Finding Funding at Duke and Beyond

Ways in which you can track funding while you are here at Duke include:

- Browsing through Duke’s Funding Alert newsletter
  - Sign up at http://ors.duke.edu/funding-newsletter
- Subscribing to grants.gov
  - Provides access to announcements from 26 federal agencies (list available at http://grants.gov/aboutgrants/agencies_that_provide_grants.jsp)
  - Sign up to receive notifications at http://grants.gov/applicants/email_subscription.jsp
- Enrolling at COS Pivot
  - Provides access to over 26,000 funding opportunities
  - Suggests potential funding opportunities for you based on your Pivot profile (harvested and maintained by COS Pivot editors)
  - Gives you one place to manage and track funding of interest

The focus of today’s workshop will be creating funding searches in COS Pivot, saving them so that you can receive weekly e-mail alerts, and tracking funding opportunities

Why Pivot? It is one of the primary funding search databases

- There are others, like IRIS, but Duke does not have a license
- There are foundation search databases, but those are typically limited access (i.e., those that work in fundraising for a university)
- Pivot combines funding opportunities that are governmental, foundation, NGO, and professional organization-oriented funding opportunities from around the world
NSOE Finding Funding Workshop
Christine Erlien

Getting started

- The URL for COS Pivot is [http://pivot.cos.com](http://pivot.cos.com)
- Log in with COS username and password
- If you don’t have one, you can easily create one (Click on Log-In and then Log-in Help)

![Pivot login page](image)

- Create your Pivot account (*Use your Duke e-mail account → e-mail address must match the specified e-mail domain listed for your school*)

![Create your Pivot Account form](image)

- You will be sent a confirmation e-mail to the specified e-mail address with a link you will need to click to get full Pivot access
- Your e-mail address will also be your username when logging in to Pivot (New accounts only); if you prefer, you can choose to change username once logged in the first time
  - To update basic information (i.e., username or password) in your account you can click on *My account* next to your name from your Pivot Home Page.
Profiles are created (using publicly available information sources) for faculty members listed on University academic department websites, part-time and adjunct faculty and in some instances, graduate students.

What’s in a profile?
- Name
- Email Address
- Webpages (homepages, pages that list publications, and CV pages)
- Degree Information (institution, degree type, discipline, year)
- Research Interests
- Current academic departmental affiliations (includes role/position)
- Publication information is also collected and linked to profiles using database searches (PubMed, ProQuest, CSA, ERIC, Agricola)

How might you use a profile?
- A way to share your research interest & publications
  - For more information on claiming profiles, see [http://www.youtube.com/proquestpivot#p/a/u/1/BEEuw001uuo](http://www.youtube.com/proquestpivot#p/a/u/1/BEEuw001uuo)
- A way to find collaborators
- During your graduate career - a way to find committee members or mentors

The Pivot homepage (see graphic below) is your dashboard or launchpad
- Access saved funding searches (and view and manage funding alerts)
- Manage individual funding opportunities of interest
Performing a Quick Search

- You can perform a Quick Search from the main Funding page

- Search options
  - Exact phrase (e.g., “hydraulic fracturing”)
  - Boolean operators (i.e., AND, OR)
  - Proximity (e.g., Indoor w2 environment)
  - Truncation (e.g., cartograph*)

- Or you can perform a more advanced search by
  - Clicking on Advanced Search under the Search mechanism on the Funding page, or
  - Selecting to Refine your query if you have already begun a search

Refining a query

- Search options
  - Dropdown can change search field selection to abstract, title, or sponsor

- Amount of funding
  - Can also specify amount (e.g., 5000) or timeframe (30 day, 90 day)

- Activity location
  - Can be helpful to specify. Some funders only fund research in a particular geographic area

- Citizenship or residency
  - Helpful if you wish to limit to opportunities for those with US citizenship, or conversely to those for another country’s citizenship
Either option will also return opportunities for which there are not citizenship restrictions

- **Funding Type**
  - Allows you to select travel, thesis/dissertation, postdoctoral award, research, etc.

- **Keyword**
  - Each opportunity is assigned at least 1 keyword. Search/select keyword from keyword database

- **Requirements**
  - Classifiers for people (e.g., grad/ugrad, women, minority), institutions (e.g., academic, non-profit, commercial)
Saving your searches

- Select *Save your query* at the top of the search page. A dialogue box will pop up where you will be asked to name your search and whether you want to receive weekly e-mails about updates for this query.

Putting opportunities on *Tracked or Active* lists

- Select the opportunity either from the master search list, by clicking in the check box next to it, or from within an individual opportunity.
  - Under *Tools* in the upper right-hand corner, click on *Put opp on* and select *tracked list* or *active list*.
  - Active Opportunities are those which are the most important to you. Tracked Opportunities are those which you want to monitor, but they are less critical.
- You will be asked if you would like to tag these opportunities (i.e., with keywords) for future reference.

References/Help

- Youtube houses a series of Pivot videos at [http://www.youtube.com/proquestpivot#p/](http://www.youtube.com/proquestpivot#p/)
  - Profiles
  - Quick search
  - Advanced funding search
  - Navigating your funding search
- Help and FAQs available in the Support section within your Pivot account.
- Upcoming webinars and recorded sessions are also available in the Support area of your Pivot account.
- COS Pivot Tech Support is available Monday-Friday, 6 am Pacific to 5 pm Pacific
  - By email: support@refworks-cos.com
  - By phone: +1.775.327.4105