# Insights for the management of flexible funds: ACCESS Flex Fund Round 2 evaluation report

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# Executive Summary

## Why does effective flexible fund management matter?

In recent years UKRI, and its constituent research councils, have funded numerous initiatives that include flexible funding as part of their mandatory work programmes. This requires research investments to act as funding bodies, governing and distributing resources effectively and fairly. In addition to scientific merit, many of these programmes aim to embed specific principles – Equality, Diversity and Inclusion (EDI) is particularly common – and require applicants to their flexible funds to integrate such principles into their projects. While commitments to specific principles are not new across the UK research funding landscape (e.g. Framework for Responsible Research and Innovation (RRI)), attempts to embed principles in an integrated manner into fund management are under-documented and under-evaluated. This lack of evidence and guidance is a gap that this report aims to address.

## What is ACCESS and what are the aims of our 'Flex Fund'?

ACCESS (Advancing Capacity for Climate and Environment Social Science) is an ESRC-funded programme of work providing leadership on social science contributions to tackling and solving a range of climate and environmental problems. The ACCESS 'Flex Fund' has a total value of £1 million and aims to develop new ways of thinking, new approaches and new networks that will enhance the visibility, use and impact of the social sciences to address the transition to a sustainable and biodiverse environment and a net zero society. It also aims to provide project leadership opportunities for early career researchers (ECRs). The ACCESS Flex Fund is not intended to support new social science research. Instead, it aims to support a portfolio of diverse activities, such as knowledge transfer, engagement, communication, and network building across sectoral and disciplinary boundaries.

## Why might this report be useful to you?

This report provides insights from a mixed methods evaluation of Round 2 of the ACCESS Flex Fund. It aims to provide guidance and food for thought for other flexible fund managers and administrators, as well as funding institutions more generally.

Round 2 of our Flex Fund had a total value of £726,000. We received 74 applications and made 3 project awards. From an operational perspective, the fund was delivered on time, making awards to projects that scored highly on our award criteria. In that sense, Round 2 'worked'. However, when it comes to evaluation, it is not straightforward to conclude that Round 2 was wholly successful. One reason for this is that the fund required applicants to integrate three Guiding Principles into their proposals: Equality, Diversity and Inclusion (EDI), Knowledge Co-Production (KCP) and Environmental Sustainability (ES). The ACCESS team also used these principles to inform management and operation of the fund. Determining the fund's overall success, in terms of delivering on these Guiding Principles, is more challenging since these aspects are more difficult to assess and to quantify. In this report we evaluate the performance of our fund from the diverse perspectives of fund managers, operations team members, reviewers and applicants across two key questions: 1. How well did funding procedures work? 2. How effectively did we embed our three guiding principles? In each section of the report, we highlight findings, challenges, key learnings and insights. We also present four key recommendations for effective flexible fund management.

## What were our key findings?

**How well did our funding procedures work?**
In Round 1, we had found ourselves pressed for time and applicants reported similar feelings. For Round 2, we adopted a 'slower' approach to fund distribution, spread over twelve months. Having more time for both partner relationship and application development was valued by applicants. The operations team were able to comfortably deliver time-consuming processes such as application blinding, and the management team had time to provide strong support and guidance to peer review college members and the review panel.

However, despite this overall success, looking across the different groups consulted for this evaluation report, some pitfalls are worth noting. First, consistency of guidance documents across all stakeholders (applicants, operations team, managers and reviewers) is vital, and the risk of even minor discrepancies between documents produced by different parts of a fund team can be mitigated via an enhanced checks procedure. Second, where stakeholders with diverse knowledges and experience are involved in fund delivery (e.g. non-academic project partners and peer reviewers; ECRs), careful review of the effectiveness of communication of technical rules, such as those relating to financial eligibility, is essential. Third, consideration should be given to the suitability of application platforms for applicants, administrators and reviewers, while being aware that it can be difficult to reconcile different needs and priorities.

**How successfully were our Guiding Principles embedded in the fund?**
The majority of lead applicants reported that they found it easy to incorporate the three Guiding Principles into their proposals and said they would use them again in future. Applications frequently reflected our guidance on choosing meeting venues, travel options and designing workshops. Furthermore, we funded three excellent projects which had thoughtfully and effectively integrated the guiding principles, maximising synergies and transparently tackling tensions between them.

From a procedural perspective, our three principles were deliberately embedded at every stage of the funding process and the positive consequences of this are evident from Round 2 outcomes, when compared with Round 1.

***Equality, Diversity and Inclusion (EDI)***: Round 2 applicant teams were more diverse across geography, institution, career stage and gender than Round 1; but awards made were unintentionally institutionally narrow (Russell Group universities). The Management group was diverse across discipline, career stage and sector, as was the peer review college and review panel. Some reviewers were entirely new to ACCESS, which brought additional benefits to the network, and ECRs benefited from the experience of contributing to decisions on funding awards.

***Knowledge Co-Production (KCP)***: Submissions to Round 2 were nearly twice as likely to involve partnerships between academic and non-academic organisations as Round 1; many submissions involved new partnerships and pursued topics that arose from engagement between academics and non-academic collaborators. However, our online Padlet tool was less than successful in fostering co-production between potential partners. A sandpit event could have facilitated greater pre-submission co-production, (albeit at the cost of more time and resources).

***Environmental Sustainability (ES)***: There was a common tension in fund delivery and in applications between the merits of in-person and online meeting formats which touches on Equality, Diversity and Inclusion and Knowledge Co-Production as well the sustainability implications of travel. We encountered this tension at our review-panel meeting, which initially favoured a face-to-face meeting format, as well as surface travel. However, following discussions between the panel and the management team, we revised this to run a hybrid meeting, and used the experience to devise new Travel Guidance for ACCESS, which pays more attention to the handling of interactions and tensions between our Guiding Principles.

## Recommendations

1. **For larger awards, use a preliminary application stage** (e.g. a sandpit or expression of interest) to avoid deterring non-academic partners from participating in funding bids. This will minimise the gap between input (of time, resources) and outcome (likelihood of award or failure) for applicant teams.

2. **Engage early and reflexively with blinding processes** to ensure they meet Equality, Diversity and Inclusion goals around limiting unconscious bias in decision-making, are appropriate in terms of administrative time required, and allow for effective peer review (for example of the suitability of project partners when knowledge co-production is encouraged). This will benefit applicants, administrators and peer reviewers.

3. **Make cautious use of portfolio decision-making (i.e. assess proposals interdependently and use multiple criteria for award)** to ensure awards are diverse (e.g. a mix of topics, disciplines, project outcomes, teams), as well as of scientific merit. This will help align flexible funds with the overall aims, objectives and explicit principles of the initiatives managing them.

4. **Allocate sufficient staff time and financial resources** to deliver the additional work levied by taking an approach to fund delivery and evaluation that is guided by multiple principles. Resourcing an initial interest stage, application blinding, reviewer training, and individualised applicant feedback, for example would have benefits for academic applicants, non-academic partners and reviewers. Resourcing mixed method evaluation will allow the effectiveness of fund delivery to be assessed, and evidence gaps to be addressed.

# Introduction

ACCESS aims to increase the visibility, impact and use of social science to address environmental problems, helping to drive transformative change towards just and sustainable societies. One of the ways that we champion environmental social science is to **encourage new networks, new thinking and new approaches** about the contributions social science can make to tackle environmental problems, enabling the transition to a sustainable and biodiverse environment and a net zero society. We also aim to provide leadership opportunities and **build capacity** amongst environmental social scientists.

The ACCESS flexible fund is the most significant mechanism that we have to do this. With a total value of £1 million, it represents 20% of our grant from the Economic and Social Research Council (ESRC). The 'Flex Fund' was a mandatory element of our application for funding, with proposals required by ESRC to: "*manage a flexible and competitively distributed funding programme to commission smaller projects that meet the aims of the investment*" (ESRC, 2021, page 4). As with ACCESS more generally, the Flex Fund was not intended to support new social science research. Instead, it aimed to support a portfolio of diverse activities to enable sustainability transitions such as knowledge transfer, engagement, communication, and network building across disciplinary and sectoral boundaries.

Flexible funds are an increasingly common element of initiatives funded by UKRI and other funding bodies. In terms of advantages, they offer flexibility to tackle new challenges that arise across a funding period of 5 years or more. They can bring new expertise into established leadership teams or research networks. Yet they also pose challenges. First, they require an expertise in fund management that researchers, who may be used to responding to but not managing funding calls, may not have. Second, they require evaluation procedures and award criteria that suit a focus on diverse, non-research activities (e.g. impact, engagement, capacity building). While there is little guidance available on how to effectively deliver flexible funds, there is an emerging literature on 'portfolio' decision-making (Canton, 2025) in which applications are reviewed interdependently and against multiple criteria, not just scientific merit. By sharing our evaluation of the ACCESS Flex Fund, we aim to contribute to this literature.

As with all ACCESS activities, we aim to embed our **Guiding Principles** of Environmental Sustainability (ES), Equality, Diversity & Inclusion (EDI), and Knowledge Co-production (KCP) (Barr *et al.*, 2023) into the planning, delivery and evaluation of the ACCESS Flex Fund. Critical to this is sensitivity to potential synergies as well as trade-offs between these principles, which are typically viewed separately in academic projects or initiatives. One of the motivations to produce this report is to address a dearth of guidance on how to ensure flexible funds are delivered in ways that are not only efficient, but also empowering, co-produced, sustainable, equitable, diverse and inclusive.

This report evaluates Round 2 of the ACCESS Flex Fund, which aimed to distribute £726,000 to projects that advanced the goals of ACCESS. **Evaluation and reflexivity**, using different types of evidence, is integral to the way that ACCESS works. Here, we reflect on what worked well and not so well in Round 2 of our Flex Fund, across all dimensions of funding procedures, including design and dissemination of the call for proposals, operational aspects and peer review. In so doing, we aim to generate useful insights from our experiences and to share those insights, including any challenges we faced, with funding institutions and with other projects and initiatives delivering similar funds.

Round 2 aimed to distribute funding via three project awards of about £240,000 each. The rationale for this number of awards was to contrast with Round 1, which made 9 funding awards for small projects, each valued at less than £30,000, and each led by an Early Career Researcher (ECR). To guarantee a balanced portfolio to our Flex Fund as a whole, we therefore prioritised a small number of larger projects in Round 2. To maintain our prioritisation of **capacity building and empowerment**, we mandated that all submitted proposals had to have an ECR in the project team. Beyond that, all proposals were obliged to embed the ACCESS Guiding Principles using an integrated approach. This included co-producing the project with non-academic partner organisations, whose role in each project would be substantiated through resource allocation, while minimising environmental impacts, and weaving EDI across all project activities.

In designing Round 2, we built on insights generated from the evaluation of Round 1 (Devine-Wright, 2023; Devine-Wright *et al.,* 2023). This led to several changes to our approach, including:

- Increasing the clarity of wording in the Call for Proposals concerning how we expected applicants to embed Guiding Principles into their submissions
- Providing a Padlet to encourage team building and the co-production of proposals
- Improving the online submission process
- Ensuring sufficient time duration to undertake key operational tasks (e.g. the 'blinding' of proposals prior to sending out to peer reviewers)
- Adding an evaluation criterion of 'Overall fit to the call', from which we could rank proposals after peer review; and separating out criteria related to Methods and Guiding Principles, which were combined in Round 1
- Providing supported opportunities for ECRs to sit on a Review Panel
- Adding 'drop in' sessions to guide peer reviewers, particularly less experienced ECRs
- Structuring the Review Panel meeting to take place over two days, to minimise fatigue and ensure sufficient time to reach consensus on funding awards

Given the extent of these innovations to the funding process, and our aim to work reflexively to produce guidance that could be useful to others, we designed a mixed method evaluation that sourced material and data from diverse sources. The next section sets out the methodology we used to evaluate Round 2.

# Methodology

Our approach to evaluation integrates insights and data from four sources: management, operations, peer reviewers and applicant teams (for roles and relationships see Fig. 1).

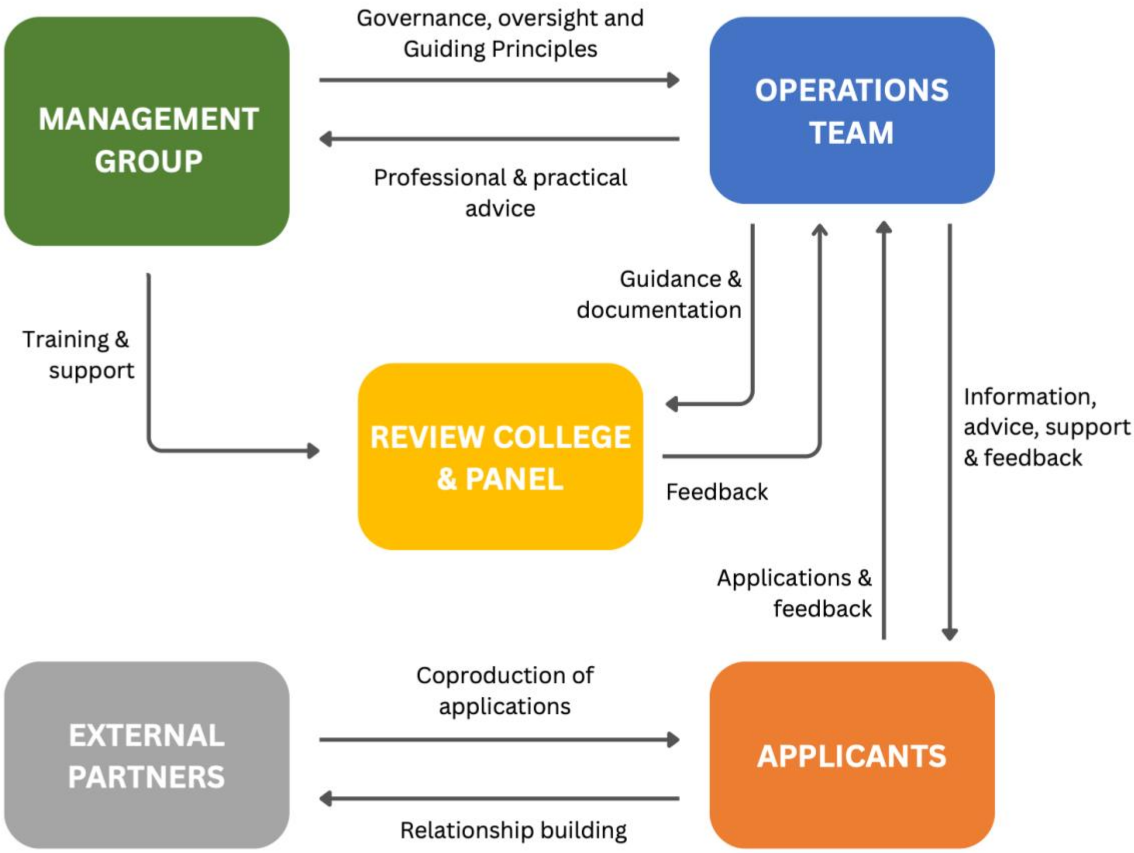


*Figure 1. Structuring flexible funds: Organogram showing relationships and roles within the ACCESS Flex Fund.*

We draw on reflections from those involved in managing the fund and those operating the fund. A feedback survey was distributed to peer reviewers, including those who blind reviewed applications as well as those who sat on the Review Panel that made decisions about awards. Data about the characteristics of applicant teams was drawn from application forms; and finally, data was collected using two surveys distributed to applicants (an Equal Opportunities Monitoring Survey; and a Feedback survey). These are described in turn below.

**1. From management:** We generated reflective insights on our own management experience of designing and delivering the funding call through a series of reflective exercises (e.g., wash-up calls, reflective brainstorming) amongst the members of the ACCESS Flex Fund Round 2 Management Group[1]. This group oversaw governance of the fund and aimed to be as diverse as possible in terms of discipline, career stage and sector of employment. It included academic Co-Leads with responsibility for leading on the ACCESS Guiding Principles, to ensure synergy between those and the Flex Fund, one ECR, as well as one representative from a non-academic partner organisation and one from the funding body, ESRC.

**2. From operations:** We evaluated our own operational experience of designing and administering the funding call through a series of reflective exercises (e.g., wash-up calls, reflective brainstorming) amongst the project operations team, which consisted of individuals with skills in project management, administration, communications and research finance[2].

**3. From peer review college and review panel members**: We evaluated peer reviewers' experience of assessing Round 2 applications using a brief post-review feedback survey that was sent to all 39 members of the Peer Review College (responses *n* = 11; 28% – see Appendix 7). We also emailed the 14 Review Panel members to invite their feedback (responses *n* = 2, 14 %).

**4. From applicants:** We investigated the characteristics of the applicants and their perceptions and experiences of applying to the fund. The characteristics of applicant teams were investigated using information from the application forms (see Appendix 3). Because of this, analysis about the composition of the applicant teams is based on the entire sample of Round 2 applicants (applications *n* = 74; individual applicants *n* = 333) [3]. The number of individuals per application ranged from 1 to 14.

We also report demographic information provided by individual applicants using an Equal Opportunities Monitoring (EOM) survey (see Appendix 6)[4]. The EOM survey was sent to all applicants named on submissions (surveys sent *n* = 321, responses *n* = 116, 36% response rate)[5]. For some applications, we received EOM responses from multiple applicants in the same team, while for other applications we did not receive any EOM responses from applicants. The EOM survey was an optional part of the submission process for applications and did not inform decision-making for the applications.

Finally, we evaluated lead applicants' perceptions and experience of applying to Round 2 using a survey sent out in October 2024 after awards were made – approximately six months after the funding call closed (surveys sent *n* = 74, responses *n* = 24, 32% response rate; see Appendix 8).

[1] The ACCESS FFR2 Management Group consisted of environmental social scientists working in academia and the public sector, as well as representatives from the ACCESS project operations team, ACCESS leadership team, and ACCESS Guiding Principles Team. Members included Patrick Devine-Wright (Chair and ACCESS Director), Birgitta Gatersleben (ACCESS Co-Director)), Kate Burningham (ACCESS lead on Equality, Diversity and Inclusion), Stewart Barr (lead on Environmental Sustainability), Tracey Dale (ESRC representative), Steven Guilbert (Early Career Researcher representative), Susan Williams (Natural Resources Wales, as non-academic representative), Helen Walker (Finance Manager), Sarah Baker (Communications Officer).

[2] The ACCESS project operations team comprised Project Managers (Sue Varley at Exeter, Kirstie Hatcher at Surrey), Administrators (Sarah Thorn at Exeter, Trevor Hood at Surrey), the Communications Officer (Sarah Baker at Exeter), plus our Research Finance Manager (Helen Walker at Exeter).

[3] Note that any one person could be an applicant across multiple applications, so these 333 applicants may not be 333 unique individuals.

[4] We also included a link to an EOM survey with the peer reviewer feedback survey, to collect demographic information about our peer reviewers. However, we only received four responses to the peer review EOM survey, so those data have not been reported.

[5] EOM surveys were sent to 321 email addresses; for some individuals named on applications, the email address provided on the application form 'bounced back' or there was no email address provided.

# Findings (1): Experiences of managing and operationalising Round 2

Here, we capture reflections on the managerial and operational delivery of Round 2 from members of the Management Group and Project Operations Team. We also report on feedback from members of the Peer Review College and Review Panel. At the end of each sub-section, we summarise key learnings and insights.

Round 2 extended across a 12-month time period from a preparatory stage beginning in September 2023, pre-announcement in November, call for proposals in February 2024, closing date in April, peer review in May-June, Review Panel meeting in July, culminating in award announcement in September 2024 (See Appendix 1 with timeline and full list of critical tasks).

Preparatory stage work involved planning key tasks and milestones, and drafting key documents including the Call for Proposals, a Frequently Asked Questions document, and revising the Marking Criteria (see Appendix 4).

This timescale was carefully deliberated over by the management and operations teams, learning from lessons in Round 1 regarding pinch points where cumulative ACCESS project tasks co-occurred (e.g. delivering our [Annual Assembly]), stretching capacities to deliver the call. An additional concern was to provide as much time as possible for applicants to co-produce proposals with non-academic partners, hence early pre-announcement of outline details, and 12 weeks duration between the issue of the call in early February 2024 and the closing date in late April 2024. Key operational tasks and milestones within this 12-month period included the call launch, a webinar, the blinded peer review process and the two-day review panel meeting.

## Operational handling of queries from applicants

The Project Operations team received 243 enquiries from prospective applicants over the call period, including 14 communicated via the ACCESS Flex Fund Round 2 online noticeboard Padlet. The types of query received included the following:

- Letters of support clarification and advice on fixed-term contracts over the period of the project
- Definition and role of an ECR
- Inclusion of tables and figures, Gantt charts, PowerPoints, attachments
- Word count, especially references
- Blinding – how to do this in applications
- Visas and ability to apply, ability to apply as a non-UK researcher
- Staff time in the budget – Co-Lead (CO-I) and Project Lead (PI), Directly Incurred (DI) and Directly Allocated (DA) staff and size of team
- Start date clarification and flexibility
- Finance – clarification on budget and partner eligibility as a Public Sector Research Establishment (PSRE) and the <30% of the budget stipulation, Value Added Tax (UKRI rules), indexation included, budget headings – where to include certain costs, % full economic costing (FEC)

- Media coverage/communications support availability for awardees
- Possibility of submitting more than one application as either a project lead or co-lead
- Subcontracting partners
- Intellectual Property rights
- Use of existing data
- Proposals fitting the scope of the call (e.g., engineering)
- Using the application form – team members, ability to save etc.
- How many applications an organisation can make – demand management

**Key Learnings and insights:**
Future calls could check to see whether these operational issues could be clarified in Call for Proposals documentation, in order to reduce later demands on operational staff to respond to numerous queries from applicants.

## Application form and submission

A Microsoft (MS) Form was used in Round 2 to submit applications, which brought both benefits and drawbacks. MS Forms had been used in Round 1 and proved easy to set up and administer; it was also straightforward in collating the data into a spreadsheet for the peer review process. We therefore retained the use of MS Forms for Round 2 applications.

Although there is an option to save a copy of an MS Form, approximately 10% of applicants requested a PDF copy after submission. The MS Forms option did allow applicants to keep their application open indefinitely without any loss of work or saving required, and, evidently from the time taken to complete the form, some applicants chose to copy and paste their responses from another application (such as MS Word).

Seven applicants submitted proposals prior to the call deadline and requested the ability to revise these post-submission (e.g. to revise costings; team members) but prior to the deadline. These requests were permitted and enabled in Round 2.

Each application was read through in order to sense check finance costs; this took two days in total to complete across all applications. Some minor anomalies were identified between costings provided in specific Justification of Resources (JoR) sections and the final cost of the project. None of the discrepancies found warranted ineligibility from the peer review process.

In the application form, "open text" questions had a 750- and 1000-word count limit, which caused an unforeseen issue with the MS Form character limit being reached. This was overcome by including an additional text box for the additional words, but was not an ideal formatting experience for applicants.

There was some ambiguity in the wording of the Justification of Resources (JoR) question. Because of this, it was agreed to discount the maximum word count limit. Instead of having one section, this question was split up into different costings subsections, so it wasn't clear that the word limit meant the total number of words across all subsections. In hindsight, offering one text box response with clear bullet points on context required would have been better.

Regarding the Guiding Principles, there was a small discrepancy between the wording of the application form and the wording of the marking criteria. In the form, adopting the Guiding Principles was mentioned in a general manner, while peer reviewers were asked to evaluate if they were adopted in an integrated manner.

The outcome option for "New methods of translating evidence" was listed twice on the form. This did not cause any negative impact on applications, but it could have meant that an application had not met the criteria (as all were supposed to have ticked at least two different delivery outcomes). All applications were checked manually and none were affected.

These findings were discussed at a Flex Fund Management Group meeting. An email was then sent out to the Peer Review College alerting them to these issues arising with the JoR, Guiding Principles and the outcome delivery anomalies, offering guidance.

**Key learnings and insights:**
Future calls could decide in advance if they wish to allow freedom for revision to applicants post-submission but pre-call deadline, given the additional time required of operational staff to enable such revisions to be implemented.

It is worth considering use of a more powerful survey tool in flexible fund calls, such as Qualtrics, which allows lead applicants to save and edit their submissions, and also supports a larger maximum number of characters in response fields. This would also prevent applicants making calculation errors through the use of a formula function to ensure the total project cost is automatically calculated.

There needs to be capacity amongst management and operational teams to cross-refer the Call for Proposals documentation with the Application form and Submission process. What was lacking in Round 2 was a close proof-reading of both the Call and the Form in relation to each other, and to fully pilot the questions in a copy of the form before going 'live' to eliminate errors and the extra work required to rectify them *post hoc*.

## Recruiting the Peer Review College (Stage 1)

Our goal was to establish a peer review college that was as diverse as possible in terms of career stage, discipline and sector. We assumed that we would receive a greater number of proposal submissions than in Round 1 ($n$ = 61), and so would require a greater number of reviewers than were used in Round 1 ($n$ = 20). We were also aware of a broader challenge to secure sufficient reviewers for journal and grant reviews, given the voluntary nature of that work, and the time of year that we would require review work (June), which coincides with end of term duties for many academics. Against that challenging backdrop, we advertised across ACCESS networks during the period March-May 2024.

There were improvements made with administering the Peer Review College compared to Round 1. An invitation was sent out across the ACCESS network to recruit reviewers. The net for potential reviewers was cast wider than in Round 1, creating a more diverse college, including members of ACCESS' Policy and Practice Working Group, Project Advisory Board, Leadership College Fellows, Flex Fund Round 1 awardees, and the Partnership Group. An MS Form was prepared in which potential reviewers could either confirm or decline participation. This 'opting in' approach ensured that people committed and actively engaged early on with the peer review process. One further benefit of the MS Form was including a question for members to suggest other colleagues to act as reviewers, which worked well to recruit new people into the Peer Review College and into ACCESS more generally.

73 people completed the Peer Review College form, with 40 of those confirming their availability to peer review. Ultimately, 33 people were allocated to review, with five people agreeing to be called upon in reserve. This worked well in keeping to administrative capacity and pre-empting any problems. The dropout rate, from this cohort of 33 reviewers, was just one person, which was a significant improvement on Round 1.

The Round 2 peer review college was multi-sectoral (i.e. comprising academics, government officials, employees in NGO and third sector organisations), multi-disciplinary, and spanned career stages and multiple geographies (Wales, Northern Ireland, Scotland, England and international). It included individuals who had not been connected with ACCESS previously, thus expanding the ACCESS network, as well as those who had. It included ECRs drawn from: the ACCESS Knowledge Exchange and Impact Fellows, our Leadership College, and Flex Fund Round 1 applicants. The recruitment of ECRs into the review college thus helped to address our wider goal of capacity building, providing valuable grant review experience for ECRs. The final college membership was also drawn from ACCESS Co-Leads and our international project advisory board, ensuring a balance of experience and topic expertise.

We opted for two reviews per application, continuing the number utilised in Round 1 and requiring 148 reviews to be submitted, given a total of 74 applications. We carefully selected reviewers for each submitted application with the aim of ensuring diversity in each case across the categories already listed such as reviewer discipline, sector, career stage, and geography. This was then set against the need to balance the number of proposals sent to each reviewer, with the aim of ensuring a roughly similar number of reviews required per person acting as a reviewer ($n$ = 4).

Given our purposeful recruitment of ECRs into our Review College, as well as our commitment to capacity building, we instigated a new procedure in comparison to Round 1 – holding three online drop-in sessions for members of the review college during May-June 2024 when the ACCESS Director and Co-Director were available to respond to any queries arising from review work. These sessions were used by a small minority of review college members, and were useful in providing a forum to discuss issues such as expectations regarding text descriptions against the marking criteria, the approach to the 'overall fit to call' summary question (i.e. drawing on details from preceding review criteria) and using key words to ensure consistency between the comments used and the scores awarded. Further innovations in Round 2 were the separation of 'methodology' and 'guiding principles' into two separate criteria and the addition of a new, summary criterion: 'Overall fit to call', scored from 0 (unable to assess) to 6 (outstanding) (see Appendix 4).

**Key learnings and insights:**
Reviewer recruitment is an ongoing challenge for funding bodies and journals. We addressed that by giving 3 months for recruitment, requiring an 'opt-in' mechanism from reviewers, and encouraging the suggestion of colleagues, which worked well to recruit new people into the Peer Review College and into ACCESS more generally. Even though only a small number of reviewers attended our online drop-in sessions, we nevertheless conclude that such sessions can be informative to provide further clarity on marking criteria and enable consistent reviewing, particularly in contexts when reviewers are diverse across discipline, career stage and sector.

## Preparing applications for the Peer Review College (Review Stage 1)

To minimise the risk of unconscious bias amongst reviewers and help facilitate diversity amongst applicants and awardees (Independent SAGE, 2025; Singh Chawla, 2021), we retained our practice from Round 1 and 'blinded' applications (i.e. removed any identifying markers) for the initial review by members of the Peer Review College. Learning from Round 1, more operational time was given to prepare the applications for this blind peer reviewing process (Stage 1). Nine working days provided enough time to complete the following:

- Creating a spreadsheet with application data, including correcting errors identified by any applicants post-submission (within the deadline).
- Checking the eligibility of the applications against the advertised criteria, regarding ECR involvement and Project Lead institution.
- Checking the word count limit for each section and redacting extended responses accordingly.
- Saving each application with any word count limit as a PDF using a unique Round 2 ID.
- Blinding each application for peer reviewing, by omitting any identifiable information, such as names of team members and organisations.
- Organising up to five applications into batches of two reviewers from different organisations and/or disciplines/departments to the applicant team, to avoid conflicts of interest.
- Sending emails on to each of the peer reviewers with the blinded PDFs, link to the Microsoft review scoring form and evaluation guidance documentation.

Following feedback from Round 1 reviewers, it was decided that applications should be formatted as PDFs for review, rather than shared in Microsoft Excel. The PDF format was considered by the majority of reviewers to be easier to view and evaluate each section of the application. However, this format change added to the administrative process. Each application had to be downloaded and saved three times: in its original form; as a blinded application with any word count limit changes and allotted a Flex Fund ID for Stage 1 (peer reviewing); and finally, as an unblinded application allotted a Flex Fund ID for Stage 2 (review panel). Some additional challenges were also experienced while editing and blinding the applications, such as the time it took to use PDF editing software and manage formatting/reformatting issues. Two members of the project operations team participated in this process, which ensured that the deadline was reached.

More time was also allocated to allow the reviewers to return the scored applications (4 weeks), which enabled the operations team to send reminder emails and check on any evaluation anomalies. This time window was also supported by reviewers, by accounting for e.g., other workload commitments during the review window, reviewers who worked part-time or outside of academia, and the half-term holidays.

Using the 'Read receipt' option for sent emails helped identify Peer Review College members who may not have viewed their applications and enabled the Team to ascertain where follow-up/reminder communication was required. This process also helped identify that when sending out applications to non-academic reviewers, a number of organisations' email accounts had difficulties receiving Zip files. This was rectified by sending individual PDF files, rather than one Zip file.

**Key learnings and insights:**
Blinding of applications and organising peer review takes time. Learning from our experiences in Round 1, we extended the amount of time available for the blinding task to nine working days, changed the format in which applications were shared with reviewers, and extended the available time window for peer review to 4 weeks.

## Feedback from the Peer Review College

We distributed a survey to all members of the review college to evaluate their experiences of reviewing applications (see Appendix 7). 11 people responded to the survey (*n* = 39, 28% response rate). Below we present findings from this sample of the review college.

The majority of reviewers who responded to our survey found the review guidance materials clear and either 'extremely' or 'very' useful. Most reviewers found it 'quite easy' to evaluate the applications against the marking criteria, although two found it 'quite difficult'. Four reviewers attended the online drop-in sessions and found them very useful, and most respondents considered that the time period of 4 weeks to conduct their reviews was 'about the right length of time' for reviewing their batch of applications.

**Blind review process**
Five respondents found the process of blind review 'quite easy', three found it 'neither challenging nor easy' and one found it 'quite difficult'. However, comments received about conducting blind review in relation to the Guiding Principles highlight the need for more consideration regarding what information on proposals is blinded and how this is done, particularly in relation to balancing EDI and KCP goals, for example

- "*Given the focus of the call, blinding partner organisations seems counterproductive, especially as working with partners serving traditionally disadvantaged communities is something the call actively encourages"*
- *"It did make it a bit more difficult to identify whether the suggested partners were suitable to truly inform knowledge co-production*".

**Guiding Principles**
Several reviewers commented on how assessment of the Guiding Principles could be improved:

- *"Greater clarity could have been given over what is meant by an 'integrated approach' to ACCESS guiding principles."*
- *"The only issue was that, as pointed out subsequently by e-mail from ACCESS Admin, applicants were not specifically instructed to focus on the integration of the ACCESS Guiding Principles."*

This included how blind reviewing connected with assessment of the Guiding Principles:

- *"It would be good to reflect more on the EDI and KCP aspects of blinding, and in particular focus on the amount of information about partner organisations that is expected or given in an application. This is particularly important in relation to the EDI Guiding Principle."*

**Wording of the criteria for assessment**

Reviewers recommended the provision of additional information to help their assessments:

- Provide examples of the kinds of answers that would score more/less highly
- Provide a list of criteria that would achieve a high score.
- Adjust some of the descriptors associated with high scores. For example, one person fed back that some descriptors were a little leading: *"Outstanding' descriptors of 'virtually flawless' and 'a method that is so robust it would be difficult to improve' felt a pretty high bar, and I didn't feel I would be able to give that score without more experience".*

**Assessing value for money**

Nine responses were received regarding guidance given on how to assess value for money, five of whom found it straightforward and four of whom found it challenging. Of the latter group who found it challenging, one respondent mentioned that if projects were based on the outcomes of initial scoping activities, and did not have firm activities planned, it was tricky to assess value for money. Several recommendations were made about how to improve the assessment of value for money by a diverse panel of peer reviewers. These are summarised below:

- Provide additional guidance, or more specific criteria, on what good or bad value for money is and what reviewers should be looking for
- Instead of value for money, ask if the resources are appropriate for the proposed project
- Request additional details in the Justification of Resources to assess if proposed spend was coherent with what was proposed

Additional guidance on value for money is particularly necessary for less experienced reviewers, whether ECRs or non-academic reviewers. It is also necessary to inform non-academic reviewers about academic finance expectations (e.g. regarding overheads and estates), which some Round 2 panel members, who were less experienced in assessing university costings, found a challenge to understand and interpret.

**Other recommendations**

- Clarity on social science: '*Call documents were quite clear in describing the importance of bringing social science benefits to new fields but were less clear as to whether this should be environmental social science, or social science more generally (both formulations were used in different places).'*
- Academic vs. non-academic emphasis of proposals: '*More clarity on 'how to rate potential academic contributions of proposals, while for ACCESS I can see why one might wish to give these less weight than partner benefits I'm not sure the assessment of methods quite does justice to the stronger academic rationale some studies had over others.'*
- Assessing fit to the Flex Fund: *'More guidance on the types of application expected, such as research focused or application of ESS and Knowledge exchange focused… some FF applications clearly were research focused – and high quality – it was sometimes tricky to ascertain the fit for the flex fund, as opposed to other applications that were more focused on creating legacy and extending use and application of existing ESS research'.*

- For drop-in sessions to guide peer reviewers, consider either recording drop-in sessions, summarising any updates, or trying to find a time outside working hours when others might have been able to attend.

**Key learnings and insights:**
Further clarification about how to assess 'Value for Money' could be provided, particularly to less experienced reviewers or those from outside of research institutions. Blinding the names of partner organisations can obstruct assessment of other Guiding Principles such as Knowledge Co-Production. What an 'integrated approach to the Guiding Principles' means could be spelt out in greater clarity.

## Managing and operating the Review Panel (Review Stage 2)

**Membership**
The review panel was tasked with making decisions on funding awards. Our approach to the membership of the Review Panel was to ensure continuity with members of the Peer Review College, expecting a subset of college members to volunteer for the panel, while also ensuring that panel members had direct knowledge of reviewing applications. By keeping to members of the review college, this also ensured that the panel had familiarity with ACCESS and with the marking criteria. 14 individuals volunteered to participate in the Review Panel. As with the Peer Review College, a key concern related to our EDI guiding principle was to ensure the panel was as diverse as possible. The panel comprised four ECRs, one non-academic social scientist and a range of disciplinary perspectives.

**Structure and process**
Five working days were given to produce a spreadsheet of reviewed (but now unblinded) applications in time for the Review Panel, including collating peer reviewers' scores and comments, assessing variances between reviewers, and identifying conflicts of interest when Review Panel members were from the same institution as part of an applicant team. Due to capacity constraints, the email to the Review Panel, setting out full instructions and including links to the panel documentation and PDF files of unblinded applications, was sent out a day late after 6 days instead of the proposed 5. This gave the Panel slightly less than 2 weeks to read the applications and prepare for the panel meeting.

To add value to the review panel experience, we opted to hold a hybrid meeting, unlike the Round 1 panel that was only online. The face-to-face dimension of this was intended to provide additional networking opportunities to those participating in person, as an added incentive to participate. We decided to hold the meeting across two days, from early afternoon to lunchtime on the following day. In-person participants were invited to dinner that evening, and ACCESS funded this dinner, together with all travel expenses. Splitting the session into two parts arose from feedback from the Round 1 panel, which took place over the course of one long day, and led to fatigue at the end of the meeting when final decisions needed to be taken. Splitting the panel meeting into two parts also afforded time to reflect on the applications in between the afternoon of the first day, and the morning of the second day.

The Terms of Reference of the Review Panel were revised following experiences from Round 1. Learning from Round 1, we ensured that the 'Introducers' for each application were selected from those individuals who had reviewed those particular applications, lessening additional workload for

panel members and ensuring familiarity with 'their' applications. Following conventions employed by UKRI, we designated Introducer1 as having the primary role to summarise each proposal in terms of content, strengths and weaknesses, and advising the designated Introducer 2 as only adding to the discussion their thoughts on a proposal to the extent that they would present new information to the panel. This was to ensure that we had sufficient time to consider all relevant applications in the limited time available. Across those decisions, any potential conflicts of interest were identified *a priori* (e.g. reviewer who had worked as a colleague with a member of a proposal team). The new 'overall fit to call' criterion enabled the review panel to view each application in terms of its summary score from the two reviewers (a scale from 0-12), alongside scores on specific criteria.
Stage 1 review scores were assessed prior to the panel and the 74 applications were clustered into three groups:

- Group 1: Higher ranking proposals with consensus from both peer reviewers (i.e. with a combined Overall Criterion score of 10 or above, so scored as 'Excellent' (5) or 'Outstanding' (6)). There were a total of 27 applications in this group.
- Group 2: Higher ranking proposals with a lack of consensus from the two reviewers (i.e. a combined Overall score of less than 10, with one reviewer overall score of 5 or more and a score variance of at least 3 between reviewers). There were a total of nine applications in this group.
- Group 3: Lower ranking proposals with consensus from both peer reviewers (i.e. a combined Overall score of less than 10, and with neither reviewer score above 5). There were a total of 38 applications in this group.

Following discussion, it was agreed by the Review Panel to scrutinise the applications in the first two groups only (*n* = 36), ensuring sufficient time for deliberation on those applications. Assessment proceeded in two stages. First, all Group 1 and Group 2 applications were discussed by the panel in turn, beginning with the highest ranked proposal. The two Introducers described the merits and weaknesses of each proposal, before discussion was opened out to the entire panel, which continued until a consensus was reached on the proposal's overall score.

Second, in Round 2, additional scrutiny of the top scoring applications was conducted using portfolio criteria (see Appendix 5). Six additional criteria were introduced to facilitate 'portfolio decision-making' (Canton, 2025) by the review panel, viewing the top scoring applications interdependently rather than separately. Use of these additional criteria aimed to ensure diversity in the Flex Fund awards overall, across Rounds 1 and 2. Panel members were asked to consider: whether proposed activities were distinct from current ACCESS work, including Round 1 awards; whether proposals addressed diverse environmental challenges (e.g. water, land use change, energy) and involved diverse disciplines; whether they would take place in parts of the UK, and with organisations, that ACCESS had not yet reached; and whether they were likely to produce diverse outcomes. The Review Panel considered the highest-ranking applications across these criteria when selecting the three proposals to award, with the overall aim being to ensure that awarded proposals were both high quality *and* provided a diverse award portfolio of funded projects.

## Feedback from the Review Panel:

Two members of the panel responded to a call for feedback. They mentioned that they found the panel to be a very productive and positive process, with several contributing factors:

- The splitting of the panel over two days, with a break for reflection, was well-paced and enabled for better decision making, without feeling rushed or tired.
- The inclusion of researchers at all career stages was beneficial, bringing different perspectives and enabling the panel to pay attention to high-level as well as detailed comments.
- Different views were expressed on the meeting format – one appreciated the hybrid format, the other preferred solely a face-to-face arrangement and recommended that for the future.
- The paperwork was exceptionally clear and assisted in the production of introducer comments.
- The panel was well-chaired.
- Consensus was reached on the strongest proposals for the call after panel deliberations.
- Further clarification regarding the Methods criteria, indicating some uncertainty about how the ‘use of social science’ was scored in the applications: whether it was sufficient to use a social science method, or required conceptual insights as well.

Overall, the panel was judged to be a smooth and positive process. However, discussions amongst panel members raised the issue of tension between, on the one hand encouraging face-to-face attendance at the panel meeting, and on the other hand discouraging flying to ACCESS meetings on sustainability grounds. This discussion was one factor that led to us to co-produce new Travel Guidance that sets out more clearly how trade-offs and tensions between our guiding principles of EDI, KCP and ES can be handled (see also Golding *et al*., 2024). (see also Golding *et al*., 2024).

**Key learnings and insights:**
Review panels work well when panel members are diverse and have already acted as peer-reviewers on specific applications, enabling familiarity with applications and marking criteria. By giving panel members the Introducer role for applications they have reviewed in the Peer Review College stage, familiarity with application details can be ensured and additional workload prior to the panel meeting minimised. Holding the review panel over two half-days (afternoon and following morning) reduces the fatigue involved and provides opportunity for reflection in between sessions. The inclusion of reviewers at all career stages is beneficial, bringing different perspectives and enabling attention to be paid to high-level as well as detailed comments.

# Findings (2): Analysis of applicants' professional and personal characteristics to assess diversity and inclusion

## Composition of applicant teams

Analyses presented here are based on information provided in Round 2 application forms, which enabled us to assess whether applicant teams were diverse in terms of comprising individuals across different career stages, sectors and institutions.

74 applicant teams were comprised of 333 applicants in total (Figure 2). More than half the applicant teams ($n$ = 45, 61%) consisted of applicants drawn from across sectoral boundaries (i.e., applicants were based across both academic and non-academic organisations; Figure 3). This was a greater proportion of mixed-sector applications compared to Flex Fund Round 1, in which 34% of application teams involved non-academic organisations.

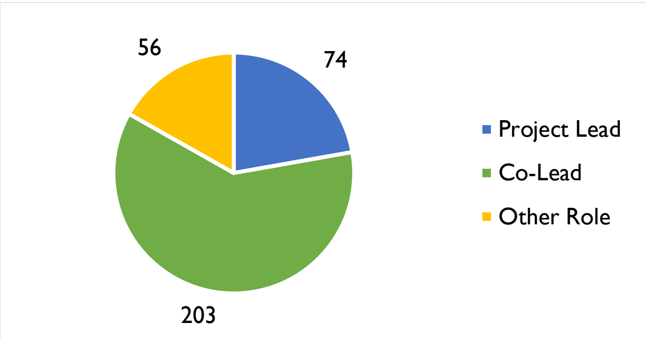


*Figure 2. Number of applicants in each project role.*

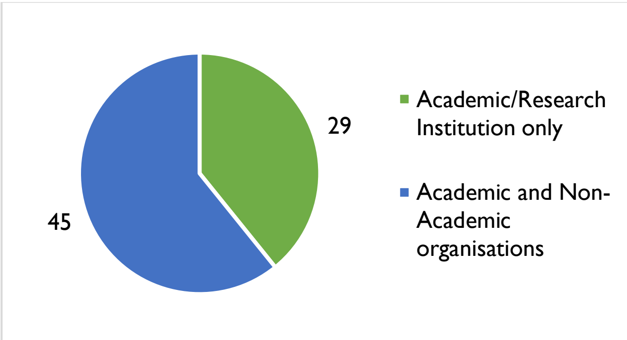


*Figure 3. Number of single- versus multiple-sector teams*

Most individuals involved in Round 2 proposal teams ($n$ = 242, 73%) were based in a university or research institution (Figure 4). Of the 91 applicants based in non-research organisations, more than half were working in the third sector ($n$ = 50, 55%; Figure 4) with relatively few applicants based in business or industry.

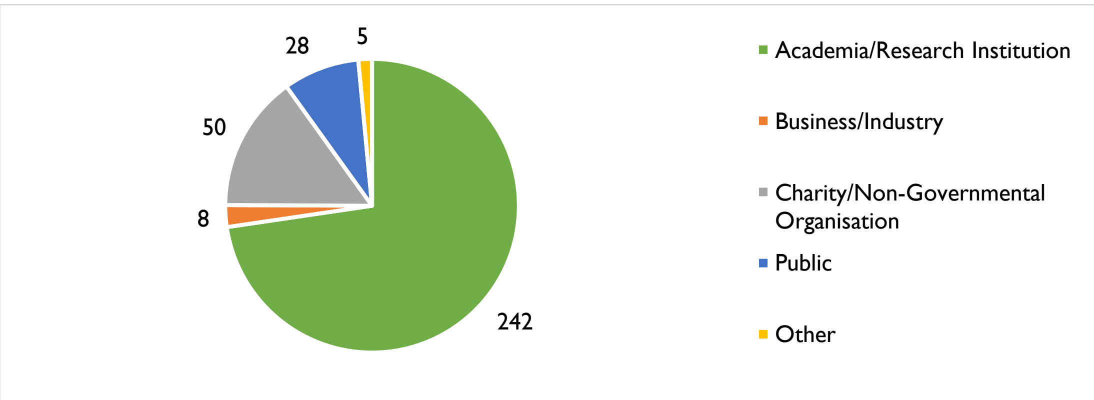


*Figure 4. Proportion of applicants working in each sector.*

Of the 74 Project Leads who were all based in research organisations under ESRC eligibility rules, just over half (*n* = 41, 55%) were based outside of the 24 universities in the Russell Group (Figure 5)[6]. Of the other 168 applicants who were based in research organisations, 70% (*n* = 118) were not based at a Russell Group University.

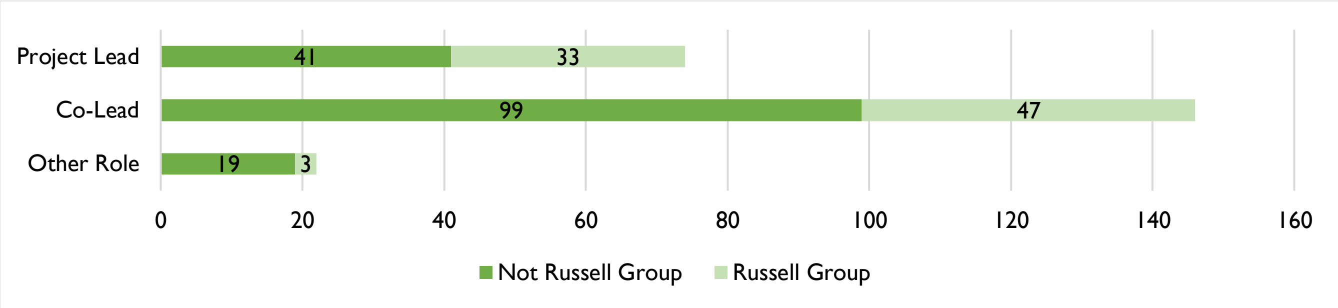


*Figure 5. Proportion of academic applicants based in non-Russell Group versus Russell Group Universities (*n* = 242).*

As expected, there was a high prevalence of Early Career Researchers (ECRs) within application teams, given this was mandated by the call for proposals. 47% of all applicants to Round 2 (i.e. Project Leads and Co-Leads) self-identified as an ECR. 69% of all applications were led by a Project Lead who identified as an ECR. A Pearson's chi-square test indicated that Project Leads were more likely to be ECRs and those in other roles were less likely to be ECRs. There was no observable difference in ECR status among Co-Leads (Table 1; $X^2$ = 29.10, df = 2, $p$ < .001).

*Table 1. Does applicant identify as an Early Career Researcher?*

| | | Early Career Researcher | |
|---|---|---|---|
| Population | *N* | Yes | No |
| All Applicants | 333 | 156 (46.8%) | 177 (53.2%) |
| Project Leads | 74 | 51 (68.9%) | 23 (31.1%) |
| Co-Leads | 203 | 93 (45.8%) | 110 (54.2%) |
| Other Role | 56 | 12 (21.4%) | 44 (78.6%) |

**Key learnings and insights:** Round 2 was successful in empowering Early Career Researchers to apply for funds and to lead applications. It was successful in fostering teamwork across sectoral boundaries, particularly partnerships with Third Sector organisations, and encouraging submissions from non-Russell Group Universities.

[6] https://russellgroup.ac.uk/about/our-universities

## Professional characteristics of applicants

Analyses presented here are based on information provided in the optional Equal Opportunities Monitoring (EOM) survey, for which a total of 116 responses were received from Round 2 applicants (total *n* = 321; response rate = 36%). Although based on a subsample of approximately one third of applicants, it nevertheless enabled us to assess whether applicants were diverse in terms of professional background (sector, career stage, discipline, and location of work). Of these, 106 responses were from applicants whose projects were not funded, one response was from an applicant whose project was funded, and nine responses were from applicants who did not provide a project title in the EOM survey (so it is unknown if their projects were funded or not)[7].

EOM survey responses were received from people who held a range of project roles, including Project Leads and Co-Leads (Figure 6). A series of Pearson's chi-square tests were conducted to explore any differences in applicants' professional characteristics (e.g. sector, career stage, discipline) and project role type (Table 2). No observable differences were noted[8].

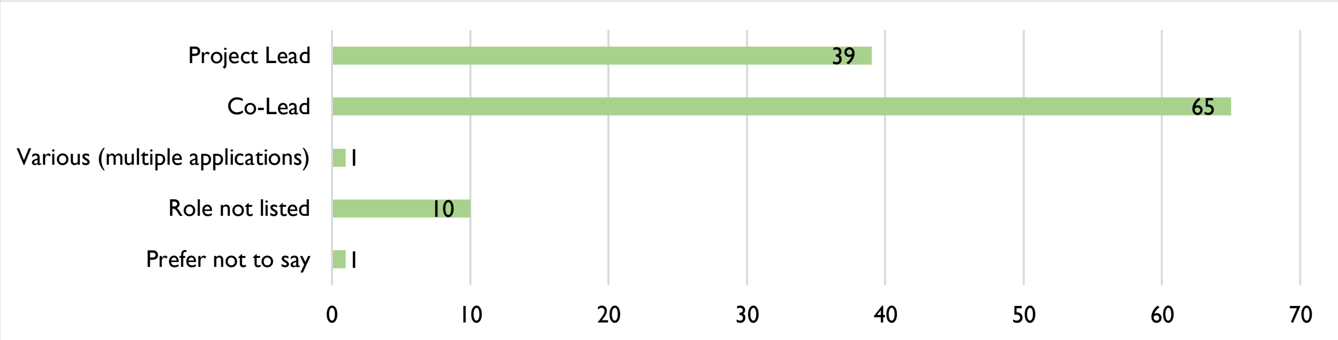


*Figure 6. 'Please indicate your role on your application(s) to the ACCESS Flex Fund (Round 2)'*

*Table 2. Pearson's chi-square results for comparisons of applicants' professional characteristics by project role*

| Characteristic | N | $X^2$ | Degrees of Freedom | *p*-value |
|---|---|---|---|---|
| Sector of work | 115 | 7.27 | 10 | .70 |
| Career stage – Academia | 88 | 14.57 | 14 | .41 |
| Career stage – Government / Public sector | 8 | 8.00 | 8 | .43 |
| Career stage – Other sectors | 18 | 8.97 | 6 | .18 |
| Disciplinary background | 116 | 12.47 | 6 | .052 |
| Job location | 116 | 18.72 | 26 | .85 |

Note. Project role collapsed into three groups - Project Leads (PI), Co-Leads (CO-I) and Other Roles

[7] Due to the pattern of responses, we could not conduct any inferential statistics to examine whether there were any demographic differences between applicants whose projects were funded and applicants whose projects were not funded.

[8] Note that these inferential statistics should be interpreted with caution, given the small sample sizes in some tests, the unequal sample sizes between comparator groups, and the larger contingency tables (all variables have at least 3 response options). Not all test assumptions were met (e.g., some cells had expected counts below 5).

Respondents to the EOM survey worked in different sectors, although most worked in academia (*n* = 88; Figure 7). In terms of applicants' career stage, there was generally equal representation across a range of early, mid, and late career roles (Figures 7 – 10).

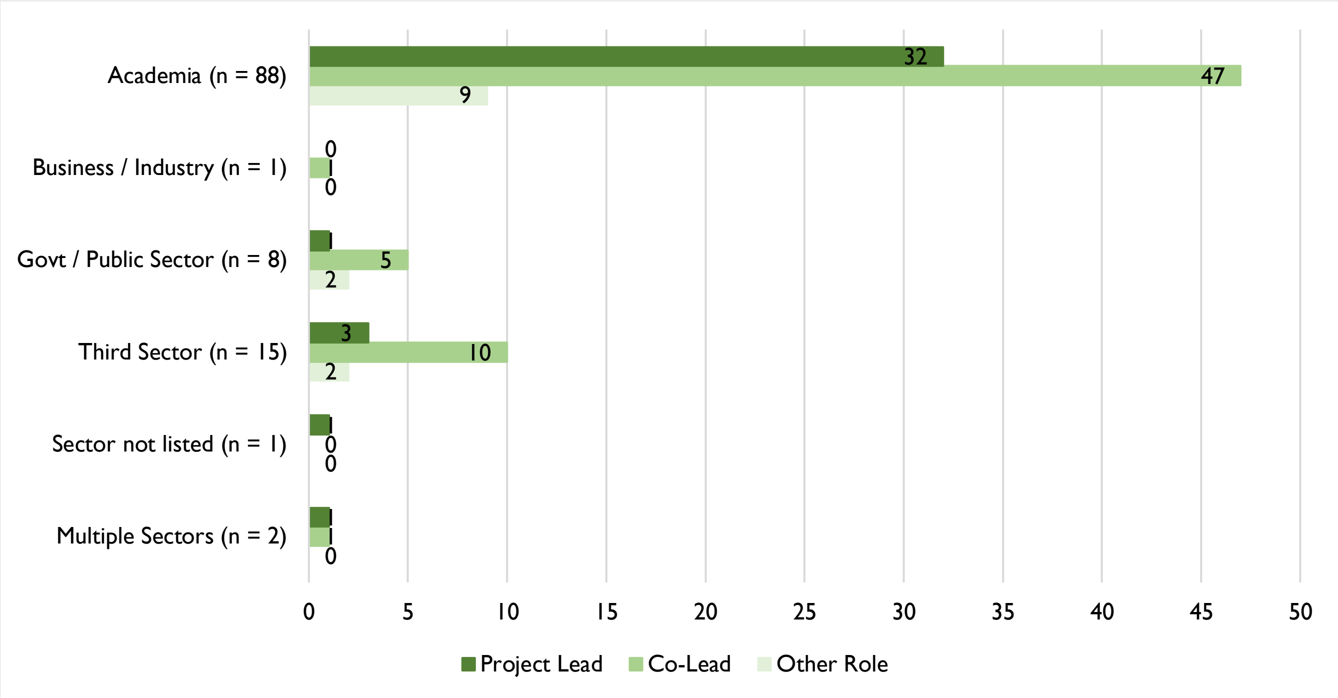


*Figure 7. 'In what sector do you work?'* (n = *115)*

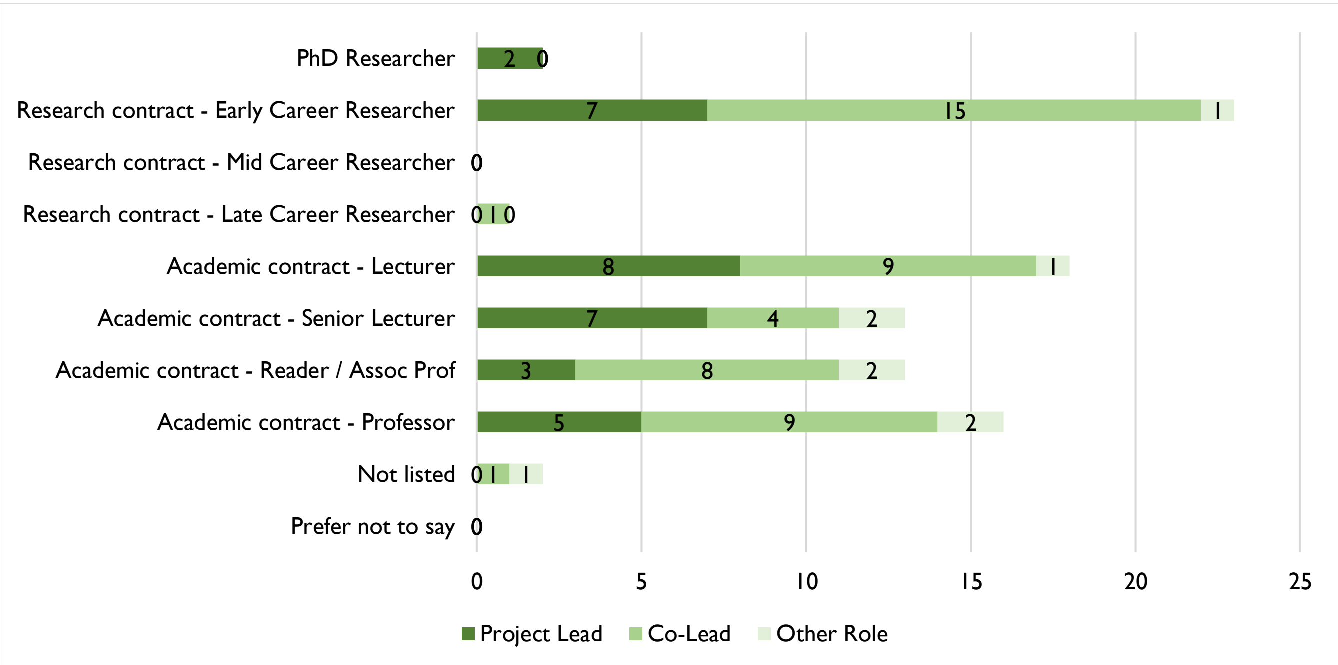


*Figure 8. 'Academia - How would you describe your career stage?'* (n = *88)*

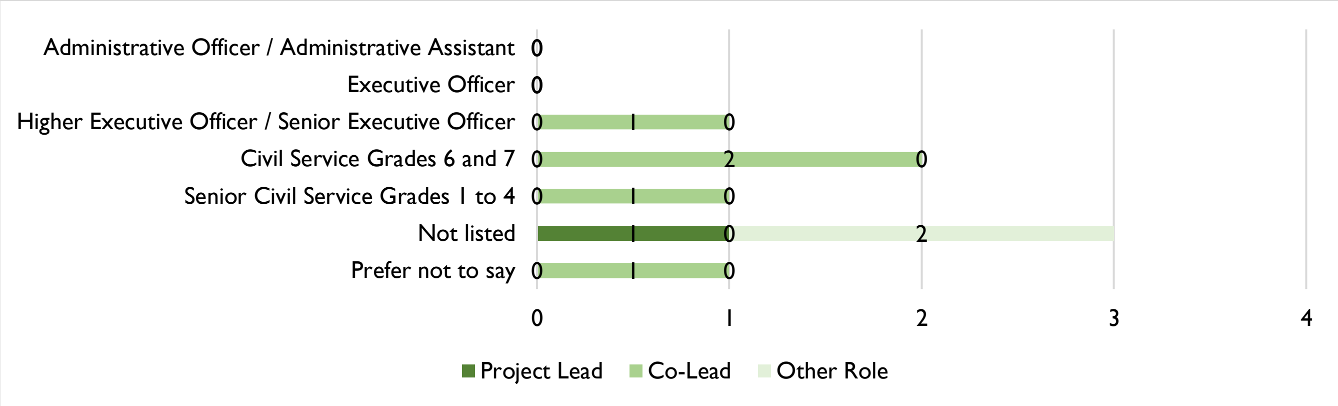


*Figure 9. 'Government/Public Sector - How would you describe your career stage?'* (n = *8)*

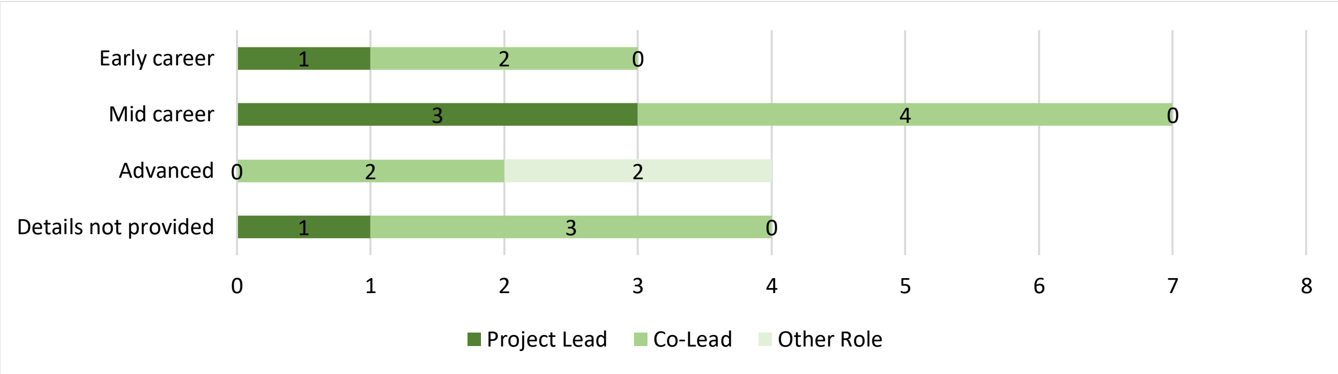


*Figure 10. 'Other Sectors - How would you describe your career stage?'*[9] (n = *18)*

A range of disciplinary backgrounds were reported by applicants, with 46% (n = 53) coded as having a social science background (Figure 11). Applicants' job roles were based across all four devolved nations (Scotland, Wales, Northern Ireland and England), including all nine regions of England (Figure 12).

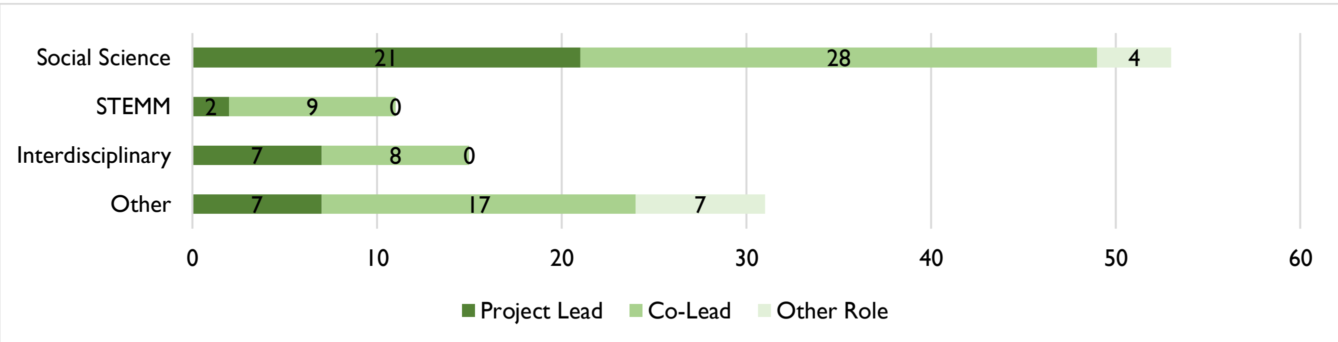


*Figure 11. 'Please describe your disciplinary background.'* [10] *(n = 116)*

[9] Combines *Business/Industry*, *Third Sector*, *Multiple Sectors*, and *Sectors not listed*. Categories coded based on open-text responses.

[10] Coded based on open-text responses. Respondents were classified as 'interdisciplinary' if they reported disciplinary backgrounds that crossed STEMM and social science boundaries. Respondents were classified as 'other' if they reported an Arts & Humanities background, specified a topic area rather than discipline (e.g., net zero, transport planning), or specified a role / skill set (e.g., project management, education).

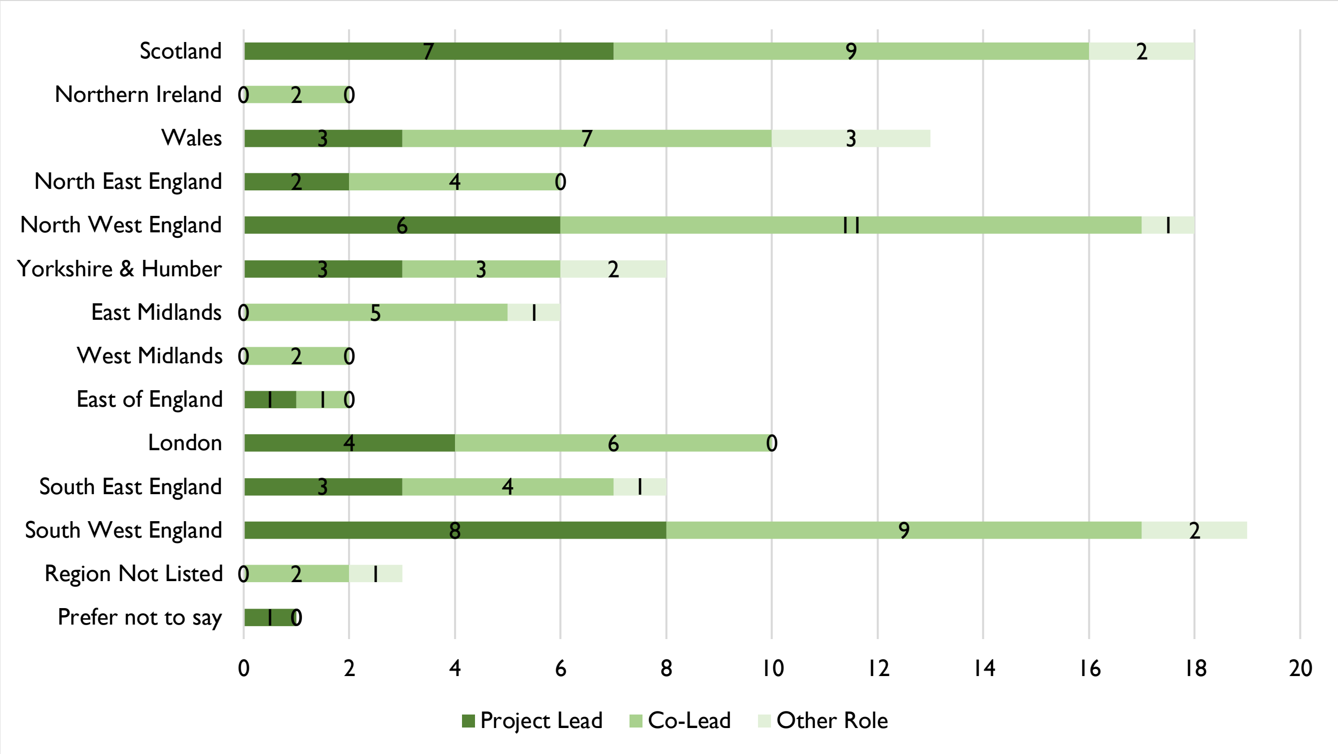


*Figure 12. 'Where is your job geographically based?'* (n *= 116)*

**Key learnings and insights:** Taken together, analyses of professional characteristics indicate that applicants holding different roles in proposed projects (Project Leads, Co-Leads, and those in other roles) did not substantially differ in terms of career stage, disciplinary background, sector of work, and job location. However, while patterns of professional characteristics might be similarly represented across project roles, there are still opportunities for greater representation. For example, very few projects involved applicants from the business sector, and even after discounting Project Leads (who were required to be based in research institutions), most other applicants were also from similar organisations. This indicates there is still scope for further enabling transdisciplinary working. While different career stages seemed to be well-represented amongst applicants, there were some geographical differences. Some regions in England were under-represented (e.g., East of England, West Midlands and the North East England), and there were fewer applicants based in Northern Ireland compared with Scotland and Wales.

## Personal characteristics of applicants

As with the previous section, analyses presented here are based on data from the optional EOM survey, for which a total of 116 responses were received from applicants (*n* = 321, 36% response rate).

A series of Pearson's chi-square tests were conducted to explore whether applicants' personal characteristics differed between project roles (see Table 3). Role types included three groups – Project Leads (PI), Co-Leads (Co-I) and Other Roles[11].

There were no observable differences between groups on any characteristic except for both measures of gender identity. Examination of standardised residuals in the contingency tables indicated that applicants who identified their gender as non-binary were more likely to be in 'Other Roles', than be Project Lead or Co-lead, as were applicants who reported that their current gender identity was different to the gender identity assigned to them at birth. However, this observed difference should be interpreted with caution, as it is likely due to the low numbers of people across the whole sample who identified as non-binary, or as a different gender now from that assigned to them at birth.

*Table 3. Pearson's chi-square results for comparisons of applicants' personal characteristics by project role (n = 116)*

| Characteristic | $X^2$ | Degrees of Freedom | *p*-value |
|---|---|---|---|
| Age | 20.95 | 16 | .18 |
| Gender - identity now | 23.05 | 8 | .003 |
| Gender - identity same/different to at birth | 18.76 | 4 | .001 |
| Ethnicity | 9.72 | 10 | .47 |
| Sexual orientation | 4.21 | 10 | .94 |
| Religion / Belief | 13.08 | 12 | .36 |
| Disability / long-term health condition | 2.51 | 4 | .64 |
| Neurodiversity | 3.62 | 4 | .46 |
| Caring responsibilities | 5.01 | 10 | .89 |
| Parental education | 3.92 | 8 | .86 |

Note. Project role collapsed into three groups - Project Leads (PI), Co-Leads (CO-I) and Other Roles

Response distributions to the demographic questions in the EOM survey are shown in Figures 13 –22. The ages of applicants who responded to the survey ranged from 25-29 (*n* = 11) to 60-64 (*n* = 5), with the most common age range being 45-49 (*n* = 24, 21%). About two-thirds of applicants identified as women (*n* = 72, 62%) and as having no religion (*n* = 74, 64%). Most applicants identified as cis gender (*n* = 111, 96%), as White (*n* = 94, 81%), and as heterosexual (*n* = 89, 77%). Just under one-fifth of applicants reported having a disability or long-term health condition (*n* = 20, 17%) or considered themselves to be neurodiverse (*n* = 17, 15%). Around 44% reported having some form of caring responsibilities (*n* = 51). Finally, about two-thirds of applicants reported having at least one parent or guardian who was educated to at least degree level by the time the respondent was aged 18 (*n* = 76, 66%).

[11] To protect confidentiality, descriptive statistics for comparator groups are not reported for personal demographic characteristics such as age, gender, ethnicity – they are only reported for professional characteristics (e.g., sector, location). As with the professional characteristics (see above), these inferential statistics for the personal characteristics should be interpreted with caution due to relatively small sample sizes.

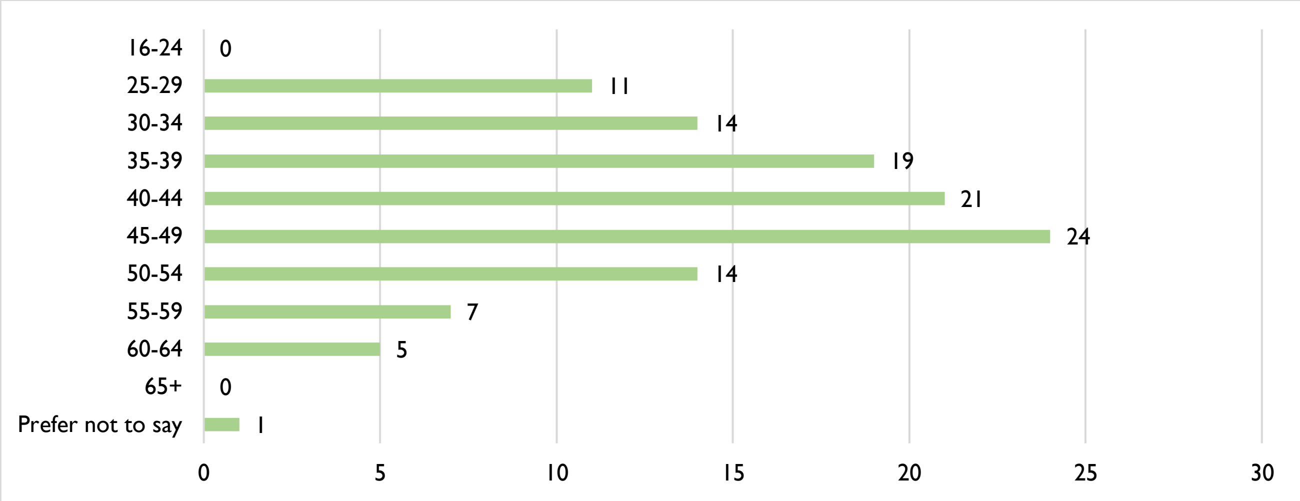


*Figure 13. 'What is your age?'*

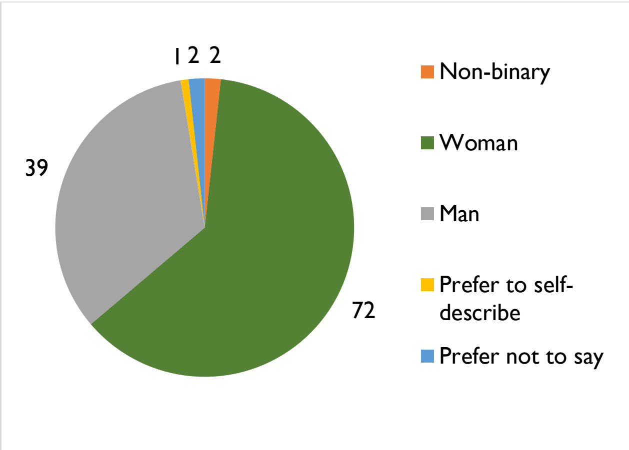


*Figure14. 'How do you describe your gender?'*

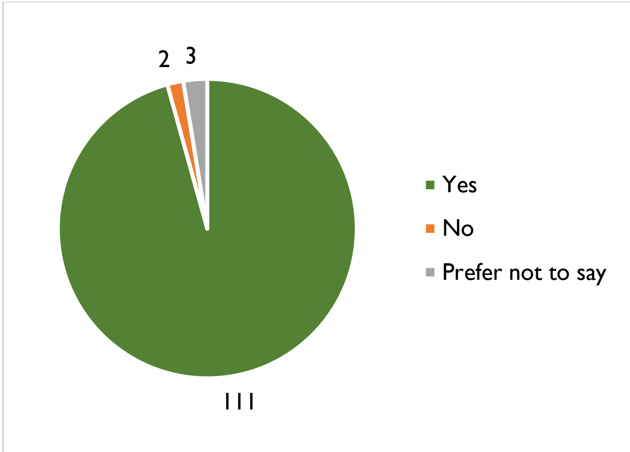


*Figure 15. 'Is your gender identity the same as the gender you were originally assigned at birth?'*

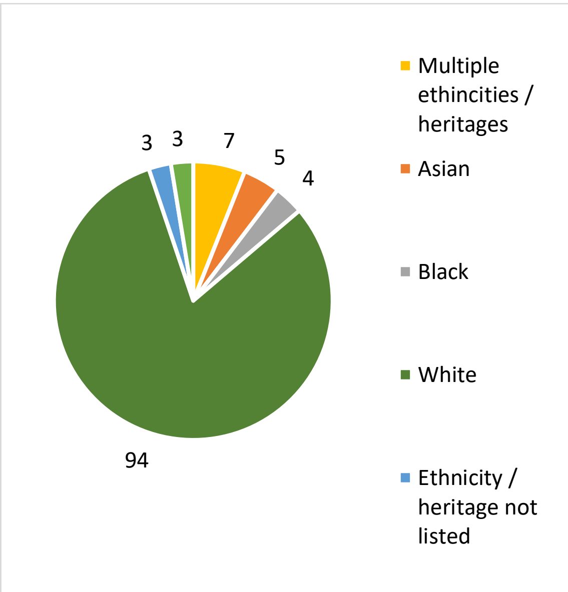


*Figure 16. 'How do you describe your ethnicity?'*

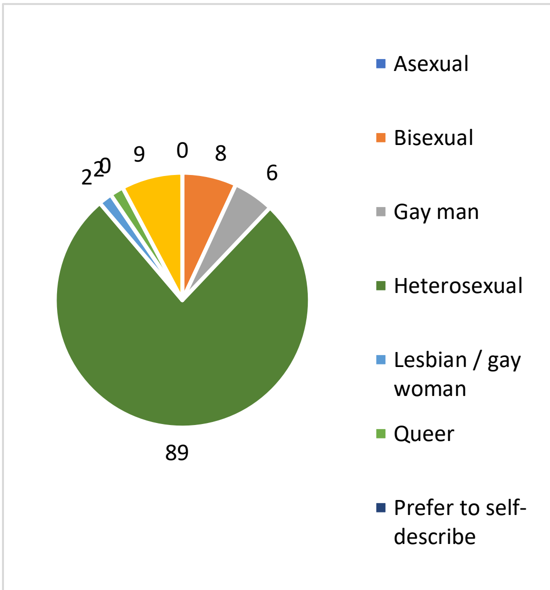


*Figure 17. 'How would you describe your sexual orientation?'*

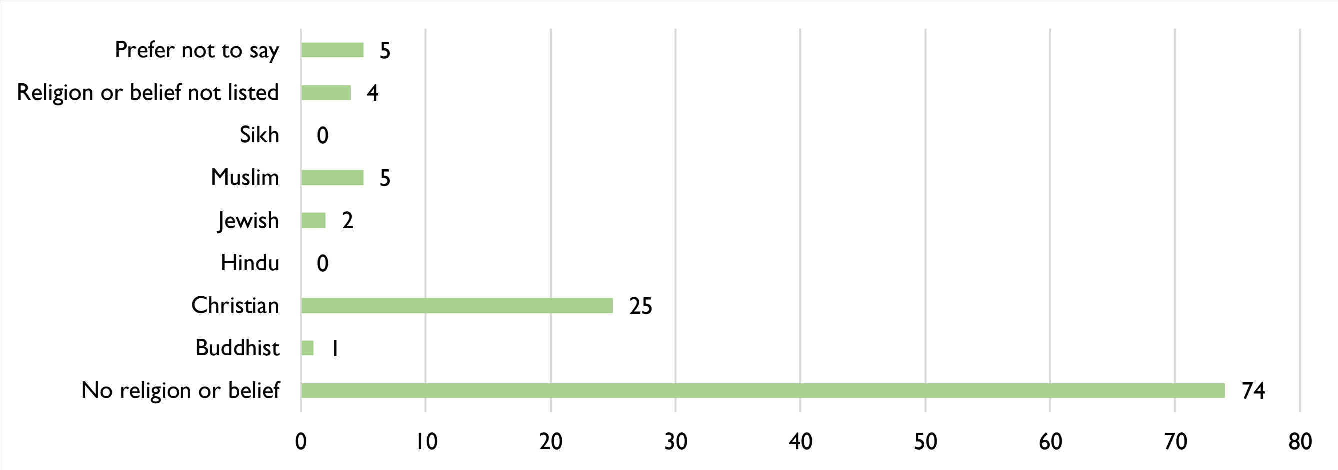

Figure 18. *'What is your religion or belief?'*

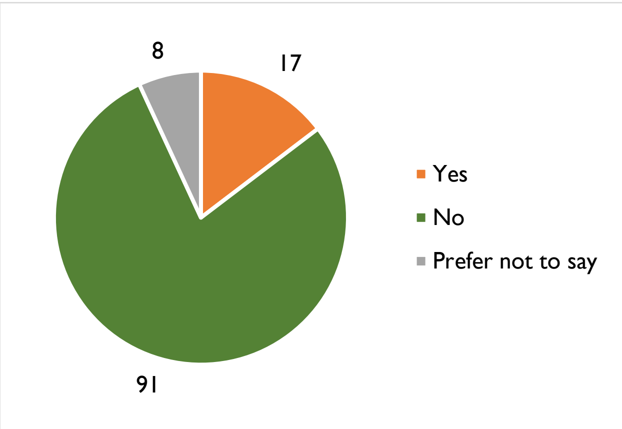

Figure 19. *'Do you consider yourself to be neurodiverse?'*

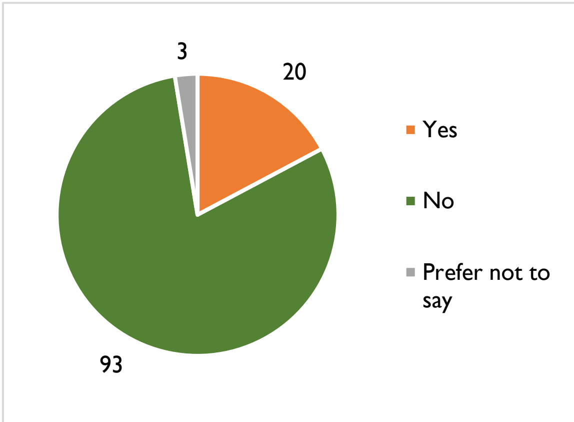

Figure 20. *'Do you consider yourself to have a disability or long-term health condition?'*

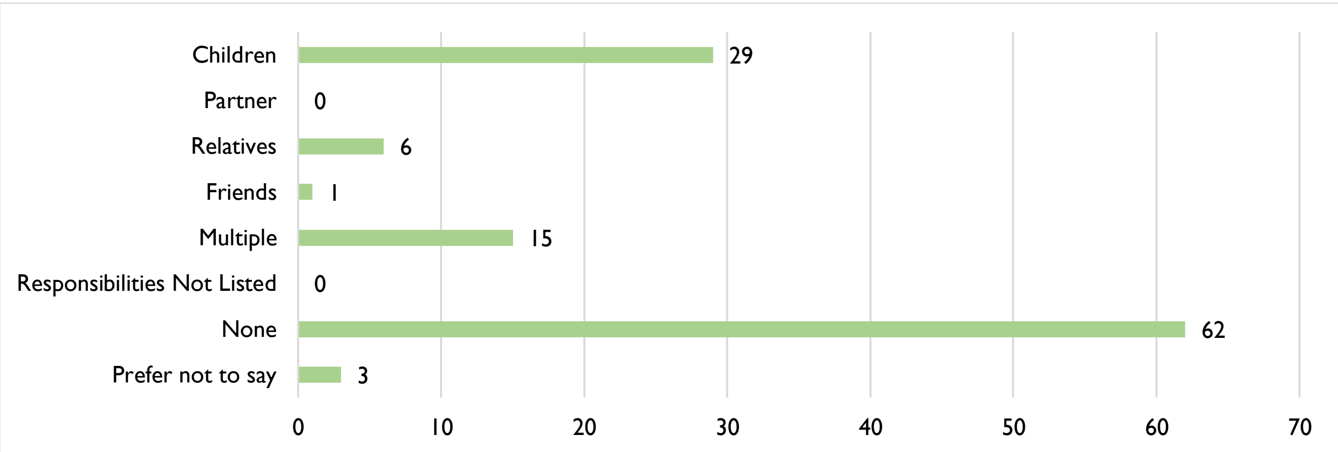

Figure 21. *'Do you have caring responsibilities?'* [12]

[12] Respondents could select more than one option – for those who did so, these responses have been recoded as 'Multiple'.

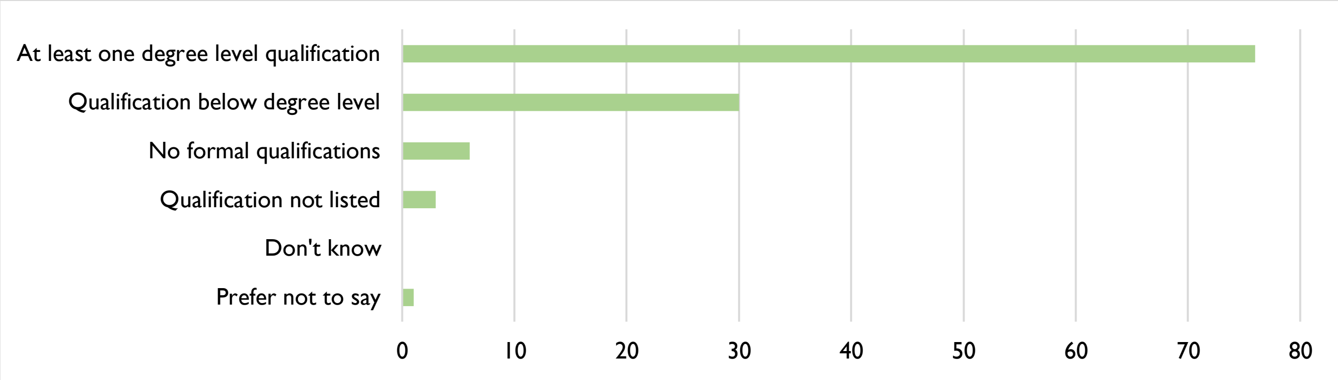


*Figure 22. 'What is the highest level of qualifications achieved by either of your parent(s) or guardian(s) by the time you were 18?'*

**Key learnings and insights:** Across the three groups of applicants (i.e., Project Leads, Co-Leads or those in other roles), patterns of personal characteristics (e.g., age, ethnicity, neurodiversity, etc.) were similar. In some areas, patterns of personal characteristics could be considered positive in terms of diversity and/or greater representation for people traditionally under-represented in research communities. For example, there was a good mix of different age ranges amongst applicants, and more women than men were applicants. While the majority identified as white or heterosexual, it is encouraging to see that around one-fifth of the applicants who responded to the EOM survey did not identify their ethnicity or sexuality this way. Sizeable proportions of the sample also reported being neurodiverse, having a disability or long-term health condition, or having caring responsibilities.

However, in terms of religion and class, there appeared to be less diversity across the sample. Considering the major world religions, only one person identified with Buddhism, and no applicants reported their religion as Hinduism or Sikhism. Taken as a proxy for class, responses to the question about parental education indicate an under-representation of applicants from a working-class background.

While these data can mostly be interpreted positively – especially given relatively equal representation between different project roles – we do not mean to imply that Round 2 successfully overcame systemic barriers for all people who face challenges in accessing research funds. Funders and organisations will still need to work to change cultures, systems, and procedures to enable greater diversity amongst applicants (Schneider *et al.*, 2024).

# Findings (3): Perceptions of Round 2 by lead applicants

This section draws on the perceptions and experiences of lead applicants (i.e. Project Leads) to Round 2. 24 lead applicants responded to our feedback survey, a response rate of 32%. Two of the applicants who responded had also applied to Flex Fund Round 1.

## Applicant topics and awareness of call

Respondents were asked about how they selected the topic of their application. The most common sources were their own research interests (*n* = 20, 83%), and their engagement with non-academic collaborators (*n* = 18, 75%) (Figure 23). The latter is higher than occurred in Round 1 (*n* = 12, 55%) and therefore suggests a higher degree of proposal co-production by comparison to Round 1.

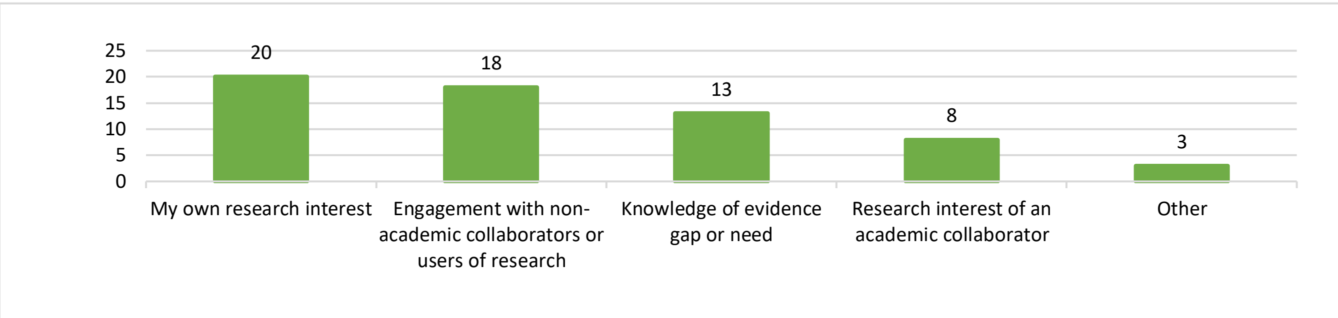


*Figure 23. Where did your topic of application come from?*

In the application form, applicants were asked how they heard about the call for applications to Round 2. Most reported hearing via word of mouth (*n* = 23, 96%; Figure 24).

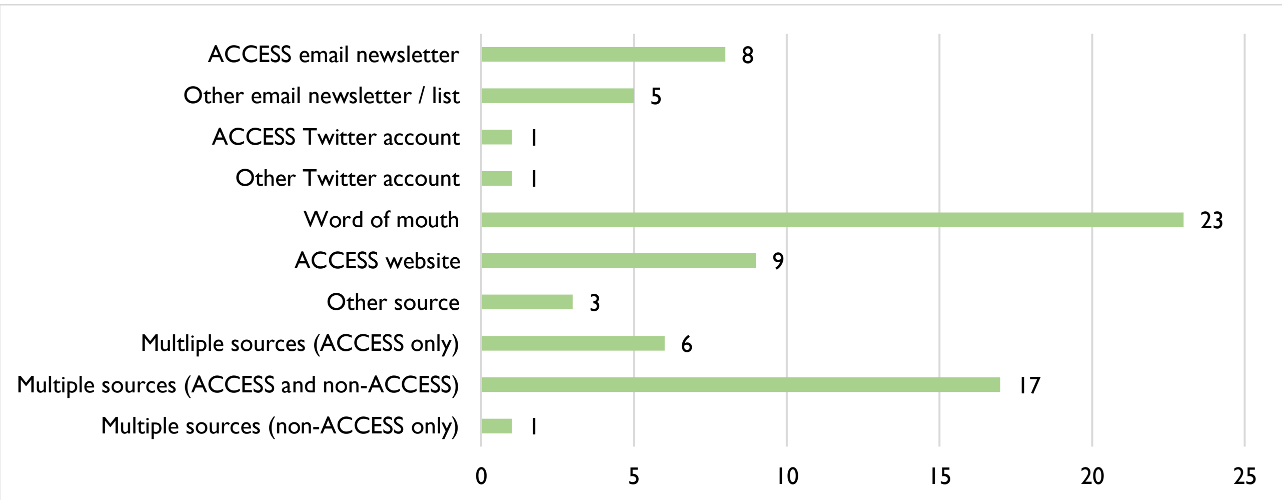


*Figure 24. Sources where applicants heard about call for applications to Flex Fund Round 2.*

Note. Applicants could select multiple options. Word of mouth was commonly selected amongst applicants who selected multiple sources.

## The application process

Respondents were asked about the duration of the application window and the usefulness of pre-application information provided by ACCESS. The majority found the 12-week application window to be ‘about the right amount of time’ (*n* = 22, 92%) and the call for proposals (*n* = 20, 83%) and the launch webinar (*n* = 18, 75%) to be ‘useful’ (Figure 25).

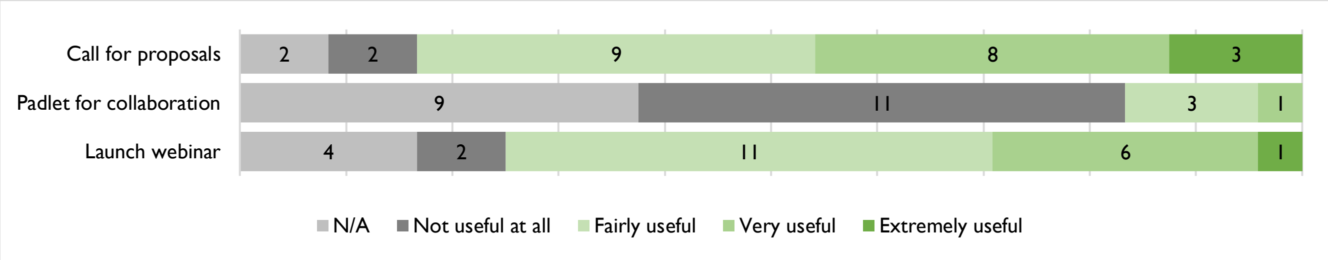


*Figure 25. How useful did you find the pre-application information?*

Some applicants raised specific difficulties regarding the application form. The online form was viewed by some as being difficult to understand; others mentioned that it did not allow the inclusion of diagrams helpful for communicating complex ideas, and there were word count errors in the system. One respondent recommended that a Word document application option could address these issues, noting that this would particularly benefit neurodiverse applicants.

All respondents indicated that their projects involved non-academic partners and, for three-quarters (*n* = 18, 75%), these were new partnerships between academics and non-academic organisations.

In Round 2, we used a ‘Padlet’ to facilitate the establishment of new collaborations across the 12-week period of time between the call for proposals and the submission deadline. However, the Padlet was only indicated as being useful by a small proportion of respondents (*n* = 4, 17%). Responding to an open-ended question, several respondents suggested alternatives to the padlet for identifying and engaging with potential partners (Table 4).

*Table 4. Suggestions from individual applicants for identifying and engaging with potential partners*

| | **Applicants** | **Funders** |
|---|---|---|
| *Finding partners* | Work with existing collaborators<br>Draw on own, colleagues’ and institutional networks<br>Approach local organisations | Provide a searchable list of potential collaborative partners |
| *Building collaborations* | Organise extended multi-day or residential meetings with collaborators to enable relationships and understandings to develop | Hold “matchmaking” workshops with practitioners who have research gaps to address |
| *Managing practicalities* | Be conscious of the potential difficulties and risks of building effective partnerships at speed | Provide an example budget to facilitate conversations about costs between Project Leads and partners |

While the emphasis in the call on high-risk ideas was regarded as positive, survey comments indicated that knowledge co-production relationships with non-academic partners are challenging where project funding is small and potentially damaging to relationships where funding is not awarded. One respondent noted that requiring a high degree of knowledge co-production does not align with ECR capacity and ability to engage with partners; often they have few resources to offer in exchange. They recommended introducing a two-stage process with shorter idea proposals submitted first, shortlisted, and followed with full invite only proposals to prevent over-investment from applicants and partners.

## Incorporating the Guiding Principles into applications

Respondents reported a high degree of ease with regard to incorporating each of the Guiding Principles into their applications (KCP & ES *n* = 23, 96%; EDI *n* = 22, 92%; Figure 26). However, a minority of respondents found using the Guiding Principles together more difficult (*n* = 5, 21%).

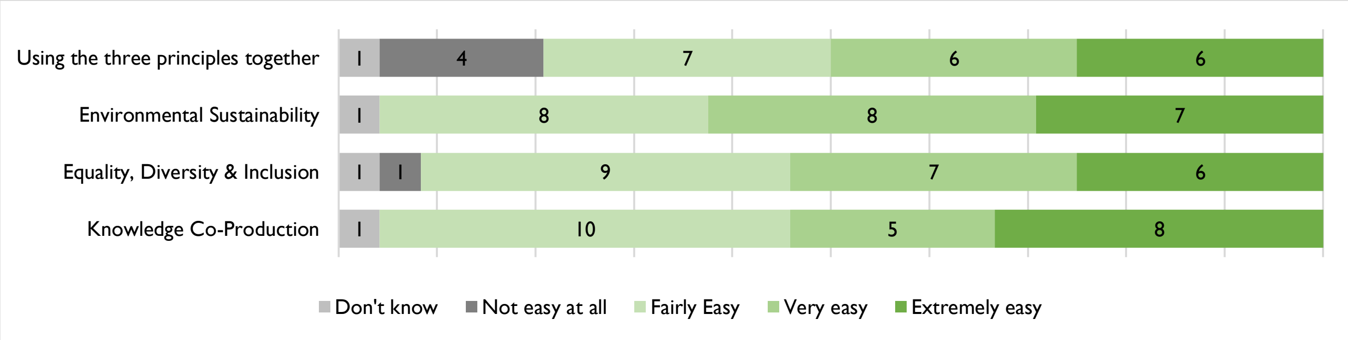


*Figure 26. How easy did you find it to incorporate the three ACCESS Guiding Principles into your proposal?*

Some respondents shared specific reflections about the individual Guiding Principles:

- **KCP:** "My research proposal was entirely co-produced from start to finish (from the research problem, question, approach, etc) and non-academic partners actively contributed to writing the proposal. This was a significant ask for them as they were from public sector bodies that wouldn't receive direct funding for staff time anyway. I think *if the co-production model is to be promoted and expected, these barriers and the associated reputational risks need to be thoroughly considered by the funders" (emphasis added).*

- **EDI:** "One thing I *felt uncomfortable with was that I wanted to use* the language of 'equity' rather than 'equality', but felt I had to match your language and use 'equality' even though it wasn't the right word" *(emphasis added).*

- **ES:** "...I recall feeling a *tension around distinguishing between the environmental sustainability of the project and the environmental-related outcomes* we wanted the programme to have" *(emphasis added).*

In the survey, we also invited reflections on combining the Guiding Principles. Respondents shared mixed views on their combination, ranging from this being intuitive to this being ambiguous, which led to confidence for some applicants and uncertainty for others regarding what was expected from them (Table 5). Respondents recommended improving the clarity of the call by including more detail of what the Guiding Principles entailed. Reducing the number of principles was also proposed.

*Table 5. Individual lead applicant reflections on combining the Guiding Principles*

| | **Support** | **Challenge** |
|---|---|---|
| *Understanding the combined principles* | The principles were intuitive: *'it just made sense', '[these principles] tend to be my guiding principles too', 'we felt they naturally fitted'. 'there were only co-benefits in combining the three principles'* | The principles were ambiguous: *'addressing three at the time in a meaningful manner was a challenge' 'Greater clarity on what the call was after – i.e. fewer principles – may encourage sharper proposals'.* |
| *Combining the principles* | Being asked to identify tensions and conflicts, rather than mask or ignore them, without feeling like all conflicts had to be remedied, was helpful. | The term 'incorporating' was difficult to interpret, 'integrating' would be more accessible. |
| | Universities' resources on planning ES projects are helpful for thinking through interlinkages with EDI and KCP. | Examples of how to incorporate environmental sustainability in online projects would be helpful. |
| | Thinking about integrating EDI helps critically develop the aims and methods of co-production projects. | The principles are broad and open to multiple interpretations, making it difficult to align proposals effectively. |
| | KCP enabled genuine inclusion of non-academic partners' experiences in proposals, and a collaborative space to identify environmentally sustainable ways of working. | |

When asked, 'Would you use the guiding principles again in a future project or activity?', a third were unsure or would not use them again (*n* = 8, 33%), and two thirds would use them again or have already used them (*n* = 16, 67%; Figure 27).

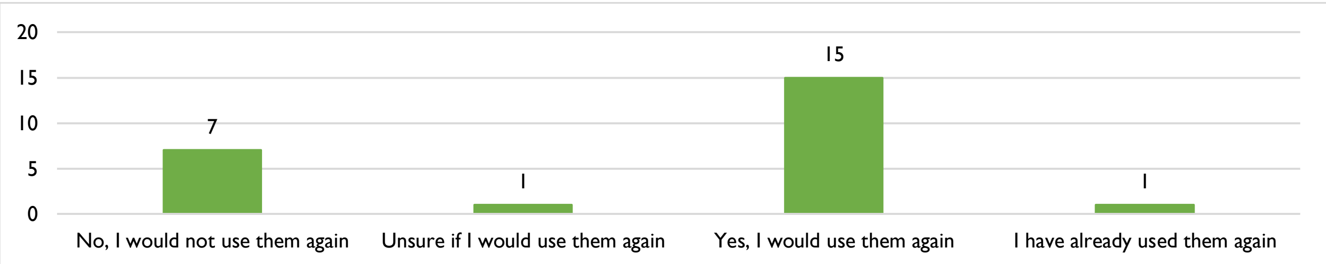

*Figure 27. Would you use the ACCESS Guiding Principles to help you plan a future project or activity?*

## Perceptions of feedback provided to lead applicants

Generic feedback was provided to each lead applicant via email, after the Review Panel made decisions on awards. This feedback followed a similar approach to that used in Flex Fund Round 1, but with additional detail and information provided about what distinguished high quality (i.e. funded proposals) from lower quality submissions. This feedback set out these details for each of the review criteria in turn. The decision not to provide specific feedback to each lead applicant was made due to capacity constraints regarding the time that would be required to do so. In the feedback survey, respondents were asked about the usefulness of receiving generic feedback and asked to share any further reflections. Almost two-thirds did not find the feedback 'useful at all' (*n* = 15, 63%; Figure 28). The consensus from lead applicants was that ACCESS should have budgeted for and shared project-specific feedback based on peer reviewers' comments and scores.

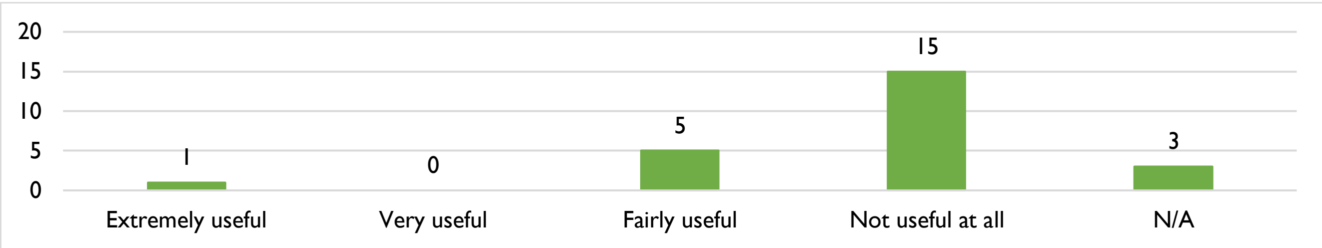


*Figure 28. We provided feedback where funding was not awarded. This was generic feedback due to capacity constraints. To what extent did you find the feedback useful?*

Disappointment that proposal-specific feedback was not given was widely expressed in open-ended reflections (Table 6). It was felt that generic feedback was insufficient, especially given the time, effort and collaborative engagement invested in developing proposals. Applicants could not discern from the feedback which aspects applied to their own application. For teams who applied, this was perceived as a missed opportunity to learn from the process and take their ideas forward successfully. Respondents noted that ACCESS' approach to feedback was especially problematic given the stated ambitions of the funding call to extend opportunities to Early Career Researchers across the UK via this call.

*Table 6. Individual applicant comments about ACCESS feedback to applicants*

| | **Views and suggestions for future practice** |
|---|---|
| *Limitations of generic feedback* | *'Too generic'*<br>*'It was like being told the rules of the game after the match has finished'*<br>*'ChatGPT generated generic feedback'*<br>*'We found this aspect more disappointing than the actual outcome of not receiving the funding, especially given the time and effort invested in the application process and the social capital that went into engaging with the potential collaborators'*<br>*'These comments cannot be useful if they are not targeted at the weaknesses of the specific proposals.'*<br>*'Lack of transparency was quite disappointing, particularly given that collaboration and co-production were central to the call.'* |
| *Benefits of proposal-specific feedback* | Help applicants understand why they were unsuccessful, develop their ideas, and improve future applications.<br>Support EDI in relation to applicant career development.<br>Increase use and relevance of environmental social science as with feedback more projects might get funded elsewhere.<br>Enable Project Leads to explain to partners why they were not successful, thereby protecting their partnerships. |
| *Enhancing generic feedback if unavoidable* | Include proposal scores against criteria used in decision-making – *'Even UKRI give scores'*.<br>Provide more information on why the three proposals were chosen.<br>Schedule an online drop-in session for verbal feedback, creating a space to talk about why proposals were successful and give unsuccessful applicants the chance to ask questions about their own proposals.<br>Avoid advising unsuccessful applicants to apply for funding which only some universities have access to.<br>It would help to publish the criteria for assessment with the call. |

## Future calls

There was clear support for ACCESS values and Guiding Principles in survey responses: particularly inclusion, co-production and ECR development. One respondent urged ACCESS to keep these central to any future funding decisions. Another respondent urged ACCESS to consider how the benefits of ACCESS could be spread more widely among those whose projects were not selected for funding. For example, ACCESS could have created a network or community of support for all unsuccessful research teams, where they might find encouragement to continue to develop their project idea. It is possible that the ACCESS Expert Database, Leadership College and Summer School training opportunities could play a role here.

**Key learnings and insights:**
Survey findings indicate that Round 2 was successful in encouraging Knowledge Co-Production in terms of enabling new partnerships and a focus on topics that arose from engagement between academic researchers and non-academic partners. Use of the Padlet was not viewed by many as successfully enabling co-production; instead 'matchmaking' workshops or meetings were recommended to foster collaborative team-building, which was considered especially valuable for potential applicants who were ECRs. There were varying degrees of perceived difficulty amongst survey participants in the application of the Guiding Principles, both separately and in an integrated manner. This suggests that future funds could usefully provide additional clarity and guidance, including examples, in a call for proposals on how to submit high quality applicants that apply Guiding Principles. Finally, generic feedback, which was undertaken due to capacity constraints, was not perceived as useful by many lead applicants who completed the survey. Future flexible funds, particularly those mandating knowledge co-production, should assess capacity at an early stage and, where possible, ensure sufficient resources are available to provide tailored feedback to applicant teams.

# Section 4: Reflections and Recommendations

Flexible funds have proliferated in recent years and offer many potential advantages. They can enable response to changing circumstances, giving flexibility to tackle new problems that arise across a relatively long funding period of 5 years or more. They can expand and diversify research networks, bringing new expertise into established leadership teams. They can also provide resources for important non-research activities, including network building, knowledge transfer and impact. Yet they also pose challenges, in terms of requiring expertise in fund design, management and distribution that researchers, who are used to responding to calls for proposals but are rarely responsible for their design, may not have. Furthermore, there is a dearth of guidance available on how to ensure funds are delivered in ways that are not only efficient, but empowering, co-produced, sustainable, equitable, diverse and inclusive. That heterogeneity of aims means that narrow indicators for evaluation, specifically 'scientific merit', may be insufficient.

For that reason, when it comes to evaluation, it is not straightforward to assess the 'success' of flexible funds, including ACCESS Flex Fund Round 2 . From an operational perspective, we can conclude that the fund was delivered on time, making awards to 3 projects that scored highly on our award criteria. In that sense, Round 2 'worked'. Yet, determining the fund's overall success in terms of delivering capacity building opportunities for ECRs, or embedding our Guiding Principles, is more challenging, since these aspects are more difficult to assess and to quantify. In this sense, the challenges we faced are consistent with previous research emphasising the complexity and incertitude in assessing research activities that are explicitly 'transformative' (Stirling, 2023; Canton, 2025). In our evaluation of the ACCESS Flex Fund, we identified some difficulties integrating the different Guiding Principles, challenges in operational delivery, and negative feedback from lead applicants. This is clear indication of room for improvement, and so the sharing of learnings here might be useful for those delivering future funds.

In reflecting on Round 2 and identifying recommendations, we evaluate how well funding procedures worked, and the embedding of our Guiding Principles across funding stages and procedures. These issues are reviewed from the diverse perspectives of fund managers, administrators, reviewers and applicants.

**How well funding procedures worked:**

While the operational procedures used in Round 2 were largely successful, feedback from the operations team, peer reviewers and from applicants clearly point to some areas where improvements could be made. Although efforts were made to improve the guidance documents issued with the call (building on feedback from Round 1), it is the case that a fund involving ECRs and non-academic partners in various roles – as applicants, peer reviewers and members of the review panel – and a fund obliging an integrated approach to Guiding Principles requires clear and detailed information to ensure consistency across stages and actors.

One challenge related to the financial aspects of proposals. Whether enabling the preparation of submissions led by ECRs or the evaluation of submissions by non-academic reviewers, guidance needs to be accessibly written and cannot assume prior knowledge of ESRC eligibility rules or conventional research finance procedures. We did not always achieve that goal.

A second challenge related to the use of an online platform for submissions. In Round 2, there were clearly technical challenges in switching between different platforms (MS Forms and ADOBE PDF) across preparation, submission and review stages, with applicants, operational staff and peer reviewers each having different goals and priorities in terms of functional requirements that were difficult to reconcile.

A third challenge concerned consistency between specific details of the Call for Proposal guidance (put together by the management team) and Submission forms (put together by operational team members). In Round 2, minor deficiencies in the application form (e.g. emphasis upon integrated Guiding Principles) could have been identified in advance if we had improved how we checked across both sets of documents prior to the call going out.

**How well the fund embedded our Guiding Principles:**
From the applicants' perspectives, findings from feedback surveys were positive in that the majority of Lead Applicants reported that they had found it easy to incorporate all three Guiding Principles of EDI, KCP, and ES into their proposals and said they would use them again in future.

In terms of EDI, Round 2 applicant teams were generally more diverse in comparison to Round 1. 69% of Lead Applicants were Early Career Researchers. 55% of Lead Applicants were based outside of the Russell Group. Applications were submitted from all regions of England, as well as all devolved nations of the UK. About two-thirds, 62%, of Round 2 applicants that completed our EOM survey identified as women. These are strong indicators of success. That said, it is also the case that there was a dearth of non-academic partners from the Business sector; and a clear gap between the institutions of those who submitted (e.g. 55% from non-Russell Group Universities) and those who received award (none from non-Russell Group Universities). Indeed, some lead applicant survey respondents were critical of the fact that the review panel did not include an additional portfolio criterion – the type of institution that the lead applicant was affiliated to. Feedback indicated that making awards solely to lead applicants affiliated to Russell Group institutions was perceived as incompatible with EDI as a guiding principle.

In terms of KCP, submissions were nearly twice as likely to involve multiple sectors – academic and non-academic – by comparison to Round 1 (61% vs. 34%); to involve new partners, and to pursue topics that arose from engagement between academics and non-academic collaborators. These indicate some degree of success in fostering KCP. However, it is also clear that the online Padlet tool did not enable KCP between potential partners. More engaged funding preparation – for example delivering a Sandpit stage – could have facilitated greater KCP prior to the submission of proposals. This option was ruled out in Round 2 due to constraints on time and resources. This broader challenge of delivering on the Guiding Principles with limited capacity is returned to below.

In terms of ES, submissions generally adopted our guidance in terms of what kinds of meeting venues (i.e. accessible and efficient) or modes of travel (e.g. surface/public transport) to select. We did encounter one trade-off at the review panel stage between environmental sustainability (avoiding flying/use of surface travel) and EDI (caring responsibilities; avoiding a length of time away from home). This challenge contributed to our decision to co-produce our Travel Guidance paying more attention to how interactions between EDI, KCP and ES can be handled (see also Golding *et al*., 2024).

## Key recommendations

**Using a preliminary application stage to avoid discouraging the involvement of non-academic partners:**
In funds that encourage or require knowledge co-production with non-academic partners, 'failure' (i.e. rejection of an application) has impacts beyond research organisations. It can unintentionally deter non-academic partners from engaging in the time required to enable academic collaborations if they judge the high probability of failure to outweigh the benefits of a low probability award. Given that, we recommend that future flexible funds which encourage knowledge co-production use interim stage procedures to minimise the gap between input (of time, resources) and outcome (likelihood of award or failure) by applicant teams. One option is to use an Expression of Interest stage to sift outline proposals. While rejection rates may still be high, the 'loss' of invested time and resources is lower for applicants. Another option is to deliver a Sandbox stage, which has the added value of enabling fund managers to have some say in putting together diverse project teams, for example providing advice on embedding Guiding Principles before submission, as well as shaping directions proposals can take. Each of these 'interim' stage measures would reduce disincentives to collaboration by non-academic partners.

**Blinding applications:**
Blinding applicant identifiers is a useful procedure to increase inclusion in funding procedures, enabling reviewers to focus more on quality of ideas and less on the reputation of an institution or individual. Blinding applications can also help reduce any impact of unconscious bias in the assessment process and can lead to greater diversity amongst awardees, as well as improving the quality of science and evidence (Independent SAGE, 2025; Singh Chawla, 2021). Yet it can be costly to administer in terms of the operational capacity required and can introduce unintended challenges in relation to other Guiding Principles. Despite providing guidance to applicants to remove names from a case for support, there were instances where our operational staff were required to remove such markers that were still present in submissions. A second issue is the challenge peer reviewers found to evaluate the quality of KCP when names of partner organisations had been removed. Arising from these challenges, we recommend future funds clarify what level of blinding is required in order to achieve EDI goals, without compromising other principles such as KCP (e.g. removing identifying information about applicants but retaining identifying information about partner organisations). This could involve production of new guidance, as well as the provision of training for operational staff.

**Improving the use of 'portfolio' decision-making:** Use of additional criteria, beyond scientific merit, and looking across applications interdependently to evaluate research proposals can improve funding decisions, even if it remains unconventional (Canton, 2025). This is particularly relevant when funds aim to be transformative, when funds need to be viewed holistically rather than each application be viewed in isolation, and when they involve multiple objectives, some of which may be difficult to quantify (Canton, 2025; Sterling, 2023). We chose to consider distinctiveness of the proposed work from ACCESS, alongside diversity of environmental challenges, disciplines, location, project partners and outcomes. In the case of funds that are not primarily focused on research, and which aim to turn guiding principles into practice, as was the case here, having multiple award criteria, and undertaking a 'portfolio' approach to final award decisions, has clear benefits.

The perception among some lead applicants that it would have been more inclusive to include a criterion relating to institution status (Russell Group vs non-Russell Group) is a useful challenge, as is the evident gap between institutional affiliations of our total sample of applicants, and those that received an award. While this does suggest the value of incorporating an additional criterion in flexible fund decision-making, caution must be observed. This is because type of institution is not a simple proxy for how much support is provided to lead applicants, since this is likely to vary both within and between research institutions. For this reason, it is difficult to adopt any clear line or boundary between individual applications and research institutions. As a result, we suggest that future funders adopt a cautious, humble and reflexive approach when undertaking portfolio approaches to flexible funds, given that adding criteria increases the complexity of decision-making. We recommend that future flexible funds consider carefully how to implement portfolio decision-making. Following Stirling (2023), this could include use and evaluation of formal portfolio assessment methods that include both quantitative and qualitative indicators, avoid a narrow technocratic approach, and evaluate outcomes in a transparent manner.

**Resources and capacities:** These are fundamental to enable effective delivery of Guiding Principles in flexible funds, in particular EDI and KCP. Our experience from Round 2 is that being inclusive often requires additional work (at least, the first time these processes are created and piloted; once established, some processes may be less time-intensive for future funding rounds). Blinding applications takes time by operational staff. Guidance sessions for ECR and non-academic peer reviewers takes more management time. Yet, these actions can bring benefit to applicants and reviewers, so consideration of how to resource them from an early stage of fund preparation is important. Offering tailored feedback to each unsuccessful lead applicant is important to encourage learning and avoid potential deterrence to KCP by non-academic partners, yet requires time and careful work by both operational and management teams. While we managed to deliver on some of these aspects in Round 2, if we had budgeted to deliver a pre-submission sift stage (e.g. Expression of Interest or Sandbox) and planned for sufficient capacity to devise personalised feedback to lead applicants, our overall approach would likely have been more inclusive. In sum, we recommend that future flexible funds budget for these activities from the earliest stage to ensure sufficient capacity to turn Guiding Principles into practice.

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# Appendix 1 – Timeline of Round 2

| | |
|---|---|
| **Pre-announcement** | **23 November 2023** |
| **CALL LAUNCH DATE** | **5 February 2024** |
| Webinar<br>Padlet opened: ACCESS FFR2 2 online noticeboard | 19 February |
| Email sent to recruit to Peer Review College to act as independent peer reviewer (Stage 1) and sit on Review Panel (Stage 2)<br>Online form: ACCESS FFR2 Peer Review College | 22 March |
| **CALL CLOSING DATE** | **26 April 2024 5pm** |
| Ops team to complete eligibility sift, blinding and batching applications to send to peer reviewers | 29 April to 10 May (allows 9 days - Bank holiday 6 May) |
| Email sent to peer reviewers with guidance document and update on the number of applications received and drop in session dates | 1 May |
| **STAGE 1: PEER REVIEW**<br>Ops team send out 5 max blinded applications to each independent peer reviewer | **13 May** |
| Round 2 online drop-in dates for Peer Reviewers | 16 May 2 -3pm; 22 May 10-11am; 6 June 2-3pm |
| ***HALF TERM*** | ***Mon 27th May – Fri 31 May*** |
| Email sent to Peer Review College members who had agreed to sit on Review Panel to confirm attendance in-person or online | 29 May |
| Deadline: Peer reviewers return scored applications to Ops team (2 reminder emails also sent) | 10 June (allows 4 weeks including half-term) |
| Ops team to create Review Panel spreadsheet with applicant details and evaluations, and allocate introducer roles | 17 – 25 June |
| Email sent to Review Panel with link to applications and evaluation details, and Terms of Reference | 25 June |
| **STAGE 2: REVIEW PANEL MEETINGS**<br>Panel discuss Group 1 and 2 ranked applications.<br>Two introducers share their thoughts on the merits of each application with the rest of the panel | **8 and 9 July** |
| **NOTIFICATION OF OUTCOME**<br>Email sent to all lead applicants | **8 August 2024** |
| **ANNOUNCEMENT OF AWARDS**<br>Press release and website launch | **24 September 2024** |
| Grants start | 1 October 2024 |
| Grants finish | 30 Sept 2026 at the latest |

# Appendix 2 – Aims of the ACCESS Flex Fund

The ACCESS Flex Fund aims to develop new ways of thinking, new approaches and new networks that will enhance the visibility, use and impact of the social sciences to address the transition to a sustainable and biodiverse environment and a net zero society. It also aims to provide project leadership opportunities for researchers who have not had that experience.

The primary aim of the ACCESS Flex Fund is not to support new social science research. Instead, it will support a portfolio of diverse activities such as knowledge transfer, engagement, communication, network building etc. Some illustrative examples (but not restricted to these) include:

- pilot projects to experiment with new ideas, methods or practices that advance the use of the social sciences to address climate and environmental challenges

- develop and test new materials to communicate social science to target audiences (e.g. videos, infographics)

- events to promote collaboration across disciplinary or sectoral boundaries (e.g. workshops involving experts from different disciplines or sectors)

- events to address challenges associated with the ACCESS Guiding Principles of Sustainability, Knowledge Co-Production, and Equality, Diversity and Inclusion (e.g. workshops involving BAME researchers;

- engagement activities with different groups;

- explorations of low-impact research activities)

- skills and capacity development to enable cross-boundary collaborations (e.g. training)

- research involving primary or secondary data analysis (e.g. gauging the contributions of particular disciplines or approaches in informing environmental policy or practice on a given topic).

# Appendix 3 – Application Form

**PLEASE NOTE: This copy of the application form is for information only. Please submit your application online via the ACCESS Flex Fund application form.**

Please submit your application by 17:00 GMT on Friday 26 April 2024.

If you have any issues with completing the application process, please contact ACCESS_admin@exeter.ac.uk for advice.

* Required

**Project Lead**
(Must be led by researcher based in an institution eligible to receive UKRI funding)

First Name: *

Last name: *

Organisation *

Discipline(s) or Area(s) of Work: *

Email: *

Do you identify as an Early Career Researcher in line with the definition for this call? * Yes/No

If yes, briefly explain here why you fit the definition of an ECR

Do you need to add any other team members, such as Co-Leads or Research Assistants?
There is space to include five more people. * Yes/No

**Other** Team **Members**
Please add details of each team member below.

First Name: *

Last Name: *

Organisation *

Is this organisation a non-academic institution? * Yes/No

If yes, which sector:

- ☐ Business or industry
- ☐ Third sector
- ☐ Public sector
- ☐ Other (please specify)

Discipline(s) or area(s) of work: * ________________________________________________

Email: *

Do they identify as an Early Career Researcher in line with the definition for this call? * Yes/No

If yes, briefly explain here why they fit the definition of an ECR ___________________________

Please state their intended role on the project: *

- Co-Lead
- Research Assistant
- Other (please specify) ________________________________________

Do you need to add another team member? * Yes/No

*(On the online application form, further sections are provided for contact details of each other team member.)*

Contacts at Submitting Institution (i.e. Institution of the academic member of staff Project Lead)
Please provide the name and email of a finance and contracting contact below.

Applicants whose contract ends before the proposed research **must include a confirmation letter from the eligible Research Organisation they intend to be based at**, stating that they will be supported for the entire duration of the grant if it is successful, as per Economic and Social Research Council (ESRC) research funding guidance: https://www.ukri.org/publications/esrc-research-funding-guide/.

**Finance Contact Details**
Full name: *

Email: *

**Contract Contact Details:**
Full name: *

Email: *

**Part A – Project Details**

**Summary (accessible language) 250-word max**
In plain English, provide a summary we can use to identify the most suitable experts to assess your application.

We may make this summary publicly available on external-facing websites, so make it suitable for a variety of readers, for example:

- opinion-formers
- policymakers
- the public
- the wider research community

**Project Plan**
Please be aware we will be using a blind screening process as part of our commitment to Equality, Diversity and Inclusion best practice (e.g. reducing unconscious bias). **We therefore request that you do not include identifying information (such as names of institutions, people, organisations, reports, publications etc.) in your answers.** For example, you might tell us 'I led a report/project about x/y/z' rather than 'I led [title of report / name of research group]'.

**Project title:** *

**Project overview**
Please provide a statement outlining the following:

- What the project is
- Its objectives.
- What environmental challenge it is addressing.
- How it is novel.

- How the project will advance the use of social science to address climate and environment challenges.
- Where it will be conducted.
- A timescale for its execution.

***Please do not exceed 750 words.*** *

**Research Approach and Design**
Please explain how you will conduct this project. Provide justification for each technique/approach you intend to use.
***Please do not exceed 1000 words.*** *

**ACCESS Guiding Principles**
Please explain how the project will integrate the ACCESS Guiding Principles. Please explain how your project will ensure **Equality, Diversity and Inclusion** (EDI); build in **knowledge co-production**; and ensure the **environmental sustainability** of your activities.
***Please do not exceed 750 words.*** *

Projects will be expected to deliver at least **TWO** of the following outcomes, please identify which of these apply to your project, as indicated in the statement you have provided above: *

- ☐ New ideas or frameworks
- ☐ New methods of translating evidence or insights
- ☐ New networks
- ☐ New methods of translating evidence
- ☐ Development of new skills or capabilities
- ☐ Increased use of social science amongst specific target groups

Impact, identifying specific project outputs and outcomes
Please provide a statement outlining the anticipated outputs of your project (e.g. workshops, reports, infographics, videos, images, publications). In addition, identify the outcomes of your project and how these relate to and will arise from specific outputs.
**Please do not exceed 750 words** *

**Part B – Justification of Resources**
**Using no more than 500 words**, please provide a breakdown of the costs associated with your project. The ACCESS Flex Fund will meet **100% of the full economic costs** on the proposal submitted. Please note that the combined costs for international Co-Leads, and UK business, third sector and government body Co-Leads must not exceed 30% of the total full economic cost of the grant application (at 100% fEC).

Please refer to ESRC's guidance on what costs are covered here: https://www.ukri.org/publications/esrc-research-funding-guide/. If you are unsure, please contact ACCESS_admin@exeter.ac.uk for advice.

Please also include how the ACCESS Guiding Principles were applied in your costing process.

- DA Staff (Investigators) Brief description:*
- DA Staff (Investigators) Cost (£) *
- Estates Costs (£) *
- Indirect Costs (£) *
- DI Staff (Research Assistant, Administrators) Brief description: *
- DI Staff (Research Assistant, Administrators) Cost (£) *
- Travel and Subsistence Brief description: *
- Travel and Subsistence Cost (£): *
- Equipment Brief description: *
- Equipment Cost (£): *
- Other (Venue hire, External Speakers/ facilitators, Consultancy Fees) Brief description: *
- Other (Venue hire, External Speakers/ facilitators, Consultancy Fees) Cost (£): *
- Exceptions (Eligible costs associated with international and non-academic partners) Brief description: *
- Exceptions (Eligible costs associated with international & non-academic partners) Cost (£): *

- Total 100% cost of project (£): *

Please tell us how you heard about the ACCESS Flex Fund: *

- ☐ ACCESS email newsletter
- ☐ Other email newsletter or list
- ☐ ACCESS Twitter Account
- ☐ Other Twitter
- ☐ Word of mouth
- ☐ ACCESS website
- ☐ Other (Please specify)

Thank you for completing the application for the ACCESS Flex Fund Round 2 2024. Your submission has been recorded.
**If you are willing to provide information to aid our Equal Opportunities monitoring, please complete the survey using this link:** [*survey link here*]

# Appendix 4 – Marking Criteria

6 is the highest overall score it is possible to give a proposal.

A score of 4 or above is a recommendation to consider a proposal for funding.

A score of below 4 is a recommendation not to fund a proposal.

A score of 0 means unable to assess.

Note that, in addition to the overall criterion score of up to 6, each application will have additional criteria with a maximum potential score of 27, reflecting criteria on Advance the use of social science, guiding principles impact, approach and method (all scored out of 6) and value for money (scored out of 3).

**Criteria 1: How well does the proposal advance the use of social science to address environmental challenges?**

For each application, make a judgement about which of the following categories best describes the proposal in terms of advancing the use of social science, using a scale from Outstanding (a score of 6) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box. As well as putting a number on each proposal for this criterion, you must justify your score in the text box below, drawing on the guidance wording related to each category.

**6= Outstanding** (the advance in using social science is of the highest quality; the environment problem is clearly specified; the rationale for why the project will advance the use of ESS is very clear indeed, with strong and convincing content in terms of all aspects, virtually flawless)

**5= Excellent** (an application that clearly will advance the use of social science contributions to environmental challenges; arguments are convincing in connecting the application of social science to specific environmental challenges, but the application has minor flaws)

**4= Good** (application clearly refers to the social sciences, makes some attempt to show how their use will be advanced but lacks strong arguments that clearly connect the application of social science to specific environmental challenges in a convincing way)

**3= Satisfactory** (application clearly refers to ways of advancing the use of social science to address environmental challenges, but lacks clarity or strong arguments; is not fully convincing)

**2= Fair** – some weaknesses (application refers to social science aspects of environmental challenges but lacks clarity or convincing arguments for what social science will be advanced through the work programme; not convincing)

**1= Poor** (unclear how social science is relevant to the proposal – which disciplines or concepts or methods; unclear how social science use will be advanced arising from the work proposed; unclear which environmental problem is addressed; lacking clarity or coherence; numerous flaws)

**0= Unable to assess**

**Textbox: Justify your score**. Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

**Criteria 2: How well does the proposal provide an integrated approach to the ACCESS Guiding Principles (GPs)?**

For each application, make a judgement about which of the following categories best describes the proposal in terms of providing an integrated approach to the Guiding Principles. Draw on all relevant sections to do this, including the Justification of Resources.

Use a scale from Outstanding (a score of 6) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box. As well as putting a number on each proposal, you must justify your score in the text box below, drawing on the guidance wording related to each category.

**6= Outstanding** (all 3 GPs and their inter-actions handled with highest quality; approach clearly thought through and potential synergies and tensions amongst all 3 GPs identified; virtually flawless)

**5= Excellent** (all GPs addressed, generally addressed well, but each could be slightly improved, or their interactions more clearly spelt out; excellent integration amongst GPs)

**4= Good** (e.g. all GPs identified and addressed but unevenly or with some deficiencies – for example, while some are excellent or outstanding, others are satisfactory, fair or poor; good attempt at integration)

**3= Satisfactory** (e.g. all GPs identified but superficially, with little depth or consistency across all 3 GPs, little attempt to think through their integration)

**2= Fair** – some weaknesses (e.g. some of the GPs are identified and addressed, but not all of them, and even when present superficially, with little depth or consistency across all 3 GPs, one or more could be absent; very little attempt to think through their integration)

**1= Poor** (e.g. GPs not mentioned in the text, lack of emphasis in proposal on sustainability, EDI and co-production; no attempt to think through their integration)

**0= Unable to assess**

**Textbox: Justify your score.** Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

**Criteria 3. How well does the proposal specify likely impacts of the work, including identifying project outputs and outcomes?**

For each application, make a judgement about which of the following categories best describes the proposal in terms of delivering impact. Use a scale from Outstanding (a score of 6) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box. As well as putting a number on each proposal, you must justify your score in the text box below, drawing on the guidance wording related to each category.

**6= Outstanding** (application has at least 2 clear outputs leading to multiple outcomes; application shows outstanding arguments about how outcomes will be achieved, leading to highest certainty of impact).

**5= Excellent** (application has at least 2 clear outputs and multiple clearly specified outcomes; application shows convincing arguments about how outcomes will be achieved, leading to high certainty of outcome delivery).

**4= Good** (application has 2 clearly identified outputs, and is clear about how these will lead to several outcomes that are relevant to ACCESS, but the arguments could be more convincing about how outcomes might arise)

**3= Satisfactory** (application has 2 clearly identified outputs from the work proposed, but the outcomes are not fully clear or convincing about how these will lead to outcomes; it is also not fully clear how these outcomes are relevant to ACCESS)

**2= Fair** – some weaknesses (application has only 1 identified output or outcome; poorly explained arguments for how outputs will lead to outcomes; or lacks outcomes clearly relevant to ACCESS and social science)

**1= Poor** (application lacks clearly identifiable outputs and clearly identifiable outcomes).

**0= Unable to assess**

**Textbox: Justify your score.** Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

**<u>Criteria 4. How well does the proposal specify a robust approach and methodology?</u>**

<u>For each application, make a judgement about which of the following categories best describes the proposal in terms of providing a robust approach and methodology. Use a scale from Outstanding (a score of 6) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box. As well as putting a number on each proposal, you must justify your score in the text box below, drawing on the guidance wording related to each category.</u>

**6= Outstanding** (application has a methodology that is superbly described, is clearly thought through with outstanding clarity and depth, has a method that is so robust it would be difficult to improve, and with outstanding fit between the methodological approach and the project aims and objectives; overall, it has no obvious weaknesses to approach and method).

**5= Excellent** (application has a methodology that is excellently described, thought through in depth, with a robust methodology, and with excellent fit between the approach and the project aims and objectives; overall, it has some weaknesses of approach and method, but these are minor and not significant).

**4= Good** (application has a methodology that is well described, is thought through in some depth, is quite robust, and with good fit between the approach and the project aims and objectives; overall, it has some weaknesses or lack of clarity in approach and method that are not minor in nature, and clearly reduce the quality of the proposal).

**3= Satisfactory** (application has a methodology that is satisfactorily described, yet lacks important details; shows some signs of being thought through but lacks depth, is quite robust but could be clearly improved in the methods used, and with a satisfactory fit between the approach and the project aims and objectives; overall, it has some important methodological weaknesses that negatively impact the quality of the proposal).

**2= Fair** application has a methodology that is somewhat clearly described, lacks depth in how it is thought, is somewhat robust, and fairly good fit between the approach and the project aims and objectives; overall, it has many methodological weaknesses that significantly reduce the quality of the proposal)

**1= Poor** (application methodology is not clearly described, is not thought through in depth, not robust, and with a poor fit between the approach and the project aims and objectives; overall, it has numerous significant weaknesses in approach and method that severely undermine the overall quality of the proposal).

**0= Unable to assess**

**Textbox: Justify your score**. Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

**Criteria 5:** How well does the proposal deliver **value for money?**

Drawing on text in the application about **project costs, equipment and budget**, make a judgement about which of the following categories best describes each proposal in terms of delivering value for money.

Use a scale from Outstanding (a score of 3) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box.

As well as putting a number on each proposal, you must justify your score in the text box below, drawing on the guidance wording related to each category.

**3= Outstanding** value for money (costings fit with our budget limit; very clear description for each cost category; costs fit with approach and are clearly and strongly justified)

**2= Satisfactory** value for money (budget total fits with £200 - £240k limit; most budget items seem appropriate, but costings lack detail or clear justification; some costs not clearly justified or seem inappropriate to ACCESS', e.g. flights)

**1= Poor** value for money (very over-budget or very under-budget limit of £200 - £240k unclear justification of resources; ask is either too high for project activities so poor value for money or too low so lacks feasibility)

**0= Unable to assess**

**Textbox: Justify your score**. Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

**Criteria 6: What is the overall quality of a proposal in terms of its fit to the Flex Fund Round 2 call**?

For each application, make a judgement about which of the following categories best describes each proposal in terms of its overall fit with the ACCESS Flex Fund objectives. Use a scale from Outstanding (a score of 6) to Poor (a score of 1). If you feel unable to assess the proposal, put a score of zero in the box. As well as putting a number on each proposal, you must justify your score in the text box below, drawing on the guidance wording related to each category.

**IMPORTANT:** This is an overall criterion that will be used to decide whether an application should be considered for funding by the review panel. Other sections of the proposal should be used to inform your overall quality judgement. While some elements of a proposal may be outstanding, excellent, etc., if you feel that there is a **critical flaw** in the proposal, you should use this overall ranking to reflect that and justify it in the textbox on the scoring form.

**6= Outstanding** (an application that provides a perfect fit with the overall objectives of the ACCESS Flex Fund; is virtually flawless in its consistency with overall ACCESS goals to raise the visibility, use and impact of social science to address environmental problems)

**5= Excellent** (an application that provides an excellent fit with the overall objectives of the ACCESS Flex Fund; is mainly consistent with overall ACCESS goals, but has some minor weaknesses)

**4= Good** (an application that provides a good fit with the overall objectives of the ACCESS Flex Fund; but clearly has some weaknesses in its consistency with overall ACCESS goals)

**3= Satisfactory** (an application that provides a satisfactory fit with the objectives of the ACCESS Flex Fund; has some clear weaknesses in its consistency with overall ACCESS goals)

**2= Fair** – some weaknesses (an application that provides a perfect fit with the objectives of the ACCESS Flex Fund; has many clear weaknesses in its consistency with overall ACCESS goals)

**1= Poor** (an application that provides a poor fit with the objectives of the ACCESS Flex Fund; is not consistent at all with overall ACCESS goals to raise the visibility, use and impact of social science to address environmental problems)

**0= Unable to assess**

**Textbox: Justify your score**. Please use two to three sentences justifying your score. Please use descriptors that relate to your score (e.g. a score of 5 being "excellent" in quality)'.

# Appendix 5 – Portfolio criteria

Portfolio approach suggestions

1. How different is each application from existing ACCESS activities, including Flex Fund Round 1 awards? Indicating a clear development of ideas pursued already and career development opportunities for applicant teams.

2. When taken collectively, do the top ranked applications offer a range of expected outcomes?

3. Do top ranked applications bring new disciplines into the ACCESS network?

4. Do top ranked applications bring new organisations into the ACCESS network?

5. Do top ranked applications reach geographical areas new to ACCESS?

6. Do top ranked applications cover diverse environmental topics and challenges?

# Appendix 6 – Equal Opportunities Monitoring (EOM) Survey for Applicants

**Monitoring EDI in the ACCESS Network – Participant Information Sheet V1.1 2023-08-21**
**ACCESS Flex Fund Round Two**

Thank you for submitting an application to the ACCESS Flex Fund Round Two. We would like to gather additional information about applicants and invite you to complete this short, anonymous survey. You can choose to answer all, some, or none of these questions. The survey is voluntary and should take no more than 10 minutes to complete.

ACCESS is committed to advancing equality, diversity and inclusion (EDI) in climate and environmental social science. We would therefore like to collect some information about your personal and professional demographic characteristics (e.g., age, gender, career stage) to help us understand more about who applied to the Flex Fund Round Two. By collecting this information, it will help us assess where we are as a programme and where we need to do further work to advance EDI.

The primary purpose of this short survey is therefore to aid our general project monitoring and evaluation activities and does not form part of a research project. However, as a secondary purpose, we may also wish to publish high-level, aggregated, anonymized EDI data in future academic articles and project reports, which can be considered research. To read more about who is responsible for the EDI survey, and how your data may be used, click here to download [PDF embedded]

**Thank you for reading this information and considering taking part in the EDI survey. If you are willing to take part, please continue to the next page to confirm your consent and start the survey.**

**Monitoring EDI in the ACCESS Network - Consent Form V1.1 2023-08-21**
**(University of Surrey Ref: FASS 22-23 093 EGA)**

Thank you for considering taking part in this survey. If you have any questions about the Information Sheet or the explanation about the survey, please ask the researcher before you make your decision. You can download a copy of this Consent Form and the Information Sheet to keep and refer to at any time (click here to download)

Please read these 5 statements and then indicate below whether you consent to take part in the survey.

- I confirm that I have read and understood the information sheet dated v1.1 2023-08-21 for the above study.
- I have had the opportunity to consider the information and asked questions which have been answered satisfactorily.
- I understand that my participation is voluntary and that I am free to withdraw at any time during the study without giving any reason. Furthermore, I understand that data already collected cannot be withdrawn as all data collected are anonymous.
- I understand that information I provide may be subject to review by responsible individuals from the University of Surrey and/or regulators for monitoring and audit purposes.
- I understand that information I provide will be used in various anonymised outputs, including project reports, academic publications, presentations, and blogs on websites.
- I consent to the processing of my special category data (gender; age; race/ethnicity; sexual orientation; religious or philosophical beliefs; health) for the purposes stated in the information sheet.

**Please confirm whether you consent to take part in this survey:**

○ I have read and understood the 5 statements above and **I agree to take part** in this survey

○ I **do not agree** to take part in this survey

*Skip To: End of Survey If Q2 = 2*

Please provide the name of the project for which you are a (co-)applicant to the ACCESS Flex Fund (Round 2). If you are a (co-)applicant on more than one project, please list them all here.(This information will only be used by ACCESS after funding has been awarded to assess personal and professional characteristics at the aggregate level between all applicants to the Flex Fund and those who are awarded funding.)

________________________________________________________________

Please indicate your role on your application(s) to the ACCESS Flex Fund (Round 2)

- ○ Principle Investigator (PI)
- ○ Co-Lead (Co-I)
- ○ PI & Co-I (i.e., named across multiple applications)
- ○ Role not listed above (please provide details) __________________________________________________
- ○ Prefer not to say

In what sector do you work?

- ○ Academia
- ○ Business / Industry
- ○ Government / Public (local or national)
- ○ Third Sector
- ○ Sector not listed above (please provide details) __________________________________________________
- ○ Multiple sectors (please provide details) __________________________________________________
- ○ Prefer not to say

*Display This Question: If "In what sector do you work?" = Academia*

Academia - What is your career stage? (Please select the option which mostly closely matches your job grade, even if this is not your exact title)

- ○ PhD student
- ○ Research only contract - Early Career Researcher
- ○ Research only contract - Mid Career Researcher
- ○ Research only contract - Late Career Researcher
- ○ Academic contract - Lecturer
- ○ Academic contract - Senior Lecturer
- ○ Academic contract - Reader / Associate Professor
- ○ Academic contract - Professor
- ○ Career stage not described above (please provide details) ___________________________________
- ○ Prefer not to say

*Display This Question: If "In what sector do you work?" = Government / Public*

Government / Public - What is your career stage? (Please select the option which mostly closely matches your job grade, even if this is not your exact title)

- ○ Administrative Officer / Administrative Assistant
- ○ Executive Officer
- ○ Higher Executive Officer / Senior Executive Officer
- ○ Civil Service Grades 6 and 7
- ○ Senior Civil Service Grades 1 to 4
- ○ Career stage not described above (please provide details) _____________________________________
- ○ Prefer not to say

*Display This Question: If "In what sector do you work?" = Business/Industry OR Third Sector OR Not Listed OR Multiple*

How would you describe your career stage? ________________________________________________________________

Please describe your disciplinary background (if applicable) __________________________________________________

Where is your job geographically based (if you currently/mostly work from home, where is your institution primarily located)?

- ○ Scotland
- ○ Northern Ireland
- ○ Wales
- ○ North East England
- ○ North West England
- ○ Yorkshire & The Humber
- ○ East Midlands
- ○ West Midlands
- ○ East of England
- ○ London
- ○ South East England
- ○ South West England
- ○ Region not listed (please provide details) ________________________________________
- ○ Prefer not to say

How do you describe your gender?

- ○ Non-binary
- ○ Woman
- ○ Man
- ○ If you prefer to self-describe, please provide details ____________________________________
- ○ Prefer not to say (5)

Is your gender identity the same as the gender you were originally assigned at birth?

- ○ Yes
- ○ No
- ○ Prefer not to say

What is your age?

- ○ 16-24
- ○ 25-29
- ○ 30-34
- ○ 35-39
- ○ 40-44
- ○ 45-49
- ○ 50-54
- ○ 55-59
- ○ 60-64
- ○ 65+ (
- ○ Prefer not to say

How do you describe your ethnicity?
Ethnic origin is not about nationality, place of birth or citizenship. It is about the ethnic / heritage group to which you perceive you belong. Please tick the appropriate box

○ Multiple ethnicities / heritages
○ Asian
○ Black
○ White
○ Ethnicity / heritage not listed above
○ Prefer not to say

*Display This Question: If "How do you describe your ethnicity?" = Multiple ethnicities / heritages*
Multiple ethnicities / heritages

○ Please provide details ________________________________________________
○ Prefer not to say

*Display This Question: If "How do you describe your ethnicity?" = Asian*
Asian

○ Bangladeshi
○ Chinese
○ Indian
○ Japanese
○ Korean
○ Pakistani
○ UK (British/English/Scottish/Welsh/Northern Irish)
○ Asian ethnicity / heritage not listed above (please provide details) ____________________________
○ Prefer not to say

*Display This Question: If "How do you describe your ethnicity?" = Black*
Black

○ African
○ Caribbean
○ UK (British/English/Scottish/Welsh/Northern Irish)
○ Black ethnicity / heritage not listed above (please provide details) ______________________________
○ Prefer not to say

*Display This Question: If "How do you describe your ethnicity?" = White*
White

○ Roma / Traveller
○ UK (British/English/Scottish/Welsh/Northern Irish)
○ White ethnicity / heritage not listed above (please provide details) ______________________________
○ Prefer not to say

*Display This Question: If "How do you describe your ethnicity?" = Ethnicity / heritage not listed*
Ethnicity / heritage not listed

○ Arab
○ Indigenous
○ Jewish
○ Ethnicity / heritage not listed above (please provide details) _______________________________
○ Prefer not to say

How would you describe your sexual orientation?

- ○ Asexual
- ○ Bisexual
- ○ Gay man
- ○ Heterosexual
- ○ Lesbian / gay woman
- ○ Queer
- ○ If you prefer to self-describe, please provide details ________________________________________
- ○ Prefer not to say

What is your religion or belief?

- ○ No religion or belief
- ○ Buddhist
- ○ Christian
- ○ Hindu
- ○ Jewish
- ○ Muslim
- ○ Sikh
- ○ Religion or belief not listed (please provide details) __________________________________________
- ○ Prefer not to say

Do you consider yourself to have a disability and/or long-term health condition?

- ○ Yes
- ○ No
- ○ Prefer not to say

Do you consider yourself to be neurodiverse? (e.g., be autistic, have dyslexia, dyspraxia, ADHD, etc.)

- ○ Yes
- ○ No
- ○ Prefer not to say

Do you have caring responsibilities? Select all that apply.

- ☐ Children
- ☐ Partner
- ☐ Relatives
- ☐ Friends
- ☐ None
- ☐ Caring responsibilities not listed above (please provide details) ________________________________
- ☐ Prefer not to say

What is the highest level of qualifications achieved by either of your parent(s) or guardian(s) by the time you were 18?

- ○ At least one degree level qualification
- ○ Qualification(s) below degree level
- ○ No formal qualifications

- ○ Don't know
- ○ Qualification level not listed above (please provide details) ____________________________________
- ○ Prefer not to say

# Appendix 7 - Post-Call Survey to Peer Review College

**Evaluation of Peer Reviewing for the ACCESS Flex Fund Round 2**

Thank you for the time you have taken to review the Flex Fund Round 2 (FFR2) applications. Your time and experience have been invaluable. ACCESS would like share learning about how to undertake Flex Funds as effectively and fairly as possible, and to do this we would value your reflections and experiences about being a reviewer.

This anonymous survey has 23 questions. You can choose to answer all, some, or none of these questions, with as much or as little detail as you have time and capacity for. The survey is voluntary and should take between 5-10 minutes to complete.

**Were you part of the Peer Review College for ACCESS Flex Fund Round 1 during 2023?**

- ○ Yes
- ○ Not sure
- ○ No

Review guidance materials Flex Fund Review guidance materials were provided to you in advance of reviewing the applications (on 13th May 2024).

**How clear did you find the review guidance materials?**

- ○ Extremely clear
- ○ Very clear
- ○ Fairly clear
- ○ Not clear at all
- ○ I don't know

**How useful were the review guidance materials?**

- ○ Extremely useful
- ○ Very useful
- ○ Fairly useful
- ○ Not useful at all
- ○ I don't know

**How easy did you find it to evaluate the applications against the evaluation criteria?**

- ○ Very easy
- ○ Quite easy
- ○ Neither easy nor difficult
- ○ Quite difficult
- ○ Very difficult
- ○ I don't know

**Please add any further comments you may have about the review guidance materials** (e.g. How could the materials have been improved? What additional information might have been helpful for you?):

___________________________________________________________________

<u>Drop-in Sessions</u>

Drop-in sessions were provided to give guidance to peer reviewers.

**Were you aware that we provided drop-in sessions to provide guidance to peer reviewers?**

- ○ Yes
- ○ No (please skip to end of page)

**Did you attend any of these drop in sessions?**

- ○ Yes
- ○ No (please skip to end of page)

**If you attended a drop-in session, how useful was it for you?**

- ○ Extremely useful
- ○ Very useful
- ○ Fairly useful
- ○ Not useful at all
- ○ I don't know
- ○ N/A

**Please add any further comments you may have about the value of the drop-in sessions or how they could be improved**

______________________________________________________________________

<u>Timescale for review</u>

We provided a period of 4 weeks to review the Flex Fund Round 2 applications.

**In your view, was this 4 week duration:**

- ○ About the right length of time
- ○ Too long
- ○ Too short

**Please add any further comments you may have about the timeframe for review:**

______________________________________________________________________

**How was the experience of assessing 'Value for Money', from your perspective?**

______________________________________________________________________

**Do you have any suggestions that might have helped you to evaluate 'Value for Money?'** (e.g., additional information or support)

______________________________________________________________________

<u>Blind review process</u>

ACCESS seeks to drive innovation in social science research and practice to help us shift towards more inclusive, co-produced and sustainable futures. One way we have sought to innovate is by trialling a blind peer review process and we would like to seek your views on this.

**Was this your first time reviewing a project application as 'blind' review?**

- ○ Yes
- ○ No

**How easy or challenging did you find the process of blind review?**

- ○ Very challenging
- ○ Quite challenging
- ○ Neither challenging nor easy

- Quite easy
- Very easy
- I don't know

**Would you be willing to conduct blind review again in the future?**

- Yes
- No
- Not sure
- Please provide a brief explanation ______________________________________________

We employed a blind review process to minimize the risk of unconscious bias by reviewers (in line with the Equality, Diversity and Inclusion elements of our Guiding Principles). We are curious to hear whether people experienced any synergies or tensions between this action (taken to align to Equality, Diversity and Inclusion goals) and the other two Guiding Principles (Knowledge Co-Production and Environmental Sustainability).

**Please share any comments you may have about conducting blind review in relation to the Guiding Principles** (e.g., do you feel it supported Equality, Diversity and Inclusion goals? Do you feel that blinding made it harder to assess Knowledge Co-Production? Did it have any effect on your evaluation of environmental sustainability?).

____________________________________________________________

**Please share any other comments you might have about your experience of blind review** (e.g., compared to 'unblinded review', where details are not removed, do you feel it helped or hindered your evaluations? Do you have any suggestions for how the blind review process might be improved?).

____________________________________________________________

Reviewers were asked to evaluate an applicant's approach to the Guiding Principles within their project proposals.

**How easy or difficult did you find it to evaluate applicants' integration of our Guiding Principles?**

- Extremely easy
- Fairly easy
- Neither easy nor difficult
- Fairly difficult
- Extremely difficult
- I don't know

**Please share any comments you may have about how easy or difficult you found the evaluation of the Guiding Principles within applications**

____________________________________________________________

**Do you have any suggestions that might have helped you to evaluate applicants' approach to integrating the Guiding Principles into their applications?** (e.g., additional information)

____________________________________________________________

**Thinking about your experience overall, how did you find the experience of being a Peer Reviewer for the Flex Fund Round 2?**

- Very challenging
- Fairly challenging
- Neither challenging nor straightforward
- Fairly straightforward
- Very straightforward

**Do you have any final comments about acting as a Peer Reviewer for the ACCESS Flex Fund?**

_______________________________________________________________

Thank you for completing this feedback form. If you are willing to provide information to aid our Equal Opportunities Monitoring, please complete this optional survey here: [*survey link here*]

# Appendix 8 – Post-Call Survey to Lead Applicants

**ACCESS Flex Fund Round 2 Lead Applicant - Evaluation Survey**
Thank you for agreeing to complete this short survey. Your answers will help us to evaluate Round 2 of the ACCESS Flex Fund.  Questions marked with an asterisk (*) are mandatory.

This short survey is anonymous. All data will be stored and processed securely in line with data protection regulations.

* Required

**Pre-application**

1. Did you apply to Round 1 of the ACCESS Flex Fund?  (Round 1 was held in 2023) *

- Yes
- No

2. Where did your Round 2 topic of application come from? (Tick all that apply) *

- My own research interest
- Research interest of an academic collaborator
- Engagement with non-academic collaborators or users of research
- Knowledge of evidence gap or need
- Other

3. We provided a time period of 12 weeks between launching our call for proposals and the closing date, to given applicants time to work up their applications with partners. In your view, was this 12 week duration: *

- Too long
- About the right length of time
- Too short

4. Please state how useful you found the following pre-application information: *

| | Not useful at all | Fairly useful | Very useful | Extremely useful | N/A |
|---|---|---|---|---|---|
| Launch webinar (19 February 2024) | ○ | ○ | ○ | ○ | ○ |
| Padlet to enable collaboration | ○ | ○ | ○ | ○ | ○ |
| Call for proposals documents | ○ | ○ | ○ | ○ | ○ |

5. If your application involved partnership working, did your application involve any new partners that you had not worked with before? *

- Yes
- No
- N/A

6. Do you have any ideas (other than Padlet) for improving identification of and engagement with potential collaborators? (e.g. you could provide examples of how you may have done this successfully before)

**ACCESS Guiding Principles**

7. How easy did you find it to incorporate the three ACCESS Guiding Principles into your proposal? *

| | Not easy at all | Fairly easy | Very easy | Extremely easy | Don't know |
|---|---|---|---|---|---|
| Knowledge Co- Production | ◯ | ◯ | ◯ | ◯ | ◯ |
| Equality, Diversity & Inclusion | ◯ | ◯ | ◯ | ◯ | ◯ |
| Environmental Sustainability | ◯ | ◯ | ◯ | ◯ | ◯ |
| Using the three principles together | ◯ | ◯ | ◯ | ◯ | ◯ |

8. Please share any reflections about combining the three ACCESS Guiding Principles in your proposal. (e.g. examples of co-benefits/tensions and how you addressed them)

9. Would you use the ACCESS Guiding Principles to help you plan a future project or activity? *

- I have already used them again
- Yes, I would use them again
- Unsure if I would use them again
- No, I would not use them again

10. If you have used the Guiding Principles again and you are happy to be contacted to share your experience, please include your name and email below:

**Application Feedback**

11. We provided feedback where funding was not awarded. This was generic feedback due to capacity constraints. To what extent did you find the feedback useful? *

| | Not useful at all | Fairly useful | Very useful | Extremely useful | N/A |
|---|---|---|---|---|---|
| Generic feedback | ◯ | ◯ | ◯ | ◯ | ◯ |

12. Please share any comments you would like to about the feedback.

13. Do you have any further comments about the ACCESS Flex Fund?