Knowledge Foundation

CALL FOR PROPOSALS

EXPERTKOMPETENS 23

Mini/Maxi

- Deadline for application is **15:00 on 6 February 2024**.
- Decisions will be communicated to applicants in June 2024.
- After signing the agreement, approved projects may start on 1 September 2024 at the earliest and on 1 February 2025 at the latest.

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About the Knowledge Foundation

The Knowledge Foundation is a funder with the mission to strengthen Sweden's competitiveness. The foundation funds research and competence development at Sweden's university colleges and newer universities when it takes place in collaboration with the business sector. The Foundation's calls are open to all scientific and artistic subject areas.

Contents

The programme Expertkompetens

Continuous competence development throughout a person's working life, or lifelong learning, is a crucial piece of the puzzle in responding to the changing competence needs in the business sector. Universities and university colleges will have an important role to play in this by taking greater responsibility for the development and transition of professionals, as also set out in the Higher Education Act. For many universities and university colleges this may mean an increased need to reach and adapt the education activities to new target groups of students. At the same time, this kind of activities may offer greater opportunities for collaboration with the business sector on educational issues.

The Knowledge Foundation aims to use the Expertkompetens programme to give university colleges and newer universities (henceforth named universities in the call text) the opportunity to work with companies to develop their ability to meet the needs of the business sector in terms of competence development for professionals.

Objective of the programme

The objective of the Expertkompetens programme is to develop and implement business-relevant educational activities at second cycle level for working professionals[1]. The objective of the programme is also to strengthen the long-term capacity of universities to manage educational activities tailored to professionals' competence development.

The purpose of the programme and its contribution to strong research and education environments

The Knowledge Foundation seeks to support the development of strong research and education environments that create value for academia, the business sector and society. In different ways, all the Knowledge Foundation's programmes are aimed at enabling environments to establish and maintain a strong, long-term, national, and international scientific or artistic position which also contributes to the profiling of the university. For more information on the Knowledge Foundation's view on strong research and education environments, go to www.kks.se.

The specific purpose of the programme Expertkompetens is to establish or renew educational collaboration between universities and the business sector, and to improve long-term access to relevant research-related expertise for the business sector. The programme also helps the research and education environment to strengthen their relationship with the business sector in areas related to the environment's research orientations, thus contributing to profiling.

Programme versions

The programme primarily supports the establishment of educational activities for professionals in collaboration with the business sector. The programme may also provide support for environments with already existing educational activities for professionals, but who wish to significantly renew or modify it, in order to strengthen the long-term sustainability.

In order to effectively match the needs and conditions of the applicant research and education environment, the programme is offered in two versions – *Expertkompetens Mini* and *Expertkompetens Maxi* (further referred to as *Mini* and *Maxi* in the call text). The versions differ in terms of scope (credits – hp), project duration, funding amount, etc., according to the table below.

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[1] Professionals with an undergraduate degree or equivalent experience from working in the business sector.

	Mini	*Maxi*
Project duration	2–3 years	4–5 years
Scope of educational activities	10–15 credits	45–60 credits
Project support	SEK 266,000/credit (= SEK 2.66–4 million)	SEK 200,000/credit (= SEK 9–12 million)
Co-producing companies involved from the project start	5	10
Hearing part of the assessment	no	yes

Where educational activities for professionals are to be **established**, the choice of programme version is made based on the environment's already existing level of experience of collaboration with the business sector in research and/or educational matters. For an appropriate goal fulfilment, environments without any prior experience of collaboration with the business sector are therefore recommended to apply for the programme version *Mini*. Environments already having some or significant experience of collaboration may choose between the two programme versions and base their choice on the needs, circumstances, and ambitions of the environment.

Environments with already existing educational activities for professionals, but with a need of **significant renewal or modification** may choose programme version based on the extent of the needs.

Expertkompetens Mini
is aimed at all kinds of environments, <u>regardless of prior experience</u> of collaboration with the business sector, wishing to establish educational activities for professionals,
or
environments that need to significantly renew or modify their existing educational activities for professionals to a <u>lesser extent</u>.

Expertkompetens Maxi
is aimed at environments already having <u>some or significant experience</u> of collaboration with the business sector and wish to develop this further through the establishment of educational activities for professionals,
or
environments that need to significantly renew or modify their existing educational activities for professionals to a <u>greater extent</u>.

The choice of programme version must be described and motivated in the project plan.

Project design

The projects will involve universities, companies, and possibly other relevant partners, working closely together to analyse and define competence needs and jointly develop and implement relevant educational activities.

- **Co-production:** In order to be clearly based on the needs and conditions of the business sector, the project must be conducted in co-production with the business sector (see under *Participation of business sector* below for more information). The project requires active, extensive, and continuous business involvement at several levels throughout all phases of the project.
- **Matching competence needs:** Educational activities should be based on an in-depth analysis of the competence needs of the business sector. The needs should be coupled to the applicant research and education environment's scientific or artistic expertise.

- **Renewal:** Overall, the educational activities may include both new developments and further development of existing educational provision but must represent a significant renewal or modification in relation to existing provision.

- **Content and form:** In order to attract professional students and to ensure that the educational activities meet their needs and circumstances it is of utmost importance that the educational activities are designed in close collaboration with the business sector. This applies both to content and form (for example the form of study, pace of study, scope, and examination methods), which also may contribute to a good student throughput. In this perspective it is also important for the project to place particular emphasis on support for suitable pedagogical and/or didactical customisations to the educational activities.

- **Integration:** The educational activities must be offered free of charge, must be integrated into the university's regular educational provision, and be assessed, quality-assured and approved in accordance with the procedures laid down by the university.

- **Scope:** The scope of the developed educational activities should be 10–15 credits *(Mini)* and 45–60 credits *(Maxi)* respectively, and they should be delivered at second cycle and/or postgraduate level.

- **Recruitment:** The recruitment of professional students is a critical factor that should be a key focus. Project proposals should outline how marketing, recruitment, validation, etc. will be handled, and include an estimate of the anticipated number of students. The recruitment procedures described should demonstrate professionalism and flexibility and the ability to test new solutions.

- **Repeated activities:** Projects should be planned so that all the educational activities developed can be carried out on two (2) occasions. This will allow feedback from the first occasion to be used to make improvements ahead of the second occasion.

- **Ambitions for lifelong learning:** The project must have the endorsement of the university's management and work unit level (such as departmental level or equivalent), and it must be consistent with the university's long-term priorities and ambitions regarding educational activities for professionals. The project implementation should provide good opportunities to harness and share experiences from the project within the university. The partners involved should also evaluate and draw lessons during the course of the project and prepare for further activities after the project has been completed. The focus of this work should be on establishing effective and appropriate forms of collaboration, development, and implementation, rather than on maintaining a specific educational content.

- **Project participants:** Staff expected to be involved in the project should have a skills profile and experience appropriate to the requirements of the project. Key individuals in the project should be able to devote a substantial portion of their time.

- **Exchange of experiences:** Experiences and good practice from projects within Expertkompetens will be shared in order to better achieve the objectives. Approved projects will therefore participate in programme-wide exchanges of experience.

Terms and conditions

Applicants

Sweden's university colleges and newer universities[2] with degree-awarding powers at master's[3] level or higher within the subject area of the project, may apply. The Knowledge Foundation welcomes applications within all scientific and artistic fields. When the application concerns an artistic field, the concept *scientific* is to be replaced by *artistic* in the call text.

Several universities within the Foundation's target group, and/or research institutes, may collaborate in the project if this strengthens the application and the project, but only one university may be the main applicant and contracting party vis-à-vis the Knowledge Foundation.

Participation of the university

In order to achieve long-term and sustainable activities there must be a clear commitment from the applicant university. This applies, for example, to the prioritisation and planning of resources (such as financial and staff planning), but also to the involvement of the university's supporting functions. Education-related support functions should be actively involved already from the outset of the project to develop ways of working and procedures that support successful project implementation and enhance opportunities for continued operation on completion of the project. For example, there may be a need to develop student recruitment and admission methods, validation of prior learning and to shorten lead times for the educational activities.

The university must co-finance the project with direct funds equivalent to at least 10 percent of the amount requested from the Foundation. The university's contributions must be clearly stated in the project plan and budget. Please note that overhead costs are not to be included in the co-financing from the university.

A project manager, who must have a PhD and be employed by the main applicant university, should be responsible for the implementation of the project. The project manager should have solid experience in developing and implementing education at the relevant level (second cycle and/or postgraduate level). The application should also state who will be the project owner at the main applicant university. The project owner, who should have staff and budget authority at a senior level at the university, has responsibility for ensuring proper conditions for implementing and monitoring the project. The project manager and the project owner should not be the same person.

Participation of business sector and other partners

The project must be co-produced with business partners. For more information on co-production, go to www.kks.se.

At least five companies (within *Mini*) and at least ten companies (within *Maxi*) must be involved from the start of the project, and thus in the application, however the project requires an active, broadened, and extended collaboration with additional business partners throughout its duration. Participating business partners will contribute, among other things, by identifying competence needs, developing educational content and form, and offering expertise and experience from practical challenges. The involvement of the business sector, for example through workshops, reference groups, steering groups,

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[2] Blekinge Institute of Technology, Dalarna University, Halmstad University, Jönköping University, Karlstad University, Konstfack, Kristianstad University, Linnaeus University, Malmö University, Mid Sweden University, Mälardalen University, Royal College of Music in Stockholm, Royal Institute of Art, Stockholm University of the Arts, Swedish Defence University, Swedish School of Sport and Health Sciences, Södertörn University, University of Borås, University of Gävle, University of Skövde, University West, Örebro University.

[3] Degree-awarding powers at master's level or higher is required to ensure that good conditions prevail for a close connection between research and education within the subject area.

etc., should be clearly detailed in the project description. The application should also indicate whether, and if so how, business partners are involved in the actual implementation of the educational activities.

The business partners' total and joint contribution to the project, primarily through in-kind contributions, must correspond to at least 10 percent of the amount requested from the Knowledge Foundation. This will be followed up in the project reporting.

Please note that co-financing companies must fall within the scope of the Knowledge Foundation's definition of business sector (go to www.kks.se for more details). The applicant should contact the programme manager well in advance if there is any uncertainty regarding the definition.

Other relevant partners, like Swedish universities outside the Foundation's target group, trade associations, public bodies or companies that fall outside the scope of the Foundation's definition of business sector, may also participate if they strengthen the application and the project. These partners bear their own costs in the project, and these costs cannot be counted as co-financing. The contributions of all partners must be clearly described and justified in the application and signed letters of intent should be attached.

If any economic or personal links exist between the involved companies, between any company and university, or between any company and individual researcher(s), this must be disclosed. The project plan must clearly indicate any personal conflicts of interest, and the individual's various roles in the company or university must be fully described. For example, ownership of shares, board memberships, and employment/consultant work should be specified.

Project duration

The project duration should be 2–3 years for *Mini* and 4–5 years for *Maxi*.

Financial framework and budgeting

Maximum funding from the Knowledge Foundation is SEK 266,000/credit within *Mini*, which means SEK 2.66–4 million, and SEK 200,000/credit within *Maxi*, which means SEK 9–12 million.

Funds from the Knowledge Foundation can be used for:
- Project management and collaboration with the business sector and potentially other partners.
- In-depth analysis of the business sector's competence needs and matching them with the applicant environment's subject expertise.
- Development of educational activities, including the development of tailored educational approaches.
- Development of new working methods for e.g., communication, marketing, student recruitment, admissions, and validation – *the Knowledge Foundation will cover a maximum of 50 percent of the cost*.
- Equipment – *the Knowledge Foundation will cover a maximum of 50 percent of the cost*.
- Implementation of developed educational activities on (minimum and maximum) two occasions.
- Costs of project-related dissemination of knowledge and lessons learned.

The Knowledge Foundation does not fund:
- Infrastructure costs, such as platform or similar costs.
- Costs relating to the regular activities of support functions linked to education.
- Costs of integrating educational activities into the university's regular provision.

Co-applicants in the Knowledge Foundation's target group and research institutes may be reimbursed for costs directly attributable to their participation in the project from funds granted by the Foundation. Other participating partners bear their own costs in the project.

Budgeting of funds must be in accordance with the instructions presented in the document *General terms and conditions for projects funded by the Knowledge Foundation*, go to www.kks.se. The budget in the application must cover the entire project and include both the Knowledge Foundation's support and the contributions of the university, companies, and any other partners. It should be possible to assess the costs of the proposed activities from the project plan.

The application should not include overhead costs. Such costs (20 percent) will be calculated and included in the proposed contract if the Foundation approves the application.

Application

The application, which can be written in Swedish or English, should be submitted via the project manager's account in the Knowledge Foundation's application system (www.kks.se). Supplementation of the application after the closing date of the call is not possible.

In the application form, applicants should indicate the project title with the programme version applied for: '*Expertkompetens Mini*: [Project Title]' or '*Expertkompetens Maxi*: [Project Title]'.

In the application form, the project's main subject focus is stated based on the *Standard for Swedish Classification of Research Subjects*. For projects of an interdisciplinary nature, a maximum of three (3) different subjects can be selected.

The project budget should be entered directly in the application form and should not include overhead costs (OH).

In the application form, state the city and postal code for the place where the unit within the company that will conduct the main part of the co-production is located.

A table of planned project participants is to be attached to the application form. From participating companies (and potentially other partners), only key participants need to be entered. Attachment template for project participants (*Staff in the project*) is downloaded as an Excel file from www.kks.se but must be converted and attached as a PDF file (make sure that the entire Excel spreadsheet fits on one PDF page).

Appendices to the application

The following appendices (as pdf-files) should be attached to the application and in the same order as below. The structure of the appendices must follow the headings specified for each appendix. Under each heading, the main characteristics of the information that the foundation expects are stated, however applicants can provide supplementary information that is deemed appropriate based on the direction of the proposal.

NOTICE: All body text in Appendices 1 and 2 must follow the format font Arial, font size 11 pt, single line spacing.

Appendix 1. The project's contribution to the research and education environment (may not exceed 2 pages, see below for more information if the project is planned in collaboration between several environments)

To be uploaded under *Description of host research and education environment and project contribution.*

This appendix should be written jointly by the head of the research and education environment and the project manager. When a project is planned in collaboration between several environments, all environments shall be included, however, the appendix may only be extended by half a page per

additional environment. Start from the group or environment where the project has closest context. Design the description based on the following headings:

1.1. The project's contribution to the development of the research and education environment

Describe how the project will contribute to the development of the research and education environment. Connect to the purpose and the goals of the call. It must be made clear in what way the project entails added value in relation to previous and ongoing projects within the environment, especially projects with the same project manager.

1.2. The research and education environment (or environments) in which the project will be conducted

Describe the environment's current situation and ambition.

a) Current situation with results from the past five years (area of activity and direction of research and education within the environment, personnel composition, scientific production, development of educations, funding, collaborative and business partners etc.)

b) Ambition and objectives for the further development of the environment.

Appendix 2. Project plan (may not exceed *10 pages (Mini), or 15 pages (Maxi)*, page numbered)
To be uploaded under *Project plan.*

- **Introduction** – General presentation of the project and its objectives and purpose.
- **Partners and organisation** – Describe and explain the participating project partners and their respective roles, contributions, and anticipated benefits. Describe and explain the management and organisation and the expertise and involvement of key individuals. Account for how gender equality aspects have been considered in the composition of the project group (more information on www.kks.se).
- **Experiences of collaboration with the business sector** – Describe overall experiences (if any) of collaboration with the business sector in research and educational issues, and experiences and results (if any) from development of education for professionals (including previous projects). Based on this, explain the decision to apply for *Mini* or *Maxi*.
- **Link to business challenges and competence needs** – Provide an overall analysis of the competence needs to be addressed and how they are of strategic importance to the business sector. Provide an estimate of student volumes from the business sector in the short and long term. Describe how the business sector and other partners have participated in the analysis. Describe how the project continuously will maintain a high level of business relevance through the collaboration with the business sector. Describe the scientific strengths and expertise of the host research and education environment within the subject area and indicate how the planned educational activities match the corresponding field of competence in the business sector. Account for and relate to any similar activities for professional development in Sweden in the field of competence. Account for whether sex and gender perspectives are relevant in the project design and content, and if so, how these will be included (more information on www.kks.se).
- **Planned educational activities** – Describe how the project will be used to achieve synergies between the environment's research and education. Describe planned educational activities as far as known and indicate how they respond to identified competence needs of the business sector. Give details of how the activities relate to existing educational provision at the university. Describe how the educational activities will be implemented and tailored to meet the specific needs and circumstances of the target group. Give details of, and explain anticipated admissions and student throughput, as well as recruitment and marketing strategies.

- **Implementation plan** – Specify how the project implementation will allow for the development and implementation of appropriate educational activities of high quality, relevance, and appeal. Specify how the business sector and other partners will be involved and cooperate in the various parts of the project. Describe how the university's support functions will be involved in the project and how any development of internal working methods and processes will take place. Specify how monitoring, learning and continuous adaptation of the activities during the project period will take place, and how it may contribute to sustainable educational activities for professionals in the longer term. Provide an overall plan of activities and timetable.
- **Budget** – Describe and justify the overall project budget, and in particular the funding from the Foundation. Indicate how the total funding is distributed between the various partners and parts of the project. Describe and justify the budget in relation to the project content.

If the university has been previously rejected on a similar Expertkompetens project application, and reapplies, this must be stated along with comments on how the previous assessment panel's aspects are handled within the current application.

Appendix 3. Qualifications (may not exceed 1 page per person)
To be uploaded under *Attachments in accordance with the call and in the same order as stated in the call.*

Attach CVs for individuals crucial for the implementation of the project. Include merits of relevance in relation to the project using the following selection of headings (more information on www.kks.se):

- **Degrees**
- **Positions**
- **Research output:** select at most ten (10) research results/outputs. In addition to scientific publications, this could be for example: documented artistic merits, instrumental or product development, data set, software, patent, process or policy contributions, and implementation of research results.
- **Teaching:** the full diversity of academic teaching, training and supervision activities, education development including open teaching resources.
- **Cooperation:** with academia, business and other societal actors including communication efforts
- **Leadership:** project management, activity development, assessment assignments, centre management, department assignments, etc.

Appendix 4. Letters of intent
To be uploaded under *Attachments in accordance with the call and in the same order as stated in the call.*

Signed letter of intent from each of the co-producing companies involved from the start of the project, and potentially other partners, must be attached. Each letter of intent must include the company's:

- needs and motives for participation,

- contributions and participation in the implementation of the project,

- expected results and benefits of participation,

- planned co-financing (total amount must be stated)

The letters of intent should either be signed manually or electronically by, for example, GetAccept, ebox, or similar systems.

Appendix 5. Signatures from the university (template)

To be uploaded under *Attachments in accordance with the call and in the same order as stated in the call.*

The application must be signed by the project manager, the project owner, and the vice-chancellor. The project manager's signature implies responsibility for the described implementation. The project owner and the vice chancellor assure through their signatures that the university approves the project and will be involved according to the project description.

Appendix template is downloaded from the Foundation's website, www.kks.se. The signature appendix should either be signed manually or electronically by for example eduSign, GetAccept, ebox or similar systems.

Preparation and assessment

The application will be reviewed by the secretariat of the Knowledge Foundation to ensure that it complies with the formal requirements. If these are met, an external assessment panel will conduct an overall assessment based on the assessment criteria below. The assessment will consider, where applicable, whether the application is for a project within the *Expertkompetens Mini* or *Expertkompetens Maxi* programme. As a supplement to the written application, a hearing is held with representatives from the project within the *Expertkompetens Maxi* programme. Funding decisions are made by the Foundation's CEO (*Mini*) and the Foundation's board (*Maxi*), respectively, after recommendation by the external assessment panel.

Formal requirements

The application must meet the following requirements before the Knowledge Foundation will consider it for evaluation. If the application does not meet the following requirements, it will be rejected without further evaluation.

- The applicant university must belong to the Knowledge Foundation's target group and have degree-awarding powers at master's level or higher for the subject area.
- The project must be in line with the objective and purpose of the call.
- The application must include parts and appendices according to the call.
- All body text in Appendices 1 and 2 must follow the format font Arial, font size 11 pt, single line spacing.
- The project manager should have a doctoral degree and be employed at the applicant university.
- The educational activities must be at second cycle and/or postgraduate level, must be offered free of charge, and must be eligible for credits.
- The applicant university must co-finance the project with at least 10 percent (OH excluded) of the amount requested from the Foundation.
- Co-financing companies must fall within the scope of the Knowledge Foundation's definition of 'business sector' and must, during the course of the project, jointly co-finance the project with at least 10 percent of the amount requested from the Foundation.
- Signed letters of intent, with detailed co-financing, from each of the co-producing companies should be attached, as well as from all other participating partners (if any).
- The funds requested from the Knowledge Foundation is SEK 2.66–4 million (*Mini*) and SEK 9–12 million (*Maxi*).
- The start date of the project is 1 September 2024 at the earliest and 1 February 2025 at the latest.

- The duration of the project should 2–3 years for *Mini* and 4–5 years for *Maxi*.
- Any financial or personal links must be clearly stated in the application.
- Budgeting of funds must be in accordance with the instructions presented in the document *General terms and conditions for projects funded by the Knowledge Foundation*, see www.kks.se.
- The vice-chancellor, project owner and the project manager must sign the application.

Assessment criteria

Strong research and education environment
- To what extent is the project expected to contribute to the short-term and long-term development of the research and education environment?
- To what extent is there a clear description of the research and education environment's current situation?
- To what extent is there an adequate ambition for the development of the research and education environment?

Scientific quality[4]
- How well does the scientific strength and expertise of the applicant environment within the subject area match the corresponding field of competence in the business sector?
- How do the educational activities relate to other similar initiatives in Sweden and to existing educational provision at the university?
- To what extent is there an adequate description of whether sex and gender perspectives are relevant in the project? If considered relevant, are the perspectives appropriately included in the project design and content?
- Does the environment have an adequate level of experience of collaboration with the business sector for the chosen programme version, and how are results and previous experience (if any) taken into account in the design of the project?
- To what extent is the project expected to contribute to the effectiveness and sustainability of educational activities for professionals?
- To what extent will the project be used to achieve synergies between the environment's research and education?

Benefits to the business partners
- To what extent is there a well-founded analysis of the business sector's competence needs, and is the assessment of student volumes from the business sector reasonable in the short and long term?
- To what extent is the involvement of the business sector in all aspects of the project adequate and sufficient?
- Do the planned educational activities appear to be appropriately selected and designed in accordance with the competence needs of the business sector and the needs and circumstances of the target group?

Implementation
- How well on an aggregated level are the merits and experiences of the project group fulfilling the requirements for an adequate project implementation?
- To what extent is there an adequate description of how gender equality aspects have been considered in the composition of the project group?

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[4] When the application concerns an artistic field of research, the concept *scientific* is replaced by *artistic* in the call.

- How well is the implementation of the project described and to what extent does it allow for development and implementation of appropriate educational activities for professionals?
- To what extent are there reasonable targets for admission and student throughput, and convincing strategies for student recruitment and marketing?
- To what extent is the involvement of the university's support functions adequate, and is work on potential development of internal approaches and processes well designed?
- To what extent does the implementation allow for monitoring, learning and continuous adaptation during the project period, and how does it contribute to sustainable activities in the longer term?
- To what extent is the activity and timetable well designed and realistic?
- Is the budget clearly presented and explained, and are the costs reasonable in relation to the project content?