadership qualities, …
* Go on to explain how the proposed research and training will contribute to your further professional development as an independent, mature researcher or professional.
* This should also include a description of how your host will contribute to your further professional development.
* Note that this will partially overlap with section 2.1.

**2. Impact**

**2.1 *Enhancing the potential and future career prospects of the researcher***

Explain the expected impact of the planned research and training on the career prospects of the experienced researcher after the fellowship. Which new competences will be acquired?

Explain how the research and training will have a lasting impact on your career.

* Again, you want to make this section as specific as possible and therefore you should clearly state all new competences that you will acquire through the research and training described in sections 1.1 and 1.2.
* Clearly explain how this new expertise affect your career and strengthen your CV.
* Distinguish between short term impact (during and shortly after the project) and the longer term impact.
* Also include the impact on the expansion of your network, not only at the KU Leuven but also through collaborations and/or secondments in the framework of your project, networking opportunities during workshops and conferences, ... How will this affect your career?

*Example: Do NOT write ‘I will learn new techniques and expand my skills during this project’. Do write (for example!) ‘I will get an in-depth knowledge of electron microscopy and how to use it for my research, which will not only be crucial for the successful completion of this project but which will also open up new research lines after the conclusion of this project. Specifically, I would like to set-up a follow-up study that investigates … .’ ‘Through the supervision of two Bachelor students I will gain hands-on experience in leadership, mentoring and coaching, all highly valuable skills that I will greatly benefit from when starting my own research group in the near future.’*

**2.2 *Quality of the proposed measures to exploit and disseminate the action results***

There is a close link and often some overlap between dissemination (section 2.2), exploitation (section 2.2) and communication (section 2.3). However, these three terms do refer to three different types of activities (as explained below). It is important that you understand the difference and clearly distinguish between what is asked in this section 2.2 and the following section 2.3. It will give a negative impression to your evaluators if you are not able to do this.

Describe how the new knowledge generated by the action will be disseminated and exploited, e.g. communicated, transferred into other research settings or, if appropriate, commercialised.

What is the dissemination strategy - targeted at scientists, potential users and to the wider research and innovation community - to achieve the potential impact of the action?

Please make also reference to the "Dissemination & exploitation" section of the H2020 Online Manual[[6]](#footnote-7).

The following section of the European Charter for Researchers refers specifically to dissemination:

**Dissemination, exploitation of results**

All researchers should ensure, in compliance with their contractual arrangements, that the results of their research are disseminated and exploited, e.g. communicated, transferred into other research settings or, if appropriate, commercialised. Senior researchers, in particular, are expected to take a lead in ensuring that research is fruitful and that results are either exploited commercially or made accessible to the public (or both) whenever the opportunity arises.

Concrete planning for section 2.2 must be included in the Gantt Chart (see point 3.1).

* Dissemination = sharing your research results with other experts who can potentially use the research results. These experts are your peers in the research field, but also non-academic experts to whom your research results may be relevant including industry, other commercial players and policymakers. Dissemination could (eventually) lead to exploitation.
* Exploitation = using your research results for commercial purposes or in public policymaking. You do not have to make it happen during your project, but show the potential of your findings. And if you possibly can cause exploitation during your project, include this in your WPs, including your strategy to deal with Intellectual Property Rights, if relevant.

**IPR @ the KU Leuven**

In accordance with Flemish legislation, the KU Leuven is the sole owner of full intellectual property rights to research results obtained during research activities at the university. KU Leuven will therefore own (subject to any Third Party interests) the Intellectual Property in the results arising from this fellowship. KU Leuven has the rights to exploit commercially such Intellectual Property by the most appropriate means whilst safeguarding academic dissemination. The financial benefit of commercial exploitation being enjoyed by both the university and the staff concerned.

* You should define multiple dissemination and exploitation actions and together they form your dissemination and exploitation plan. To define actions, use the following questions:

1. Who are the potential users of your research results? You should think broadly, and go beyond the traditional and obvious academic setting.

e.g. researchers in Europe/worldwide, students, public or private institutions, industries, policy makers, civil servants, officials, NGOs, interest groups (such as patient organisations, labour unions, …), …

1. How will you inform and contact each potential user? You will use different strategies to target the different potential users that you identified with the first question.

e.g. Open Access publishing, scientific journals, workshops, conferences, guest lectures, reports, text books, …

1. How will you or other potential users (eventually) exploit your research results?

e.g. new research settings, new research projects, new methods, new policies, new collaborations, new exhibitions, new strategies, new practices, …

*Example 1: Following Horizon 2020 guidelines, I ensure open access to all peer-reviewed scientific publications of my research results, either by publishing in open access journals or by self-archiving my articles in the KU Leuven repository ‘Lirias’ (*[*https://lirias.kuleuven.be/*](https://lirias.kuleuven.be/)*).*

*Example 2: I will also disseminate my research outcomes to the European automobile industry through the European Automobile Manufacturers' Association (ACEA), who has agreed to publish an article about my research on their website and in their newsletter. In particular, the results of the noise measurements performed in WP 2 may be of interest to car manufactures, and may lead to better design methods.*

*Example 3: The European Commission as well as national governments and NGOs working with refugees may benefit from the results of this project, as our analysis will be the first comprehensive study of European perception of the refugee crisis. I will therefore organise a conference about the project outcomes, specifically targeting European and national policy makers and representatives from NGOs. The conference will be promoted through, among others, the European Council on Refugees and Exiles (ECRE) and several relevant websites and publications (e.g. …).*

***2.3*. *Quality of the proposed measures to communicate the action activities to different target audiences***

Please make also reference to the guidelines [*Communicating EU research and innovation guidance for project participants*](http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-comm_en.pdf)*[[7]](#footnote-8)* as well as to the "communication" section of the H2020 Online Manual[[8]](#footnote-9)*.*

Concrete planning for section 2.3 must be included in the Gantt Chart (see point 3.1).

The following section of the European Charter for Researchers refers specifically to public engagement:

**Public engagement**

Researchers should ensure that their research activities are made known to society at large in such a way that they can be understood by non-specialists, thereby improving the public's understanding of science. Direct engagement with the public will help researchers to better understand public interest in priorities for science and technology and also the public's concerns.

* Communication = making your research activities known to society (the general public and the media) by promoting your project and its results. The EU expects that MSCA fellows communicate about their research to the general public, to enhance the impact research has on society, to create awareness, and to convince young people to choose a career in research.
* You should define multiple communication activities and together these activities form your communication plan. As a general rule, you should be involved in at least one activity per fellowship year. Use the following questions to define communication activities:

1. Which ‘target audiences’ do you wish to communicate with? You should first identify your different target audiences because this will determine your communication method.

e.g. the general public at large, university students, high/primary school students, high/primary school teachers, community organisations, …

We recommend that at least one of your activities targets young people (high school students, university students) with the aim of promoting science and research (careers) as this is a priority for the EU.

1. What, where and how will you communicate with each target audience? Choose parts of your research suitable for each target audience that you identified with the first question. Use different communication methods to target each target audience. Also note that the EU really likes ‘hands-on’ activities (experiments, workshops, …) as they are thought to be more effective.

e.g. workshops, summer schools, guest lectures, public talks, events, consultations, visits, activities, experiments, articles in newspapers/popular magazines, press release, interview, TV, radio, blogs, websites, Facebook, (online) exhibition, …

1. Outline the expected impact of each communication activity.

e.g. new knowledge, new commitments, new developments, new initiatives, new events, new inspiration, new teaching materials, new approaches, new interests, new experiences, new debates, new thoughts, new perspectives, new ideas, new attitudes, new behaviour, new values, …

*Example 1: I will inform the public at large of my research and its implications for society through the project’s website. The home page will feature a short movie in which I explain my research to an audience of non-experts. In addition, I will use my website to post regular blog posts about the progress of my research.*

*Example 2: During my PhD, I was already involved in a programme (‘Junior College STEM’, see www...) that aimed to develop interest of high school students in STEM with the eventual goal of attracting more students to STEM studies and eventually also STEM research careers. I developed methods and materials that I found were highly effective for communicating about STEM with high school students. At the KU Leuven, I will transfer my knowledge to other members of the department and if possible the university at large by conducting a workshop about talking to and engaging students for STEM studies and careers. In addition, I will use my expertise by talking to high school students during the yearly ‘Science Day’ in Flanders (*[*http://www.dagvandewetenschap.be/*](http://www.dagvandewetenschap.be/)*).*

|  |
| --- |
| **Science communication @ the KU Leuven**  The KU Leuven is continuously reaching out to the general public and youngsters through a broad range of initiatives (see below for some examples). For all these initiatives the university needs researchers that want talk about their research, bring a testimony, lead a workshop, demonstrate an experiment, ...   * Science Slam The YouReCa Challenge [www.scienceslam.be](http://www.scienceslam.be) * Science Day <http://www.dagvandewetenschap.be/> * Other initiatives including the Flemish Science Week, STEM Academy   <http://www.kuleuven.be/communicatie/wetenschapscommunicatie/> (Dutch only)   * Courses on presenting research orally and communicating research to non-specialists [www.letstalkscience.be](http://www.letstalkscience.be) * KU Leuven Blog <https://kuleuvenblogt.be/about-this-blog/> * KU Leuven Newsroom; press Office; press releases <http://www.kuleuven.be/english/press/index> * Campuskrant (monthly KU Leuven magazine for employees, students and alumni) <http://www.kuleuven.be/ck> |

**3. Quality and Efficiency of the Implementation**

***3.1 Coherence and effectiveness of the work plan***

The challenge here is to provide a credible plan, that is ambitious but at the same time also feasible to be executed by one person within the available time frame.

Your work plan should include all the research and training activities, and in addition, the management activities, the dissemination, exploitation & communication activities, secondments, … You describe your work plan in the text and in addition you visualise your work plan in the Gantt Chart. The Gantt Chart should include all activities!

The proposal should be designed in such a way to achieve the desired impact. A Gantt Chart should be included in the text listing the following:

* Work Packages titles (for EF there should be at least 1 WP);

As a guideline, your project should have one or more (maximum 3-4) WPs that are related to the research project. In addition, you may add WPs dedicated to training, management, and communication, dissemination and exploitation.

The work plan should include the following information about your WPs:

* The WP title,
* The WP objective(s),
* A brief description of the work/different tasks that you will perform
* The deliverables and milestone associated with each WP (see below)
* The timing (by using the Gantt Chart)
* List of major deliverables, if applicable;[[9]](#footnote-10)
* List of major milestones, if applicable;[[10]](#footnote-11)

Each WP/objective will have one or more deliverables and milestones. While there is a close link between deliverables and milestones, these terms refer to different things (as explained below). It is important that you understand the difference and clearly distinguish between deliverables and milestones. It will give a negative impression to your evaluators if you are not able to do this.

* Deliverable = PHYSICAL output of your project

e.g. report, document, technical diagram, software, meeting minutes, text book, journal publication, data management plan, …

*If you participate in the pilot on Open Research Data, the Data Management Plan should be included as a deliverable.*

* Milestone = control points in time used to monitor the progress of your project

Milestones often correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the action where, for example, the researcher must decide which of several technologies to adopt for further development.

* You should number your deliverables and milestones according to delivery dates following the format <WP number>.<number of deliverable/milestone within that WP>. For example, deliverable 4.2 would be the second deliverable from work package 4.

*Example:*

* *List of major deliverables*

*Deliverable 1.1 (Month 1): Personal Career Development Plan*

*Deliverable 1.2 (Month 3): Data Management Plan*

*Deliverable 2.1 (Month 10): Comprehensive dataset on XXX*

*Deliverable 3.1 (Month 18): Manuscript on YYY*

*Deliverable 3.2 (Month 24): Manuscript on ZZZ*

*Deliverable 4.1 (Month 24): End report of the project*

* *List of major milestones*

*Milestone 1.1 (Month 4, 8, 12, 16, 20):Targeted check on the Personal Career Development Plan.*

*Milestone 2.1 (Month 5): Data on AAA available*

*Milestone 2.2 (Month 10): Assembly and analysis of data on AAA completed*

*Milestone 2.3 (Month 12): Creation of matrices completed*

*Milestone 3.1 (Month 15): Data analysis of BBB completed*

*Milestone 3.2 (Month 21): Questionnaires analysed*

* Secondments, if applicable.

The schedule should be in terms of number of months elapsed from the start of the action.

**Example Gantt Chart**

***Reflecting work package, secondments, training events and dissemination / public engagement activities***

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  | | | | | | | | | | | | | | | | | | | | | | | | **Global Fellowship only** | | | | | | | | | | | |
| **Month** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** | **17** | **18** | **19** | **20** | **21** | **22** | **23** | **24** | **25** | **26** | **27** | **28** | **29** | **30** | **31** | **32** | **33** | **34** | **35** | **36** |
| ***Work package*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Deliverable*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Milestone*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Secondment*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Conference*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Workshop*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Seminar*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Dissemination*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Public engagement*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| ***Other*** |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |

***Delete rows and columns that do not apply.***

***3.2. Appropriateness of the allocation of tasks and resources***

Describe how the work planning and the resources mobilised will ensure that the research and training objectives will be reached.

Explain why the amount of person-months is appropriate in relation to the activities proposed.

Explain that your work plan is indeed ‘credible’ and feasible to achieve the aims of your project. You should explain this in terms of the resources that are available:

* Personnel (= you): explain why the project is feasible in terms of the number of person-months that you will be working on all the activities included in your work plan.
* Budget: explain how the budget available for the research, training and networking costs (800 euro / person-month) is sufficient to cover the costs associated with all the activities included in your work plan. If the budget is not sufficient (e.g. you will conduct expensive experiments), explain how you have or will secure additional funding to ensure the successful execution of your project.
* (Infrastructure at your host institution and, if relevant, partner organisation(s) should not be discussed here but in section 3.4).

***3.3 Appropriateness of the management structure and procedures,* including risk management**

Describe the:

* Organisation and management structure, as well as the progress monitoring mechanisms put in place, to ensure that objectives are reached;
* Describe your financial management strategy
* Explain the progress monitoring mechanisms that you and your supervisor will put in place, including regular meetings, … We recommend that you meet with your supervisor at least one a month, in some research domains more frequent meetings are recommended. If you are unable to meet in person, you may include Skype calls or other ways to engage with each other

**Text suggestion for project organisation and management structure**

My project will be supervised by Prof/Dr X who will provide leadership and encourage me to develop my skills. At the start of the project, Prof/Dr X and I will agree on a Personal Career Development Plan that will include the project’s objectives, specific tasks and activities, milestones and deadlines. There will be regular [how often] meetings thereafter during which we will review and monitor the overall schedule and work plan. Such meetings will involve discussion of methods and allow an opportunity to discuss problems … [Meetings at the end of the 1st and 2nd years / Meetings to coincide with milestones / …].

The Human Resources Department at the KU Leuven will draw up an agreement between the university and myself following the requirements specified in the Grant Agreement. The overall administrative and financial management of the project will be handled by the Research Coordination Office and the Financial Monitoring Office. They have extensive experience in managing external grant and contract income. This project will be assigned a dedicated finance assistant from the finance support team who will set up the budget in line with the eligible cost categories and who will monitor expenditure to ensure that only eligible costs are claimed for. I will manage my research, training and networking budget under the guidance of Prof/Dr X, in accordance with the terms and conditions of the grant agreement, the University’s Financial Regulations and the University’s Purchasing Office Procurement Guide.

* Research and/or administrative risks that might endanger reaching the action objectives and the contingency plans to be put in place should risk occur.
* You should identify all the risks associated with the execution of your work plan (e.g. new technique that may not work, experiment that may fail, permission that you fail to obtain, …) and provide a ‘plan B’. We recommend that you list all these risks in a table, indication whether the risk will have a high, medium or low impact on the project, and providing an alternative strategy in case the risk indeed occurs.
* Do not draft a project with a ‘high’ risk in the early phase. In case this risk indeed occurs, you may not be able to execute the remainder of the project and evaluators may find that this undermines the feasibility of your project.

***3.4******Appropriateness of the institutional environment (infrastructure)***

The active contribution of the beneficiary to the research and training activities should be described. For GF also the role of partner organisations in Third Countries for the outgoing phase should appear.

* Give a description of the main tasks and commitments of the beneficiary and all partner organisations (if applicable).
* (Briefly) describe the tasks and commitments of the KU Leuven and, if relevant, partner organisation(s)
* Describe the infrastructure, logistics, facilities offered in as far they are necessary for the good implementation of the action.
* Describe the research infrastructure available at KU Leuven (in particular at your research group) and, if relevant, partner organisation(s). Strongly focus on the infrastructure that is needed to ensure the proper execution of your research project and avoid too general descriptions.

*This section should be complementary to section 5 (refer to section 5 to avoid too much duplication).*

* Briefly describe other facilities that are available to you at the KU Leuven and, if relevant, partner organisation(s), as far as these facilities are relevant for the successful execution of this project.

**Training and career development @ at KU Leuven**

The KU Leuven is fully committed to developing its support for postdoctoral researchers. In 2012 the KU Leuven developed the YouReCa (‘Young Researchers’ Careers’) programme, to improve and widen the career perspectives of KU Leuven’s young researchers. YouReCa organises a broad spectrum of activities that are related to skills, career development (through a dedicated Career Centre for researchers <http://www.kuleuven.be/personeel/careercenter/youreca-career-center/yourecaENG/indexeng>), and strengthening the international orientation of researchers’ careers.

**Administrative and HR support for international researchers @ the KU Leuven**

The Human Resources Department and the International Admissions Unit, which is an official Marie Curie mobility centre recognized by the Flemish government, both have dedicated personnel who are able to assist me with settling in, by providing advice and support on issues such as salaries and taxation, pension rights, social security, visas, work permits and health care. The KU Leuven supports and implements the principles specified in both the European Charter for Researchers and the Code of Conduct for the Recruitment of Researchers. These principles are reflected in several university documents and regulations which combined specify the roles, responsibilities and entitlements of researchers, as well as those of the university (including the departments’ policy plans, the Terms and Conditions of Employment, the Recruitment and Selection Procedures, the European Charter for Researchers, the Code of Practice on Intellectual Property, Commercial Exploitation and Financial Benefits, …).

**Technology transfer @ the KU Leuven**

*In case Intellectual Property is generated in your research, we recommend that you also mention our Technology Transfer Office as a facility that is available to you.*

KU Leuven Research & Development (LRD) is the knowledge and technology transfer office (TTO) of the KU Leuven (<https://lrd.kuleuven.be/en/technology-transfer-office>). LRD has developed a tradition of collaborating with industry, securing and licensing intellectual property rights, creating spin-off companies and stimulating knowledge-driven regional development, and supports researchers in their interaction with industry and the exploitation of their research results.

**STOP page count – MAX 10 pages**

1. All partner organisations should be listed here, including secondments [↑](#footnote-ref-2)
2. For example hosting secondments, for GF hosting the outgoing phase, etc. [↑](#footnote-ref-3)
3. As defined in [Commission Recommendation 2003/361/EC](http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2003:124:0036:0041:en:PDF). [↑](#footnote-ref-4)
4. Literature should be listed in footnotes, font size 8 or 9. All literature references will count towards the page limit. [↑](#footnote-ref-5)
5. The hosting arrangements refer to the integration of the researcher to his new environment in the premises of the host. It does not refer to the infrastructure of the host as described in the Quality and efficiency of the implementation criterion. [↑](#footnote-ref-6)
6. <http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/dissemination-of-results_en.htm> [↑](#footnote-ref-7)
7. <http://ec.europa.eu/research/participants/data/ref/h2020/other/gm/h2020-guide-comm_en.pdf> [↑](#footnote-ref-8)
8. <http://ec.europa.eu/research/participants/docs/h2020-funding-guide/grants/grant-management/communication_en.htm> [↑](#footnote-ref-9)
9. A deliverable is a distinct output of the action, meaningful in terms of the action’s overall objectives and may be a report, a document, a technical diagram, a software, etc. Should the applicants wish to participate in the pilot on Open Research Data, the Data Management Plan should be indicated here.

   Deliverable numbers ordered according to delivery dates. Please use the numbering convention <WP number>.<number of deliverable within that WP>. For example, deliverable 4.2 would be the second deliverable from work package 4. [↑](#footnote-ref-10)
10. Milestones are control points in the action that help to chart progress. Milestones may correspond to the completion of a key deliverable, allowing the next phase of the work to begin. They may also be needed at intermediary points so that, if problems have arisen, corrective measures can be taken. A milestone may be a critical decision point in the action where, for example, the researcher must decide which of several technologies to adopt for further development. [↑](#footnote-ref-11)