



APPLICATION GUIDE

2024 AgeTech Advance: Healthy Aging Research Program

Version date: May 31, 2024

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1. ABOUT AGE-WELL

AGE-WELL is Canada's Technology and Aging Network. The pan-Canadian network brings together researchers, non-profits, industry, government, care providers, older adults and caregivers to develop and deliver technology-based solutions to support healthy aging. Currently, AGE-WELL includes more than 300 funded and affiliated researchers from 50 universities and research centres across Canada. AGE-WELL works closely with older adults and caregivers to help current and future generations of Canadians enjoy the best quality of life possible.

AGE-WELL's vision: Canada's leadership in technology and aging benefits the world.

Towards this vision, AGE-WELL's mission is:

To develop a community of researchers, older adults, caregivers, partners and future leaders that accelerates the delivery of technology-based solutions that make a meaningful difference in the lives of Canadians.

AGE-WELL funds projects that:

- Are driven by real-world problems and AGE-WELL challenge areas
- Address specific areas of interest to AGE-WELL and its partners and stakeholders
- Focus on innovative technology-based solutions to support older adults and caregivers

- Are user-centred, involving end-users and stakeholders in all stages of research
- Consider not only the technology but the practice, policy, and service delivery models that are needed for the solution to be effective
- Have the potential to lead to economic and social impact
- Help AGE-WELL to achieve its mission

2. PROGRAM OVERVIEW

As AGE-WELL completes its 10-year mandate as a Networks of Centres of Excellence (NCE), the Network is advancing Canada’s aging innovation ecosystem through three interconnected pillars: 1) Capacity-building (EPIC-AT - funded through the CIHR Health Research Training Platform program, 2) Technology adoption (envisAGE - funded through the Strategic Innovation Fund Stream 5); and 3) Research (funded through the Strategic Science Fund) —no one pillar alone is sufficient. The **2024 AgeTech Advance: Healthy Aging Research Program** supports the critical Research pillar of the ecosystem, focusing on technology-enabled solutions that support healthy aging.

According to the World Health Organization (WHO), healthy aging is not solely about longevity, it is about creating the environments and opportunities that enable individuals to pursue what they value throughout their lives. Everybody can experience healthy aging. Being free of disease or infirmity is not a requirement for healthy aging, as many older adults have one or more health conditions that, when well controlled, have little influence on their wellbeing”. Technology plays a crucial role in facilitating healthy aging by providing innovative solutions that empower individuals to manage their health proactively and maintain their well-being, and that contribute to safer, more accessible, or more connected communities.

The 2024 AgeTech Advance: Healthy Aging Research Program will support innovative projects that:

- 1) Advance the development of *novel* technology-enabled solutions or validate *existing* technologies in new environments that enhance older adults’ lives and support healthy aging;
- 2) Support a better understanding of the development, implementation, and adoption of AgeTech such as co-creation approaches with older adults or caregivers, ethics and technology, barriers to AgeTech adoption, development of standards etc. that may strengthen pathways to impact for Canadian AgeTech innovations, and;
- 3) Include and meet the needs of populations at risk and **equity deserving groups** of older adults and care partners.

We strongly encourage submissions from underrepresented groups, including First Nations, Inuit and Metis Peoples of Canada, persons living with disabilities, members of visible minority/racialized groups, and members of LGBTQ2+ communities.

This program seeks to fund mature projects with established protocols that are able to meet their objectives and deliverables within 18 months. It is expected that projects will have the required team members, partners, and stakeholders in place by September 30, 2024.

Award Duration: 18 months, with no possibility for extension. AGE-WELL project funds must be expended in full by March 31, 2026.

Challenge Areas

AGE-WELL-supported projects must have the potential for real-world impact through the development of technology-based solutions that will support older adults and caregivers in their daily lives or through research that supports and strengthens pathways to impact of technology-based solutions. These solutions must be grounded in real-life challenges that older adults and caregivers face.

AGE-WELL's research and knowledge mobilization programs and activities are organized around (8) eight [Challenge Areas](#). Projects funded through the **2024 AgeTech Advance: Healthy Aging Research Program** must align to at least one of the following:

1. Supportive Homes & Communities
2. Health Care & Health Service Delivery
3. Autonomy & Independence
4. Cognitive Health & Dementia
5. Mobility & Transportation
6. Healthy Lifestyles & Wellness
7. Staying Connected
8. Financial Wellness & Employment

While these Challenge Areas cover a broad spectrum of needs, we recognize that there may be emerging challenges not explicitly listed here that are increasingly important. Applicants with innovative solutions addressing other challenge areas are encouraged to apply and must demonstrate how their proposed research contributes to advancing technology-enabled improvements to the well-being and independence of older adults.

3. AVAILABLE FUNDING AND MATCHING FUNDING REQUIREMENT

Funding Available: Up to \$175,000 per project, depending on project scope, matching funding and available program funding.

Matching Funding Requirement: A minimum of 50% of total **eligible project costs** must be provided by the applicant or its partners as cash or in-kind contributions (e.g. to receive the maximum funding amount for this award, total eligible project costs would be at least \$262,500). Matching cash or in-kind funds must be from non-federal sources, such as industry, academic, provincial, or the community. International partners are encouraged, however AGE-WELL funds must remain in Canada. Please refer to the definition of matching funds in Appendix A.

4. PROGRAM REQUIREMENTS

- a) **Maturity of Project:** This program seeks to fund mature projects with established protocols that are able to meet their objectives and deliverables within 18 months. Applications must include a strong plan indicating ability to deliver on proposed objectives within 18 months with no extension requests. This funding program will prioritize projects with a demonstrated track record of progress rather than supporting early-stage or pilot projects. Evidence of previous outcomes and outputs (e.g., pilot data, publications, prototypes, patents) will be important.
- b) **Ethics Approval:** Proof of prior ethics approval and if necessary, a timeline to process amendments for the proposed research will be required with the application.
 - If your proposed project for AGE-WELL funding is part of an ongoing program of research that has already received ethics approval, you *must verify that the proposed activities fall within the scope of the existing approval.*
 - If your proposed project for AGE-WELL funding introduces new activities or elements you *must confirm that they extend the scope of an existing ethics approval* and provide an estimate of the time required to secure an amendment.

- c) **Stage of Technology Development (where applicable):** Projects focused on developing novel technologies must be at **Technology Readiness Level (TRL)** stages 3 to 6.
- d) **Equity, Diversity, and Inclusion:** application and team development must include the following:
- Applications must clearly demonstrate how the project integrates Equity, Diversity, and Inclusion (EDI) principles in its design and execution, including how sex and gender have been considered throughout the project.
 - Applicants are encouraged to review the following resources when considering how to integrate EDI in their research: [Best practices in equity, diversity and inclusion in research practice and design](#)
 - For applications involving Indigenous populations (including First Nations, Inuit and Métis) the research team must include at least one member who self-identifies as Indigenous (First Nations, Inuit or Métis) or demonstrates a track record of meaningful and culturally safe involvement with Indigenous Peoples.
- e) **Inclusion of older adults and caregivers:** AGE-WELL supported projects are expected to engage older adults and/or caregivers in all aspects of the research, including co-creation methods. Teams are expected to have engaged stakeholders in developmental work preceding this application and will be required to demonstrate continued engagement for the duration of the funding term.
- f) **Development of Highly Qualified Personnel (HQP):** HQP are required to be integrated as a part of the research team and their roles in the project should be made explicit. HQP will have affiliated with the proposed project will have access to AGE-WELL's [EPIC training program](#). HQP supported through project funds will be required to participate in AGE-WELL's EPIC training program.
- g) **Partnerships:** Teams are expected to have the appropriate partnerships in place to ensure project goals and objectives are met. Teams will be asked to identify partners involved in the project and their role in the application module. **Partner contributions** may also be a source of cash or in-kind contributions to the project. Where partner contributions are to be counted towards the required matching funding for this call, both cash and in-kind amounts must be included in the budget template. Please refer to the instructions for the application module and the Guidelines for Calculating In-Kind Contributions in Appendix B.
- h) **National Security Guidelines for Research Partnerships:** The Government of Canada has charged federally funded organizations such as AGE-WELL with helping to safeguard the integrity of research against risks to national and economic security, including the theft and misappropriation of research and the unauthorized transfer of ideas, research outcomes and intellectual property. In the case where an application involves **one or more partner organization(s) from the private sector**, including when they participate alongside other partner organizations from the public and/or not-for-profit sectors, the Nominated Principal Applicant must complete the [National Security Guidelines for Research Partnerships' risk assessment form](#) and submit it as part of the application. Please refer to [The National Security Guidelines for Research Partnerships](#) for more information.

5. WHO CAN APPLY

The Nominated Principal Investigator must be an independent researcher affiliated with a Canadian postsecondary institution and/or its affiliated institutions (including hospitals, research institutes and other non-profit organizations with a mandate for health research and/or knowledge translation) at the time of funding.

Projects must involve an **Early Career Researcher (ECR)** as a Principal Investigator (PI) or Co-Principal Investigator (Co-PI). ECRs are highly encouraged to serve as the Nominated PI. An ECR is a researcher within five years of the date of their first independent research-related appointment. Given that career progress for an ECR is particularly vulnerable to normal life circumstances, the eligibility window may be adjusted. See Appendix A for details.

Additional requirements:

1. The Nominated Principal Investigator and Co-Principal Investigator(s) must hold substantive roles in Canada for the duration of the requested grant term.
2. Co-Applicants can be independent researchers, knowledge users, or trainees.
3. The **Ultimate Recipient** (Institution paid) is required to execute an Ultimate Recipient Agreement or equivalent with AGE-WELL to enable the transfer of funding.

An individual cannot submit more than one application to this competition as a Nominated Principal Investigator or Co-Principal Investigator, but can be named as a Co-applicant on more than one project.

AGE-WELL funding cannot be sub-granted by the Principal Investigator. All project team members to receive funds must be identified in the application and meet eligibility requirements to hold AGE-WELL funds specified in this call for proposals.

6. REVIEW AND SELECTION PROCESS

Each application will go through a scientific review conducted by AGE-WELL's Research Management Committee and members of AGE-WELL's College of Reviewers, a relevancy review conducted by the AGE-WELL Older Adult and Caregiver Advisory Committee and members at large, and a strategic review by AGE-WELL leadership.

Applications will be evaluated across the following areas:

- Alignment with the Call for Proposals, AGE-WELL Challenge Areas and program goals
- Scientific excellence and innovation
- Project maturity, feasibility and likelihood project will meet its objectives within 18 months
- Budget and matched funding
- Team and project management with special emphasis on the involvement of ECRs, trainees, older adults and/or caregivers, partnerships, and the integration of EDI principles
- Potential to generate social and/or economic impact
- Development of Highly Qualified Personnel (HQP)

7. HOW TO APPLY

Applications will be accepted through AGE-WELL's Forum Research Portal. A link and instructions for accessing the research portal will be added to the Call for Proposals webpage for this call. Details about the application module sections and instructions are included later in this document.

Contact Information

For general inquiries about this funding opportunity, please contact the AGE-WELL Network Management Office research management team.

Email: applications@agewell-nce.ca

8. APPLICATION MODULE INSTRUCTIONS

The following instructions are meant to assist applicants in the completion of the online application module. Note that the application should be submitted via the AGE-WELL Forum Research Portal by the Nominated Principal Investigator. The application form is not collaborative; therefore, only one user (i.e. Nominated Principal Investigator) can submit an application per project.

A. ADMINISTRATIVE INFORMATION

Project Details

Provide details of the Nominated Principal Investigator and any Co-Principal Investigators, their respective Institutions, and the project title.

Lay Summary

Provide a 250-word lay summary that includes a problem statement, objectives, activities and anticipated impact(s) of the project. The intent of this summary is to communicate the purpose and core elements of the project to audiences who may not have scientific training. This summary may be used for future communications if the proposal is successful.

Keywords

Provide up to six (6) keywords that best describe the main themes and focus areas of your proposal.

Total Funding Requested

Total Matching Funded Confirmed and Requested

Identification of Primary AGE-WELL Challenge Area

SELF- IDENTIFICATION FORM

In line with federal funding agencies, AGE-WELL is asking Nominated Principal Investigators submitting an application for funding competitions to self-identify with information on age, gender, Indigenous identity, visible minority and population group or disability. The online module for this funding opportunity includes a self-identification form consisting of several questions. If you would prefer not to self-identify and/or provide the requested information, you may select "I prefer not to answer" for any or all of the questions.

Please note that the information provided will not be shared. It will not be used to adjudicate applications and will not affect your ranking. This information is solely collected so the platform can monitor the equity performance of programs and design new measures that achieve greater equity, diversity and inclusion in the research enterprise.

The collection of this information is an essential part of efforts to improve EDI in science and research. For further information, please see the Tri-Agency's policy on Self-Identification Data Collection in Support of EDI and Canada's 50-30 Challenge here:

https://science.gc.ca/eic/site/063.nsf/eng/h_97615.html

B. RESEARCH PLAN

The research plan should provide a framework for the operation of the project.

Projects **must** consider equity, diversity, inclusion and indigeneity in terms of research design, team composition and impact of proposed solution.

Applicants are encouraged to review the following resources when considering how to integrate EDI in their research: [Best practices in equity, diversity and inclusion in research practice and design](#)

1. Project Maturity (Maximum of 250 words, approx. 1/2 page)

This program seeks to fund mature projects with established protocols that are able to meet their objectives and deliverables within 18 months. This funding program will prioritize projects with a demonstrated track record of progress rather than supporting early-stage or pilot projects. Evidence of previous outcomes and outputs (e.g., pilot data, publications, prototypes, patents) will be important.

Clearly outline the current stage of development and key accomplishments of the existing project. How will the proposed project build upon this foundation to enhance and achieve its goals?

For projects developing novel technology: Provide evidence of the current technology readiness level (TRL) stage and provide a roadmap to achieve higher TRLs within the project timeframe.

Ethics Approval: This funding opportunity requires proof of prior ethics approval and a timeline to process necessary amendments for the proposed research. Please append a copy of REB approval to your application.

- If your proposed project for AGE-WELL funding is part of an ongoing program of research that has already received ethics approval, you *must verify that the proposed activities fall within the scope of the existing approval.*
- If your proposed project for AGE-WELL funding introduces new activities or elements, you *must confirm that they extend the scope of an existing ethics approval (rather than require an entirely new research ethic's protocol)* and provide an estimate of the time required to secure an amendment.

2. Background and Rationale (Maximum of 500 words, approx. 1 page (excluding reference list))

Outline the planned activities and provide an overview of the latest advancements in the field, highlighting existing goals, potential solutions and the specific needs that will be addressed by your research. Please include references as a separate uploaded document.

3. Objectives, Methods and Deliverables (Maximum of 1,500 words, approx. 3 pages)

3.1. Objectives

Provide an overview of research plans, including the scope of the proposed 18-month project, as well as a brief statement of longer-term objectives (multi-year) that positions the present project within a larger project plan. Identify and describe your research questions and objectives for the proposed 18-month project.

Describe how the Challenge Area identified in Section A will be addressed by this project.

3.2 Approach and methods

Describe the approaches and methodologies that will be used in the project to achieve its objectives. This section must describe how objectives identified in section 3.1 will be met by the proposed 18-month program of research.

Describe how older adults and/or care partners will be involved in the research, including co-creation methods.

Describe how sex and gender will be considered in the research, methods, analysis and interpretation or explain why sex and/or gender are not applicable to the research proposal.

3.3 Innovation and impact

Describe the novelty and originality of the proposed program of research.

Describe in detail the anticipated scientific outcomes and potential impact of the proposed project, including how your project will 'push the scientific envelope' in the research field. This should include the relationship of the research program to similar work conducted elsewhere in Canada and internationally.

Outline your **knowledge mobilization** or commercialization strategy, if relevant. Specifically, describe the mechanisms you intend to utilize to engage stakeholders and disseminate your key findings to ensure their integration into relevant communities, or to move your technology towards its intended market.

How will you aim to support the broader impact and practical application of the research outcomes? How will your project encourage collaboration between the user sectors, providing specific examples, such as applying research findings to technology advancement, market development, health systems improvement, or public policy innovation.

3.4 Timelines and deliverables/milestones

Describe major milestones and deliverables for this 18-month project.

Note that graphics cannot be pasted into the online module.

4. Project Team and Partnerships (Maximum of 500 words, 1 page, plus table)

Project teams must involve an Early Career Researcher (ECR) as a Principal Investigator (PI) or Co-Principal Investigator (Co-PI) and are highly encouraged to serve as the Nominated PI.

Projects are encouraged to include team members from more than one discipline. Projects must identify a Knowledge User with relevant lived experience and expertise. Applicants must consider the development of trainees or Highly Qualified Personnel (HQP) through their inclusion as team members. A detailed plan of how trainees will be involved in the research and benefit from being part of the project should be included.

Applicants are encouraged to consider their processes of identifying, recruiting and selecting research team personnel based on equity, diversity and inclusion best practices as one means to enhance excellence in research, training and outreach.

If partner organizations are included in proposed research project plans, including as part of any knowledge mobilization or commercialization plans, these organizations and their activities should be described in the application. Partners contributing matching funding should also be described.

Briefly describe the expertise, role and contributions of all project personnel listed in the table provided in the application module.

Project Personnel Table: List all identified project team members, including Principal Investigator (PI), Co-Principal Investigator (Co-PI), Collaborators, Highly Qualified Personnel (HQP), Knowledge User(s) and Partners.

Biosketches: A brief bio (free form, maximum 1,500 words) for all identified PIs and Co-PIs must be appended to the application and should include:

- 1) Name: Full name and contact information
- 2) Academic Affiliation: The institution or organization where you currently hold a position.
- 3) Academic Title: Your current academic title or position, such as Professor, Assistant Professor, Researcher, etc.
- 4) Education: Briefly list your highest academic degrees, including the institution, degree earned, and field of study.
- 5) Research Interests: Summarize your primary areas of research interest or expertise.
- 6) Professional Experience: Highlight any relevant professional experiences, including previous academic appointments, research positions, or relevant industry experience.
- 7) Publications: Optionally, you may include a selection of your most significant publications, particularly if they are relevant to your current research interests.
- 8) Awards and Honors: Mention any notable awards, honors, or recognitions you have received in your academic career.

Letters of Support: Letters of support are required if partners are providing contributions to be used to meet the matching funding requirement. Letters of Support from key partners not providing matching funding are encouraged but not required. Please refer to the Budget and Budget Justification section.

Research Partnership Risk Assessment: In the case where an application involves one or more partner organization(s) from the private sector, including when they participate alongside other partner organizations from the public and/or not-for-profit sectors, the Nominated Principal Investigator must complete the [National Security Guidelines for Research Partnerships' risk assessment form](#) and submit it as part of the application. Please refer to [The National Security Guidelines for Research Partnerships](#) for more information.

C. BUDGET AND BUDGET JUSTIFICATION

Complete and upload an overall 18-month project budget using the template spreadsheet provided, as well as a free form budget justification detailing proposed project expenditures / **eligible project costs**, including all funds cash and in-kind to be used for matching funds (see below for more detail).

This must include how AGE-WELL funding differs from and is unique from other sources of funding already in place for this project.

Note that AGE-WELL funding cannot be sub-granted by a Principal Investigator. All project team members to receive funds must be identified in the application and meet eligibility requirements to hold AGE-WELL funds specified in this call for proposals.

Eligible project costs include expenses related to:

- Incremental research and knowledge mobilization costs, including salaries to highly qualified personnel (HQP), including students, postdoctoral fellows, and research associates
- Professional and technical services or contracts
- Equipment
- Materials and supplies
- Research-related travel

Matching Funding Requirement: A minimum of 50% of total eligible project costs must be provided by the applicant or its partners as cash or in-kind contributions (e.g. to receive the maximum funding amount for this award, total eligible project costs would be at least \$262,500). Matching cash or in-kind funds must be from non-federal sources, including industry, academic, provincial, or community-based sources. International partners are encouraged, however AGE-WELL funds must remain in Canada.

Please refer to the definition of matching funds in Appendix A.

Partner contributions may be a source of cash or in-kind contributions to the project. Where partner contributions are to be counted towards the required *matched funding* for this call, both cash and in-kind amounts must be included in the budget template outlining eligible project costs and described in the budget justification. Matching funds must be identified as confirmed or requested. If matching funds are *requested*, funds must be confirmed prior to final confirmation of award value from AGE-WELL.

Letters of Support for Matching Funding

For matching cash or in-kind contributions, a letter of support is required from the matching funding source outlining the specific value of the funding used for the match. In the case of in-kind contributions, the method for calculating the value must be described and follow ISED guidelines. Please refer to Guidelines for Calculating In-Kind Contributions in Appendix B.

D. SUPPORTING DOCUMENTS (UPLOADS)

- References
- Ethics Approval Documentation
- Bios for Nominated Principal Investigators and Co-Principal Investigators
- Research Partnership Risk Assessment Forum (if applicable)
- Budget Template
- Budget Justification
- Letters of Support

APPENDIX A - Glossary

“Collaborators” are individuals who contribute to the delivery of activities. “International Collaborators” are individuals contributing from outside of Canada.

“Early Career Researcher” (ECR) is a researcher within five years of the date of their first independent research-related appointment. Given that career progress for an ECR is particularly vulnerable to normal life circumstances, the eligibility window may be adjusted as follows:

- a) eligible leaves (e.g., maternity, parental, medical, family medical, bereavement) will extend ECR status (i.e., will not be counted towards the maximum) and credited as twice the amount of time taken;
- b) no adjustments are provided for professional leaves (e.g., training, sabbatical, administrative). No adjustments are provided for time spent on non-research related duties or for the pursuit of non-research related career activities.

“Eligible Project Costs” means those incurred by a researcher at an Ultimate Recipient organization that are required to complete the project. Eligible project costs in the research costs fall into specific categories (see Budget section above) and align to federal Tri-Agency expense categories.

“Equity” is about fairness. It is about deliberate efforts to ensure processes for allocating resources and decision-making are fair and do not discriminate on the basis of personal characteristics. Equity is a summative concept that is the outcome of deliberate efforts to create more diverse and inclusive approaches to organizational practices and to program delivery, including research. Equity results in parity of outcomes for members of under-represented groups or for those who face discrimination.

“Diversity” is about representation. It brings a focus to the representation of groups that have traditionally been under-represented and have faced systemic discrimination in spheres as varied as employment, participation in clinical research, or in attracting research funding. Diversity is a dynamic concept. Some individuals may identify in ways that do not change over time. For others, the ways in which they identify may evolve over time. For example, sexual identity may change over time.

“Inclusion” is about belonging. It is socially constructed. It brings into focus the climate or culture that fosters belonging in workplaces or when participating in activities or programs. Belonging cannot be mandated; it is experienced. While diversity is measured more objectively, inclusion relies on qualitative metrics.

“Equity Deserving Groups” means racialized persons (including Black Canadians), persons living with disabilities (including invisible and episodic disabilities), Canadians who identify as 2SLGBTQI+, and First Nations, Inuit and Métis peoples as founding peoples of Canada who are under-represented in positions of economic influence and leadership.

“Fair Market Value” means the price that would be agreed to in an open and unrestricted market between knowledgeable and willing parties dealing at arm’s length, who are fully informed and not under any compulsion to transact.

“Highly Qualified Personnel (HQP)” are trainees, specialized staff, and research staff, such as undergraduate and graduate students, postdoctoral fellows, research associates, research assistants, and technicians.

“International Collaborators” means an individual, organization, or entity that engages in cooperative efforts or partnerships across national borders to achieve common goals, solve problems, conduct

research, or advance mutual interests. International collaboration often involves sharing resources, expertise, and knowledge among participants from different countries or regions.

“Knowledge Mobilization” means the reciprocal and complementary flow and uptake of research knowledge between researchers, knowledge brokers and knowledge users—both within and beyond academia—in such a way that may benefit users and create positive impacts within Canada and/or internationally.

“Knowledge Users” are individuals who use a particular product (including a knowledge product) or service. They can be, but are not limited to, a practitioner, policy-maker, educator, decision-maker, health care administrator, community leader, or an individual in a charity, patient group, private sector organization, community, or media outlet.

“Leveraged Funds” means existing investments in the science, technology and innovation ecosystem being leveraged to further the objectives of the funded recipient. Includes cash or in-kind from federally-funded entities (e.g., CFI, organizations primarily funded by the federal government) and from federal departments and agencies.

Examples of leveraged funds:

- Existing NSERC, SSHRC or CIHR projects with work that will be complimentary to the AGE-WELL funded project.
- The rental value of CFI-funded equipment that is essential to the delivery of AGE-WELL funded project activities.

“Matching Funding” means new, incremental contributions (**of cash or in-kind**) for *eligible costs* which would not exist in the absence of the AGE-WELL award. Eligible sources include non-federal partners or revenues (including donations).

Examples of matched funds:

- Private-sector or non-profit partner contributions earmarked to advance specific AGE-WELL-funded project activities
- Provincial awards to support the advancement of AGE-WELL-funded activities or research projects in that province

Ineligible to be considered matched funds:

- Leveraged Funds (see definition)
- funding from federally-funded entities (e.g., CFI, Digital Research Alliance of Canada, Tr-Councils, and organizations primarily funded by the federal government) and from federal departments and agencies.
- funding already used to meet a matching requirement for a federal program.

“Partner” means an organization that helps the project team carry out its mandate and entities involved in the delivery of programs or projects. In the case where an application involves *one or more partner organization from the private sector*, including when they participate alongside other partner organizations from the public and/or not-for-profit sectors, the Nominated Principal Investigator must complete the [National Security Guidelines for Research Partnerships’ risk assessment form](#) and submit it as part of the application.

“Partner Funding / Partner Contributions”, depending on the nature, can be considered either:

- Leveraged Funds (see definition)
- Matched Funds (see definition)

“Research Project” means a focused investigation aimed at exploring, understanding, or discovering new information or solutions within a specific area of study. The ultimate goal of a research project is to contribute new knowledge, insights, or solutions to the field of study and to disseminate findings.

“Technology readiness levels (TRLs)” describe the different stages of pre-commercial development of technologies. They provide a way of estimating the maturity of technologies. TRLs 3- 6 refers to technologies at or between proof of concept to demonstration in simulated environments. Also see: <https://ised-isde.canada.ca/site/innovation-canada/en/technology-readiness-levels>

“Training Opportunity” means a short-to-medium term engagement that exposes trainees to new knowledge and skills that are generally intended to create or enhance professional skills. It includes but is not limited to internships, placements, and time-limited positions in labs with specific training outcomes.

“Ultimate Recipient” means an organization approved for funding by the AGE-WELL. AGE-WELL distributes funds to Ultimate Recipients through the use of an Ultimate Recipient Agreement (or equivalent).

APPENDIX B - Guidelines for calculating the value of in-kind contributions

In-kind contributions are defined as cash-equivalent goods or services that represent an incremental expense that would not otherwise be incurred, and which would have to be paid for with cash if not provided.

In-kind contributions:

- Must be relevant and central to the proposed research activities of the applicant;
- Must be eligible expenses as per the funding program guidelines; and
- Cannot have been used to fulfill the matching requirements of other federal programs.

The nature of an in-kind contribution and its valuation must be detailed

Calculation table

The table below is a non-exhaustive list of in-kind contributions, with an indication of how to calculate their value.

Category	Acceptable valuation method	Not acceptable
Access to unique databases	Incremental cost of access	Cost of developing or maintaining database
Analytical and other services	Internal cost of services	Commercial cost of access
Equipment	Donated (used) <ul style="list-style-type: none"> • Fair market value • Company book value • Donated (new) • Selling price to most favoured customer (if stock item) • Cost of manufacture (if one of a kind) • Loaned • Rental equivalent based on depreciation • Rental equivalent to highest-volume rate 	List price or discounted list price Rental equivalents exceeding accepted values had the equipment been donated or sold Development costs
Hospitality	Cost	Alcoholic refreshments
Materials	<ul style="list-style-type: none"> • Unit cost of production for commercial products • Selling price to most favoured customer • Price for internal transfers • Cost of production of prototypes and samples 	Development costs
Intellectual property	Fair market value of licencing and royalties	<ul style="list-style-type: none"> • Cost of maintenance and litigation • Licensing fees paid to partners

Professional and technical service contracts	Cost	
Salaries (General)	Actual salary cost (including benefits).	Salary overheads, external charge-out or consultant rates, cost of benefits outside the average market range.
Salaries (Academic researcher)	Actual costs to the institution for release time from teaching duties (e.g., the cost of hiring a sessional instructor for course release may be counted).	Academic faculty salaries
Salaries (Clinicians)	Portion of their salary for time devoted to working on SSF projects that are additional to their routine (including teaching or service work) activities	Remuneration already received for teaching or service work
Student stipends	Cost of the stipend equivalent to the portion of their time working on SSF work	The portion of time dedicated to non-SSF work
Software	<ul style="list-style-type: none"> • Most-favoured-customer cost for 1 licence per software package • Cost of equivalent commercial product (where donated software is not commercially available) • Cost of training and support (at the university/college site) for software by industrial partner personnel 	Development costs
Travel costs	Travel and accommodation costs (generally aligned with the National Joint Council's Travel Directive or similar institutional directive)	Travel costs
Use of facilities	<ul style="list-style-type: none"> • Cost of access to the facility • Internal rates for use of specialized equipment • Internal rates for value of lost production, resulting from downtime 	