

Guidelines for Proposers and Organisers of Science Meetings within a Programme

APPLICATIONS

The Steering Committee may decide to have a call for proposals or operate on a continuous submission basis. Consult the Programme home page for information.

Applications should be submitted through the Internet (for submission procedure, see below) and will be forwarded automatically to the Programme Chair who is responsible for circulating the application(s) for decision and relaying the information on awards to the ESF office. Applications are normally submitted for decision at Steering Committee meetings, but can be dealt with by email between meetings.

ELIGIBILITY

The Steering Committee will consider proposals for conferences, workshops and schools on topics within the scope of the Programme and with a European or international dimension. They will be assessed on their scientific quality and relevance to the Programme. Priority will be given to meetings taking place in countries that financially support the Programme (see the Programme home page), and the applicants should be established scientists/researchers based in a country in which the ESF has a Member Organisation or from any other country in which a contributing organisation is based.

ASSESSMENT

Applications will be assessed using Guidelines for Programme Steering Committees Concerning Assessment of Applications for Funding (Appendix 1), by the whole Steering Committee, or the Steering Committee may decide to delegate this task to a sub-group of the Committee.

PARTICIPATION

Priority should be given to participants from countries which financially support the ESF Programme (contributing organisations). The involvement of young scientists is strongly encouraged. Organisers are asked to ensure balanced geographical representation amongst the participants.

ESF funding should not normally be used to support more than 10% of speakers from non-ESF member countries (calculated on the basis of capita funded by ESF). The number of participants from non-ESF member countries can be increased provided they are funded from a source other than ESF. Special cases must be justified and agreed by ESF.

The participation of researchers from industry and the private sector in ESF meetings is welcome, and is subject to the basic principles set out below:

- All scientific actions within ESF take place "openly", i.e. there shall be no confidential information. Intellectual Property Right or copyright are the property of all participants contributing financially or intellectually to the activity.

- ESF does not favour any one private sector participant over another and so ESF activities are open to all researchers who have the expertise to be involved.
- Industrial and other private sector participants are normally responsible for their own costs related to travel, subsistence and accommodation.
- In the case of full participation in an ESF Research Networking Programme, it is expected that the organisation concerned will make a financial, or in some cases an in-kind, contribution to the overall costs of the activity.

(See **Appendix 2.1**)

FUNDING

The amount of funding awarded for a meeting will be decided by the Programme Steering Committee based on the proposed Research Networking Programme and budget.

Scientific meetings organised by ESF are expected to be non-profit making. In principle, participants at ESF meetings should not be required to pay registration fees.

ESF funding should be principally used to cover the travel and accommodation costs of speakers and participants. Costs for hiring meeting facilities should be kept to a minimum. Where possible, organisers should try to negotiate the use of meeting facilities within their universities/institutes either as an in-kind contribution or for a minimum fee.

Local administrative costs (where applicable) should not exceed 10% of the ESF funding for the meeting. Such costs include administrative and technical assistance, printing, photocopying, telephone, fax, email etc. Additional support (consumables) for schools may be considered.

Honoraria are not normally paid by ESF and, in principle, the organisers of and speakers at ESF meetings will not be remunerated.

ESF funding should not be used for social activities such as excursions, concerts etc. which do not have any scientific link to the Programme's objectives.

ESF funding may be used to fully or partially fund a meeting. Organisers of ESF meetings are encouraged to apply for additional funding, e.g. from national research organisations, universities, private companies etc. It is the responsibility of the Chair or organiser of the activity and his/her institution to ensure that ESF approval is obtained prior to making any commitments and that sponsors comply with ESF policy and for providing the necessary written agreements and documentation.

ESF VISIBILITY

To heighten awareness of the ESF Programme supporting an event, the organisers should clearly identify the meeting as an ESF-funded or co-funded activity, e.g. in announcements, Programme abstracts, etc. Organisations contributing to the activity should also be credited in relevant publications. The ESF secretariat will send a package to the organiser including ESF documentation to be distributed to participants. The ESF remit and ESF logos will be made available to organisers for downloading on the ESF web site.

PROCEDURE

STEPS

1. Organisers are asked to submit **online** the ESF application form for a science meeting. The form can be accessed from the relevant Programme website.
2. The ESF will inform applicants of the outcome of the evaluation procedure.
3. If the application is successful, the organiser will receive instructions on how to complete the acceptance form and on reporting procedures, including online submission of the full list of participants.
Upon receipt of the acceptance form, the ESF makes an advance payment (normally 80% of the allocated grant, two months before the meeting).
4. The final bank transfer will be made upon receipt at the ESF, online, of the **financial report**, of the **scientific report** and the **final list of all meeting participants** within two months of the meeting.
If the actual expenditure is lower than the advance payment, the unspent funds must be returned to the ESF.

ADMINISTRATION

Once the final budget has been approved, the organiser is responsible for making preliminary contacts with all prospective participants. An attendance and accommodation form may be circulated for participants to return directly to the organiser who will then supervise the designated hotel reservations and practical arrangements.

The organiser should notify participants well in advance of the meeting of the exact details concerning reimbursement for meeting expenses, e.g. full payment for each participant, payment for speakers only, payment of up to a certain limit. Cases, where participants from non-contributing countries are supported by the Programme to participate, should be clearly indicated.

When making payments, the organisers must follow ESF's financial rules for the reimbursement of expenses.

RECORDING OF PARTICIPANTS

In order to obtain an accurate record of all ESF-funded participants, organisers are required to complete an electronic form on the ESF website with full coordinates of all meeting participants. Further information on the ways in which such information will be used by ESF can be found at <http://www.esf.org/data>. In line with French law and with European Union directives on the protection of personal data, it is the organiser's responsibility to inform participants that their information is being entered into the ESF database.

SCIENTIFIC REPORT

Organisers are required to provide, within two months of the meeting, a **scientific report** online which will be the basis of evaluation of the activity. The report, which should be uploaded by the organiser in .pdf or .doc format, should not exceed six A4 pages, consisting of a summary (up to one page), a description of the scientific content of and discussion at the event (up to four pages), an assessment of the results and impact of the event on the future direction of the field (up to two pages), and the final programme of the meeting. The full list of speakers and participants should also be attached to the report.

All reports will be evaluated within the Programme, normally by the sub-group delegated to recommend the awards, and if necessary using external peer review. Unless other arrangements are agreed, the contents of reports will be considered as being in the public domain and may be used, suitably acknowledged, in the compilation of reports submitted by the Programme to ESF.

FINANCIAL REPORT

For the **financial report** submitted after the meeting, when a departmental or other locally audited account is chosen (university, institute), it is sufficient to fill in the ESF final payment form online and forward a copy signed by the local organiser and the university's finance officer to the ESF. (Original bills are not normally required).

When, exceptionally, the payment from ESF is made into an account not operated by an official organisation, the account holder must provide a detailed financial statement with original justification of all expenditure (travel tickets, bills, receipts, etc.).

ESF FINANCIAL RULES FOR THE REIMBURSEMENT OF EXPENSES

Participants in ESF meetings should arrive and depart as close as possible to the beginning and end of the meeting. In cases where participants have been on non-ESF business either before or after the meeting, the organiser should only cover expenses incurred by attendance of the ESF meeting, **unless** extension of stay is justified by a **significant** reduction in overall cost (resulting e.g. from reduced air fares).

Direct refund of travel costs

Air tickets should be tourist class (or at a lower rate if cheaper tickets, e.g. PEX/APEX, are available). To benefit from the most economical fare, early booking is essential. Where no price is indicated on the ticket, the invoice should also be provided to the organiser.

Train tickets and train supplements may be first class.

Taxis should only be taken when convenient public transport is not available.

Costs of health, life and luggage insurance are not reimbursed by the ESF.

Cancellation insurance fees will only be reimbursed for PEX/APEX tickets.

Use of private car (including road tolls and fuel) should be reimbursed, unless otherwise agreed in advance, on the basis of 1st class train fare or, for longer distances, on the basis of the APEX airfare where this is more economical. An estimate of the fare from a certified travel agent should be produced with the claim for reimbursement. For short journeys by car where no public transport is available and therefore no estimate of fare can be provided, the number of miles/kilometres covered should be indicated. When two or more participants travel together by car, travel costs will be reimbursed to one person only.

Accommodation

Ideally, the organiser should be invoiced directly by the Hotel or Conference Centre after the meeting. Invoices should not include individual meals or incidental expenses (such as supplement for an accompanying person, laundry, bar bills, private telephone calls, etc.) which should be paid directly by the guest before departure. Individual reimbursements of room and breakfast should be made to participants only on the production of hotel bills.

Meals

When possible, meals should be provided for all participants within the meeting organisation. Alternatively, the organiser may provide a lump sum of maximum 21 Euros per lunch or dinner directly to participants.

Co-sponsorship of Conferences and Meetings

Participation of researchers from industry and the private sector in ESF activities

In promoting research within Europe, the ESF wishes to bring together the expertise which is available within all sectors of the research community, including people from industry and the private sector, commerce and consultancies.

Although ESF activities tend to operate in the more 'basic' part of the research spectrum, there may nevertheless be a strong interest from non-public sector researchers, and their participation in ESF actions is encouraged. Such participation can be an important and desirable element for the mutual benefit of the parties involved. This is allowed for through flexible and optimal organisational procedures, tailored to meet the needs of the respective collaborations and the envisaged external participants.

The basic principles for the participation of researchers from industry and other parts of the private sector are set out below:

- All scientific actions within ESF take place 'openly', i.e. there shall be no confidential information. Eventual IPR or copyright are the property of all participants contributing financially or intellectually to the activity.
- ESF does not favour any one private sector participant over another and so ESF activities are open to all researchers who have the expertise to be involved.
- Industrial and other private sector participants are normally responsible for their own costs related to travel, subsistence and accommodation.
- In the case of full participation in an ESF scientific or *à la carte* programme, it is expected that the organisation concerned will make a financial, or in some cases an 'in-kind', contribution to the overall costs of the activity.

PRIVATE SECTOR SPONSORSHIP

The involvement of the private sector in ESF activities is welcomed, subject to certain conditions. In particular, ESF is willing to allow and accept sponsorship of science activities supported by the Foundation and sponsorship of websites of these activities, conditional on the sponsors assuring ESF, in writing, that they comply with, or are willing to comply with, ESF policy guidelines. This is particularly emphasised in relation to good research practice and ethical matters. In addition, all sponsorship arrangements cannot be of an exclusive nature.

ESF POLICY GUIDELINES

Policy guidelines are set out in the ESF Science Policy Briefing series, in particular:

- The use of animals in research
- Good research practice
- Genetically modified plants
- Controlled clinical trials
- Human stem cell research

These documents are available in pdf format at <http://www.esf.org/research-areas/medical-sciences/activities/science-policy.html> or upon request from the ESF Office.