

UBC Okanagan, University of Exeter Excellence Initiative

Initiator Grant Guidelines:

1) Background

The University of British Columbia Okanagan and The University of Exeter have been developing a bilateral relationship since 2017. The Universities have worked together to enable collaborations that are multi-disciplinary, co-investing to bring together people and resources that, with their combined expertise, are able to deliver transformative impact in the work they do and the challenges they tackle. This lies at the heart of shared UBC-Exeter Research and Education goals.

In 2019, the Vice Chancellor of Exeter signed an MOU with President Ono of UBC, and a joint panel from UBCO and Exeter awarded funding for a range of joint projects.

The Universities have now agreed to create the UBCO-Exeter Excellence initiative, through which they will offer three funding schemes between now and the 2024-25 academic year. These are:

Initiator Grant Scheme, Catalyst Grant Scheme, and Visiting Scholar Joint Fellowship Scheme. These schemes aim to:

- Tackle research and/or education challenges that could not be as effectively carried out by one partner on their own
- Increase the impact of the research or education activities of Exeter and UBC domestically and internationally
- Support the development of novel, interdisciplinary research and/or teaching and learning concepts to the point of implementation and submission of bid(s) for external funding
- Support collaborators in developing their initiatives to the point of achieving high impact / high influence publications or equivalent

The 2024/25 round of the Initiator Grant Scheme is now open for applications, with a closing date of **15 March, 2024.**

2) Objectives

Building upon previous rounds of partnership seed funding (2018) and Fellowships and Project grants (2020, 2021), **Initiator Grants** are intended to support pilot projects to establish or broaden academic and research collaboration. The **key aims of the Initiator Grant Scheme** are to:

- Develop and expand relationships between Exeter and UBC Okanagan
- Support both research and education initiatives
- Enable grant holders to develop projects for Catalyst funding and/or competitive, larger scale external grant applications

3) Funding Details

Applications up to a maximum **GBP £4,000 / CAD \$6,000** are invited to apply.

Funding will be provided to the nominated lead applicant who will be responsible for the budget and for all arrangements for any events, activities and participation. Where applicants list costs in both CAD and GBP, the

exchange rate will be calculated as per the date of the award letter using [OANDA](#). In addition to description, applicants must provide justification for budget lines.

Up to 3 Initiator Grants will be funded in March 2024, with a further competition later in the year. All funded applications will be promoted via the websites of each University; and are expected to be completed in a twelve-month period from the award date.

4) Eligibility Criteria

The Initiator Grants will be available to the whole academic community at Exeter and to academic faculty members (lecturers, EL/research professors at all ranks) in the Faculties of Creative and Critical Studies and Arts and Social Sciences at UBCO.

Eligible costs include:

- Travel and subsistence
- External speakers/facilitators
- Meeting, venue and catering costs (please note that for group meals, key guests will generally be funded, but everyone else is expected to pay for themselves, unless there is a clear justification for why all attendees should be paid for)
- Equipment (small purchases in line with project deliverables)

The following items are not eligible for funding under this scheme:

- Academic salaries
- Third-party travel costs
- Publication costs
- Student fees / tuition
- Indirect costs, estates costs and overheads associated with internal research facilities

5) Application Process

Applicants will need to complete the Initiator Grant Scheme application form in conjunction with their counterpart(s) at the partner institution. Both a lead applicant and co-applicant at the partner institution will need to be identified for each application. Funding will be provided to the nominated lead applicant who will be responsible for all arrangements for any events, activities and participation.

Applicants should ensure that activities are planned and scheduled so that in the event of an award, activities can be undertaken soon after. We expect projects to be completed within the stated deadline of 12 months. Identical copies of the application should be submitted to both institutions at the below email addresses by **15 February, 2023**.

Exeter: GP-Funding@exeter.ac.uk

UBCO: lacia.vogel@ubc.ca

All applications will be jointly assessed and shortlisted by the UBCO-Exeter Excellence Initiative leads. Lead applicants will be notified within the specified timeframe (see Key Dates in section 8).

6) Assessment Criteria

Applications will be assessed via a competitive selection process based on the following criteria:

- Quality of initiative / activity plan as outlined in the application
- Potential to expand upon existing or newly identified areas for collaboration
- Perceived value for money
- Contribution to advancing and sustaining the UBCO – Exeter partnership

7) Feedback and Submissions

Please note that feedback is not usually provided for Initiator Grant Scheme applications. Resubmission is by invitation only.

8) Key Dates

Date	Activity
February 2024	Calls for applications issued
15 March 2024	Application deadline
15 April 2024	Applicants notified of outcome
15 March, 2025	Project completion deadline
31 May, 2025	Post-project report (part A) submission deadline

9) Grant Acquittal and Reporting

Awardees must agree to adhere to all requirements related to the receipt of funding including deadlines and procedures for acquittal of funds and reporting on outcomes.

Awardees will have up to a maximum of 12 months after the award date to utilise the funds for the project or initiative. Funds that are not utilised within the specified period will be withdrawn.

Upon completion of the project, awardees will be required to submit a brief report outlining the successes and outcomes of the project. Report forms will be provided to Project Leads.

This report will be utilised for the follow up of potential opportunities, reporting on outcomes and to highlight successes of the Excellence Initiative between UBCO and Exeter.

Awardees who embark on international travel are required to abide by official reporting, insurance and registration requirements as outlined in:

- UBC Travel Policy and Guidelines: <https://finance.ubc.ca/travel/plan/faculty-and-staff-travel-guide>
- Relevant Exeter policies: <https://www.exeter.ac.uk/coronavirus/travel/staff/>



10) Contacts

Please consult your home institution contacts if you would like any additional information.

Exeter:

Stuart Westhead (Global Partnerships Regional Head – North America & Europe) s.westhead@exeter.ac.uk

Peter Clack (Director Global Exeter) p.clack@exeter.ac.uk

UBCO:

FCCS faculty: Dr. Jodey Castricano (Assoc Dean of Research & Graduate Studies) jodey.castricano@ubc.ca

FASS faculty: Dr Alison Conway (Assoc Dean of Research & Graduate Studies) alison.conway@ubc.ca



Annex A

Assessment Criteria

This guidance has been drawn up to assist applicants when completing their Initiator and Catalyst Grant Scheme application forms. The purpose is to explain what type of information and evidence is required to satisfy the assessment criteria.

Assessment criteria	Application form [section]	Evidence Required
Strategic fit	4	Clear information on how the proposed project would enhance the development of one of the established themes and, if applicable, subthemes.
Quality of initiative/activity	5, 6, 7, 8, 9	How well the application has been considered and planned, and the strength of its potential for taking forward a development or collaboration. Are the goals stretching but achievable? Using data to substantiate, the bid should identify the need for and value of the proposed project and how this fits with UoE and UBC objectives. Include supporting details on how the project would be significantly enhanced as a result of it being undertaken through the Excellence Initiative, rather than by an individual academic or institution.
Anticipated outcomes and benefits	7, 8, 9	Specific reference to outcomes and benefits that are anticipated to be a direct result from this project, with approximate timescale. How likely are these? How significant might they be?
Leveraging funding	7, 8, 9	Clear details of how the project aims to leverage external funding as a direct result of this award.
Impact	6, 7, 8, 9	Communicate how this project will create (non-academic) impact in a way that will benefit and elevate the global reputations of both UBC and Exeter through wider engagement and societal change. What is this potential impact and when, where and by whom might it be felt? Does the project show a capacity for change or benefit to the economy, society, culture, public policy or services, health, the environment or quality of life, beyond academia?



Value for money	8, 9/ throughout	<p>Is the proposal offering value for money? Is it communicating strong evidence of:</p> <p>a unique opportunity that is in line with the initiative’s purpose</p> <ul style="list-style-type: none"> ▪ mobilising a new or already interested, but perhaps disparate, research group, or disciplines, to come together and collaborate for the purpose of step change quality research and teaching ▪ project management capabilities of the proposers - reassurance that, if funded, the project will run on time, to budget and deliver against agreed aims, activities and outcomes ▪ tangible and quantifiable outcomes and impact for the benefit of the institutions as well as the more immediate group ▪ the potential to publish high quality papers, influence policy, and leverage external funding
Value for money Potential to expand upon existing or newly identified collaboration	6, 7	<ul style="list-style-type: none"> ▪ Evidence of strength and potential of the relationship. How can the group and its work develop beyond the project? What mechanisms will be used to ensure ongoing communications and interaction? Clear sense of potential trajectory for the project and the relationship.
Advancing and sustaining the partnership	5, 6, 7, 8, 9	Communicates how the project relationship would contribute to sustaining and strengthening the UBC – Exeter partnership.