

# Oceans 2025/SOFI support for workshops and other events to widen involvement in strategic marine science

*Guidance notes v6: March 2010*

## **Summary**

NERC funds are available through the Oceans 2025 programme and the Strategic Ocean Funding Initiative (SOFI) to assist and stimulate UK-wide engagement in marine environmental research of a strategic nature. This support is targeted at workshops and similar events that link Oceans 2025 activities at NERC-funded marine centres ([www.oceans2025.org](http://www.oceans2025.org)) with those of the academic community and other stakeholders, including research users in the public, private and non-governmental sectors.

## **Criteria for support**

The proposed activity must:

1. Widen engagement in Oceans 2025 as defined by the agreed programme science themes and national facilities, covering both Research Programmes and National Capability components, and including knowledge exchange with university researchers, science-to-policy facilitation, and future strategic research developments in the context of NERC themes.
2. Be jointly planned and implemented by Oceans 2025 and one or more external partners, where the former is represented by an individual directly supported by the Oceans 2025 programme and the latter does not have such support (but may be a SOFI award-holder or SOFI student supervisor).
3. Demonstrate cost-effectiveness and additional commitment by the convening partners; for example, by hosting the event at an Oceans 2025 centre, university or other partner institution and obtaining either direct co-support or 'support in kind' to offset FEC charges.
4. Provide a post-activity report, with additional information as may reasonably be required for PR, evaluation and accounting purposes.

## **Procedure**

In advance of the activity (preferably  $\geq 3$  months beforehand, but no more than 1 year), the convenors must submit a Case for Support to the Oceans 2025 Science Coordinator, [p.williamson@uea.ac.uk](mailto:p.williamson@uea.ac.uk). The main text should be no more than 2 pages, providing information based on the following headings:

- Event title, proposed venue and dates
- Names of event convenors/applicants
- Background (covering rationale, context and basic structure of workshop, event or other activity)
- Aims and objectives (what specific outcomes are anticipated?)
- 'Added value' for the Oceans 2025 programme
- Support sought (with cost breakdown, and identifying i) the organisation with responsibility for logistic/financial arrangements, including T&S reimbursements at an individual level, and ii) co-support from other sources; cash or in kind, anticipated or obtained).
- Provisional participation (by Oceans 2025 and non-Oceans 2025 attendees; this information can be provided as an Annex).

Support sought through this scheme can include accommodation and meals for all UK participants, but should exclude travel costs for Oceans 2025 participants. Furthermore, support for non-Oceans 2025 participants should be greater than 50% of the total requested.

Workshops and other events may be by invitation only or openly advertised, and may be associated with national or international conferences that have separate organisational arrangements. Applicants are reminded that the Oceans 2025 website is available to advertise workshops and events. Whatever the context and activity format, it is important that an Oceans 2025/SOFI identity is promoted for the event benefiting from strategic support under this initiative, that should be targeted as indicated above.

The Oceans 2025 Executive Board will decide which activities will be supported, and at what level, taking account of the overall balance between topic areas. Bids for support can be made at any time, and it is expected that funding decisions will normally be made within one month of their receipt. If approved, an agreement will be made between the National Marine Coordination Office (NMCO, the budget holder for this initiative) and the convening organisation, as detailed below. If unsuccessful, brief feedback will be provided.

SOFI support is provided on the basis that there is no assumption of endorsement by NERC, Oceans 2025, NMCO or the marine science community for opinions expressed at the event, nor for any conclusions or initiatives arising from it. This disclaimer may need to be included in the event report.

### **Financial arrangements**

Approved costs for catering, meeting logistics and participants' T&S must initially be met by the organisation(s) responsible for convening the activity. Re-imburement will subsequently be made by a single invoice, up to the previously agreed amount, and matching the cost breakdown initially provided (unless changes have been agreed in writing to Phil Williamson). Documentary evidence of specific costs need not be submitted with the invoice, but should be retained for a reasonable time period and be available on request. The invoice should be to NMCO, submitted via Jackie Pearson (contact details below) within two months of the activity.

### **Reporting arrangements**

The workshop invoice should either be accompanied or preceded by submission of an e- report of at least 2-3 pages, providing information on:

- Main workshop outcomes and conclusions/recommendations
- Plans for follow-on initiatives (e.g. joint fieldwork, or collaborative funding bids)
- Final programme or event schedule
- List of workshop participants and their affiliations.

It is expected that this report will be published on the Oceans 2025 website; it may also be used for other PR purposes. See [www.oceans2025.org/SOFI\\_Workshops.php](http://www.oceans2025.org/SOFI_Workshops.php) for examples. There is no format standardisation since it is recognised that reports may need to meet different needs. Short articles (150 - 300 words) for the Oceans 2025 Newsletter [www.oceans2025.org/publications.php](http://www.oceans2025.org/publications.php) are also welcome,

### **Contacts**

Initial ideas for activities may be discussed with the Oceans 2025 Science Coordinator, Dr Phil Williamson (School of Environmental Sciences, University of East Anglia, Norwich NR4 7TJ; [p.williamson@uea.ac.uk](mailto:p.williamson@uea.ac.uk), tel: 01603 593111), to whom funding bids should also be submitted.

Invoices and final reports should be sent to Jackie Pearson, National Marine Coordination Office (NMCO), University of Southampton, Waterfront Campus, European Way, Southampton, SO14 3ZH; [jfpea@noc.soton.ac.uk](mailto:jfpea@noc.soton.ac.uk), tel: 023 8059 6097). Jackie should also be contacted for additional information on opportunities for pre- or post-publicity, e.g. advertising of workshops on the Oceans 2025 web site.