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**ALBERTA HERITAGE FOUNDATION
FOR MEDICAL RESEARCH**

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AHFMR Town Hall Meetings

September 2006

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Town Hall Agenda

- Introductory remarks
- Strategic framework development
- Investigator Awards
 - Fixed amount policy
 - Structural changes
- Targeted Investments (areas of interest)
 - Team Grant program
 - Polaris Awards
- Comments and questions



Strategic Framework process

- Background:
 - 4th International Board of Review (2004)
 - Consultations (2005)
 - Strategic Planning (2005/06)
 - \$500 M infusion to Endowment (2006/08)



Trustees decisions

- Investigator awards (2006)
 - Fixed amount policy
 - Structural changes
- Targeted Investments (2006/07)
 - Polaris awards
 - Team grant program



AHFMR Investigator Awards

Supporting people at all stages of
their research careers

AHFMR



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AHFMR Investigator Awards

- AHFMR is committed to using the strategy of funding people (investigators and trainees) as its key approach to investing in health research
- Opportunity for support to be available at all stages of Investigator's career
- Responsible financial management remains as key principle of accountability and planning



AHFMR Investigator Awards

- Want to enrich AHFMR awards and the competitive research environment in AB - providing the best support
- AHFMR and Institutions share overall responsibility for supporting investigators
 - Focus of AHFMR is on research support
 - Focus of Institutions is on career support



AHFMR Investigator Awards

- Key policy change:
 - Amount of AHFMR contribution for Investigator Awards will be fixed by category for duration of award
- New structural changes to be introduced in 2007
- Additional issues related to the Investigator awards under consideration

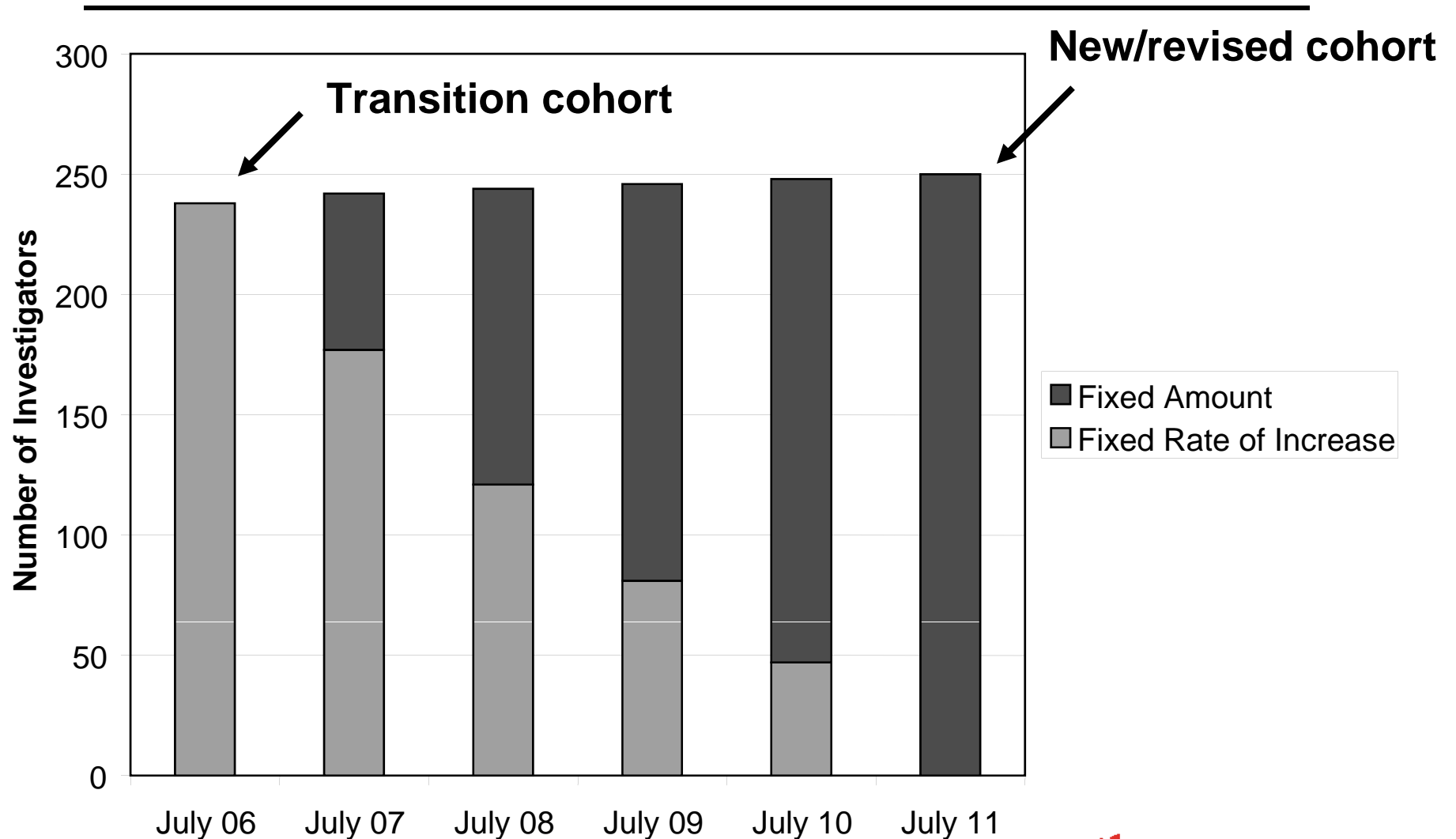


Supporting people: approach

- Trustees agreed on new policy for the support of Investigators: AHFMR will set its contribution to the support of investigators at a fixed rate
 - Phase 1: transition of existing Investigator awards using a **fixed annual rate increase (6%) on 2005/06 AHFMR contribution** for remaining duration of each individual award (July 2006)
 - Phase 2: implementation of **fixed amount awards** policy for new and renewal awards (July 2007)
- Contributions will be pooled



AHFMR Investigators - Transition period (Phases I and II)



Fixed amount awards

- 3 levels of support to be offered:
 - CI, PHI and Scholar
 - Senior Scholar
 - Scientist
- Amounts have been approved and will be announced within a few weeks
- Research Prize remains as a separate contribution to this new arrangement and will continue to be paid directly to investigator



AHFMR awards: Current “Structural” characteristics

- 3 years (renewable once) mentored awards for CI/PHI
- 5 years (non renewable) for Scholars and Senior Scholars
- 5 years (renewable to age 69) for Scientists
- Entry to system within 15 months of AB appointment
- All awards require 75% time protection
- Terminal awards are available (1 or 2 years) if application for further support are unsuccessful



Modified AHFMR Investigator Awards

- Modification to period of eligibility for entry into AHFMR (**24 months**)
- Time protection to remain at 75% except for Scientists (**elimination of the exclusion rule for administrative positions**)
- Mentoring to be strengthened (and **added as a requirement for Scholar level awards**)
- Length of term of AHFMR awards to be **extended to 7 years** for all awards (**exception CI and PHI renewals**) .
- **Terminal awards to be eliminated (once Investigator is part of the “new” cohort)**
- Research Prize: to remain in place for full duration of each award
- **Links to academic career progression** to be redefined within eligibility requirements for Investigator support



AHFMR INVESTIGATOR SUPPORT PROGRAMS

CI/PHI (New)

7 YEARS

- MENTORED
- 75% TIME

SCHOLAR:

7 YEARS

- MENTORED
- 75% TIME

SENIOR SCHOLAR:

7 YEARS

- 75% TIME
- ASSOCIATE PROF.
- AB FIT/BENEFIT

SCIENTIST:

7 YEARS

- FULL PROF.
- LEADERSHIP
- RENEWABLE

PROGRESS
REPORT AT YEAR 4

AHFMR



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AHFMR Investigator Awards

- Other considerations
 - Establishment grant packages: remain as independent request and linked to the investigator awards, and AHFMR will work to optimize their value for leverage and impact
 - Discussions on the evolution of the Research Allowance will be on-going, as will the final determination on the approach to the Stipend Incentive



AHFMR Targeted Initiatives

AHFMR



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AHFMR Targeted Initiatives

- Tremendous health research capacity in AB which has matured significantly in last 25 years
- Building on its core support of individual investigators, AHFMR will develop pro-actively new strategies to provide additional targeted investment opportunities
 - to build on existing strengths or
 - to develop research in areas of importance to AB



AHFMR Targeted Initiatives

- Initial thoughts on
 - Areas of focus or interest for AHFMR
 - Team grants program
 - Polaris Awards



AHFMR Targeted Initiatives

- Principles
 - Excellence remains as key determinant for investment
 - Consistency and alignment with provincial plans and activities will be a consideration for support
 - Potential for health/societal impact
 - Formation of partnerships
 - Fostering collaborative, inter-institutional, multi-disciplinary research



Areas of focus/interest

- Maternal, fetal and child health
- Mental health, mental illness and addictions
- Health system sustainability
- Modern lifestyles and health
- Health issues in rural and remote environments
- Health, genes and the environment
- Health and injury
- Modern techniques and technologies (including IT) and health
- Health and behaviour: disease prevention
- Health and infectious diseases
- Food and health



Team Grant program

- Leadership by internationally recognized high quality investigator
- Multi-institutional (pan-Alberta), multi-disciplinary
- To support complex research project with defined (measurable) health outcomes
- Demonstrated relevance to areas of interest



Team Grant program

- Letters of intent to be requested from the community
 - Define project
 - Identify potential team participants
 - Outline fit of proposal to key requirements of the program
 - Broadly highlight resource requirements
- Late 2006 or early 2007



Polaris awards

- High profile recruitment expected to catalyze significant research thrusts in Alberta with potential high impact
- Recruitment to be a joint effort between AHFMR and Universities



Background

- Award of up to \$1,000,000 per year for up to 10 years from Foundation
- Substantial additional financial contribution from partner(s) will be expected
- Recruitment awards **only** for exceptional investigator (Research Star)
- Leadership to enhance existing research or build activity in developing area of research
- Influence throughout Alberta and nationally



Additional programmatic discussions

- Strategies for investment for the support of Trainees to be reviewed
- Plans are underway to start the development of an Infrastructure support program
- Review of peer-review processes to be undertaken





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