

# Waypoint Research Proposal Process

## Roles and Responsibilities

ROLE	RESPONSIBILITIES
<b>Principal Investigator(s) (PIs)</b>	<p>Initiates grant and/or project proposal processes. Prepares all required proposal materials. Provides subject matter expertise related to the research proposal.</p> <p>Following notice of award for grant-funded projects, begins next steps (e.g., Waypoint Research Application Form [WRAF]; Review Ethics Board [REB]/REB exempt) and engages all relevant internal stakeholders.</p>
<b>Site Principal Investigator(s) (Site PIs)</b>	<p>Present when external projects are conducted at Waypoint. Together with the Research Coordinator and Manager, Research &amp; Academic Operations, ensures the external PI and/or external project team follow(s) Waypoint policies and procedures.</p>
<b>Research Analyst(s)</b>	<p>Support(s) PI(s) with grant proposals (e.g., conducting literature searches), letters (e.g., writing letters of support), and/or other required materials.</p> <p>Following notice of award, may support PI(s) in developing project approval documents (e.g., WRAF, REB) and other research-related activities as needed.</p>
<b>Scientific Writer</b>	<p>Supports PI(s) in drafting grant proposal materials.</p>
<b>Research Coordinator</b>	<p>Supports PI(s) in drafting the proposal by:</p> <ul style="list-style-type: none"> <li>• Providing timelines;</li> <li>• Working with Senior Business Analyst to draft budgets and justification;</li> <li>• Ensuring all relevant stakeholders are engaged, deadlines are met, and all parts of application are complete.</li> </ul> <p>Once PI completes the grant application, sends all proposal materials for review and approval (i.e., by the Manager, Research; Director, Research; Vice-President, Research; Grant Review Committee; and Senior Leadership Team).</p> <p>Following notice of award, works with Manager, Research and Senior Procurement Officer to develop and/or review sub-grant and project-related agreements. Also works with Senior Business Analyst to oversee grant accounting, conduct monthly tracking, and manage grant funds jointly with Manager, Research.</p>

ROLE	RESPONSIBILITIES
<b>Manager, Research &amp; Academic Operations</b>	<p>Reviews proposal materials to confirm all operational elements of proposal are captured. Works with Research Coordinator to ensure all appropriate stakeholders are engaged at the application stage. Provides any recommendations to Director, Research.</p> <p>Following notice of award, works with Research Coordinator and Senior Procurement Officer to develop and/or review sub-grant and project-related agreements. Also works with Senior Business Analyst to oversee grant accounting, conduct monthly tracking, and manage grant funds jointly with Research Coordinator.</p>
<b>Director, Research &amp; Academics</b>	<p>Reviews proposal materials to ensure proposal is strategically aligned with Waypoint's current strategic plan. Provides any recommendations to the Vice-President (VP), Research for proposals requiring VP approval.</p>
<b>Vice-President (VP), Research &amp; Academics</b>	<p>Provides final oversight and sign-off on proposal materials on behalf of the Research &amp; Academics department.</p>
<b>Senior Business Analyst</b>	<p>Reviews and provides final sign-off on grant proposal budget materials to ensure accuracy of budget items (e.g., salaries).</p> <p>Following notice of award, oversees grant accounting administrative and financial support. Activities include:</p> <ul style="list-style-type: none"> <li>• Conducting monthly tracking;</li> <li>• Coordinating invoicing out to vendors and/or grant agencies;</li> <li>• Managing grant funds jointly with Manager, Research and Research Coordinator.</li> </ul>
<b>Senior Procurement Officer</b>	<p>Reviews grant proposal materials to:</p> <ul style="list-style-type: none"> <li>• Assess for organizational risk, and engage Director, Risk, Privacy and Access when necessary;</li> <li>• Be aware of potential agreements or contracts that may follow;</li> <li>• Update Director, Materials Management/Procurement of upcoming review timelines.</li> </ul> <p>Provides final review for proposals that do not require an authorized signature from Waypoint. When an authorized signature is required, submits final materials and provides any recommendations to the Director, Materials Management/Procurement.</p> <p>Following notice of award, works with Manager, Research and Research Coordinator to develop and/or review sub-grant and project-related agreements.</p>

<b>ROLE</b>	<b>RESPONSIBILITIES</b>
<b>Director, Materials Management/ Procurement</b>	Reviews grant proposal materials from a contractual and risk management perspective. Submits final materials and provides any recommendations to VP, Corporate Services and Chief Financial Officer (CFO), and President and Chief Executive Officer (CEO).
<b>VP, Corporate Services and Chief Financial Officer (CFO)</b>	Reviews and provides sign-off for grant proposal materials that require a signature on behalf of Waypoint.
<b>President and Chief Executive Officer (CEO)</b>	Provides final review and sign-off for grant proposal materials that require a signature on behalf of Waypoint.