

# ENTERPRISE RESEARCH PILOT PROGRAM

## Request for Applications Spring 2027 Award Cycle

### FUNDING OPPORTUNITY AT A GLANCE

| Award            | Funding Range | Purpose                                                                                                                                                                | Expected Number to Fund this Cycle |
|------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------|
| Open Pilot Award | \$15K–\$75K   | Generate evidence needed to advance a promising research idea to extramural funding application. Projects may address any scientific area and any translational stage. | Up to 16 awards                    |

### Key Program Features

- Letter of Intent (LOI) and invited Full Application process.
- Projects supported across the full translational spectrum, from basic discovery through population and community research.
- Projects characterized by Scientific Area(s), Translational Stage, and Strategic Driver(s).
- Scientific review is followed by portfolio-level consideration to build a balanced, high-impact set of enterprise investments.

### Key Dates

| Milestone                             | Date                   |
|---------------------------------------|------------------------|
| RFA Release                           | November 2, 2026       |
| Letter of Intent Deadline             | December 4, 2026       |
| Invitation to Submit Full Application | January 8, 2027        |
| Full Application Deadline             | February 5, 2027       |
| Award Notification                    | Week of March 15, 2027 |
| Earliest Project Start                | April 1, 2027          |

### LOI eApplication Link

[Click here to access the ePilot Electronic Submission Form](#)

### PURPOSE

The Wake Forest University School of Medicine (WFUSM) and Advocate Health Enterprise Research Pilot Program support high-potential research through a coordinated portfolio of institutional research investments. The program is designed to accelerate innovation, strengthen collaboration, advance health system transformation, improve community health, and build sustainable pathways to future external funding and impact.

The Enterprise Research Pilot Program brings institutional pilot investments into a shared framework that supports investigator-initiated science while enabling intentional investment across scientific strengths, health system priorities, community needs,

translational stages, and emerging opportunities. The goal is not simply to fund individual projects; it is to build a portfolio of investments that collectively advances the research mission of Advocate Health and WFUSM.

Awards support promising investigator-driven projects that require preliminary evidence to establish feasibility, test an innovative concept, reduce scientific uncertainty, or position the work for subsequent research and external funding.

Appropriate activities may include:

- Generating preliminary data or early proof-of-concept findings.
- Testing a novel scientific hypothesis, method, tool, intervention, or technology.
- Conducting a focused feasibility or validation study.
- Developing or evaluating a dataset, assay, model, measure, or research approach needed for subsequent work.
- Producing evidence that directly supports a defined next-stage research or funding opportunity.
- Competitive applications will explain what uncertainty the pilot will resolve, what evidence will be produced, and how that evidence will materially advance the research program.

## Categories of Research

This RFA welcomes investigator-initiated projects across a wide range of topic areas. Pilot applications will be characterized according to three categories: scientific area, translational spectrum, and strategic drivers. These categories do not determine funding level or eligibility. Instead, they will be used to determine expertise required for the review and to support portfolio-level decision making.

| <b>Scientific Area</b><br>Projects may address any area of research relevant to the Advocate Health and WFUSM research mission.<br>Applicants will select <b>up to three</b> scientific areas. |                            |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| Addiction Research                                                                                                                                                                             | Obesity                    |
| Aging                                                                                                                                                                                          | Pediatric Trauma           |
| Alzheimer's Disease and Related Dementias                                                                                                                                                      | Planetary and Human Health |
| Artificial Intelligence                                                                                                                                                                        | Precision Medicine         |
| Cancer                                                                                                                                                                                         | Primary Care               |
| Cardiovascular                                                                                                                                                                                 | Primate Research           |
| Child and Family Health                                                                                                                                                                        | Redox Biology              |
| Critical Illness, Injury, and Recovery                                                                                                                                                         | Regenerative Medicine      |
| Diabetes                                                                                                                                                                                       | Remote Health Monitoring   |
| Eye and Vision                                                                                                                                                                                 | Rural/Community Health     |
| Healthcare Innovation                                                                                                                                                                          | Sleep and Circadian Rhythm |
| Lung Health                                                                                                                                                                                    | Stroke                     |
| Men's Health                                                                                                                                                                                   | Vaccines and Immunology    |
| Musculoskeletal                                                                                                                                                                                | Women's Health             |
| Neurosciences                                                                                                                                                                                  | OTHER                      |

| <u>Translational Spectrum</u><br>The Enterprise Pilot Portfolio supports research across the full translational spectrum.<br>Applicants will identify the translational stage of the proposed project. |                                                                                                                                                                                |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| T0 – Basic Research                                                                                                                                                                                    | Fundamental research that reveals mechanisms of biology, disease, or behavior and provides the foundation for later stages of translation.                                     |
| T1 – Discovery / Preclinical Research                                                                                                                                                                  | Research that connects fundamental discoveries with potential human application, including preclinical models, early intervention development, and related translational work. |
| T2 – Translation to Humans / Clinical Research                                                                                                                                                         | Research in humans that tests, refines, or evaluates interventions, technologies, behaviors, outcomes, or health services.                                                     |
| T3 – Clinical Implementation                                                                                                                                                                           | Research focused on moving evidence into routine care, evaluating implementation, and identifying gaps or opportunities in care delivery.                                      |
| T4 – Population & Community Impact / Public Health                                                                                                                                                     | Research examining health outcomes at the population or community level and the effects of approaches to prevent, diagnose, treat, or manage health conditions.                |

| <u>Strategic Drivers</u><br>All projects should be aligned with enterprise priorities, referred to as strategic drivers.<br>Applicants will select all relevant categories. |                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Academic Learning Health System (aLHS)                                                                                                                                      | Uses research and real-world health system data to continuously improve care, outcomes, and organizational learning.                                                                      |
| Artificial Intelligence, Data Science and Digital Health                                                                                                                    | AI is a cross-cutting technology that supports research across multiple clinical and scientific disciplines.                                                                              |
| Cells-to-Communities                                                                                                                                                        | Acknowledges that the WFUSM research portfolio extends across the translational spectrum from fundamental biology to clinical care, populations, and community health.                    |
| Clinical Trials                                                                                                                                                             | Builds the evidence, infrastructure, capabilities, or pipeline needed to develop and conduct high-quality clinical trials.                                                                |
| Health System Science/PCORI Readiness                                                                                                                                       | Positions research teams and projects for future patient-centered outcomes or comparative effectiveness research funding.                                                                 |
| Implementation Science                                                                                                                                                      | Develops and tests strategies to move evidence-based practices into routine care and improve their adoption, delivery, and sustainability.                                                |
| National Service Lines/Translational Centers of Excellence                                                                                                                  | Cancer, Heart & Vascular, Neuroscience: Advances research aligned with enterprise clinical service-line priorities and strengthens research within strategically important areas of care. |
| Scaling Across the Advocate Health System                                                                                                                                   | Generates evidence needed to adapt, implement, or expand successful approaches across markets, sites, populations, or care settings within Advocate Health.                               |

## ELIGIBILITY, FUNDING, AND PROJECT PERIOD

These awards are open to investigators across the Advocate Health enterprise with a primary faculty appointment, including those with a Research Faculty Affiliate appointment, at Wake Forest University School of Medicine. If you have a question about your eligibility, please contact Brittney Patterson at [brittney.patterson@advocatehealth.org](mailto:brittney.patterson@advocatehealth.org).

A Co-PI structure is allowed if both PIs have expertise relevant to the project with distinct contributions to its design and implementation. **Non-faculty Researchers may serve as a Co-PI with a WFUSM faculty member.**

For projects that are focused on Community-Engaged Research and intend to have a community representative serve as a Co-PI, the community representative must work for a non-profit community organization or local government agency that serves the community within Advocate Health.

**Note:** Investigators are not permitted to have two funded pilots at the same time.

Enterprise Pilot Awards provide \$15,000–\$75,000 in institutional research support. All projects have a one-year project period, and all funds will be given at direct cost for one year. Applicants should request the amount needed to accomplish the proposed work and justify how the requested investment is tied to the project's milestones and intended outcome. It is important to budget for what you need, as opposed to reaching the top limit of each funding range; budgets at the top of the range will receive a higher level of scrutiny.

## RESOURCES FOR APPLICANTS

Applicants are encouraged to use available enterprise research resources to strengthen pilot applications. Specifically, the CTSI and WFUSM Research Centers are ready to work with all investigators to strengthen study design, identify collaborators, assess feasibility, plan community or stakeholder engagement, access data and informatics expertise, and prepare competitive applications. Available resources and instructions for requesting support are provided through the Enterprise Research Pilot Program application materials and program websites below.

- [CTSI Resources](#)
- [WFUSM Research Centers](#)
- [WFUSM Shared Resources and Cores](#)

## APPLICATION PROCESS

The Enterprise Pilot Awards use a two-stage application process: a required Letter of Intent followed by an invited Full Application. Applications that do not comply with the stated requirements will not be considered for review.

### Stage 1: Letter of Intent (LOI)

The LOI is designed to identify promising opportunities, indicate alignment with enterprise-wide priorities, support reviewer and resource planning, and determine which applicants will be invited to submit a Full Application. Only one letter of intent per PI allowed per cycle.

#### One-Page Scientific LOI

Applicants will upload a one-page scientific LOI. References may be provided on additional pages. The one-page LOI should concisely address:

- Problem, unmet need, or opportunity
- Central research question, objective, or specific aim(s)
- Why the project is important and/or innovative
- Proposed approach and feasibility
- Anticipated next step toward extramural funding

#### LOI Review

1. An administrative review will be completed to verify that the project is responsive to the RFA, guidelines were followed, investigators are eligible, and the application is complete.
2. LOIs that pass the administrative review are reviewed by the WFUSM Intramural Research Support Committee (IRSC), a Dean-appointed committee of selected expert faculty. Reviewers at this stage will evaluate whether the project has clear research aims, is feasible within the 12-month project period, is likely to generate actionable results, and focuses on activities that directly support the development, execution, or advancement of research rather than routine educational, training, administrative, or clinical operations.
3. An invitation to apply for a full application, or notification if you are not selected, will be communicated via e-mail by 01/08/2027.

### Stage 2: Invited Full Application

#### Format Specifications

- Arial font, no smaller than 11 point for uploaded narrative documents
- Margins of at least 0.5 inches on all sides
- Single-spaced text
- All uploaded documents must be in PDF format

## Full Application Components

- Project title and investigator/key personnel information
- Confirmation or update of Scientific Area(s), Strategic Driver(s), and Translational Stage
- Scientific Abstract (250 words max)
- Research Strategy (3 pages maximum)
  - Specific Aims
  - Significance and Innovation
  - Approach
  - Study Team
  - Anticipated Outcomes
- References (no page limit)
- Structured milestones, target dates, and evidence of completion (1 page max)
- Anticipated next step toward extramural funding
- Budget and Budget Justification (budget template plus 1 page justification)
  - Complete the [budget template form](#) and a brief justification for the funds requested. Please explain how other resources may be leveraged to support the project. If the proposed research will be done on more than one campus/institution, please include details in the justification.
- Information Regarding Human Subjects
  - Address the following if the project involves human subjects:
    - IRB Approval Status (note: IRB approval is not required for full application submission)
    - Clinical Trial Classification Questions
    - Protection of Human Subjects (1 page max)
- Information Regarding Live Vertebrates
  - Address the following if the project involves live vertebrates:
    - IACUC Approval Status
    - IACUC approval will be required (as 'just in time' information) for implementation of projects with live vertebrate animals
- NIH-style biosketches for key personnel

## REVIEW AND SELECTION

### Scientific Review

Invited Full Applications will undergo centralized peer review by the IRSC. Reviewers will evaluate scientific merit and feasibility using an NIH-aligned framework. Reviewers will also provide structured comments on next-step potential; these considerations are intended to inform portfolio decisions and are distinct from scoring criteria.

### Core Review Factors

- Factor 1 – Importance of the Research: significance and innovation.
- Factor 2 – Rigor and Feasibility: approach, study design, methods, and likelihood that the proposed work can be completed successfully.
- Factor 3 – Expertise and Resources: whether the investigators, environment, and resources are sufficient for the proposed work.
- Overall Impact: the likelihood that the project will exert a sustained, powerful influence on the relevant research field or translational pathway, considering the proposed scope and intended pilot outcome.

### Additional Reviewer Considerations

- Milestones and Deliverables: whether the project has clear, measurable milestones and outcomes appropriate to the requested investment.
- Budget Appropriateness: whether the requested resources are reasonable and well aligned with the proposed scope and milestones.

### Portfolio Optimization and Funding Recommendations

Following scientific review, meritorious applications will be considered collectively by the Pilot Study Council to develop the Enterprise Pilot Portfolio. Portfolio consideration is not a second scientific review. Its purpose is to identify the combination of investments that best advances the enterprise research strategy while preserving scientific quality and investigator innovation.

Portfolio-level considerations may include:

- Scientific area distribution
- Translational stage distribution
- Strategic driver mix
- Investigator development, including consideration of career stage and new research opportunities
- Community and stakeholder engagement
- Interdisciplinary, cross-Center, and cross-market collaboration
- High-Risk, High Reward research
  - Potential for external funding and other downstream impact
- Opportunities to address identified gaps or emerging needs in the enterprise research portfolio

Final funding decisions will reflect both the scientific strength of individual proposals and the goal of building a balanced, high-impact portfolio of institutional research investments.

## BUDGET GUIDELINES

Projects are expected to be completed within a one-year project period. Funded projects receive certain CTSI Services free of charge. If the proposed project plans to use these services, they should be included in the budget at \$0 and in the budget justification. For a list of CTSI services and associated fees, see the [CTSI Hourly Services Pricing Grid](#).

Pilot study budgets may range from \$15,000 to \$75,000. However, the program was developed anticipating that most pilot projects will fall within a range of \$15,000 to \$40,000.

Funds may be budgeted for:

- Salary support for research staff
- Travel necessary to perform the research
- Small equipment, research supplies, and core/service costs
- GPU, cloud computing, AI model training, specialized datasets, data annotation, software licenses
- Methodological, informatics, or other services necessary for successful execution

Grant funds may **not** be budgeted for:

- Salary support for PI or faculty co-investigators
- Biostatistical support (no charge to pilot awardees – see link above)
- General office supplies or communication costs, including printing and postage
- Conference travel or meals
- Professional education or training
- Computers or audiovisual equipment unless fully justified for the research
- Capital equipment
- Manuscript preparation/submission
- Indirect costs

## REGULATORY AND OPERATIONAL REQUIREMENTS

Applicants should identify regulatory and operational requirements early and incorporate realistic start-up timelines into the proposed project plan. Final approvals are not required at the LOI stage unless otherwise specified; however, all required institutional approvals must be in place before applicable research activities begin and before funds are released for those activities.

- Prior to receiving funds, research involving human subjects must have appropriate approval from the IRB. Either an IRB approval letter or an IRB response to a “Determination Whether Research or Similar Activities Require IRB Approval” must be submitted prior to funds being released. Human subjects must be reviewed in accordance with the institution’s general assurances and HIPAA. All key personnel must have certification of training in the protection of human subjects prior to the start of the grant period.
- Prior to receiving funds, research involving live vertebrates must have appropriate approvals from IACUC. Either an IACUC approval letter or documentation on why activity does not require IACUC approval must be submitted prior to funds being released.

- Projects requiring enterprise data, electronic health record data, clinical workflows, specialized cores, community partnerships, or other institutional resources should demonstrate that access and feasibility have been considered in the project plan.
- Clinical trials and projects requiring IND/IDE review or other specialized regulatory oversight should account for those requirements in the proposed timeline.

## PROGRAM EXPECTATIONS

Enterprise Pilot Awards are institutional investments intended to produce measurable progress toward a defined next step. Awardees will be required to participate in a structured post-award process designed to support project execution, document outcomes, and strengthen the downstream impact of the portfolio. Awardees will be assigned to a CTSI Research Navigator to support study initiation, connect the team with relevant resources, monitor progress, and help address challenges throughout the project period.

Awardees should expect to:

- Participate in a project initiation/kickoff process.
- Maintain an agreed-upon milestone and deliverable plan.
- Participate in periodic progress check-ins and provide brief progress information as requested.
- Communicate significant scientific, operational, regulatory, or budget issues that could affect successful completion of the project.
- Complete a closeout report documenting results, products, lessons learned, and the next-stage plan.
- Report subsequent publications, external funding submissions and awards, implementation outcomes, intellectual property, new collaborations, and other material products resulting from the pilot investment for a minimum of 5 years after completion of the award.
- Present project findings or portfolio outcomes at institutional events when requested.

Failure to comply with these expectations can result in a loss of funding or restrictions on receipt of future funding.