Finding Funding with Pivot-RP

If you have questions or encounter problems while registering, please contact Cailey Biles, Grant Resources Coordinator (cailey.biles@uvm.edu) or request a meeting using the Research Development consultation form.

What is Pivot-RP?

Watch on YouTube: Pivot-RP Introduction
Pivot-RP is a web-based tool that brings together an extensive funding database and a scholar expertise database. The funding database is Pivot-RP’s primary focus and includes tens of billions of dollars in available funding from federal, non-federal, and international sponsors in all disciplines. Along with access to funding opportunities, Pivot-RP provides the tools scholars need to be able to search and sort through all the possibilities and find funding relevant to their projects. With tools such as Advisor Alerts and Saved Searches, Pivot-RP can deliver new funding opportunities to your email on a weekly basis.

Creating a Pivot-RP Account

Watch on YouTube: Setting Up Your Account and Profile in Pivot-RP
1. Go to the Pivot-RP homepage (https://pivot.proquest.com/dashboard) and click on Login to Pivot-RP which is in the top right-hand corner of the screen.
2. Click Create an account and choose Use Email Address/Create Password
3. Fill out all fields in the following screen.
4. You must use your UVM email address. It becomes your Pivot-RP username.
5. Provide a password.
6. Click Create my account button.
7. Go to your email account, open the confirmation email, and click the Confirm link.

If you have questions or encounter problems while registering, please contact Cailey Biles, Grant Resources Coordinator, cailey.biles@uvm.edu.

Claiming Your Pivot-RP Profile

Watch on YouTube: Updating Your Pivot-RP Profile
The first time you log into your Pivot-RP account, you will be prompted to “claim” your profile. This is not required but it is highly recommended. Profiles are automatically created by Pivot-RP for the institution’s scholars. Claim your profile by selecting the dropdown underneath your name in the upper right-hand corner of the page and select Claim profile. If during the set up,
you search for your name and do not find an already created profile, then you can create one manually yourself.

It’s important that you fill out as many of the fields on your profile as possible and keep the information up to date. Pivot-RP uses the information you include in your profile to curate an Advisor Alert, which is a weekly email that includes links to all the new opportunities posted that match your areas of expertise. You can navigate to your Advisor Alert list by clicking on Advisor underneath My Funding Opportunities on the Pivot-RP homepage, going to your profile and selecting Funding Matches, or under the dropdown list that appears when you hover over the home button. Claiming your profile will also allow you to connect with other researchers on Pivot-RP and could help you discover potential partnerships for future projects.

**Conducting a Funding Search**
There are several ways to begin a search in Pivot-RP.

**Quick Search**
[Watch on YouTube: Basic Searching for Funding Opportunities in Pivot-RP](link)
The first option you are presented with is the quick search method. When you log into Pivot-RP, you will land on their homepage which has a quick search bar in the center of the page underneath Search for Funding. You can use this search bar if you want to search for a specific phrase or already have the title of a funding opportunity.

**NOTE:** The quick search bar automatically adds the Boolean operator “or” between words. If you are searching for a specific phrase, put it in quotation marks.

**Search All Fields**
Click on the Funding tab, which is in the top left-hand corner, to the right of the home button. On the funding page, you will see another quick search bar but this one will have three different search options above it. The first option is Search All Fields. This search is like the quick search on the homepage, but instead of placing the Boolean operator “or” between words, it will put “and”. If you do a phrase search, then the results should be the same as what you would find using the homepage quick search.

**Search by Funder**
Selecting this will change the search options underneath the bar as well. This option allows you to search for a specific funder so that you can browse what opportunities they currently have available.
Search by Keyword
When you select this option, the search button will change to a downward facing arrow. You can select keywords in two ways:

1. You can begin typing in the search bar and choose from the options that show up.
2. You can browse a dropdown list of keywords by clicking on the downward facing arrow.

Browse by Keyword
Underneath the funding search bar is an interactive chart that will also allow you to browse by keyword. Simply hover over each section to see the keywords and click on a section to see the funding opportunities related to those disciplines.

Advanced Search
Watch on YouTube: Advanced Searching for Pivot-RP Funding Opportunities
Underneath the quick search box, there will always be the option Advanced Search. This is the best option to use if you have specific search requirements and want to narrow down your results from the beginning.

1. Click on Advanced Search
2. You will be brought to a page that is divided into two parts, the top half: Find Opportunities matching (criteria you wish to include) and the bottom half: Exclude Opportunities matching (shaded in gray – criteria you want to exclude). Generally, it’s easiest to only use the top half of the page so that you don’t inadvertently exclude something of interest.
3. The All Fields boxes at the top of the page are great for searching for a specific phrase or if you are unsure of what keywords to use. These may be used to search the Abstract, Title or Sponsor fields with a word or phrase of free text. You have the option of having the search Match all the fields or Match any of the fields.
4. The most important criteria when you’re doing a search are the keywords. To select, click on the Keyword category. You can then start typing or select browse.
5. The browse feature will open the hierarchy of major and subtopics. To open major subject categories and see the narrower topics, select the plus sign [+].
6. Select a term and it will be added to your search query. You may select as many keywords as you want out of more than one major subject category.
7. When you have finished selecting all your keywords, you will have to decide if you want to uncheck the Explode box. That option would automatically include any keywords listed in the hierarchy underneath your chosen keywords. So, if you chose the keywords “Arts and Culture”, it would automatically include everything in that hierarchy. If you unselect Explode then it will only search for opportunities that are tagged with “Arts and Culture”.
8. Just like the All Fields section at the top, there are two way to use the keywords. You can choose either Match any or Match all. This will broaden or limit your search.

9. After selecting your keywords, there are several other important categories to consider.
   a. Applicant/Institution Location
   b. Activity Location (where you want to use the funds – if at UVM then type in Vermont and click on the term that comes up)
   c. Citizenship
   d. Funding Type
   e. Applicant Type

10. Run the search by clicking Search at the top of the page.

### Sorting Through Results

**Watching on YouTube: Navigating Pivot-RP Funding Results**

Results are returned in a list of hyperlinked titles which when clicked allow you to look at the full record of information. Your results can be sorted by using the sort options at the top and filtered by using the filters on the left side. If you want to make changes to your search, click on Refine Search at the top.

### Tracked Opps

When you click into a funding opportunity to see the details, over on the right-hand side at the top of a column of actions is the Track option. If you track a funding opportunity, anytime there is an update to its profile or an upcoming deadline, you will be alerted with an email. This can be useful if you are waiting for an opportunity to confirm an application deadline or don’t want to lose track of which applications are due soon. You can also select the track option from the funding search results page by checking the box next to a funding opp title and then clicking on Track at the top of the results list.

### Saved Searches

Every time you perform a search, quick or advanced, you have the option of saving it as a Saved Search. If you choose that option, the search details will be saved as a dynamic list that will continually update itself as new opportunities are posted that match the search query. You can also choose to have a list of newly posted opportunities emailed to you at the beginning of every week. There is no limit on the number of saved searches you can have.

### Groups

Creating a personal group is a way for you to share funding opportunities with other Pivot-RP users. Click on the Groups option in the center of your homepage, underneath My Profile &
Groups. Once there, you can create personal groups with people within or outside of your institution. Share search results or individual opportunities with your groups by selecting the Share option and then clicking Select group in the top right-hand corner of the box.

Also listed on the Groups page, are public groups created by your institution. You can join any of the groups to receive the funding opportunities shared to them by the Pivot-RP administrator.

Curated Opps
Curated lists are created by Pivot-RP administrators and can be found by clicking on Curated Opps. Unlike saved searches, curated lists are static and will only update when new opportunities are manually added to the list by the administrator.

Searching Profiles, Conferences, and Awarded Grants
To the right of the funding tab are three more options, Profiles, Conferences, and Awarded Grants. Profiles allows you to search and connect with other Pivot-RP profiles within and outside of your institution. Conferences provides you with an opportunity to search for current calls for papers and deadlines for upcoming conferences. Awarded Grants lets you search past grant opportunities so that you can view and connect with the recipients.

Searching Techniques
These general techniques can be used and combined in the quick search bars or in the fields at the top of the Advanced Search page.

Boolean Operators
The three basic Boolean operators are: AND, OR, and NOT. They help connect your search terms to either broaden or narrow your set of results.

Examples:
- “Food systems” and “food security”
- “Food systems” or “food security”
- “Food systems” not “food security”

Phrase Searching
Phrase searching is the method of narrowing your results by defining and searching for a specific set of words. You define the phrase by using quotation marks around the words. It can be seen in the Boolean operators’ examples above.

Proximity Searching
Proximity searching is a way to search for two or more words that occur within a certain number of words from each other. Pivot-RP uses w/ as the operator for proximity searches.

Examples:
- food w/2 system
- environment w/5 justice
- distance w/3 learning

Examples of all three search techniques combined:
- “Food system” or “food security” w/4 “climate change”
- “Visual arts” and “performing arts” w/10 technology
- “Restorative justice” not “criminal justice” w/7 healing