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Abstract	<p>Technical assistance plays a vital role in today's fast-paced and technology-driven world. Under NGI Enrichers, the main objective of the preceding process is to prepare the fellows for their exchanges in both Canada and US.</p> <p>A fellowship program is a structured and competitive initiative designed to provide individuals with an opportunity to gain specialized knowledge, skills, and experience in a particular field or discipline. As such a support system that ensures this process is smooth is vital on all support areas.</p>
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EXECUTIVE SUMMARY

The NGI Enrichers program supports European NGI researchers and innovators to spend 3-6 months in the US or Canada to work and collaborate with US and Canadian hosts, to promote knowledge-sharing and establish long-term collaborations on NGI technologies, services, and standards.

Such a program requires a structured Technical assistance process for supporting European NGI researchers and innovators. As such, NGI Enrichers' Technical Assistance process provides a comprehensive and structured approach designed to deliver expert support and guidance to Fellows from the NGI Enrichers program who seek to overcome a wide-range of challenges. This report describes the Technical Assistance Process, which is a dynamic process that aims to guide Fellows towards the resolution of all the queries that might arise as the NGI Enrichers program starts but also during its occurrence.

It discloses the context and objective behind the creation of such a process, aiming to provide a clear introduction for this document and the following chapters: with the rationale behind the creation of the Technical Assistance process having been correctly contextualized, the document then details the process itself, describing the methodology, the Fellows from US and Canada and the number of queries that have seen resolution until now.

Lastly, this deliverable explores the lessons learnt that SPI and APRE have taken from the initial implementation of this procedure and also the next steps that are currently planned in order to overcome these issues.

The Technical Assistance process offers an indispensable opportunity for organizations to overcome the multiple challenges that result from the NGI ENRICHERS Fellowship Program. By leveraging expert support and custom-tailored solutions, recipients can enhance their technical capabilities and ensure sustained success in an ever-changing business landscape.



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ABBREVIATIONS

CA Canada

CMP Community Management Platform

IPR Intellectual property rights

IP Internet Protocol

KPI Key Performance Indicators

NGI Next Generation Internet

Q&A Questions and Answers

TCP Transmission Control Protocol

US United States of America

WP Work package



1 INTRODUCTION

1.1 CONTEXT OF THE TECHNICAL ASSISTANCE PROCESS

Technical assistance plays a vital role in today's fast-paced and technology-driven world. It is a valuable service provided to individuals, businesses, or organizations seeking guidance, support, and expertise in navigating complex technical challenges. Whether it is related to software, hardware, IT infrastructure, or specialized systems, Technical Assistance aims to address and resolve issues effectively. In the NGI Enrichers' context, the main objective of the preceding task is to prepare the Fellows for their exchanges in both CA and US.

This document is a product of NGI Enrichers, funded by the European Commission and aims to present the NGI Enrichers' Technical Assistance Process which was created under the framework of WP2 – Roll out of the immersive bootcamps and Fellows' expeditions, and more specifically, Task 2.1 – Kick-off and Pre-departure immersive bootcamps. The mapping of such a process is essential following the conclusion of the first round of open calls (which started on November 30th 2022 and ended on March 31st 2023), the evaluation of the resulting applications and, ultimately, the pre-departure bootcamp.

The NGI Enrichers fellowship program is a structured and competitive initiative designed to provide individuals with an opportunity to gain specialized knowledge, skills, and experience in a particular field or discipline. Creating a support system that guarantees the smooth operation of this process is crucial, with a strong focus on key areas such as intellectual property, visa, travel, accommodation, and others that are deemed necessary.

1.2 OBJECTIVE OF THE TECHNICAL ASSISTANCE PROCESS

The main objectives of Technical Assistance processes are to provide expert guidance, support, and resources to EU Fellows overcome technical challenges and achieve their goals. As previously mentioned, this can be on multiple fronts such as:



- Technical Transfer Support and Negotiation Questions;
- Business Matchmaking Support with American Organisations;
- Assistance to Swiss Fellows;
- Travel Arrangements;
- Accommodation and Deliverables;
- Technical Assistance for Canada.

To ensure the proper implementation of this process, a comprehensive assessment was conducted to evaluate various platforms (such as mailing, messaging and CMP) that could be utilized, as well as the allocation of received requests to multiple responsible parties and the tracking methods employed. Ultimately, this resulted in the creation of a concept note detailing this process which has been validated by all involved partners.

As per the Grant Agreement of NGI Enrichers, over 90 individual Technical Assistance sessions will be reported by SPI (US Fellows) and APRE (Canada Fellows). Currently, 16 Technical Assistance requests have been implemented as of M12.



2 TECHNICAL ASSISTANCE PROCESS

2.1 METHODOLOGY

Proper activities under NGI Enrichers' framework started on September 2022, allowing for a wide range of applicants to apply for the first round of open calls. This round of calls started on November 30th 2022, reaching its end on March 31st 2023, with an initial planned allocation of 30 Fellows and applications being carried out via the F6S platform.

The Fellows' evaluations were carried out with a final outcome of 32 Fellows selected in the first call (presented in section 3 below). After the closure of the first round of calls, it was necessary to finalize the NGI Enrichers Technical Assistance process, which implied the creation of a concept note and a general communication to all Fellows informing of the steps they need to adhere to in order to have an answer to their various queries. As such, the objective of this chapter is to describe in detail the following key aspects of the Technical Assistance process:

- Reasoning behind the creation of a Technical Assistance Process;
- Methodology planning;
- Methodology implementation;
- Tracking mechanisms;
- Improvement measures.

The established methodology of the Technical Assistance process involves a structured approach to provide effective guidance and support in addressing a wide range of technical challenges. While some requests might need a dedicated way to address them, it was possible to map out a concrete methodology for the vast majority of predicted requests. This resulted from the analysis of the most commonly existing problems in similar fellowship programs, which type of answers can be provided by consortium partners and which could be the more effective communication methods to disclose issues and request assistance. In summary, the Technical Assistance Process consists of 9 steps:

- Step 1 - Process Initiation and Initial Assessment;
- Step 2 - Technical Transfer Support and Negotiation Questions;



- Step 3 - Business and Matchmaking Support with American Organisations;
- Step 4 - Assistance to Swiss Fellows;
- Step 5 - Travel Arrangements;
- Step 6 - Accommodation and Deliverables;
- Step 7 - Technical Assistance for Canada;
- Step 8 - Additional Enricher Involvement;
- Step 9 - Follow-up and evaluation.

The 9 Step process is graphically represented in the figure below:

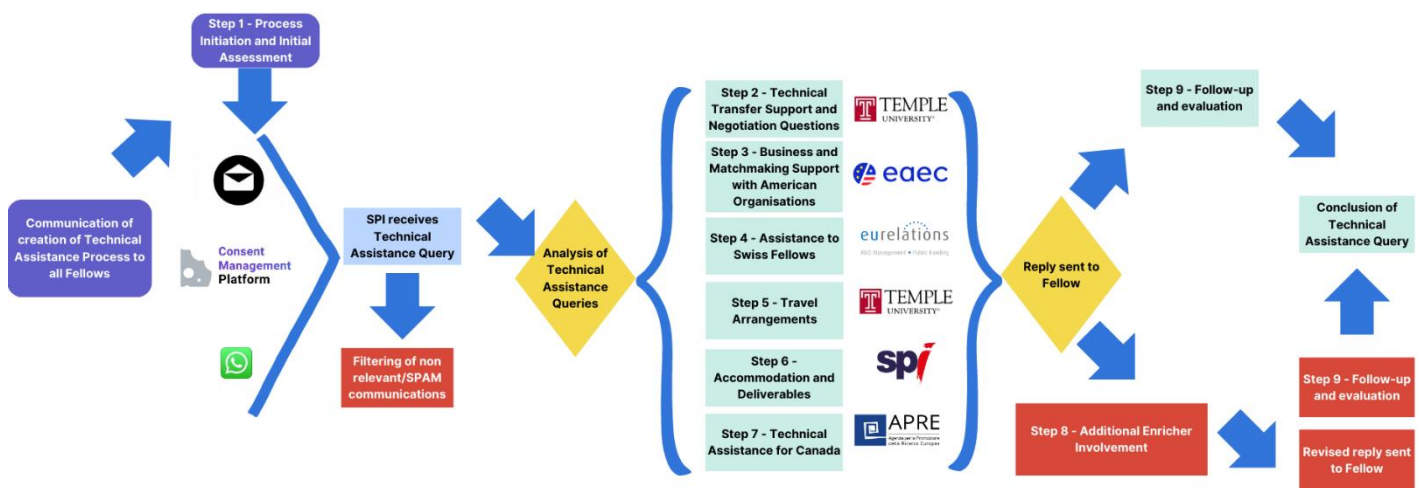


FIGURE 1 – TECHNICAL ASSISTANCE PROCESS

Step 1 - Process Initiation and Initial Assessment:

To start the Technical Assistance process, a Fellow has to communicate his/her issue to the respective NGI Enrichers partner in charge of this process, respectively, SPI for the US and APRE for Canada. This has been done via one of the following three methods:

- CMP at <https://enrichers.gi2.io/en/>. Register and contact SPI's points of contact André Almeida, Francisco Rocha, Pedro Monteiro or Mattia Ceracchi (APRE), and Giulia Butera (APRE);
- Email SPI's and APRE's teams at assistance@enrichers.ngi.eu and disclose, in sufficient detail, the Fellow's query;



- While not recommended, it is also possible to start this process via WhatsApp if a Fellow was added to the group that was created during the May 2023 Rome Consortium Meeting.

Some initial Technical Assistance requests were received at ngienrichers@apre.it, created by APRE's team. Once a request is received, it is filtered and organized by SPI and APRE. Based on the assessment, the NGI Enrichers' coordination team assigns specific NGI Enrichers to address the Technical Assistance query, keeping SPI in CC throughout the entire process so that the tracking can be implemented. This selection procedure is driven by each organization's qualifications towards a certain type of support and can be categorized into nine steps as described below (this step is illustrated via Figure 2 and Figure 3 below).

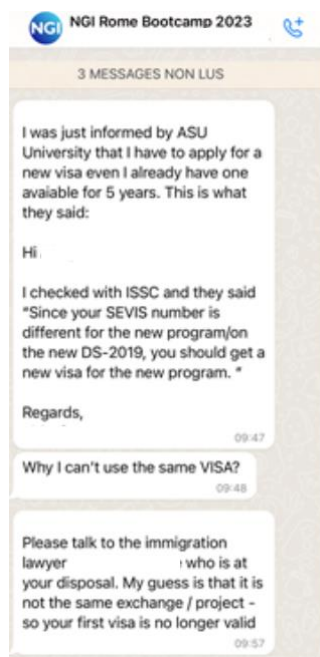


FIGURE 2 – TECHNICAL ASSISTANCE PROCESS EXAMPLE

Dear Fellow,

I hope this email finds you well. As part of our commitment to supporting your professional growth and development, we would like to introduce you to the concept of **Technical Assistance (TA)** and provide guidelines on when and how it should be utilized during your fellowship.

Technical Assistance refers to the provision of expert guidance, advice, and resources to help address specific challenges related to the exchange under NGI Enrichers taking place in the US or Canada. It is designed to supplement your existing knowledge and empower you to overcome hurdles or achieve project objectives more effectively.

We encourage you to consider utilizing Technical Assistance when you encounter issues in the following areas:

1. **Technical Transfer Support and Negotiation Questions:** If you come across complex or specialized tasks related to technical transfer or have specific questions regarding negotiations, our experienced professionals are well-equipped to assist you in navigating these intricate processes and ensuring successful outcomes.
2. **Business and Matchmaking Support with American Organizations:** Our experts can provide you with tailored business support, including matchmaking services, to help you identify suitable organizations, facilitate collaboration, and leverage valuable opportunities.
3. **Travel Arrangements:** Whether you need assistance with visa applications, itinerary planning, or logistics management, our team is here to provide you with the necessary resources and advice, ensuring a smooth and hassle-free travel experience.
4. **Accommodation and Deliverables:** If you require guidance on finding suitable accommodation during your fellowship or need assistance in defining and meeting deliverables, our experts can offer their expertise and help streamline these processes.

To request Technical Assistance, please follow these steps:

1. **Clearly define your challenge or area of need:** Identify the specific issue for which you require assistance. Clearly articulate the goals, objectives, and desired outcomes.
2. **Reach out to the designated point of contact:**
 1. Contact assistance@enrichers.ngi.eu to initiate the Technical Assistance request. Provide a brief overview of your challenge, including relevant context and any specific requirements or preferences you may have.
 2. As an alternative proceed with registration at the following link <https://enrichers.qi2.io/en/sign-up>. Once your registration is completed, click on the team tab in the top right corner, and contact either Andre Almeida or Pedro Monteiro.
3. **Collaborate with the assigned expert:** Once your request is received, our team will assign a suitable expert to work with you. Engage in open and constructive communication, sharing pertinent information and actively participating in the collaborative process.
4. **Utilize the guidance and resources provided:** Take full advantage of the expert's guidance, recommendations, and any additional resources they may share. Actively apply the knowledge gained to your project or task at hand.

We are confident that the availability of Technical Assistance will significantly enhance your fellowship experience under the NGI Enrichers project. Remember, it is a valuable resource designed to support you in overcoming challenges, expanding your capabilities, and achieving outstanding results.

If you have any questions or require further clarification regarding Technical Assistance, please do not hesitate to reach out. We are here to provide ongoing support and ensure that you make the most of this opportunity.

Wishing you continued success in your fellowship journey!

Kindest regards,

On behalf of Andre and the NGI Enrichers Team

FIGURE 3 – TECHNICAL ASSISTANCE COMMUNICATION TO FELLOWS



Step 2 - Technical Transfer Support and Negotiation Questions:

Temple University Philadelphia, a specialized NGI Enricher, provides comprehensive support for tech transfer and negotiation questions.

Temple engages with the Fellow to understand their specific tech transfer needs, including licensing, intellectual property, and commercialization.

They offer guidance on navigating the tech transfer process, providing best practices, and connecting the Fellow with relevant resources and experts.

Temple also assists with negotiation questions, helping the Fellow navigate agreements, contracts, and deal structures.

Step 3 - Business and Matchmaking Support with American Organisations:

EAEC, Venture & Capital International, supports business-related queries and matchmaking with American organizations.

EAEC engages with the Fellow to understand their business goals and requirements, providing tailored advice and strategies.

They leverage their network and expertise to identify potential partnerships and collaboration opportunities with relevant American organizations.

EAEC also facilitates participation in B2match events, which are platforms for business matchmaking and networking.

Step 4 - Assistance to Swiss Fellows:

Eurel, an NGI Enricher, focuses on providing specific assistance to Swiss Fellows.

Eurel engages in Technical Assistance to understand the unique needs and challenges faced by Swiss Fellows.

They offer guidance and support tailored to the Swiss context, including access to research infrastructure, funding opportunities, and collaboration networks.

Eurel assists Swiss Fellows in establishing connections with relevant stakeholders and research organizations.

Step 5 - Travel Arrangements:

Temple University Philadelphia, with **GAC** as an intermediary, is responsible for assisting the Fellow with travel arrangements.

Temple supports the Fellow in navigating visa processes and guiding required documentation and procedures.

They assist with flight bookings, ensuring smooth travel logistics for the Fellow.



Temple also offers relevant points of contact and resources to address any travel-related inquiries or concerns.

Step 6 - Accommodation and Deliverables:

The **SPI** team takes care of accommodation arrangements and oversees the deliverables during the Fellow's exchange.

SPI assists the Fellow in finding suitable accommodation options, considering their preferences and requirements.

They ensure that the Fellow has access to the necessary resources and facilities to carry out their activities during the exchange period.

SPI monitors the progress of deliverables, provides guidance on meeting requirements, and supports the successful completion of project milestones.

Step 7 - Technical Assistance for Canada:

APRE, as the coordinating entity, focuses on providing Technical Assistance for Canada-related queries.

APRE engages with the Fellows to understand their specific needs and interests related to Canada.

They offer guidance on collaboration opportunities, funding programs, and research networks in Canada.

APRE connects the Fellow with relevant stakeholders and resources to facilitate engagement and collaboration with Canadian counterparts.

Step 8 - Additional Enricher Involvement:

Depending on the complexity and specific requirements of the Fellow's query, additional NGI Enrichers may be involved.

These NGI Enrichers bring their expertise in various fields such as cybersecurity, privacy, ethics, funding, and legal matters.

The NGI Enrichers' coordination team ensures seamless collaboration and coordinates the involvement of additional Enrichers when necessary.

ENRICH Global, is a very relevant partner when additional support is needed. They provided the organization of the online Fellows training and also supported the Bootcamp in Rome. They have also continued to reply to multiple requests that have been posted on the WhatsApp communication channel.



Step 9 – Follow-up and evaluation:

After the one-on-one Technical Assistance, the NGI Enrichers' coordination team follows up with the Fellow to gather feedback and assess the effectiveness of the assistance provided.

Feedback and evaluation are used to continuously improve the support process and identify areas for enhancement.

As the Technical Assistance process is carried out the responsible entity has to provide feedback and detailed information of what has occurred, via an online Excel spreadsheet, created by the SPI team.

This spreadsheet can be accessed by every relevant party of NGI Enrichers, allowing for a universal assessment of the issues that Fellows have been having and how to possibly mitigate them for future calls. It allows for the tracking of the following fields:

- Fellow Name;
- Fellow email;
- Host Organization;
- Host Point of Contact;
- Email;
- 1st contact;
- Topic of Contact;
- SPI Follow-up;
- Result.

2.2 FELLOWS FROM CANADA AND US

Following the closure of the first round of calls 32 Fellows were selected and will undertake their program in either the US or Canada and are listed below:



TABLE 1 – LIST OF FELLOWS FROM THE FIRST ROUND OF CALLS

Organization
Ai Professional Software Solutions
Blocktac
Chegg
Digiotouch SARL
Eurecom
Eurecom
Finqup
Hopou (Libelium)
Insight SFI – University Of Galway (Uog)
Lawyerd!
Magos Technologies
Magos Technologies
Middle East Technical University
Multi
Omniopti
Politecnico Di Milano
Politecnico Di Milano – BONSAI Lab
Politecnico Di Milano
Politecnico Di Torino
Safemode Mobility
ScoutIt
Soluciones Sosteco S.L
Splendo
SPRITZ Research Group - Unipd
Tel Aviv University
Training Experience SI
University Of Murcia
University Of Public Service
Università Degli Studi Di Padova
Up&Charge
Walton Institute
Widnet Solutions

Note: Fellows who will be hosted by a Canadian host organization have been indicated in bold in the table above.

2.3 TECHNICAL ASSISTANCES CONDUCTED

The Technical Assistance started when the first round of calls finished on March 31 2023 and Fellows began preparing their program in the US and Canada. Although



the standard procedure was not yet finalized during this period (having been since the conclusion of the Rome pre-departure bootcamp in May), several events such as the pre-departure bootcamp and the establishment of multiple communication channels (e.g., WhatsApp groups comprising both Fellows and project consortium members) provided the Fellows with the opportunity to seek assistance and witness their initial queries being effectively addressed.

However, this process makes tracking of all requests troublesome and non-effective in the long-run and, as such, it was essential to finalize the process that was described in greater detail in earlier sections of this document, so all Technical Assistance Requests (with examples being present in Annex 3) follow a standardized workflow.

As it pertains to tracking the Technical Assistance, it is proposed that this is done via the creation of a Google Sheets document, which allows for live viewing for all project partners. The preceding document aims to provide the following information:

- Number of request;
- Fellow contact email;
- Host organization;
- Host point of contact;
- Host email;
- Method of 1st contact;
- Topic of contact;
- SPI/APRE Follow-Up;
- Result.

The requests for Technical Assistance for the US received and managed by SPI in the post-award phase can be summarized in the following table:

TABLE 2 – TECHNICAL ASSISTANCE REQUESTS FROM US FELLOWS

Fellow	Means of contact	Topic of contact	Result
Fellow 1	WhatsApp	General Status	Solved
Fellow 2	WhatsApp	General Status	Solved



Fellow 3	WhatsApp	Visa, Flights and Travel Insurance	Solved by Latif Ladid
Fellow 4	WhatsApp	Interview Support	Solved by Temple
Fellow 5	WhatsApp	Consulate/Embassy Support	Solved by Niccoló Ferrari
Fellow 6	WhatsApp	DS160 Form	Solved by Temple
Fellow 7	WhatsApp	Financial Documents	Solved by Temple
Fellow 8	WhatsApp	Flight Changes	Solved by EACE
Fellow 9	WhatsApp	Flight Changes	Solved by EACE

As mentioned in the previous paragraphs, APRE has been appointed as the NGI Enrichers Partner in charge of supporting the Technical Assistance for Canada. In the framework of the first round of open calls, encompassing all the tracks, a total number of three Fellows selected a Canadian host organization. For that reason, a limited number of requests concerning topics linked to Canada is foreseen, at least for the very first round, compared to the number of Fellows going to the US.

The delivery of the Technical Assistance service started at the end of the evaluation process and the requests have been forwarded and solved through the email address ngienrichers@apre.it, since the CMP Platform (<https://enrichers.gi2.io/en/>) had not yet been set, having been done so following the Rome pre-departure bootcamp.

The requests for Technical Assistance for Canada received by APRE in the post-award phase can be summarized in the following table:

TABLE 3 – TECHNICAL ASSISTANCE REQUESTS FROM CANADA FELLOWS

Fellow	Means of contact	Topic of contact	Result
Fellow 1	Email	Sub-grant agreement	Request was redirected and solved by GAC
Fellow 2	Email	Facilitating contact with the selected host organization	Solved by APRE



Fellow 3	Email	Possibility of changing host organization after the selection process	Solved by APRE
Fellow 4	Email	Postponement of the expedition	Solved by APRE
Fellow 5	Email	Facilitating contact with the selected host organization	Solved by APRE
Fellow 6	Email	Facilitating contact with the selected host organization	Solved by APRE
Fellow 7	Email	Collaboration between two host organisations	Solved by APRE

To sum up, APRE has received and solved a total of seven requests in the framework of the Technical Assistance service provided to the selected Fellows. The majority of the queries concerned the facilitation of the contact between the Fellows and the host organisations. Technical Assistance requests received until the end of the project will be updated in the final version of the deliverable.



3 LESSONS LEARNT AND NEXT STEPS

Technical issues can be intricate and diverse and, as such, they need strong problem-solving skills which allows the NGI Enrichers team to diagnose problems efficiently and find innovative solutions via the fulfilment of the project's overarching goal for this procedure, which is over 90 Technical Assistance queries conducted.

The most important aspect of providing Technical Assistance is understanding the issues and concerns of the people seeking help. To that end, having a clear communication style is vital because technical jargon can be overwhelming for those seeking assistance. It is essential to communicate in a clear, concise, and understandable manner, avoiding using technical terms without explanation, and adapting the language style to suit the user's level of understanding.

Lastly, the importance of having tracking methods is another of the main lessons learnt from the initial undertaking of Technical Assistance processes. Keeping track of common issues and their solutions can significantly streamline the Technical Assistance process. Documenting troubleshooting steps, FAQs, and best practices enables the entire team to provide consistent and efficient support.

Having established a solid foundation for the NGI Enrichers' Technical Assistance process, the next steps will be undertaken in the next project period to maximize its effectiveness and also ensure the process is duly optimized for the on-going second round of calls, but also the third round, scheduled to occur in the Summer of 2024. These will include:

- Refining and optimizing the process to enhance efficiency mainly via: Improvement of response time ensuring requests are forwarded to the relevant parties between two to three days maximum, implementation of feedback mechanisms such as a simple survey (draft version can be seen in Annex 2) that allows the Fellow to disclose his experience with this process (e.g.: rating from 1 to 5 multiple areas such as response time, quality of the response and also open fields where suggestions can be made);
- Proactive address of common issues via the creation, until October 2023, of a FAQ section on the NGI Enrichers' website, expansion of assistance channels;



- Starting in September 2023, Bi-monthly follow-up communications by SPI and APRE to all Fellows to gauge if they are facing any issues;
- Between August and September 2023, proceed with the bi-weekly creation of social media posts exclusively targeted towards Technical Assistance;
- By October 2023, proceed with the publication of a dedicated news piece on the NGI Enrichers website. This will be replicated in early 2024;
- Concerning the second round of calls, which started in July 2023, the proposed Technical Assistance process will also be implemented and adjusted accordingly considering the experiences with all Fellows during the first round of calls and also independent teachings;
- Based on the results of the monitoring process, as well as lessons learned from the Technical Assistance to be provided to the EU Fellows from the second round of calls, the project team will assess the Technical Assistance process for the third round of calls and define an action plan for its efficient implementation.



ANNEX 1 – FEEDBACK SURVEY

Part 1 – Identification:

- Field 1: Fellow name;
- Field 2: Fellow email;
- Field 3: Fellow organization;
- Field 4: Technical Assistance team contact point;
- Field 5: Date of initial contact;
- Field 6: Date of received reply

Part 2 – Evaluation of received assistance:

- Field 7: From 1 to 5, how satisfying would you classify the length of the process?
- Field 8: From 1 to 5, how would you classify the process' ease of use?
- Field 9: Ranging from inadequate to exceptional, how would you rate the methods via which you can receive technical assistance?

Part 3 – Recommendations:

- Field 10: Considering your experience, how can the process be the improved?



ANNEX 2 – RECEIVED REQUESTS EXAMPLES

Question 1

- Do we have anything that can serve as proof of financial support besides the contract?”

Question 2

- “If a consultation is booked with the lawyer, can this be included in the 3000\$ costs for travel, insurance and visa?”

Question 3

- “Can the DS2019 form be signed by the embassy without a previous visa interview?”

Question 4

- “My visa has bearer is subject to section 212(E) written. Two year rule does apply. What does this mean?”

Question 5

- “Is there any risk with a DS2019 form that is not signed by the embassy?”

Question 6

- “Does the grant get transferred directly to our personal bank accounts?”

Question 7

- “Are extra approvals needed from other university authorities?”

Question 8

- “Why can't I use the old VISA for this new program?”

Question 9

- “Can someone suggest a health insurance package/vendor which meets J-1 requirements, while also being reasonably priced?”

