

# Funding and Bidding Process

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- Eligibility
- Initial Scoping Stage
- Terms & Conditions
- Structure of Bid
- Project Pitfalls
- Budget
- Evaluation Criteria
- Checklist for Final Stages
- Evaluation Process

- HEIs funded by HEFCE
- HEIs funded by HEFCW
- FECs in England teaching HE to 400+ FTEs
- Other institutions as project partners ONLY

- Read the call & background briefings to understand programme rationale
- Ensure project ideas are within scope & map to call objectives, timetable, budget, activities envisaged, priorities
- Consider fit with institutional objectives
- Consider project partners; internal & external
- Clarify outputs and wider benefits to community as a whole
- Secure institutional support & funding commitment at a high level for project period and consider sustainability issues

- Read JISC Guide to Bidding

<http://www.jisc.ac.uk/bidguide.html>

- Read JISC Terms and Conditions of Grant

[http://www.jisc.ac.uk/proj\\_tocgrants.html](http://www.jisc.ac.uk/proj_tocgrants.html)

- Read JISC Project Management Guidelines

[http://www.jisc.ac.uk/proj\\_manguide.html](http://www.jisc.ac.uk/proj_manguide.html)

- State aims and objectives clearly and concisely
- Clarify project outputs and outcomes, demonstrating impact and wider benefits to education and research
- Describe how bid meets criteria set out in the call
- Provide a sound project plan and project management arrangements
- Document proposed dissemination and evaluation mechanisms
- Demonstrate how the bid is aligned with the objectives of your institution
- Demonstrate high level institutional support
- Provide clear costings, % FTEs, grades of staff, fEC etc.
- Give value for money, with institutional contribution(s) as appropriate
- Comment on sustainability issues when JISC funding ceases

- Cover Sheet
- Introduction – rationale, project length, how contribute to programme
- Project Description (deliverables, performance indicators, methodology, project plan, timetable, project management, analysis of risks, dissemination, evaluation, sustainability, intellectual property)
- Budget, broken down across project years (staff time, T&S, hardware/software, dissemination, evaluation, total fEC costs + institutional contributions towards fEC)
- Key personnel, relevant skills (indicate where plan to recruit)
- Letter(s) demonstrating support from lead and partners

- Ensure budget is clear & detailed, clarifying total cost
- Breakdown budget across project years (Sept/Oct start)
- Staff costs: proportion of time, include salary increases
- Travel & subsistence, consumables
- Dissemination & embedding
- Evaluation
- If an HEI, cost fEC & summarise qualitative and quantitative benefits project partners will gain from project
- Indicate institutional contribution(s) towards fEC

- Recruiting staff often takes longer than envisaged
- Finding staff with the right skills if innovative area
- Project manager is key; sufficient resources must be devoted to this aspect
- Formal consortium agreements required between partners, clarifying responsibility of each partner, who will deliver what, funding to each partner, ownership of deliverables etc.
- Project interdependencies
- Staff turnover on projects can be relatively high, particularly near end
- Scalability
- Embedding new processes within an institution should never be underestimated

- Review the evaluation criteria – weighted
  - Quality of proposal & workplan (30%)
  - Impact (30%)
  - Partnership & dissemination (10%)
  - Value for money (15%)
  - Experience (15%)
- Check bid demonstrates what it needs to convincingly
- Consider your bid from an evaluator's perspective
- Ask someone fresh to review the bid and score against the evaluation criteria and provide feedback

- Check deadline (12 noon, 22 June 2006)
- Check format for submission of bids (pdf; electronic only)
- Check page lengths adhered to (10 single sides A4, Arial 10)
- Optional appendices (e.g. CVs)
- Ensure letter(s) of institutional support provided
- Ensure cover sheet completed FULLY
- Submit bid to mailbox indicated
- Automated response

- Expert Evaluation Panel (committee members, advisory boards)
- Conflicts of interest avoided
- 2-3 markers per bid using formal marksheet and guidance
- Executive analyse the marks and produce report
- Evaluation panel meeting (balance of projects, regions etc.)
- Communicate decisions to bidders (late July)
- Issue funding letters (August)
- <http://www.jisc.ac.uk/bideval.html>