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# The Leverhulme Trust

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**Professor Gordon Marshall**  
Director

University of Reading, March 2014

.... scholarships for such purposes of research and education...as my Trustees may in their discretion direct.

Annual expenditure of circa £70 millions across some 15 funding schemes, largely funding research in the UK higher education sector



**William Hesketh Lever (1851-1925)**

# The Trust Board

- Comprises eight former members of Unilever senior management, from diverse international backgrounds
- Governs an independent and autonomous charity
- Meets four times each year for decisive discussion
- Has experience of identifying potential and quality
- Is resistant to academic fashion
- Makes awards competitively
- Relies on expert peer review

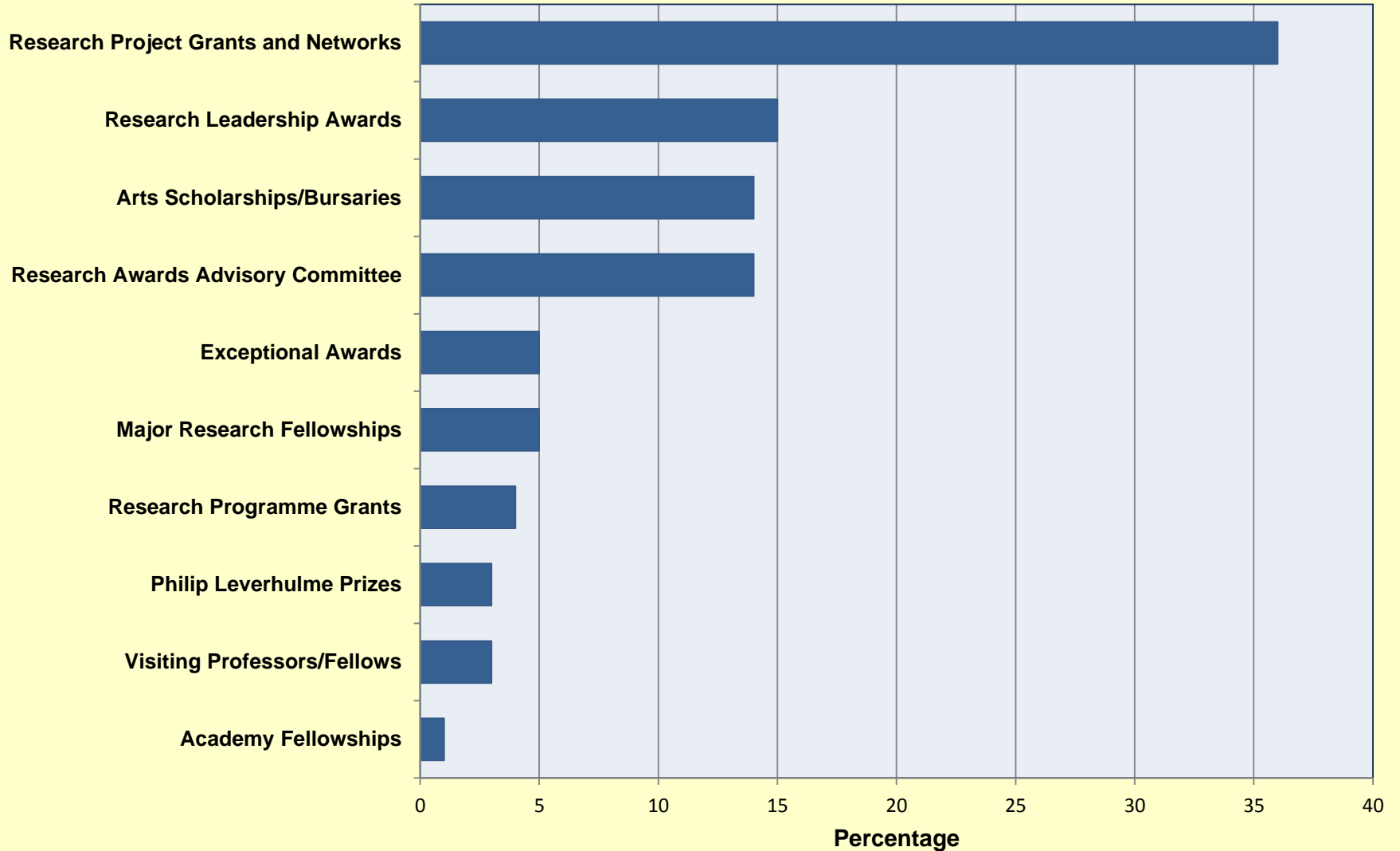
# The resource

- £2.5 billion endowment (mostly Unilever shares)
- Up to £70 millions distributed as grants each year
- More than 4,000 applications received each year
- Approximately 1,500 live awards at any time
- Office staff of 14 persons

# The awards

- **Research Programmes:** up to £1.75M (including 'Tipping Points', 'Value', 'Resilience')
- **Research Project Grants:** up to £500k
- **Fellowships:** Early Career, Major Research, Research, Emeritus, and Academy
- **Collaboration:** International Networks, Visiting Professorships, International Academic Fellowships and Study Abroad Studentships
- **Philip Leverhulme Prizes:** approximately 30 annually, spanning 6 rotating subject areas, each prize worth £100k
- **Arts Portfolio** (Fine and Performing Arts): Scholarships, Innovative Teaching, Artists in Residence
- Occasional **exceptional awards**

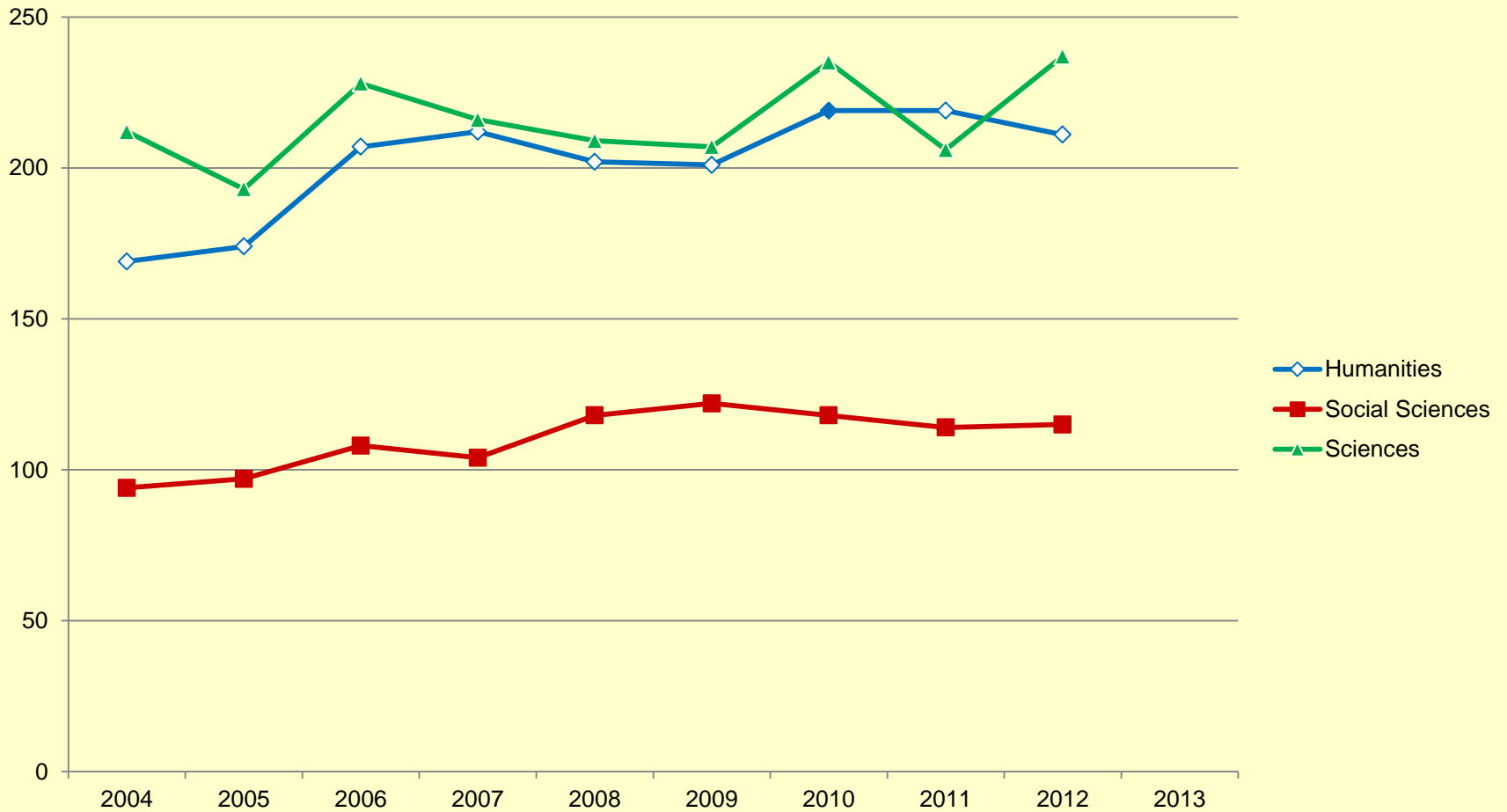
# Distribution of funds in 2012



# Total applications (N) and success rates (%) in principal award schemes

	2007		2008		2009		2010		2011		2012	
	N	%	N	%	N	%	N	%	N	%	N	%
<b>Research Project Grants &amp; International Networks</b>	652	20	1068	22	951	19	1085	23	1005	20	908	20
<b>Study Abroad Studentships</b>	77	26	113	15	127	13	125	14	111	15	90	17
<b>Early Career Fellowships</b>	486	12	477	14	533	14	670	11	717	11	714	12
<b>Research Fellowships</b>	527	18	603	15	647	15	554	16	637	15	545	17
<b>International Academic Fellowships</b>	35	31	61	20	36	31	42	24	46	29	26	43
<b>Major Research Fellowships</b>	196	13	213	14	184	18	155	18	101	25	147	19
<b>Emeritus Fellowships</b>	91	40	105	31	120	28	137	25	92	38	91	35
<b>Visiting Professorships</b>	72	47	73	49	74	58	76	51	106	38	91	50
<b>Philip Leverhulme Prizes</b>	137	19	129	21	198	12	193	13	180	17	143	21

# Number of grants awarded by field of study





# How to apply for an award

- A two-stage process for Research Project Grants, International Networks, Arts Portfolio awards: more than 1000 Outline Applications received annually; all taken to Stage 1 peer review (approx. 12 weeks)
- Positive recommendation (Approximately 50%) leads to invitation to submit a Detailed Application (3 deadlines per annum)
- Detailed Applications then submitted to Stage 2 peer review and decision by Trust Board (success rate approximately 40%)
- All other schemes have a one-stage application process, normally annual call and deadline, with decisions delegated to expert panels and subject to due scrutiny by the Trust Board; success rates typically 15-35%)

# The Trust supports...

- **High quality scholarship** (based on an excellent project, having a sound methodology, clearly expressed)
- **The responsive mode** (the choice of topic lies with the applicant in almost all our schemes)
- **Robust peer review** by the global academic community
- **All disciplines**, although the Trust avoids assuming the tasks of other specialist agencies such as Government (including Research Councils), the Wellcome Trust (medicine), and projects originating in countries with a well-developed research infrastructure

# Particular weight is given to...

- The **originality** of the proposed work, beyond incremental development, and beyond the immediate subject
- The **removal of barriers** between traditional disciplines
- **Intellectual curiosity** and willingness to take appropriate risks
- **Fresh directions** and departures from existing approaches
- The justification offered for the **choice of the Trust** as the source of funds

# We do not fund...

- **Medical research** which is of direct relevance to clinicians, health professionals and/or the pharmaceutical industry
- Policy-driven research where the principal objective is to assemble **an evidence base for immediate policy initiatives**
- Research of which **advocacy** forms an explicit component
- Research which is aimed principally at **an immediate commercial application**
- Applications in which the **balance between assembling a data bank or data base and the related subsequent research** is heavily inclined to the former
- Applications in which the **main focus** is on **capacity building, networking,** or the **development of the skills** of those involved

## To sum up...

- The Board comprises private-sector business executives but does not encourage a utilitarian approach to the pursuit of knowledge
- The Trust has a distinctive and keen appetite for higher-risk research proposals
- A large proportion of our awards therefore support basic (fundamental or 'blue-skies') and cross-disciplinary (or multi-disciplinary) projects
- We have no capacity for generating onerous administrative or reporting requirements
- The Board respects expert peer review but derides obfuscation and the unnecessary use of jargon

# Common errors in applications

- An overly-detailed review of the literature – accompanied by an under-specified research design (failure to state how the problem will be addressed and the work will be done)
- Claims to scholarship, quality or significance, measured purely in terms of metrics, impact, or institutional standing
- The supposition of a hidden agenda or quota system in Trust grant-making
- Failure to write in transparent terminology, where requested to do so

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