



# Finding Funding with Pivot-RP

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## 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 scholars with the tools they need to be able to search and sort through results and find funding relevant to their projects. With tools such as Advisor Alerts and Saved Searches, Pivot-RP can deliver new and relevant 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.

## 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



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homepage, going to your profile and selecting *Funding Matches*, or navigate to this 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](#)

The first option 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”.

#### Search by Funder

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 and a dropdown menu will become available. 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 the dropdown list of keywords by clicking on the downward facing arrow.



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### 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.

Click on *Advanced Search*. You will be brought to a page that breaks down the different pieces of information that Pivot-RP includes on a funding opportunity profile into sections that you can fill out to create a funding search.

- **All Fields:** These may be used to search the Abstract, Title or Sponsor fields with a word or phrase of free text. This is a great place to add keywords or concepts that are not adequately captured by Pivot-RP's list of keywords. You have the option of having the search *Match all the fields* or *Match any of the fields*.
- **Funder:** Add a specific funder by using free text search or selecting from Pivot-RP's list of funders.
- **Amount:** Specify an amount or range of money and choose preferred currency
- **Deadlines:** Set date restrictions if you have a strict timeline to keep.
- **Limited Submission:** Search for opportunities that only allow a limited number of applications from an institution. (To move forward with a limited submission, you will need an award letter from Research Development. Visit the [Limited Submission page](#) for more information).
- **Applicant/Institution Location:** Enter in Vermont or other location(s).
- **Activity Location:** This is where the money will be spent, enter Vermont or the pertinent location(s).
- **Citizenship:** Enter in your citizenship(s).
- **Funding Type:** Choose the types of funding relevant to your funding goals.
- **Keyword:** To select key words, you can start typing or select *browse*. 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 [+]. 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. When you have finished selecting all



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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”. 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.

- ***Applicant Type***: Select the types that best describe you.
- ***Funder Type***: If you are looking for funding from a specific type of organization, you can make that selection here.
- ***Country of Funder***: If you are looking for funding from specific countries then add them here.
- ***Recently Added***: This gives you the option of only seeing opportunities that have been added recently to the database.

After *Recently Added*, you will see that there is a second half to the Advanced Search page that is labeled *Exclude Opportunities matching* (shaded in gray) This is for criteria you want to exclude. Use the *Exclude* option with caution as you don't want to inadvertently exclude something of interest.

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

### **Funding Searches for International Students and Faculty**

Some organizations have citizenship requirements as part of their eligibility criteria. This can make it challenging for international students and faculty members to find U.S. funding opportunities that they are eligible to apply for.

If you are looking for U.S. funding opportunities than two important categories to fill in when you are creating your advanced search are *Citizenship* and *Country of Funder*. Providing your citizenship will make sure that the search pulls in opportunities that are open to you and not restricted to U.S. citizens. For *Country of Funder*, choose United States and the database will filter out opportunities from other countries.

After you hit the search button, use the tools on the left-hand side to refine your results further. Other search details might pull in opportunities from outside the U.S. so click on United States underneath *Country of Funder* to filter those out.



## 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.

## Sharing Searches

Any search can be shared by clicking on the *Share Search* option in the upper right-hand corner of the search results page. You have the option to either copy a link or email the link to someone directly from Pivot-RP. The person who receives the link will be able to open it directly to the search results page and use it as their own search. Shared links are only valid for 90 days.

## 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



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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.



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### **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.

Example:

- food w/2 system - will search for any phrase that includes “food” and “system” within 2 words of each other regardless of order such as “system of food”.

Examples of all three search techniques combined:

- “Food system” or “food security” w/4 “climate change”
- “Visual arts” and “performing arts” w/8 technology
- “Restorative justice” not “criminal justice” w/6 healing

### **Getting help with Pivot-RP**

If you have questions or encounter problems while registering, please contact Cailey Biles, Grant Resources Coordinator ([cailey.biles@uvm.edu](mailto:cailey.biles@uvm.edu)).

If you would like a Pivot-RP tutorial or to request assistance with a funding search, please fill out [the Research Development consultation form](#).