APPLICATION AND FACILITATION PROCESS
INTRODUCTION

1 When someone applies for the Research Exchange program via the California Alliance website webform, their information (name, faculty host requested, etc.) and application is automatically populated and uploaded in the Research Exchange Smartsheet document.

2 Each stage of the Research Exchange process will be recorded into the Smartsheet by the Home and visiting campuses as necessary (i.e. AGEP eligibility, visit confirmed, visit dates, evaluation completion).

3 The home campus will determine funding eligibility. The home campus is responsible for funding the visit, except for new Research Exchange partners (up to one year from MOU date) whose NSF-AGEP eligible students and postdocs will be funded by the NSF grant at Berkeley.
PROCEDURES FOR CAMPUS CONTACTS AT THE VISITING CAMPUS

(you are receiving a student/postdoc from another campus)

1. When the home campus selects that an applicant is eligible (“AGEP Eligible” drop-down) in the Smartsheet, the visiting campus will receive an automated notification. They will then initiate discussion with the home campus and contact the proposed faculty host via email with information on the Research Exchange. **A follow-up phone call from the respective campus Management Team member within one week of the application sent to the potential host should follow to ensure the request is reviewed in a timely fashion and with local campus PI endorsement.** During the initial research exchange rollout, faculty may not know about the Research Exchange and the purpose and importance of our programs. Personal touches can help especially from the Co-PIs and other campus administrators.

2. **Note: The California Alliance e-mail, californiaalliance@berkeley.edu and the campus representatives at both the home and receiving campus should be copied on all correspondence during the matching process to ensure seamless communication and administrative actions are recorded.**

3. If the first choice faculty host determines they would like to host the student/postdoc, the visiting campus contact will facilitate the connection between faculty host and student/postdoc.

4. If the faculty host determines they are unable to host, the visiting campus contact will enter the Smartsheet and select “NO” in the “Visit Approved 1st Choice” column. This will send an automatic message to the 2nd choice visiting campus institution. If your institution is the second choice select “NO” in the Visit Approved 2nd Choice column, and so on through “Visit Approved 4th choice.”

5. When a successful faculty host-student/postdoc connection is made, the visiting campus contact will send an email to both the faculty host and student/postdoc encouraging them to determine the best dates for the proposed trip. The home campus is responsible for financial obligations to support the visit.

6. Once dates are determined, the student/postdoc will inform the visiting campus contact. The student/postdoc will be asked to copy their home department campus contact on this email. The visiting campus contact will enter the Smartsheet and select “YES” in the “Visit Approved 1st choice” column. If your institution is the second choice, select “YES” in the “Visit Approved 2nd Choice” column, and so on through “Visit Approved 4th Choice”. The home campus will be automatically notified that a successful faculty host-student/postdoc connection has been made. The visiting campus contact also enters the dates of the visit in the “Visit Dates” column in the Smartsheet. This will automatically notify the Home Institution’s campus contact.

7. After the visit, the visiting campus contact will ask the faculty host to complete a brief mandatory evaluation.
PROCEDURES FOR CAMPUS CONTACTS AT THE HOME CAMPUS
(you are sending a student/postdoc to another campus)

1. Once eligibility is determined, the home campus will enter the Research Exchange Smartsheet and select “YES”, “NO”, or “No but OK to travel” in the “AGEP Eligible?” column of the row pertaining to the applicant. The home campus will select “No but OK to travel” if the student is deemed ineligible according to NSF criteria but another funding source has been identified, and the 1st choice visit institution is automatically notified. If “YES” is selected, the 1st choice institution representative is automatically notified.

2. The home campus contact will receive a notification when a visit is approved by the visiting campus contact in the Smartsheet. The home campus contact will then work with the student/postdoc to arrange stipend, pre-paid travel, direct deposit, reimbursement procedures etc. (process will depend on each institution’s individual policies). Newly joining partners will work with Berkeley to coordinate airfare and reimbursement for their student and postdoc participants. Please see UC Berkeley travel arrangement and reimbursement policy here.

3. After the visit, the home campus contact will ask the student/postdoc to write up a summary report (including pictures if possible) and complete a mandatory evaluation. The visiting campus contacts will send the faculty host the same mandatory evaluation.

4. Once the home campus contact has confirmed that these evaluations are complete, reimbursements to the student can be made. They will 1) upload the mandatory evaluation in the Smartsheet by clicking on the paperclip icon next to the student’s row AND 2) select “Complete” in the Status column.