

## Ernest Rutherford Fellowships Guidance on Terms and Conditions and Information on Scheme Features

This document contains guidance for ERF Fellows. The headings below indicate the topics covered in the document. Please click on the links below to be taken straight to that section:

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### 1. Introduction

This document provides guidance for the Fellows in receipt of an STFC Ernest Rutherford Fellowship for the tenure of their awards.

### 2. Ernest Rutherford Fellowship Funding

Fellowships are costed based on full economic costs (fEC). STFC will provide funding at 80% of the fEC requested. The host institutions agree to find the balance of fEC for the proposal from other resources. Universities and other higher education organisations use the Transparent Approach to Costing (TRAC) methodology to calculate fEC. Please refer to the [costs we fund](#) for further information.

For non-university organisations, Research Councils require a validation process to ensure that their costing methodologies are robust. Standard default rates should be used where Research organisations have not developed their own rates.

#### 2.1 Directly Incurred Costs

Costs that are explicitly identifiable as arising from the conduct of a project are charged as the cash value spent and are supported by an auditable record. Ernest Rutherford Fellowships provide funds to cover your salary, the costs of personal travel and some minor equipment costs. These will have been awarded under the Directly Incurred Costs heading. Fellows who have returned from a career break may also use funds applied for retraining and updating their skills where this has been justified in the context of the proposed research project.

#### 2.2 Salary

Your agreed salary will have been agreed with your proposed host institution prior to submitting an application. The agreed salary should be in accordance with the institution's standard recruitment and employment practices. The appointment level on the institution's salary scale should be justified in the application. The salary costs requested should include employer's national insurance and superannuation contributions. Salary increments over the period of the Fellowship should be taken into account, but not anticipated future pay awards.

STFC will award funds on the basis of the agreed salary scales at the time of announcement, with provision for future years increase on the basis of standard UKRI indexation rates. Once announced the grant will not normally be increased to take account of different indexation rates.

## **2.3 Travel**

Personal travel is taken to include necessary collaborative visits and fieldwork, and attendance at one conference workshop or symposium during each year of the Fellowship but excluding fieldwork and visits which form part of the work of a research group with which you may be associated.

If you are associated with an STFC research grant you must ensure that any travel connected with the research project for which the grant was given is claimed from that source.

## **2.4 Other Costs**

Fellows will have been able to request minor equipment and consumables up to a total of £5k for the duration of the fellowship under Directly Incurred Other costs. At the end of the Fellowship any resources purchased will belong to the Institution.

STFC do not fund mentoring time and this cost should not be claimed from the grant.

If Fellows have applied for costs for a laptop these should be claimed under Directly Incurred "Other Costs".

## **2.5 Relocation and Visas**

Fellows moving to the UK from overseas to take up an award may request relocation and visa costs including IHS and Certificates of Sponsorship on application under the Directly Incurred "Other Costs" heading and are in addition to the £5k under Other Costs. These costs are not extended to family members. STFC will award a maximum of £1.2k if moving from Europe or £3k if moving from outside of Europe.

Relocation costs for fellows relocating within the UK will not be funded.

## **2.6 Publication Costs**

STFC will no longer provide funding in research grants for any publication costs associated with peer-reviewed journal articles and conference papers. UKRI provides direct funding to research organisations for this purpose.

Fellows that were awarded publication costs associated with research outputs other than journal articles and conference papers, such as books, monographs, critical editions, catalogues etc. may, however, claim these as a Directly Incurred Other Cost.

## **2.7 Directly Allocated Costs**

Estates costs include building and premises costs, basic services and utilities and appear under the Directly Allocated Costs heading. Estates costs are calculated by the research organisation on application.

## **2.8 Indirect Costs**

Indirect costs include the costs of administration, such as personnel, finance, library and some departmental services. Like estate costs, indirect costs will be calculated by the research organisation and a single figure will be entered on the application.

## **3. Terms and Conditions**

STFC Fellowships are governed by the UKRI research grant terms and conditions unless otherwise stated. Applications are accepted and awards are made on the understanding that Research Organisations and Fellows agree to observe the terms and conditions and the scheme requirements set out in this document and any amendments issued during the duration of the award. STFC intends its scheme to be flexible and reserves the right to deal as it thinks fit with applications of unusual character and to waive any rule at its absolute discretion.

Fellows should refer to the UK Research and Innovation fEC Grant Standard Terms and Conditions of Grant and the UK Research and Innovation fEC Grants Standard Terms and Conditions of Grant Guidance for further information. They can be found on the [UKRI Terms and Conditions for Research Grants webpage](#).

Research Organisations must appoint Fellow employees for the full duration of the award and integrate the Fellow within the research activities of the host department, whilst ensuring that he or she is able to maintain independence and focus on their personal research programme. Awards are made on the understanding that the Fellow's work and progress are subject to the same monitoring and appraisal procedures as those of other academic staff within the host institution, and that there are adequate facilities at the host institution for the research proposed.

## **4. Other Scheme Conditions and Features**

### **4.1 Part Time Working**

Fellowships can be held either on a full-time or may be sought on a part-time basis by applicants wishing to combine their fellowship with caring responsibilities. A part-time award can be held at 50% or above of full-time equivalent. A part-time Fellow may not hold another part-time position in conjunction with the fellowship. The period of award for Fellowships held on a part-time basis will be extended on a pro rata basis.

### **4.2 Extensions**

Grant extension requests will be handled in line with the [UKRI standard research grant terms and conditions](#).

Any request for an extension should be made via the Grant Maintenance facility in Je-S or for grants awarded from 2025 via The Funding Service as soon as the required duration is known. All requests for extensions must be made before the grant ends. Making requests for extensions near the end of the grant, especially where this would move payments to a different financial year, is not encouraged as this increases the risk that we will be unable to accommodate the request within budget restrictions.

### **4.3 Maternity, Paternity, Adoption and Parental leave**

Fellows are entitled to take parental leave in accordance with the terms and conditions of their employment. We will also consider requests to continue the fellowship on a flexible or part-time basis to allow the Fellow to meet caring responsibilities. Extension requests for periods of leave will be handled in line with the [UKRI standard research grant terms and conditions](#).

### **4.4 Contribution to child-care costs associated with conference attendance or collaborative visits**

STFC will consider funding childcare expenses for Fellows, in the event that they incur substantial additional childcare costs as a result of an activity directly associated with their fellowship. The funds may be used to cover, or partially cover, childcare costs that are additional to those that would be incurred anyway, without the conference attendance or collaborative visit. This could include the cost of additional care at home or the cost of items such as flights and accommodation for the child(ren) and a carer if necessary. The maximum value of a claim is £500. Up to three

claims may be made during the fellowship. Payment will be made on receipt of a claim following the conference attendance or collaborative visit. Further details and claim forms will be available to successful applicants or available from [fellowships@stfc.ukri.org](mailto:fellowships@stfc.ukri.org).

#### **4.5 Break in Service**

You will be allowed a break in service not more than twice during the period of the award, for periods amounting together to not more than two years, to enable time to be spent on another activity related to your research that is not supported by STFC.

Breaks in service will not normally be permitted during the first or final years of the fellowship, unless this is for maternity or sick leave. STFC must be informed by the Fellow with the Head of Department in copy. Where STFC agrees to a break in service, the duration of the fellowship will not be extended and payments to the institution will cease for the period of the break (i.e. a Fellow taking a maximum break in service of two years would receive only three years of fellowship funding).

#### **4.6 Movement between Institutions (transfers)**

Fellows are expected to take up their awards at the host institution identified in the application.

Consideration will be given to requests prior to the start of an award if a Fellow is offered a permanent position at a different institution. However, the job advert, closing date and interview should all be after the date the Fellow accepted their award.

Consideration will also be given to requests during the course of an award to relocate the fellowship to a different institution for scientific, career progression or domestic reasons.

Fellows should not move their awards until approval has been given by STFC. The following information will be required for every transfer request:-

- Approval letter from the relinquishing organisation.
- Approval letter from the accepting organisation confirming:
  - The level of support provided.
  - That a suitable environment is provided to enable the successful completion of the project.
  - The teaching requirement was within the permitted limit of up to a maximum of six hours teaching, including preparation, each working week (total 260 hours per annum, pro rata for part-time awards) and that the fellow will have the necessary support.
- Clarification from the Fellow on the impact of the fellowship outcomes.

Further guidance on making a request to transfer a fellowship to another organisation can be found on the UKRI website ([Requesting a change to your project – UKRI](#)) but STFC approval should be sought prior to submitting the request through Je-S Grant Maintenance/The Funding Service.

If you have any specific personal circumstances you would like STFC to take into consideration during your transfer for example maternity leave, please contact STFC Fellowships for advice prior to submitting your transfer request via Je-S Grant Maintenance/The Funding Service.

Any computer 'consumables' that have been purchased on a Fellow's original fellowship grant should remain the property of the Fellow whilst they are carrying out their research and therefore should be transferred with the fellow.

#### **4.7 Teaching**

Fellows may undertake up to a maximum of six hours teaching, including preparation, each working week (total 260 hours per annum, pro rata for part-time awards) if the Head of Department considers it desirable and provided it does not hinder progress on research work. Apart from this, managing research and normal holidays, Fellows must devote themselves to research and no other work may be undertaken within usual working hours, although exceptions are made for time spent on public engagement and other STFC-approved business.

#### **4.8 Additional Funding Support**

During your fellowship you may be able to apply for other funding opportunities depending on the nature of the commitment and the time involved. This could be particularly important towards the end of your award to secure future funding that goes beyond your fellowship end date.

If applying for other funding opportunities, you should bear in mind that you cannot claim salary and overheads as you are paid 100% of your time to work on the ERF award.

However, you can be named on some other grant funding applications. Your application would need to explain why you think that achievement of the project goals will be possible alongside your fellowship. It would be your responsibility to demonstrate that the programme to be carried out in the award is clearly distinct from existing support and that it will be able to be carried out alongside your fellowship without detriment to either award and, without working excessive hours. Any commitment over .25 FTE will be carefully scrutinised. Please also note section 4.1, that a part-time Fellow may not hold another part-time position in conjunction with the fellowship.

Under no circumstances should applicants receive duplicate funding for the same or similar proposal from more than one funding agency. We cannot prohibit the submission of the same or similar proposals to other funding agencies (outside of UK Research and Innovation (UKRI)), but you must include details of similar proposals that have been submitted to other funding agencies.

#### **4.9 STFC Summer Schools**

STFC supports short courses and summer schools held in a core research activity supported by the STFC studentships programme (astronomy, solar system science, particle astrophysics, particle physics, nuclear physics, accelerator science) which are primarily aimed at STFC-funded PhD students. Ernest Rutherford Fellows will normally be expected to be available to participate as lecturers or tutors in summer schools.

#### **4.10 Progress Reports**

Your Head of Department is required to submit a report confirming your progress during the first half of your award.

A progress report template will be sent to your Head of Department for completion with a deadline for completion. All progress reports should be returned to [fellowships@stfc.ukri.org](mailto:fellowships@stfc.ukri.org)

#### **4.11 Reporting and Post-Fellowship Destinations**

STFC has the responsibility to demonstrate the value and impact of research supported through public funding. STFC Fellows are required to provide an annual update of information relating to the outputs, outcomes and impacts (referred to as research outcomes) that arise from their STFC funded research. Researchfish is an online system which is used to collect this information. You would be required to have a Researchfish account and to use the Researchfish system to provide these updates annually during the period of your award and usually for five years after your award has finished. Sanctions will apply to fellows who do not make a submission each year during the data submission period. More information can be found on [the UKRI Research Outcomes webpage](#).

For statistical purposes, STFC requires Fellows to complete a short questionnaire giving details of the post taken up on completion of the fellowship. STFC will send out the questionnaire within the month of the fellowship completion date and expect the Fellow to complete and return the questionnaire within one month of receipt.

#### **4.12 Career Path Tracking**

STFC is keen to track the careers of its former Fellows and may undertake detailed studies of the career paths followed by fellows several years after their fellowship has been completed. Such studies inform policy decisions affecting STFC's fellowship programme. ROs and former Fellows will be expected to respond to future requests for information from STFC on career paths followed.

#### **4.13 Public Engagement**

Applicants who wish to undertake public engagement during their fellowship should outline their plans for delivering and evaluating their engagement in their proposal. Necessary costs for such activities should be requested and justified as normal. Fellowship holders must report the outcomes of their engagement using Researchfish and the final report required by the conditions of the award.

#### **4.14 Mentoring**

Departments must provide mentoring opportunities for Fellows. This should include contact with a named individual who can draw on their experience to help you in your professional or personal development. They should also help you rapidly access resources at your Research Organisation through knowledge of appropriate processes and systems.

#### **4.15 Science Communications**

STFC should have an overview of all communications activity relating to STFC grants including for example: grants announcements, research publications, interviews and third-party media, social media campaigns and case studies. Notification of impending activity by way of an email to the STFC communications team ([pressoffice@stfc.ac.uk](mailto:pressoffice@stfc.ac.uk)) is sufficient.

STFC encourages communications and does not wish to jeopardise any such activity – rather offer support – so please notify us of your plans in advance.

## **5. Contacts**

For all enquiries, please email [fellowships@stfc.ukri.org](mailto:fellowships@stfc.ukri.org)

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