EPSRC Old Fellowships Framework

Application Guidance

Please note – this guidance applies to the old EPSRC Fellowships framework, for proposals submitted to EPSRC before 14 December 2020 only.

Separate guidance is available for the currently active EPSRC Fellowship schemes: Open Fellowships, Open Plus Fellowships and Open Postdoctoral Fellowships.

This guidance aims to provide an overview of the old EPSRC Fellowship scheme, its key features and the application process. New proposals are no longer being accepted via this old scheme. Information is provided here to support applicants who submitted prior to 14 December 2020, reviewers and panel members only.

Table of Contents

EPSRC Old Fellowships Framework ................................................................. 1
Application Guidance .................................................................................. 1
1. Overview ........................................................................................................ 2
   Aim of Scheme ............................................................................................. 2
   Eligibility ....................................................................................................... 2
   Location and Host Organisation ................................................................ 2
   Career Stages ............................................................................................... 4
   Areas in which Fellowships are available ................................................. 5
   Duration ........................................................................................................ 5
   Resources ...................................................................................................... 5
   Submission Timeline .................................................................................... 6
   Fellowship Start Date ................................................................................... 6
   Process timeline ............................................................................................ 7
   Fellowship Policy ........................................................................................ 8
2. How to apply .................................................................................................... 9
   Important information ................................................................................... 9
3. Assessment ..................................................................................................... 10
1. Overview

Aim of Scheme
The EPSRC Fellowship is a personal award which enables applicants across the postdoctoral, early and established career stage to design a flexible package to facilitate delivery of a novel and outstanding piece of world-leading research in an area of current strategic importance. Fellows should be provided with an appropriate level/an appropriate type of support and training for the duration of their fellowship to enable them to develop new or enhance existing research leadership skills, raise the profile of STEM and EPSRC and gain the experience required to enable them to advance to the next stage of their career.

Eligibility
Applicants are expected to hold a PhD by the start date of the fellowship or have equivalent research experience. There are no eligibility rules based on years of postdoctoral experience or whether the applicant holds a permanent academic position. Consideration will be given to applicants who have taken a non-standard career path after their primary degree. Applications are also welcomed from candidates who wish to re-establish themselves after a career break or other period of absence from active research.

There are no nationality restrictions imposed by EPSRC.

For further details on eligibility please see our FAQ document.

EPSRC reserves the right to reject, at any stage, applications that do not fit the remit, eligibility or ethos of this scheme.

Location and Host Organisation
Fellowships can be held at any UK university or similar Higher Education Institution (HEI) that is eligible for Research Council funding, please see https://www.ukri.org/funding/how-to-apply/eligibility/ for a full list of eligible research organisations. The Fellowship must be costed and submitted by the host
organisation. For further guidance please refer to the EPSRC Funding Guide: http://www.epsrc.ac.uk/funding/howtoapply/fundingguide/
**Career Stages**

Our fellowship is available at three different career stages. Before applying, the applicant should select the career stage they are applying for in consultation with their host institution and considering the stated aim of each career stage in the table below. Applicants will be scored against the assessment criteria with reference to the aims of the applicant’s stated career stage. Applicants are advised that they may be asked to evidence how their skills and experience would have satisfied the aims of previous career stages as part of this assessment process.

<table>
<thead>
<tr>
<th>Post-doctoral aims</th>
<th>Early career aims</th>
<th>Established career aims</th>
</tr>
</thead>
<tbody>
<tr>
<td>• To deliver high quality research in an area of current strategic importance</td>
<td>• To deliver high quality research in an area of current strategic importance which fits with other responsibilities held by the applicant</td>
<td>• To deliver high quality research in an area of current strategic importance which is uniquely shaped by the knowledge, experience and community standing of the applicant</td>
</tr>
<tr>
<td>• To achieve transition to research independence</td>
<td>• To achieve transition into a recognised research leader who advocates for STEM and EPSRC</td>
<td>• To utilise influence to shape the broader policy, research &amp; innovation landscape</td>
</tr>
<tr>
<td>• To undertake training and development to prepare for a career in research &amp; innovation</td>
<td>• To undertake training and development for continued professional development (e.g. public engagement, media, line management, leadership, grant writing etc)</td>
<td>• To support development and mentoring of other researchers and act as a role model for group and/or community</td>
</tr>
<tr>
<td></td>
<td>• To develop networks and establish a position in the community which could include building and/or expanding a research group</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Post-doctoral outcomes</th>
<th>Early career outcomes</th>
<th>Established career outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Has delivered high quality research in an area of strategic importance which has enhanced the track record of the fellow</td>
<td>• Has delivered high quality research in an area of strategic importance which has established the fellow as a recognised leader</td>
<td>• Has delivered high quality research in an area of strategic importance which is shaping the research agenda</td>
</tr>
<tr>
<td>• Has achieved research independence</td>
<td>• Has experience/understanding of advocacy</td>
<td>• Has engaged in broader advocacy roles across the research and innovation landscape</td>
</tr>
<tr>
<td>• Has undertaken appropriate professional development activities in line with their forward career aspirations</td>
<td>• Has established new connections in the community and demonstrated ability to train and/or mentor others and contributed to the career development of others.</td>
<td>• Has acted as a role model and provided mentoring of others beyond immediate responsibilities</td>
</tr>
</tbody>
</table>
Areas in which Fellowships are available
EPSRC Fellowships are open across the EPSRC remit at the Early and Established career stages. At the postdoctoral career stage applications are invited only in strategic priority areas where growth is required and where developing leaders can integrate their work into the wider landscape. Current thematic priority areas that are open for fellowship applications can be found at https://epsrc.ukri.org/skills/fellows/areas/.

Duration
The duration and the proportion of time that can be supported on the fellowship are flexible.

Applicants can apply for up to 5 years of support for Early Career and Established Career awards, or up to 3 years for Postdoctoral stage award, shorter fellowship are also allowed. Applicants should carefully consider the proposed duration of the fellowship and ensure this is appropriate to complete the intended program of work and to achieve the stated development and career goals.

Applicants may spend between 50 and 100% FTE on their fellowship. Where a fellow is ordinarily employed part-time, their EPSRC fellowship may be held part-time at a minimum level of 50% and be extended prorata accordingly. Where a fellow is employed full-time but does not spend 100% of their time on their fellowship, the fellowship duration will not be pro-rated.

Resources
Details of the resources available to each fellowship type are outlined below. Further information on allowed costs can be found in https://epsrc.ukri.org/funding/applicationprocess/fundingguide/

Applicants should carefully consider the resources being requested to ensure these are eligible and sufficient to support the intended program of work.

<table>
<thead>
<tr>
<th>Resource Package</th>
<th>Postdoctoral</th>
<th>Early career</th>
<th>Established career</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration</td>
<td>Up to 3 years</td>
<td>Up to 5 years</td>
<td>Up to 5 years</td>
</tr>
<tr>
<td>Salary</td>
<td>Up to 100%</td>
<td>Up to 100%</td>
<td>Up to 100%</td>
</tr>
<tr>
<td>Travel &amp; Subsistence</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Staff</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Visiting Researchers</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Equipment</td>
<td>Individual items costing less than £10,000 (incl. VAT)*</td>
<td>Yes – in line with current EPSRC equipment guidelines**</td>
<td>Yes – in line with current EPSRC equipment guidelines**</td>
</tr>
<tr>
<td>Consumables</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Access to facilities</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Public Communication Training | Yes | Yes | Yes

* [https://epsrc.ukri.org/funding/applicationprocess/fundingguide/resources/directlyincurredcosts/](https://epsrc.ukri.org/funding/applicationprocess/fundingguide/resources/directlyincurredcosts/) under ‘other costs’

** [https://epsrc.ukri.org/research/facilities/equipment/](https://epsrc.ukri.org/research/facilities/equipment/)

**Submission Timeline**

In general, there are no deadlines for a fellowship submission. Applications can be submitted at any time and will be processed on a rolling basis at a prioritisation panel after postal peer review. However, there are some exceptions; a specific call can have a set closing date, please see our calls page: [https://epsrc.ukri.org/funding/calls/](https://epsrc.ukri.org/funding/calls/).

For guidance on when to submit to have the best chance of the application being assessed at a forthcoming prioritisation panel, please see the tables below and the diagram on page 10. Please be aware that these dates illustrate typical timelines only and we cannot guarantee applications going to specific panels.

<table>
<thead>
<tr>
<th>Challenge Themes</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Healthcare Technologies</td>
<td>Please contact* the Healthcare Technologies team for up to date information.</td>
</tr>
<tr>
<td>Digital Economy</td>
<td>Fellowship applications predominantly go to ICT panels</td>
</tr>
<tr>
<td>Energy</td>
<td>Fellowship applications go to Physical Sciences and Engineering panels, depending on content.</td>
</tr>
<tr>
<td>Manufacturing the Future</td>
<td>Fellowship applications go predominantly to Engineering panels but can also go to ICT and Physical Sciences depending on content.</td>
</tr>
</tbody>
</table>

* [link fellowship main page](https://epsrc.ukri.org/funding/applicationprocess/fundingguide/resources/directlyincurredcosts/)

**Fellowship Start Date**

Fellowship start dates are flexible, but must be within one year from the application submission date.
Process timeline

After an application has been received by EPSRC, postal peer review can take a minimum of 4 months. If the reviews are sufficiently supportive the application will go to panel. If subsequently successful at the prioritisation panel, it can take approximately 6 weeks to the interview stage.

- Submission
- Prioritisation Panel
- Interview Panel
**Fellowship Policy**

**Resubmission**

Please note that you may only apply for one EPSRC fellowship in any 12-month period, so please consider carefully when you choose to submit your application.

EPSRC does not accept uninvited resubmissions of applications, regardless of any previous EPSRC correspondence. The policy applies to any application that has been previously submitted to EPSRC through any of its funding routes.

Further details on our resubmission and fellowship policies can be found at: https://epsrc.ukri.org/funding/applicationprocess/basics/resubpol/ and https://epsrc.ukri.org/skills/fellows/peerreviewprocess/policy/

**Equality, Diversity and Inclusion**

The long-term strength of the UK research base depends on harnessing all the available talent. EPSRC expects that equality and diversity is embedded at all levels and in all aspects of research practice and funding policy. We are committed to supporting the research community, offering a range of flexible options which allow applicants to design a package that fits their research goals, career and personal circumstances. This includes career breaks, support for people with caring responsibilities, flexible working and alternative working patterns. With this in mind, we welcome applications from academics who job share, have a part-time contract, or need flexible working arrangements.

Peer review is central to EPSRC funding decisions, we require expert advice and robust decision-making processes for all EPSRC funding initiatives. We are committed to ensuring that fairness is fully reflected in all our funding processes by advancing policy which supports equality, diversity and inclusion. Please see our Equality and Diversity webpages https://epsrc.ukri.org/funding/equalitydiversity/ for further information.

**Declaration on Research Assessment**

As part of our commitment to support the recommendations and principles set out by the San Francisco Declaration on Research Assessment (DORA; https://sfdora.org/read/), UKRI reviewers and panel members are advised not to use journal-based metrics, such as journal impact factors, as a surrogate measure of the quality of individual research articles, to assess an investigator’s contributions, or to make funding decisions.

The content of a paper is more important than publication metrics, or the identity of the journal, in which it was published, especially for early-stage researchers. Peer review and panel members are encouraged to consider the value and impact of all research outputs (including datasets, software, inventions, patents, preprints, other commercial activities, etc.) in addition to research publications. We advise our peer reviewers and panel members to
consider a broad range of impact measures including qualitative indicators of research impact, such as influence on policy and practice.

**Managing your Fellowship**

For information on how to manage your Fellowship, see [Managing your fellowship](https://www.ukri.org/files/legacy/skills/fellowshipstatement-pdf/).

**Expectations**

UKRI Statement of Expectations for Research Fellowships and Future Leaders


**2. How to apply**

There is no outline stage in the Fellowship process and applicants are required to submit a full application. Full applications must be submitted using the Research Councils’ Joint electronic Submission (Je-S) System ([https://je-s.rcuk.ac.uk/](https://je-s.rcuk.ac.uk/)).

**Important information**

Only standard 'Arial' or other San Serif font style should be used and font size 11 is the minimum that will be accepted for applications. Arial narrow and Calibri are not allowable font types. Margins should be a minimum of 2 cm in all directions.

By clicking 'submit document’ on your application form in Je-S, the application is initially submitted to your host organisation’s administration office, not to EPSRC. Your host organisation will submit the application via Je-S to EPSRC after initial checks.

Je-S guidance is provided through the Je-S help desk, available from the Je-S System front page.

Please read the instructions below before you start completing your application.
3. Assessment

EPSRC’s Fellowship submission and assessment process consists of several stages as shown in the flow chart below. Note: HO is host organisation.

- Full proposal approved and submitted to EPSRC
- Office Reject
- PI Response
- Prioritisation panel
- PI makes changes
- Submit proposal to HO for approval
- External Review: One from applicant Two from College
- Supportive
- Unsupportive
- Rejection
- Rank Order
- Theme Lead
- Theme Budget
- Funded
- Fellowship Starts
- Approximately 6 weeks after review panel

This stage takes a minimum of 4 months
Submission
Please submit your full application via the Je-S portal to your Host Organisation.
The Host Organisation will submit the full application to EPSRC via Je-S. Once the application has passed the initial EPSRC office check for policy compliance it will be sent out to be peer reviewed.

For advice on writing proposals see:

https://epsrc.ukri.org/funding/howtoapply/preparing/

Expert Peer Review
Full applications will be sent out to external postal peer review and will be assessed against the following criteria:

- Research Quality (Primary criteria)
- National Importance
- The Applicant and Partnerships
- Resources and Management
- Fellowship vision
- Research Leadership
- Communication and Ambassadorship
- Personal Development

Please note this stage can take a minimum of four months.

If the reviews are sufficiently supportive, the application will go on to be assessed at the prioritisation panel stage. You will have an opportunity to respond to reviewers’ comments. If the reviews are not supportive, the application will be rejected at this point and you will be sent copies of the reviewers’ forms as feedback.

Please ensure that your application addresses each of the assessment criteria, with reference to the aims and outcomes for the career stage you are applying against.
Prioritisation Panel
You will be assessed against the following criteria at the prioritisation panel.

It is advised that applicants consider the reviewer guidance: https://epsrc.ukri.org/funding/assessmentprocess/review/formsandguidencenotes/fellowships/

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Indicators</th>
</tr>
</thead>
</table>
| **Research Quality**            | The research you propose should have a high degree of novelty or timeliness in comparison to the broader research context of the area internationally. Research ideas should be high quality and truly innovative.  
You should be able to demonstrate some evidence of appropriate recognition within the research community on an international stage. |
| **National Importance**         | Evidence of how the proposed research:  
• contributes to, or helps maintain the health of other research disciplines,  
• contributes to addressing key UK societal challenges,  
• contributes to current or future UK economic success and/or enables future development of key emerging industry(s).  
Meets national strategic needs by establishing or maintaining a unique world leading research activity (including areas of niche capability).  
Fits with and complements other UK research already funded in the area or related areas, including the relationship to the EPSRC portfolio and our Research Area strategies https://epsrc.ukri.org/research/ourportfolio/researchareas/ and EPSRC’s Delivery Plan https://epsrc.ukri.org/about/plans/deliveryplan/ |
| **Applicant and Partnerships**  | You should have a track record of outstanding research and in delivering impact; and will need to show that you possess the ability to deliver the proposed research.  
You should exhibit an ability to work broadly and across different interfaces, identifying and positioning yourself to take advantage of opportunities |
| **Resources and Management**    | You must be able to justify the planning and project management of the proposed research programme, including the management of any staff requested.  
You must be able to demonstrate that the resources requested in this application are justified and appropriate for delivering the proposed research.  
You should identify the main risks and put contingencies in place. |
Interview Panel

Interview panel meetings will take place approximately six weeks following the prioritisation panel. An interview panel will assess the criteria below, making due consideration of the aim and outcomes of the career stage against which you have applied:

(1) The Panel will be asked to comment on the commitment and support that the host organisation offers to the project and the career of the applicant and will be asked to provide specific feedback to the applicant relating to the career development plan and support provided by the host organisation.

<table>
<thead>
<tr>
<th>Interview Assessment Criteria</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Criteria</strong></td>
</tr>
<tr>
<td>Fellowship Vision</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Research Leadership</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Communication and Ambassadorship</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Personal Development</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td></td>
</tr>
</tbody>
</table>
4. Enquiries
General enquiries about fellowships can be directed to: ResearchCareers@epsrc.ukri.org

If you are unsure whether your research falls within the remit, or if you have specific Theme area queries, please contact the most appropriate portfolio manager or a Theme fellowship co-ordinator. The up to date contacts list can be found at: https://epsrc.ukri.org/skills/fellows/areas/

FAQs: https://epsrc.ukri.org/skills/fellows/overview/faqs/

5. Version Log

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Update</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Adams</td>
<td>11/12/2019</td>
<td>List of Publications now mandatory</td>
<td>19</td>
</tr>
<tr>
<td>George Adams</td>
<td>17/02/2020</td>
<td>Removal of Pathways to Impact</td>
<td>20</td>
</tr>
<tr>
<td>George Adams</td>
<td>01/07/2020</td>
<td>Removal of priority areas at Early and Established career stage</td>
<td>21</td>
</tr>
<tr>
<td>George Adams</td>
<td>16/07/2020</td>
<td>Applicant track record changed to Applicant and partnerships, not content change</td>
<td>22</td>
</tr>
<tr>
<td>Natasha Richardson</td>
<td>10/03/2021</td>
<td>Restored version to website for review and panel assessment of proposals submitted prior to 14 December 2020. Addition of appendix on old PS EDI priority.</td>
<td>23</td>
</tr>
</tbody>
</table>
## Appendix 1: Je-S attachments check list

<table>
<thead>
<tr>
<th>Attachment Type</th>
<th>Maximum Page length</th>
<th>Mandatory /Optional</th>
<th>Extra Guidance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case for Support</td>
<td>Nine pages</td>
<td>Mandatory</td>
<td>Comprising up to two A4 sides for a track record</td>
</tr>
<tr>
<td>Diagrammatic Work plan</td>
<td>One page</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td>Host Organisation Letter of support</td>
<td>Two pages</td>
<td>Mandatory</td>
<td><a href="https://epsrc.ukri.org/skills/fellowships/hostorganisationobligations/">https://epsrc.ukri.org/skills/fellowships/hostorganisationobligations/</a></td>
</tr>
<tr>
<td>Justification for Resources</td>
<td>Two pages</td>
<td>Mandatory</td>
<td></td>
</tr>
<tr>
<td>CVs</td>
<td>Two pages each</td>
<td>Mandatory</td>
<td>For Applicant, named and visiting researchers, and researcher co-investigators only.</td>
</tr>
<tr>
<td>Project Partner Letters of Support</td>
<td>No page limits</td>
<td>As Required by EPSRC</td>
<td>Must be included from all named project partners. Must be on headed paper, and be signed and dated within six months of the proposal submission date.</td>
</tr>
<tr>
<td>Letters of Support</td>
<td>No page limits</td>
<td>As Required by EPSRC</td>
<td>In exceptional circumstances a maximum of three letters can be submitted.</td>
</tr>
<tr>
<td>Equipment Quotes</td>
<td>No page limits</td>
<td>As required by EPSRC</td>
<td><a href="https://epsrc.ukri.org/research/facilities/equipment/process/researchgrants/">https://epsrc.ukri.org/research/facilities/equipment/process/researchgrants/</a></td>
</tr>
<tr>
<td>Equipment Business Case</td>
<td>Two pages each</td>
<td>As required by EPSRC</td>
<td><a href="https://epsrc.ukri.org/research/facilities/equipment/process/researchgrants/">https://epsrc.ukri.org/research/facilities/equipment/process/researchgrants/</a></td>
</tr>
<tr>
<td>Proposal Cover Letter</td>
<td>Two pages</td>
<td>Mandatory</td>
<td>The cover letter can be used to highlight any important information to EPSRC, this must include the priority area you are applying to for</td>
</tr>
<tr>
<td>Attachment Type</td>
<td>Maximum Page length</td>
<td>Mandatory /Optional</td>
<td>Extra Guidance</td>
</tr>
<tr>
<td>-------------------------</td>
<td>---------------------</td>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Postdoctoral applicants</td>
<td></td>
<td></td>
<td>Postdoctoral applicants. This attachment type is not seen by reviewers or panel members. For Early and Established career applicants that do not need to highlight any important information to EPSRC please attached a cover letter stating this.</td>
</tr>
<tr>
<td>Technical Assessments</td>
<td>No page limit</td>
<td>As required by EPSRC</td>
<td>If you plan to use a major facility in your research, such as those funded centrally by EPSRC or a European facility, contact the facility before applying to EPSRC to check if your proposed research is feasible, and obtain a Technical Assessment if JeS marks it as required.</td>
</tr>
<tr>
<td>Other attachment</td>
<td>No page limit</td>
<td>As required, at EPSRC request only</td>
<td>This can be used for a document that does not fit under any of the headings above. This attachment type is not seen by reviewers or panel members.</td>
</tr>
<tr>
<td>List of publications</td>
<td>No page limit</td>
<td>Mandatory</td>
<td></td>
</tr>
</tbody>
</table>

Please ensure you adhere to the above attachment requirements when submitting your proposal. Any missing, over length or unnecessary attachments may result in your proposal being rejected. Please see [https://epsrc.ukri.org/funding/applicationprocess/preparing/writing/](https://epsrc.ukri.org/funding/applicationprocess/preparing/writing/) for more information on writing your proposal.
Appendix 2: Physical Sciences EDI priority

Please note this individual priority area was closed to new applications from 14 December 2020, when the new Open and Open Plus Fellowships were launched. Applicants preparing new proposals may wish to consider applying for an Open Plus Fellowship with an EDI focus.

Information is included here to assist with reviewing and panel assessment only for applications already received by EPSRC.

Physical Sciences Equality, Diversity & Inclusion Fellowship – Guidance

Applicants to this priority area will follow the normal fellowship process but with some minor alterations. These are described below. Applicants must propose a high quality and ambitious research programme, in the same way as for the other established fellowship priority areas, alongside EDI activities.

Proposals to this area will be required to submit a 2 page EDI plan, describing the approaches and activities applicants will employ, and importantly how these activities combined with the applicants leadership role will deliver the aims of the priority area, namely to inspire, enable and facilitate greater EDI in the broader physical sciences research community.

This plan should include a clear understanding of EDI challenges within physical sciences, evidence of the applicants track record in the EDI space, EDI outcomes identified and the methods required to reach them, including engagement with appropriate stakeholders to deliver these. These should be feasible and have appropriate time and resource allocated to address the challenge(s). This plan should be uploaded as an additional document rather than being embedded within the case for support. The case for support should be used to describe your research proposal.

EPSRC will check there is an EDI plan submitted. Any proposals submitted to this area without an EDI plan or one that does not address the above points will be rejected before being sent for peer review assessment. Following this initial check the proposal will be assessed by postal peer review as indicated in our standard processes https://epsrc.ukri.org/skills/fellows/peerreviewprocess/

Postal peer review will not be asked to comment on the EDI plan and neither will the EDI plan be assessed at prioritisation panel. However this document will be shared with reviewers and panel members.

Subsequent to full applications being submitted and prior to the interview, EDI plans will be sent to representatives from the community who have relevant EDI expertise. EPSRC, with input from the Royal Society Chemistry (RSC) and the Institute of Physics (IoP), will select these individuals in accordance with our standard reviewer selection policies.
These reviewers will be asked to pose questions of clarification to the applicants with regard to their ED&I plan and suggest further opportunities to incorporate over the lifetime of the project. These questions and suggestions will be submitted independently, collated and sent to the applicants in advance of the interview. A copy of the points of clarification will be shared with the interview panel to inform their questioning.

The ED&I plan will be assessed at the interview panel (but not the prioritisation panel). The criteria the ED&I plan will be assessed against are included at the end of this Guidance. There will be a panel member with appropriate expertise to assess the ED&I plan on the interview panel. All of the standard assessment criteria for fellowships will still be assessed as normal, following the standard process explained on the following pages: https://epsrc.ukri.org/skills/fellows/.

Applicants are encouraged to contact the physical sciences theme at EPSRC prior to submission. Examples of what could be included in the ED&I plan are listed below, applicants are not expected to include all of these:

- Initiate programmes and support institutions (both yours and others)
- ED&I research
- ED&I advocacy
- A national activity, something unique and delivering a real step-change
- Budgeting for activity and building a small team to deliver if necessary
- DO NOT substitute for any institutional responsibility, for example writing Athena Swan applications or any other activities already in place at your institution

To help with the development of the ED&I plan, applicants are encouraged to consider the following questions:

- What are the key ED&I challenges in Physical Sciences?
- How will you contribute to changing the culture, practices and makeup of the research community? You should provide evidence of ways in which ED&I issues will be managed/addressed/tackled both within your group, institution and in the wider community level.
- What outcomes have you chosen to target and why are these the most appropriate? How will these outcomes be measured?
- What steps will you take to raise awareness of and mitigate against the impact of bias in your group and the wider community in terms of gender, ethnicity or any other protected characteristic [https://www.gov.uk/discrimination-your-rights] through processes, behaviours and culture?
- How will you and members of your group (staff and partners (as appropriate)) act as ambassadors for ED&I?
- How will good practice be sought-out to evolve the ED&I plan/approach over the proposal’s lifetime? How will this good practice be captured and shared with the wider community?
- Are there any other ED&I aspects of the plan not yet referred to and how do you intend to achieve them?
Fit to Strategic Priorities - ED&I Fellowship assessment criteria

The equality, diversity and inclusion (ED&I) plan should deliver the aims described in the priority area, namely to inspire, enable and facilitate greater ED&I in the broader physical sciences research community.

The (ED&I) plan proposed should:

- Demonstrate a clear understanding of EDI challenges within physical sciences
- Identify clear ED&I outcomes and engage with appropriate stakeholders to deliver these
- Be feasible and have appropriate time and resource allocated to address the challenge(s) highlighted
- Contain evidence of the applicant’s track record in the ED&I space

These assessment criteria will be assessed at interview panel not prioritisation panel.