Research Lead - Researcher Application Guide

*This guide is to be used as reference for completing your application for Research Lead. To successfully submit the application, you will need to visit the website at www.researchlead.com/research-sign-up and complete these items on website. You may also review eligibility for use of the Research Lead platform at www.researchlead.com/research-eligibility-criteria. Items marked as * are required for completion of the application. Sections will need to be completed in order in the online application. If there are any questions regarding completion of the application, you may reach us at contact@researchlead.com.*

Section 1: Researcher (Principal Investigator) Information

- **First Name ***

- **Last Name ***

- **Email ***
  This email will only be used for correspondence.

- **Advanced Degrees***
  - MD
  - DO
  - PhD
  - Other:

- **Board certification(s)**
  List any medical board certifications that apply to you
  -

- **Specialty or specialties**

- **Any for-profit company or business affiliated (employment or ownership)**
  Please, disclose any for-profit business affiliations even if they are not related to your research. This will not be listed on the website and will only be used to for screening purposes.

- **Affiliated Institution***
  This is the institution to which you are affiliated. This institution will be responsible for supporting your research. Your grant will be written out to this institution on your behalf.

  - **Is this institution a non-profit?***
    Research Lead only supports research conducted through non-profit institutions.
    - Yes
    - No

  - **Institution Address**

- **Research interests*** *(250 word limit)*
  Discuss your research interests. This information may be listed on your profile. Try to use lay terminology.

- **Your story*** *(250 word limit)*
  Why did you enter the field? Why are you doing this research? What motivates you in this research?

Section 2: General Study Information

- **Official title***
  This is the title listed (or that you intend to list) on your study protocol.

- **Title for general public***
  This should be a brief title for a lay person. This should be written as if you are providing a description for a friend.

- **Category of research***
  Choose one of the following categories to assign to your research. This will be used as a filter that sponsors will use to find your research. If you do not believe any of these describe the category of your research, select "other" and designate a new category.
  - Heart & blood
  - Brain & nervous system
  - Cancer
  - Kidney & urinary system
  - Lung and bronchi
  - Infectious disease
  - Mental health
  - Immune system
  - Substance related disorder
  - Digestive system
  - Muscle, bone, & cartilage disease
  - Health & wellness
  - Skin & connective tissue
  - Environment & occupational
  - Gland & hormonal related disease
  - Metabolic disorder
  - Nutrition & lifestyle
  - Genetics
  - Public health
  - Pregnancy
  - Women's health
  - Men's health
  - Pediatric
  - Health disparities
  - Other:

- **Will your study be conducted at your affiliated institution?***
  - Yes
  - No
- **I**f **not, where will your study be conducted?**

- **Brief study summary or abstract*** *(250 word limit)*
  This summary should be in lay person language at 8th grade reading level similar to an informed consent form.

- **Study status***
  Mark only one as applicable
  - Not started
  - Initiated
  - Enrolling
  - Follow-up only
  - On hold/discontinued

- **IRB status***
  Mark only one as applicable
  - Not yet submitted
  - Submitted (not reviewed)
  - Reviewed (not approved)
  - Approved
  - Withdrawn/Expired
  - Not applicable

- **Is the study submitted to clinicaltrials.gov?***
  - Yes
  - No

- **NCT** *(if applicable)*
- **IRB#** *(if applicable)*

Section 3: Research Details

- **Background*** *(250 word limit)*
  What is the support for this study? What do we currently know? What do we know from prior research?

- **Significance*** *(250 word limit)*
  Why are you doing this study? What do you think the study is going to achieve or what insight can we gain? How does this contribute to the mission of Research Lead to improve health and reduce disease?

- **Study design***
  Select all that apply to define your study design
    - Randomized interventional
    - Non-randomized interventional
    - Prospective cohort
    - Retrospective cohort
    - Case-control
    - Database
    - Cross-sectional
    - Cell-based
    - Qualitative
    - Population-based
    - Registry
    - Other:

- **Study aim(s)*** *(250 word limit)*
  This is the study hypotheses and goals written in lay language as best possible.

- **Method(s)*** *(250 word limit)*
  What is going to happen in your study? This is just a brief overview. Try to focus on the aspects of your study that your sponsors will want to know in determining if they should support you. Try to avoid unnecessary details.

- **Eligibility Criteria**
    - **Inclusion criteria*** (250 word limit)
      Who can participate in this study? What population(s) will the results of this study reflect? Represent in bullet points if possible.
    - **Exclusion criteria*** (250 word limit)
      Who is excluded from participation in this study? What populations will not be reflected in the results? Represent in bullet points if possible.

- **Recruitment*** (250 word limit)
  How will participants be selected for your study?

- **Enrollment*** (250 word limit)
  How many people do you expect to enroll (total) in this research and in each study group as applicable?

- **Statistical analysis*** (250 word limit)
  Brief summary of your analysis as applicable. How is your study powered? How will you determine statistical and clinical significance?

- **Risks*** (250 word limit)
  What are the risks of this research for patients and society? How do you plan to mitigate these risks?

- **Benefits*** (250 word limit)
  What are the benefits of this research for patients and society? How do you plan to maximize these benefits?

- **References***
  Please provide citations of research that supports your study.

- **Additional information**
  Include any additional information you would like your sponsors to know which you believe did not fit into the prior sections.

Section 4: Timeline

It will be important to determine the milestone for your study and how long each milestone will take to achieve. You can use up to a total of six milestones which will be used to determine your payment schedule. You are required to complete a minimum of two milestones. The first milestone should be start-up or grant finalization (grant agreement signed by all parties). The last milestone should be upon completing the study and will be your final grant disbursement. The remaining milestones will likely depend on your study protocol.

Example: If you plan to enroll 60 patients, you could set the milestone as follows:
1) *Start-up*
2) *Enrollment of 20 patients*
3) *Enrollment of 40 patients*
4) *Completed enrollment*
5) *Completed follow-up*
6) *Study close-out*

- **Funding duration (days)**
  This will be the duration that your study profile will be listed on the platform for funding. After this duration your study will stop receiving funding. You can complete funding early if you meet your study goal before funding timeline is reached. Your study will be considered "funded" and we will move to finalizing your grant. The duration of funding should be a minimum of 30 days and a maximum of 180 days.

- **Description of timeline***
  Provide an overview of the timeline of your study. Where are you right now? How long do you expect various phases of the study to take (ex. Enrollment, data collection, follow-up, data analysis, presentations & publications, etc.)

Milestone	Brief Milestone Description	Duration of time between milestones (weeks)
First*	*Start-up/Grant finalization*	-
Second*		*(Between first & second)*
Third (optional)		*(Between second & third)*
Fourth *(optional)*		*(Between third & fourth)*
Fifth *(optional)*		*(Between fourth & fifth)*
Sixth *(optional)*		*(Between fifth & sixth)*

- *Durations are required only for milestones that you have provided for your study*

- **Total study duration (weeks):**
  Sum of all the milestone durations

Section 5: Budget

Budget is an important part of research. Research Lead requires that budgets be both reasonable and sufficient to complete your study as described in your study profile. Total funding will include your base study costs as described below + % indirect costs + 8% platform fees. Your grant amount will include your base costs + % indirect costs. The 8% platform fee will be applied to the base study costs and does not include indirect costs.

- **Have you received any funding towards this research? ***
  - o   Yes
  - o   No
- **If yes, how were you funded and why do you currently require funding through Research Lead?**

- **Research Lead requires an 8% fee to use the platform to fund your study. There is no upfront cost for researchers and you will only be charged if the study is funded. However, you will need to include this 8% platform fee in your total budget. ***
  - o   I understand

- **Overhead for research grant at your institution (%)*:**
  Institutional overhead varies with each institution. Research Lead supports research based on philanthropy of supporting the research that each researcher believes will be meaningful and make a difference for patients and society. Lower overhead will improve your chances of being funded as sponsors will perceive more of the money as going directly to your research. For that reason, we request that institutional overhead be capped at 15%. You may need to request an exception through your institution to confirm that your institution can meet this requirement. If this is a problem, contact us at contact@researchlead.com. We can try to contact your institution on your behalf to describe our platform.

- **Total salary costs***
  These are the total costs for salaries for the dedicated research team in your study including investigators and coordinators. Please include the proportion of time each personnel is expected to dedicate to the study and primary role and responsibilities.

- **Total participant costs***
  These are the total costs for labs, diagnostic tests, exams, and compensation that participants will need in your study. Break down these costs to the extent to provide understanding to your supporters as to where the money is going. If this does not apply, write "not applicable".

- **Total recruitment costs***
  These are the total costs for recruitment of participants in your study, including marketing materials, conferences, and meetings. If this does not apply, write "not applicable".

- **Equipment, supplies, & facility costs (other than overhead)***
  If does not apply, write "not applicable".

- **Other costs***
  Describe any other study costs that do not fall into the prior categories

Base Research Budget Breakdown:
Your budget allocation for the grant will be based upon meeting the milestones created in the timeline. We realize getting a study started is expensive. We recommend that you allocate 25% of the total budget for your first milestone. Do not include IDC and platform fee in these amounts.

Milestone	Budget needed to reach milestone ($)
First*	
Second*	
Third	
Fourth	
Fifth	
Sixth	

- *Budget amount is required for each milestone provided in the timeline section.*

- **Total Base Budget ($):**
  This should be the sum of both the costs for the milestones listed and cost categories (salaries, participants, recruitment, equipment, etc.).

- **Total Grant Amount ($):**
  This should be your base + %IDC

- **Total Funding Amount ($):**
  This should be your base + %IDC + 8% Platform Fee. The platform fee should be 8% of the total base budget (not including IDC).

Include the team you would like to be represented on the study profile.

Study Role	Name	Contact Email
Sub-Investigator		
Sub-Investigator		
Sub-Investigator		
Sub-Investigator		
Coordinator/manager		
Coordinator/manager		

Research Contact
We recommend that you provide contact information for supporters to reach the principal investigator with questions. However, this could also be another member of the study team such as the coordinator.

- **Name of research contact:**
- **Research contact phone number:**

Section 7: Screening & verification

All of these items will be used only for screening purposes and will not be included in your public study profile.

- **Principal investigator email for affiliated institution (ex.jsmith@miami.edu)***
  We will send an email to confirm verification to this email.

- **Current curriculum vitae***
  Attach file

- **Institutional letter of support***
  An institutional letter of support will be required to confirm that the institution agrees to support your research if you are funded and agrees to the indirect costs as specified in this application (less than 15%). If you do not have it at this time, you may submit your application first. However, you will be required to provide an institutional letter of support before your study profile launches on Research Lead.

- **Protocol**
  Attach file. Not required but preferred if available.

- **IRB approval letter or last correspondence (if applicable)**
  Attach file

- **Authorization allowing Research Lead to do a basic screening of your credentials and verification including the following*:**
  1) Contacting institution to confirm affiliation
  2) Contacting study team and listed endorsers
  3) Web-based search of public social media or publication sites
  - o Yes
  - o No

- **I understand that Research Lead is a crowdfunding platform and funding of research will be determined by donations of users on the platform. Research Lead cannot guarantee funding or the timeline for funding.**
  - o I agree

- **If funded by Research Lead, I agree to use the funds only for the research outlined in the study profile and grant.***
  - o I agree

- **If funded, I agree to provide brief updates on the progress of the study to my supporters on the platform at least quarterly and on completion of milestones.**
  - o I agree

- **If I develop any conflicts of interest (as defined separately in the financial disclosure form) during the course of the study, I will report them to Research Lead.***
    - I agree
- **If the study is cancelled or discontinued for any reason, I will notify Research Lead and forfeit any remaining funds to Research Lead. These funds will be either credited back to sponsors or redistributed to other research on the platform.***
    - I agree

- **If I am found to be using these funds for fraudulent or personal use (outside of research), any remaining research funding will be cancelled and the researcher will be banned from future use of the Research Lead platform.***
    - I agree

Section 8: Let's help you get funded!

- **Research (Principal Investigator) head shot***
  Attach file
- **Cover photo***
  Upload a cover photo for your page that really highlights your research and your team. This must be your photo.
- **Video**
  Consider uploading a short video (30s – 3 min) to describe the research and why you are doing it. It will really help connect to your supporters.
- **Other photos**
  Upload any other photos (must be yours) that can be used to make your profile look great and attract supporters. You may also include head shots of your team members as well.

- **Give Research Lead authorization to use any content submitted by you to the site for marketing purposes?***
  Information you submit for your study profile would be used for marketing in order to improve traffic coming to the site as well as your specific profile to increase the chances you are successfully funded on the platform. Examples include use of your head shot and "your story" section to do a featured bio on the main website page or on our social media platforms. We also may use brief excerpts from your study section or segments of your video to generate social media marketing posts to generate public interest in your study or feature your study on our main page and direct traffic to your profile. You are not required to say yes to this question in order to use the Research Lead platform for funding.
  - Yes
  - No

- **Do you allow Research Lead to edit your profile to increase changes of being funded on the platform? We will get your approval before any changes go live.***
  - Yes
  - No

- **Research Lead is continuously working to improve and adapt our platform in order to better serve both researchers and sponsors. This may include revisions to our platform procedures, requirements, and content of our website. We will try our best to notify you if there are any changes that affect you or your study funding.**
  - I understand