

Understanding the Matching and Discretionary Grant Portals

A reflection by Dr. Tim Kenyon, Vice-President, Research

In 2019, Brock University introduced [two research funding request portals](#). The portals can be used to request either research matching funds, or discretionary funding support.

This new application tool was widely announced when the portal webpage was introduced, and has been the subject of further communications from time to time. Since its introduction, these request portals have become active sources of funding requests from Brock researchers. They have served to facilitate and coordinate matching requests for many successful grant applications, and to enable the management of many research expenses that could not have been borne by researchers alone. I appreciate, though, that researchers at all levels are often overwhelmed with information and communiqués. It may therefore be worth providing another information update. This brief blog post will focus on what the portals are, why they were introduced, and how they work.

What are they?

The matching and discretionary fund request portal is an internal Brock web tool, built for the Office of Research Services by colleagues in Information Technology Services, and located on the ORS Sharepoint site. It contains information covering a class of funding requests, as well as a web-fillable form enabling researchers to request matching funds for things like grant applications and equipment needs, and discretionary funds for a wide range of (typically smaller) research expenses that might come up at short notice, or be one-offs, or not be associated with grant-funded projects. Submitted requests are quickly collated and reviewed in ORS, and are brought forward to the VPR and AVPR for consideration based on their fit with stated priority principles, and the availability of funds.

Why a portal?

At Brock, as at any other research-intensive institution, internal operating funds are frequently used to support research activity. But what activities can be supported? How much funding is it typical or reasonable to ask for? And how do you ask for it? Answers to these questions are not always known to researchers. Moreover, answers are sometimes known to some researchers, but not to others - either because some have experience with getting resources, or because some are naturally more willing just to ask.

The research funding request portal is a way of levelling this field, letting everyone have access to the same information and access to a common means of making the

request. Information about the kinds of support available and the principles underlying funding decisions can be built directly into the requesting process, too, so that preparing and submitting a request automatically informs the applicant and makes principles transparent. In this way, the process of seeking research support is made both easier and clearer for researchers.

For research staff members, placing this information online frees up considerable time that is otherwise conveyed via phone calls or emails. Having a common point of request submissions also means that a clear and consistent record of what was requested and what was allocated is kept automatically.

Institutionally, this approach opens up support to a wider range of researchers, leading to more activity and helping build capacity by enabling more applications for new research funding. Making the desiderata for funding requests explicit and inviting feedback on them also helps to ensure that the allocation model remains in step with the research community's priorities and values.

How does it work?

The VPR Matching Grant portal focuses on requests for institution-level matching that may be required for, or improve the prospects of, submissions to external grant competitions. This includes competitions held by the individual Tri-Agencies (CIHR, NSERC, SSHRC) as well as collective TIPS programs (NFRF) other funding agencies as well (e.g., Genome Canada, OCE).

The VPR Discretionary Grant portal focuses on a wider range of request types, and especially on unanticipated or urgent research administration, infrastructure, publication, centre or institute creation, or personnel costs that arise, perhaps unexpectedly, when no other source of funding is available. Such costs include anything from publication subventions to major equipment repair or replacement. A more extensive illustrative list is available on the site itself.

In both cases, the idea is for researchers first to canvass their own research grant and PER funds, and to seek contributions from their Department/Centre, other partners, and their Dean, before bringing the request forward via the portal. Making the VPR the last stop means that support comes first from sources located closest to the research project itself.

Of course, for the matching fund portal, it is particularly good to have some such departmental, partner, or decanal commitments in place when bringing forward the request, not least because this can help telegraph broad institutional support for the project to external agencies.

For discretionary portal requests, the importance of other support commitments can vary substantially by request type. Short notice and atypical expense types might mean that it is impossible to line up other funding commitments first, especially when PER and similar personal funding has already been exhausted. The VPR funding's being the only contribution may well be the best approach in such a case. However, for some discretionary expense types, such as major equipment repairs or replacement, a natural approach is to defray costs with a split between as many institutional actors and partners as possible. The discretionary expense budget is unlikely to stretch to solely cover major expenses.

In no case, however, is it a formal requirement to have other supports in place in order to submit a request. The basic requirement is only to *seek* other supports first.

I encourage colleagues to review the Sharepoint portal webpage, and to click through the application process (without submitting, of course, if it is a trial run!), just to see how the system works and what information is shared there. I hope this will be an informative and empowering experience. And, as always, if there is a way to make the process or pages clearer, please do take up the invitation posted there, to contact colleagues in ORS and share suggestions.