

# DONOR-INSPIRED STUDY PROCESSES & MILESTONES OVERVIEW

**Thank you for your dedication to supporting scientific advancements that improve the lives of dogs, cats, horses and wildlife! Your partnership is essential to our mission and you make incredible impact possible.** Because of dedicated animal lovers like you, the Foundation has funded 80 studies so far through our Donor-Inspired Study program, investing nearly \$15M in a wide range of studies in all species. We sincerely appreciate your support and look forward to all the amazing work we can fuel together through your participation in a Donor-Inspired Study with Morris Animal Foundation.

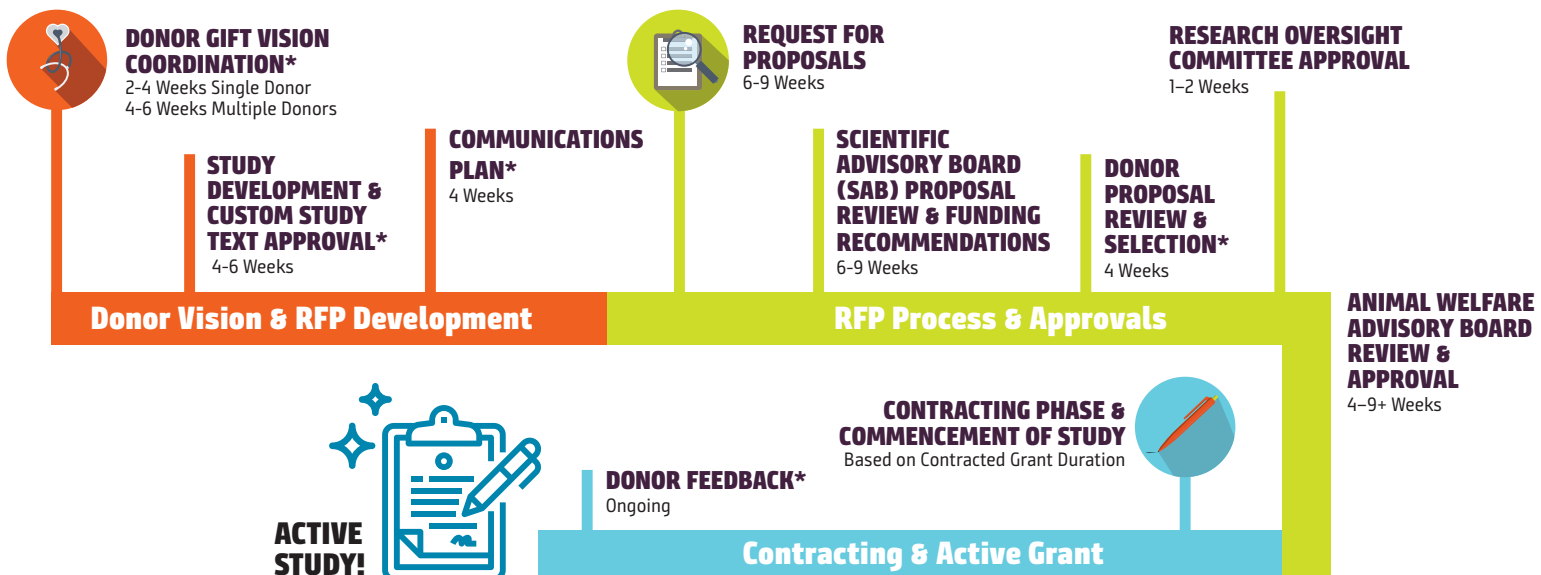
## DONOR-INSPIRED STUDY PROCESS

Your Donor-Inspired Study journey starts with a robust and well-defined process to determine the most impactful research projects to meet your goals.

Below is an overview roadmap of Morris Animal Foundation's procedures to ensure the scientific integrity of all Donor-Inspired Studies. In most cases, deviations from these procedures are not permitted.

## DONOR-INSPIRED STUDY PROCESS STAGES

\*Donor Involvement & Feedback



## **DONOR GIFT VISION COORDINATION**

In the first phase of the process, Donor discusses their animal health area of interest and funding with Foundation staff and completes a pledge agreement.

Foundation staff evaluate study idea and recommend process to donor. Most studies will follow the request for proposals process. In some cases, Foundation staff may recommend an alternate approach to meet donor's vision for highly specific studies to expand research reach and success.

**MILESTONE** Refined study topic / theme for Request for Proposals (RFP) generated

## **STUDY DEVELOPMENT & CUSTOM STUDY TEXT APPROVAL**

Foundation staff develop the Donor's idea into a specific initiative in alignment with Foundation policies.

Donor reviews and approves the custom language – approximately 1 to 2 paragraphs - that will be integrated into the Foundation's standard request for proposals template.

**MILESTONE** Donor approves language describing the goal of the funding and language in the request for proposal. The project schedule milestones are set once Donor approval is received.

## **COMMUNICATIONS PLAN**

With Foundation assistance, Donor determines scope of public messaging with an opportunity to share the inspiration for their RFP. Donors also may choose to remain anonymous. Foundation staff create an RFP opportunity.

**MILESTONE** Communications plan is finalized

## **REQUEST FOR PROPOSALS SOLICITATION** (2-3 MONTHS)

Foundation staff finalize the RFP documents and open the RFP to applicants. Staff simultaneously recruit the Scientific Advisory Board (SAB).

**MILESTONE** Dates established: RFP Open, RFP Close, Scientific Advisory Board Meeting

## **SAB REVIEW & FUNDING RECOMMENDATIONS** (2-3 MONTHS)

Foundation staff run an internal guideline compliance check. Proposals are then sent to the Scientific Advisory Board (SAB) for in-depth scientific review, followed by a review meeting where proposals are scored and then ranked.

**MILESTONE** SAB Meeting to identify proposals recommended for funding

## **DONOR PREFERRED PROPOSAL SELECTION** (1 MONTH)

**MILESTONE** With guidance and support from Foundation staff, donor selects the proposal(s) they would like to fund among the proposals recommended for funding by the SAB. Only proposals recommended for funding by the SAB may be selected by the Donor to ensure scientific rigor of projects.

## **RESEARCH OVERSIGHT COMMITTEE & ANIMAL WELFARE ADVISORY BOARD REVIEW & APPROVAL**

The Foundation's Research Oversight Committee (ROC) reviews Donor's preferred proposal(s) for alignment with the Foundation's strategic mission. Subsequently, the Animal Welfare Advisory Board (AWAB) reviews the proposal(s) to ensure there are no welfare or ethical concerns and that the proposal adheres to the Morris Animal Foundation Animal Health Study Policy.

**MILESTONE** All preferred proposal approvals achieved

## **CONTRACTING PHASE & COMMENCEMENT OF STUDY**

During contracting, a grant agreement is signed by the grantee's institution and the Foundation. The principal investigator selects a start date for the project, no later than one year from award notification.

Once contracting is completed, the grant will be considered active. Throughout the project period, the principal investigator must submit progress reports every six months. The Foundation monitors progress and results through expert reviews. Both the report and reviewer comments can be made available to Donor.

**MILESTONE** Active Study, Progress Reports, Final Report, Publications, Research Translation to Practice

### **DONOR NOTES**