



## THE LEE SCHIPPER MEMORIAL SCHOLARSHIP FOR SUSTAINABLE TRANSPORT AND ENERGY EFFICIENCY

**ACTION:** 2024 program guidance.

### **DATES:**

Expressions of Interest (EOI): EOIs should be submitted online no later than **April 15, 2024**.

The Board encourages earlier submission of EOIs. A shortlist of approximately seven (7) EOIs for the global and seven (7) for the African scholarship will be invited to submit a full application.

Applications: Applicants whose EOIs have been selected will be given approximately three weeks to prepare and submit a full application.

### **SUPPLEMENTARY INFORMATION:**

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## **1 SCHOLARSHIP OPPORTUNITY DESCRIPTION**

### **1.1 Scholarship Goals**

The Schipper Family and EMBARQ, the sustainable urban mobility initiative of WRI Ross Center for Sustainable Cities, in cooperation with leading scholars and policymakers, spearheaded the creation of a Scholarship in memory of Leon J. Schipper (“Lee” or “Mr. Meter”).

The “Lee Schipper Memorial Scholarship for Sustainable Transport” supports the momentum of Lee Schipper’s contribution to the enrichment of the international policy dialogue in sustainable transport and energy efficiency. Lee Schipper, an international physicist, researcher, musician, and co-founder of EMBARQ, inspired and shaped the thinking of a generation of students and professionals and was widely recognized for enriching policy dialogue with his passion for data and challenging conventional wisdom.

The Scholarship aims to expand the contributions to sustainable transport and energy efficiency research and policy dialogue. In memory of Lee’s work, the Scholarship will support initiatives triggering and catalyzing transformative research and policy papers. The Scholarship emphasizes “iconoclastic” contributions (challenging conventional wisdom) that have clear, transformative outputs and contribute to measurable changes. The scholarship will support proposals that nurture different stages of policy dialogue, including:

- Data collection and data quality
- Diagnosis through data analysis (qualitative and quantitative)

- Policy analysis and evaluation
- Interdisciplinary and international comparative analysis

The Scholarship aims to support young individual researchers and students in their pursuit of enriching policy dialogue consistent with Lee Schipper’s contributions.

The Scholarship will award two categories of scholarships -- Global and African. The Global Scholarship will award up to two exemplary candidates a maximum of \$10,000 each to advance transformative research in efficient and sustainable transport. In addition, a second scholarship will be dedicated to supporting one young researcher from the African continent.

The Scholarship is governed by an Advisory Board of selected experts in the field and will be managed under the umbrella of the Volvo Research and Educational Foundations. The scholarships will be awarded through a transparent process with strong governance procedures.

## **1.2 Selection Process and Priorities**

### **1.2.1 Expressions of Interest (EOI)**

The application process begins with an EOI. The EOI is a simple form intended to give the Board an early assessment of the proposed topic and the applicant's background and affiliation. It also allows the Board and prospective potential applicants to start a collaborative process for ensuring early scholarship success. EOIs should be submitted as early as possible but no later than **April 15, 2024**. The Board considers the EOIs to be an essential component of the application submission and decision-making processes. If necessary, the Board will work with pre-applicants before the EOI deadline to ensure eligibility and appropriateness of application, if applicable. Once an EOI is received, it will proceed through a two-step process:

- Screening for completeness and eligibility (both applicant and research proposal eligibility);
- Selection of shortlisted EOIs

Up to seven (7) EOIs for each of the two scholarship calls (Global and African) are expected to be shortlisted and asked to submit a full application. EOIs will be shortlisted based on broad criteria that will include consistency with Lee Schipper's contributions, merits of the research topic, applicant merits, and the prospective applicant's probability of success. The African call submissions will also be part of the global call so that African applicants will be considered for either scholarship.

### **1.2.2 Finalist Application Screening**

Applicants whose EOIs have been selected will be given approximately three weeks to prepare and submit a full application. To give prospective applicants adequate time to complete their applications (while incorporating any guidance clarifications or revisions), the Board reserves the right to adjust application dates. Once an application is received, it will proceed through a three-step process:

- Screening for completeness and eligibility (both applicant and research topic eligibility, and to ensure that the application provides complete and sufficient information for the evaluation process);
- Evaluation panel review process, applying “evaluation criteria;” and
- Final review and selection, applying “selection criteria.”

### 1.2.3 Finalist Application Evaluation Criteria

Eligible applications will be individually reviewed and assessed against three (3) evaluation criteria – organized into several sub-criteria each – as detailed in **Table 1**. For each applicable criterion, the application will be assigned a rating of between zero and five points based on the application’s fulfillment of the objectives of each criterion. These individual criterion ratings will then be accounted for according to the priority of criteria (weight) to arrive at an overall rating for the application.

The Board will require a rigorous analysis of the applications. Applicants must provide the requested information with the best possible clarity and conciseness to ensure adequate assessment of applicants’ merits.

**Table 1: Finalist Application Evaluation Criteria**

Evaluation Criteria	Factors
1. Topic merits towards a transformational outcome in sustainable transport	<ul style="list-style-type: none"> <li>● Creation of innovative, transformational outcome (“real outcome”)</li> <li>● Consistency with Lee Schipper’s Contributions (quality data collection and sound methodology; Diagnosis through qualitative or quantitative data analysis; Policy analysis and evaluation; Interdisciplinary and international comparative analysis) as means to a transformational outcome</li> <li>● Alignment with sustainable transport</li> </ul>
2. Applicant merits	<ul style="list-style-type: none"> <li>● Affiliation</li> <li>● Academic background</li> <li>● Research background (previous contributions)</li> <li>● References</li> </ul>
3. Application feasibility merits	<ul style="list-style-type: none"> <li>● Realistic and feasible scope, schedule of activities, and budget</li> <li>● Readiness of project to be commenced</li> <li>● Likelihood of research topic’s anticipated merits</li> </ul>

### 1.2.4 Finalist Application Selection Criteria

These criteria will be applied to select the final candidate. Once the full applications are evaluated against their merits based on the evaluation criteria above, the Board will select a final application based on selection criteria (one of them being the score out of the evaluation criteria). The Board will collectively review the applications to ensure consistency and balance projects against the Scholarship priorities and schedule. **Table 2** below summarizes these additional selection criteria for the Global scholars.

**Table 2: Finalist Application Selection Criteria**

<b>Selection Criteria: Global Scholars</b>
<ol style="list-style-type: none"> <li>1. Merits associated with the evaluation criteria</li> <li>2. Geographical diversity and equity of applicant and application</li> <li>3. Likelihood of Scholarship Award success</li> <li>4. Visibility of the Scholarship Award outcome</li> </ol>

### 1.2.5 Additional Application Selection Criteria for Africa Call

The African scholarship is solely aimed at supporting a young researcher from the African continent who is currently living and working in Africa. In addition to the global selection criteria above, the following specific criteria (see **Table 3**) will be applied.

**Table 3: African Scholarship Finalist Application Criteria**

<b>Selection Criteria: African Scholar</b>
<ol style="list-style-type: none"><li>1. Applicant currently has citizenship of an African country</li><li>2. Applicant currently lives and works in Africa</li><li>3. Applicant is associated with an African-based institution (or an African branch of an international institution)</li></ol>

## 2 AWARD INFORMATION

### 2.1 General Award Information and Anticipated Award Amount

The Board anticipates making an award of up to US\$10,000 to each scholar. The Board is choosing to award through this solicitation an amount that will allow for potential future rounds of solicitations and awards. There is no predetermined allocation between this and any future solicitations; all such distributions will cumulatively reflect the nature and timing of the selected applications and the available endowment for the Scholarship Program.

## 3 ELIGIBILITY INFORMATION

Applications will be required to meet minimum requirements in terms of applicant eligibility and research project eligibility.

To the extent that an application's substance exceeds the minimum eligibility requirements described below, such qualifications will be considered.

### 3.1 Eligible Applicants

Eligibility for the Scholarship Program depends on the applicant and application meeting the specified requirements.

Applicants are eligible if they are young individual researchers. For the purposes of this Scholarship, a young individual researcher is a researcher that has five or fewer years of experience since their last academic degree (Master's or Ph.D.) and is not yet 36 years old at the submission deadline for the EOI<sup>1</sup>.

The applicant must be a young individual researcher affiliated with an academic institution or research institution (public, private, or not-for-profit).

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<sup>1</sup> The eligibility periods can be extended in case of specific and properly documented circumstances such as parental leave. In case of parental leave, the applicant may request up to 18 months extension for each child born. The Scholarship Committee will assess the eligibility period based on evidence provided at the time of expression of interest submission.

- Researchers affiliated with academic institutions will be Masters or Ph.D. students, or post-doctoral research fellows at the time of submission of the EOI
- Researchers affiliated with research institutions will need to demonstrate that the research institution has been a legal entity for one year at the time of the EOI and that the research institution has a track record of published, peer-reviewed publications.

For the African scholarship, see additional applicant eligibility criteria in Section 1.2.5.

### 3.2 Cost Sharing and Matching

The Scholarship share of the costs will cover up to 100 percent of the costs for the proposed research project, but no more than US\$10,000.

### 3.3 Eligible Projects

EOIs and Applications must be for eligible research projects. These include the following requirements:

- Topic must be related to Sustainable Transport or Energy Efficiency.
- The topic(s) must be consistent with Lee Schipper's main work areas in Sustainable Transport and Energy Efficiency:
  - Data collection and quality,
  - Diagnosis through data analysis (qualitative and quantitative),
  - Policy analysis and evaluation,
  - Interdisciplinary and international comparative analysis
- The research project has not been previously published or submitted to a journal
- Ideally, the research project will be completed by March 2025. Please indicate completion date if you are not able to comply with this date.

For the African scholarship, the research should take place in Africa.

### 3.4 Other Prerequisites

In general, applications must meet the following additional prerequisites:

- Applications must be submitted in English;
- Applications must be complete;
- The research project must result in *independent utility*<sup>2</sup>.

## 4 APPLICATION AND SUBMISSION INFORMATION

### 4.1 Applying Online

Based on the criteria above, the Scholarship Committee has set up a user-friendly online form for the submission of applications.

### 4.2 Content and Form of Application

The scholarship application has two parts: (1) an EOI and for selected finalists, (2) a final full proposal.

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<sup>2</sup> A research project is considered to have independent utility if it will result, upon completion, in the creation of new or substantially improved research contributions on its own with no additional research necessary.

#### 4.2.1 Expression of Interest (EOI)

All prospective applicants must submit an EOI through an online form, which consists of the following components:

- **Research Project Description** – A brief (maximum 3,500 words) overview of the project’s main features, purpose, expected outcome, cost, and benefits from the research project; and
- **Applicant Eligibility** – answers to questions regarding applicant background, affiliation, and experience to carry out their proposed research project.
- **Supporting Documentation** – including resume/CV, letter of recommendation, and list of academic publications

For the African scholarship, please highlight the intention to apply for the African scholarship on the cover page and the application letter.

To focus prospective application efforts and remedy concerns, the Board may contact potential applicants if any questions arise from the information submitted in an EOI or if the information raises questions about the eligibility of the proposed research project or applicant.

Applicants must complete all EOI package components as required in the section above; failure to do so may result in the application being removed from consideration for an award.

#### 4.2.2 Finalist Application Package Components

Shortlisted applications in each scholarship call category (General and African) will be invited to submit a full research proposal. The components will consist of a 5 to 10-page proposal including the relevance of the work, the transformational character, the methodology, expected impact, timeframe, and costs in addition to the already provided information for the EOI. The full proposal will be submitted as a pdf via email.

#### 4.3 Submission Dates (estimated)

The approximate schedule for the 2024 scholarship submission deadlines and milestones are described in Table 4.

**Table 4: Approximate 2024 Scholarship Milestone Schedule**

<b>Milestone</b>	<b>Deadline</b>
<b>EOI submission</b>	April 15, 2024
<b>Finalists notified</b>	End of May 2024
<b>Finalist application submission</b>	Mid-June 2024
<b>Award announcement</b>	August 2024
<b>Scholars present research at Transforming Transportation 2025 in Washington, D.C.</b>	March 2025
<b>Envisaged research project completion</b>	March 31, 2025

## **5 AWARD ADMINISTRATION INFORMATION**

### **5.1 Award Notice**

Upon approval of an application, notification will be sent to the potential awardee recipient informing that the award is awaiting acceptance. Once the notice is received, the awardee will have approximately two weeks to formally confirm his or her interest. If the confirmation is not received, the Board will conclude that the awardee is no longer interested and will give the award opportunity to the next best-rated potential awardee on the list.

The Board will publicly announce selected awardees and funding.

### **5.2 Scholarship Payment**

The Scholarship recipients will receive two payments, each for 50 percent of the proposed research project costs (no more than US\$5000 each). The first payment will be administered upon acceptance of the award. The second payment will be made upon the applicant's successful completion of the project and approval of the agreed upon deliverables by the Scholarship Board.

Scholarship recipients will be responsible for paying any related taxes associated with the scholarship funds.