

BBSRC GUIDANCE NOTES FOR FELLOWSHIP (DISCOVERY FELLOWSHIP AND DAVID PHILLIPS FELLOWSHIP) REVIEWERS USING THE JE-S SYSTEM

These notes are intended to provide reviewers with specific guidance for completion of the fellowship reviewer form (used for the Discovery Fellowship and the David Phillips Fellowship). The notes should be read in conjunction with the reviewer protocols that are provided to reviewers within the Je-S system. Specific guidance is available for each individual section of the report that you are asked to complete.

COVID-19 IMPACTS

- The ongoing situation regarding the coronavirus pandemic has significantly impacted the research and innovation community and the nature of these impacts is evolving
- When carrying out an assessment, you should particularly take account of the circumstances when considering the support offered by the host institution and collaborators. This is likely to have been impacted by the pandemic, for example by reducing the amount of monetary support the research organisation or collaborator/s is able to provide
- Be aware that other aspects of a proposal may also be impacted, for example by applicants being unable to secure letters of support by the submission deadline

KEY POINTS

- Pay particular attention when assessing scientific excellence – the Committee will rely heavily on your scientific expertise to make a judgment on this aspect of the proposal
- Consider the career stage and experience (including any career breaks) when assessing the applicant's potential
- Provide 2 scores (Applicant score; Scientific Excellence score) using the specific definitions given in the scoring criteria below

BACKGROUND

The Discovery Fellowship

- The fellowship aims to allow fellows to develop research independence and gain leadership skills, to equip them to become future independent research leaders
- It supports individuals to undertake a piece of independent research within a host lab
- There is no limit placed on their years of active postdoctoral research experience
- The extent of the applicant's experience should be taken into account when considering the outputs of applicants and their demonstrations of independence
- Please review [the call text found here](#).

The **David Phillips Fellowship**

- The fellowship provides support for researchers wishing to establish their first independent research group
- Applicants have no limit placed on their years of active postdoctoral research experience
- Reviewers should ensure that it is the upward trajectory of an applicant's career that is being assessed rather than their total outputs.
- Please review [the call text found here](#).

ASSESSMENT OF PROPOSALS – INTRODUCTION

You are asked to complete a full assessment of the fellowship proposal. The following document describes the aspects of the proposal that should be commented on in your review. The review is broken down under the following headings:

- Suitability of Applicant (Person)
- Choice of host institution (Research environment)
- Scientific Excellence (Project)¹
- Strategic Relevance
- Economic and Social Impact
- Value for Money
- Interview Questions

Under each of these headings, please describe the **strengths** and **weakness** of the proposal. In identifying the strengths and weaknesses you should clearly state which should be accorded the greater significance and why. It is also helpful to raise issues or concerns with the proposal in the form of explicit questions which can be used for short-listed applicants at the interview stage.

You will also be asked to provide **2 numerical scores** for the proposal, one for the applicant, and one for the scientific excellence of the proposed research programme. Please carefully review the scoring criteria (**see appendix**) and refer back to these regularly, when deciding on a score.

Please note that fellowship applicants have a wide range of research experience and this should be taken into account when considering the potential of individual applicants.

You should note that your review will be provided, unattributed, to the applicant, who will be allowed the opportunity to comment on any factual errors and answer any specific queries raised in the review.

¹ When reviewing fellowship proposals please pay particular attention to the scientific excellence of the proposed project as your thoughts will form the basis of the scientific review of this proposal.

The following pages provide guidance on what is required for each section on the form.

REVIEWER SELF-ASSESSMENT

Comments in this section will not be sent to the applicant but will be provided to the Peer Review Committee or Panel.

- **Knowledge of the Applicant**

Indicate briefly in what capacity you know the applicant(s) and their work. If there are any potential conflicts of interest, please contact the BBSRC Office before reading the proposal.

Examples of a conflict of interest include:

- Employed by the same institution as the applicant(s)
- Actively involved in research collaborations with the applicants(s)
- Working closely with the applicant(s), for example as a co-author or PhD Supervisor, or has worked closely in the last 4 years
- Holding a current position on the governing body of or an honorary position within the institution(s) of the applicant(s)
- In receipt of personal remuneration in excess of £5,000 per annum from the applicant's organisation
- Personal/family relationship with the applicant(s)
- Your areas of expertise

- **Area of expertise**

Indicate briefly the areas of your expertise that are relevant to your assessment. Please indicate any areas of the proposal that you consider you are not qualified to assess, to enable the Office to select additional referees in these areas.

ASSESSMENT

The following section will be visible to both the Peer review Committee and the applicants. Applicants will have an opportunity to respond to the comments during the assessment process. Your identity will not be revealed. Please use these thoughts to evidence your final scores for the applicant you will provide in the "overall assessment" section of your review.

- **Suitability of Applicant (Person)**

Discovery Fellowships support excellent early career researchers who have demonstrated high potential and who wish to conduct their own independent research within a host laboratory. When assessing Discovery Fellowship applicants, please take into account the

career stage they are at; those just completing their PhD are likely to have achieved less than those with more years of postdoctoral research experience.

David Phillips Fellowships support outstanding scientists in the early stage of their research careers who wish to establish themselves as independent researchers. In making these awards, BBSRC is seeking to identify scientists who could be expected to be among the leaders of their generation of bio-scientists. David Phillip Fellowship applicants can have a range of research experience, please take this into account when assessing individuals.

Because BBSRC Fellowships are designed to provide a career boost to outstanding researchers, there is a strong emphasis on the scientific potential of the applicants and how they will use the fellowship to boost their career. In this section please comment on:

- Research outputs. Please consider the candidate's outputs relative to the level of research experience and the context in which they have been working. For example, an individual working in a under resourced lab may have fewer opportunities to establish a strong track record than an individual working in a well-funded institute.
 - Personal achievements e.g. prizes, awards, honours, presentations, student supervision, collaborations etc. (taking into account the applicant's level of research experience)
 - Demonstration of scientific independence, relative to their experience
 - The level of thought given to continued professional development activities, as detailed in their Career Development Plan
 - The level of thought given to how they might positively influence research culture, as described in their CV
- **Choice of host institution (Research environment)**

BBSRC fellowship applicants must demonstrate they have given full and careful consideration to the choice of host institution(s). Reasons should be related to the scientific infrastructure and environment, the provision of additional support, the opportunity to develop new skills, and the support for career development present at the host institution. Reasons for the choice of host should be stated clearly within the proposal.

We ask reviewers to take account of the investment that host organisations are committed to making if an award is successful. For the 2020 fellowship round, BBSRC has introduced a new host support template which should be completed by the applicant in collaboration with the head of department. Please note that it is not expected that support will be offered in all areas listed. These categories have been provided to inspire hosts to consider a wide range of ways they might support their fellows. The support offered by host institutions should be assessed more favourably if they provide support for fellows to advance their careers through, for example, tenure track appointments.

BBSRC also encourages proposals which can leverage additional funding from other sources.

Please note that there is **no requirement** for applicants to move to a new research

organisation as part of their fellowship.

- **Scientific Excellence (Project)**

As stated, please consider this carefully as your thoughts will form the basis of the scientific review of this proposal. It is not necessary to extensively restate the programme plan other than as an aid to making critical comment.

Proposals should not be over ambitious or of a complexity that would not allow researchers to make progress or to develop new ideas. Proposals should clearly explain the expected programme of work with a sensible timetable, objectives and clear milestones, and well thought through experiments.

Scientific excellence will be paramount, although allowance may be made for less experienced researchers in the presentation of their proposal.

Discovery Fellowship proposals should be scientifically excellent but not over ambitious or of a complexity that would not allow the fellow to make progress or to develop new ideas that could form the basis of their future career as a research leader. When reviewing the skills and experience of **Discovery Fellows** allowances should be made for those applicants who have limited or no postdoctoral research experience. Furthermore, please consider if the proposed project will give the **Discovery Fellow** the opportunity to develop their potential by exposing them to new methods, techniques and ideas.

When reviewing the proposed research programme please consider:

Clarity of hypotheses, aims, and objectives

Comment on whether the aims and objectives are understandable and unambiguous, and whether it will be clear when the objectives have been achieved. If the work is proposing or testing hypotheses, please comment on whether these hypotheses are clear and appropriate for meeting the objectives.

Strengths and weaknesses of the experimental design

Comment on the strengths and the weaknesses of the experiments that are proposed.

Feasibility of the work programme, given the track-record of the applicant

Comment on the skills and experience of the applicant and team (including project partners) to deliver the proposed research.

Also comment on evidence of the applicant's scientific independence (particularly in instances where Discovery Fellow applicants propose to continue research within their current research group or David Phillips Fellow applicants propose to remain at their current research organisation).

All fellowship applicants must be able to demonstrate that if awarded a fellowship, they will be genuinely working independently of senior colleagues with whom they might previously have collaborated or for whom they may have worked in a supporting role. There should be indications within the research programme that this will be the case. Short-listed applicants

will be tested on this at interview.

- **Strategic Relevance**

Relevance to industry and other stakeholders

Comment on any relevance the proposal may have in providing underpinning science which meets industrial needs or addresses the potential policy requirements for other BBSRC stakeholders.

Relevance to BBSRC strategy

BBSRC has a set of Council-wide strategic priorities (research and policy) that are applicable to all aspects of our funding; as described here <https://bbsrc.ukri.org/funding/grants/priorities/>. Comment on whether and to what extent the proposal addresses the research and policy priority areas of BBSRC.

- **Economic and Social Impact**

Impact refers to the benefits scientific research has on the economy, society and knowledge. Examples of impact outputs are available at <https://bbsrc.ukri.org/research/impact/>. A key element in this factor will be the arrangements that exist within the project to achieve the necessary interaction with the relevant users who will ensure that these aims are realised.

From March 2020, UKRI has removed the requirement for a separate Pathways to Impact attachment and the associated Impact Summary within the Je-S form for all grant proposals.

Impact activities are now expected to be integrated into the research programme of a proposal. Applicants are asked to describe their plans to generate social, economic and/or academic impact through their research using the Case for Support and Justification of Resources attachments. This can be supplemented by using the Academic Beneficiaries section of Je-S to address academic impact specifically. The structure that this takes is flexible; but impact activities should be integrated into appropriate sections of the Case for Support, not presented as an independent work package.

Activities can take a vast array of forms, involving many different stakeholders, so there are no set expectations of what they involve. Whatever approaches are taken, the work should be tailored to help realise the immediate and/or long-term value of the research.

You should comment specifically on impact activities as described in the proposal, giving consideration to the following:

- Have the key areas where impact should be explored by the researcher during the course of the fellowship been clearly identified?
- Have clear, realistic and appropriate objectives been given?
- Are the proposed activities appropriate to the research, are both routine and novel ways of engaging end-users proposed and are the activities likely to generate very significant potential for impact.
- Has the management of the impact activities been well thought out?
- Is the ability to achieve the impact objectives clearly evident?

- **Value for Money**

Fellowships now awarded by UKRI reflect the introduction in universities of full economic costing (fEC) at project level. Referees may wish to comment on the extent to which the resources requested, relative to the anticipated scientific gains and training activities proposed to be undertaken, represent an attractive investment of BBSRC funds and whether there is evidence of significant support from the host institution. Resources under Directly Incurred, Directly Allocated (except estates costs) and Exceptions can be assessed for their necessity and appropriateness.

Estates and Indirect costs must not be considered, and the overall costs of the fellowship should not normally affect your assessment of its quality.

Due to the scale of the investment made in **David Phillips Fellows**, reviewers should note that **value for money is an essential criterion against which David Phillips Fellowship applications should be assessed, alongside excellence and other key criteria**. For this funding opportunity, reviewers should be looking for written evidence that the host organisation will contribute significant support, either financially or in-kind if an award is made. Proposals that do not provide clear evidence that the research programme is highly competitive in terms of value for money, or which lack additional funding commitments, are unlikely to be successful.

Applicants have been asked to ensure that the Partnership Details section of the Je-S proforma contains **details of all institutional support** that will be made available if the applicant is successful in obtaining a BBSRC award. In addition, the **justification of resources attachment must clearly show why the resources requested are good value for money and why it is in BBSRC's interests to provide investment**. Also letters of support from all parties contributing financial or other support should be uploaded to the proposal under the Letters of Support attachment giving full and accurate details of the commitments being made.

- **Interview Questions**

Please indicate any questions or issues that you think should be addressed by the applicant if they reach the interview stage.

OVERALL ASSESSMENT

The following section will be visible to both the Committee and the applicants.

Based on the scoring schemes described in Appendix below, please consider the full range of scores available to:

- Indicate an overall score for this **APPLICANT**, taking into account the definitions of each score. This score will be used to help inform Committee E during the shortlisting of proposals. Please be prepared to use the full range of scores but tick one box only.

- Indicate an overall score for the **SCIENTIFIC EXCELLENCE OF THE PROPOSED RESEARCH PROGRAMME**, taking into account the definitions of each score. **This score will form the basis of the proposal's scientific review** and will help determine those candidates invited to interview, so please consider this carefully. Please be prepared to use the full range of scores but tick one box only.

APPENDIX

Scoring criteria: Applicant

Score	Description	Definition
6	Exceptional Fundable	<p>Applicant who, for their career stage, has clearly demonstrated very strong credentials as an independent researcher. Applicants are already recognised as being future leaders / leaders within their field.</p> <p>A very strong case has been made as to how applicants will use the fellowship to further advance their career.</p> <p>You think that this individual should be supported as a priority.</p>
5	Excellent Fundable	<p>Applicant who, for their career stage, has clearly demonstrated strong credentials as an independent researcher. Applicants are clearly establishing themselves as future leaders / leaders within their field.</p> <p>A very strong case has been made as to how applicants will use the fellowship to further advance their career.</p> <p>You think that this individual should be supported.</p>
4	Very Good Fundable	<p>Applicant who, for their career stage, has clearly demonstrated credentials as an independent researcher. Applicants are clearly establishing themselves as future leaders / leaders within their field.</p> <p>A strong case has been made as to how applicants will use the fellowship to further advance their career.</p> <p>You think that this individual should be supported if funds are available.</p>
3	Good Fundable	<p>Applicant who, for their career stage, has demonstrated credentials as an independent researcher. Applicants have presented some evidence they are establishing themselves as future leaders / leaders within their field.</p> <p>A clear case has been made as to how applicants will use the fellowship to further advance their career.</p> <p>You think that this individual could be supported if funds are available.</p>
2	Not Competitive Not Fundable	<p>Applicant who has failed to demonstrate credentials as an independent researcher and has not presented evidence that they are establishing themselves as a future leader / leader within their field.</p> <p>It is not clear how applicants will use the fellowship to further advance their career.</p> <p>You do not think this individual should be supported.</p>
1	Unfundable Not Fundable	<p>Applicants who do not reach the required standard in relation to demonstrating their credentials as an independent researcher and who have failed to show that they are developing as a future leader / leader within their field.</p> <p>You do not think this individual should be supported.</p>

Scoring criterial: Scientific Excellence of the proposed research programme

Score	Description	Definition
6	Exceptional Fundable	<p>Applicant is proposing a scientific project that is at the leading edge internationally and which is likely to have a significant impact on the field.</p> <p>The proposed research is timely, feasible within the time available and is highly likely to enable the applicant to establish their research niche and provide scope for future research directions.</p> <p>You think that this research programme should be supported as a priority.</p>
5	Excellent Fundable	<p>Applicant is proposing a scientific project that is of a high international standard and which is likely to answer important questions in the field.</p> <p>The proposed research is timely, feasible within the time available and is likely to enable the applicant to establish their research niche and provide scope for future research directions.</p> <p>You think this research programme should be supported.</p>
4	Very Good Fundable	<p>Applicant is proposing a scientific project that is internationally competitive and which will advance the field.</p> <p>The proposed research is timely, feasible within the time available and is likely to help the applicant to establish their research niche and provide scope for future research directions.</p> <p>You think this research programme should be supported if funds are available.</p>
3	Good Fundable	<p>Applicant is proposing a scientific project that has merit and is likely to advance the field.</p> <p>The proposed research is timely, feasible within the time available and could help the applicant to establish their research niche and provide scope for future research directions.</p> <p>You think this project could be supported if funds are available.</p>
2	Not Competitive Not Fundable	<p>Applicant is proposing a scientific project that has some merit but is unlikely to advance the field significantly.</p> <p>The proposed research may be timely and feasible within the time available but is unlikely to help the applicant to establish their research niche or provide scope for future research directions.</p> <p>You think this research programme should not be supported.</p>
1	Unfundable Not Fundable	<p>Applicant is proposing a scientific project that is of no significant scientific merit, is flawed, or is duplicative of other research and so is unlikely to advance the field.</p> <p>The proposed research will not help the applicant to establish their research niche or provide scope for future research directions.</p> <p>You think this research programme should not be supported.</p>