SUPPLEMENTARY APPLICATION GUIDE
Accelerating Innovations into Care - Tech for Healthy Aging

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1. PURPOSE

AGE-WELL and Alberta Innovates have partnered to co-deliver the **Accelerating Innovations into Care - Tech for Healthy Aging**, a priority stream under Alberta Innovates' AICE Concepts and AICE Validate programs.   This supplemental guide is to provide details on the additional requirements and special terms applicable specifically to the AICE–Health Aging priority stream, in addition to those outlined in the AICE Concepts and AICE Validate Program Guides.

2. 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

3. PROGRAM STREAM OVERVIEW

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 AICE Tech for Healthy Aging priority stream is powered by AGE-WELL and Alberta Innovates. The intent of this stream is to help advance and validate technologies (i.e. AgeTech) that help older adults achieve better health and quality of life as they age in the place of their choosing, or support caregivers.

In the broadest sense, AgeTech could be any type of technology that improves the lives of older adults and their caregivers.

Technologies could include, but are not limited to:

- Digital health tools
- Assistive devices
- Telehealth technologies
- Health monitoring technologies
- Fall detection, prevention and mitigation technologies
- Technology-based tools to reduce social isolation

The AICE Tech for Healthy Aging program stream will support projects that align to Alberta Innovates' AICE Concepts or AICE Validate program criteria AND:

1) Advance *novel* technology-enabled solutions that enhance older adults' lives and support healthy aging;
2) Align to at least one of AGE-WELL's Challenge areas described below and;
3) Consider how to 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.

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. 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 **AICE - Tech for Healthy Aging** priority stream 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.

4. AGE-WELL Funding

Successful projects will be co-funded by Alberta Innovates and AGE-WELL. Successful Applicants will need to enter into separate funding agreements with AGE-WELL (in addition to Alberta Innovates standard Investment Agreement) to receive AGE-WELL funding allocations.

AGE-WELL Funding Considerations:

- AGE-WELL funds must be expended by the Applicant in full by March 31, 2026.
- The Applicant ("**Ultimate Recipient**") is required to execute an Ultimate Recipient Agreement or equivalent with AGE-WELL to enable the transfer of funding.
- **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 organization(s) from the private sector**, including when they participate alongside other partner organizations from the public and/or not-for-profit sectors, any **successful Applicants** must complete the National Security Guidelines for Research Partnerships' risk assessment form and submit it to AGE-WELL for review prior to transfer of funding. Please refer to The National Security Guidelines for Research Partnerships for more information.
- **For researchers applying for this program stream**: AGE-WELL funding cannot be sub-granted by the Applicant. All project team members to hold funds must be identified in the application and meet eligibility requirements to hold AGE-WELL. This requirement does not apply to subcontractors or vendors providing services for the project.

Eligible project costs that can be covered by AGE-WELL funding **include**:

- 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 (e.g. service delivery contract)
- Equipment
- Materials and supplies
- Project-related travel, including related to the in-person event(s)/workshop(s)

Project costs ineligible for AGE-WELL funding include:

- Costs associated with the construction of, or major renovation to building and structures
- Flat-rate charges for overhead costs (indirect costs)
- Alcoholic refreshments
- Flat-rate charges for overhead costs (indirect costs)
- The purchase or lease of land
- The acquisition of major research equipment (with a net federal cost above $250,000). In exceptional circumstances, AGE-WELL will consider on a case-by-case basis the need for Recipients to surpass this amount, provided that there is a clear rationale explaining how the cost would not be considered major research equipment in the area of activities
- Costs associated with the lobbying of federal officials or public office holders (including by hiring outside firms or consultants)

5. ADDITIONAL PROGRAM REQUIREMENTS

a) **Technology Readiness Level:** This program stream seeks to fund projects focused on a technology at Technology Readiness Level of 2 to 6.
b) **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.
  - For proposals that include research, 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 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.
c) **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.

d) **Development of <u>Highly Qualified Personnel (HQP)</u>:** HQP affiliated with the proposed project will have access to AGE-WELL's <u>EPIC training program</u>.

e) **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.

Additional requirements:

1. The Applicant must continue to be based in and hold substantive roles in Alberta for the duration of the requested grant term.

6. ADDITIONAL REVIEW AND SELECTION PROCESS

In addition to the standard AICE review process, Applications will be evaluated for:

- Alignment with the AGE-WELL Challenge Areas
- involvement of older adults and/or caregivers on the team and project

7. AGE-WELL CONTACT

For general inquiries about alignment with AGE-WELL's goals for this funding opportunity, please contact the AGE-WELL Network Management Office research management team. Email: applications@agewell-nce.ca

8. SUPPLEMENTAL APPLICATION MODULE INSTRUCTIONS

The following instructions are meant to assist applicants in the completion of the Supplementary Application Module that needs to be completed and uploaded as part of a complete Application via Alberta Innovates grant portal

SELF- IDENTIFICATION FORM

In line with federal funding agencies, AGE-WELL is asking Applicants submitting an application for funding competitions to submit the supplementary Self Identification form in order 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** but must still submit the provided form with your application for AGE-WELL's records.

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

A. ADMINISTRATIVE INFORMATION
Identification of Primary AGE-WELL Challenge Area

B. PROJECT PLAN

Projects should consider equity, diversity, inclusion and indigeneity in terms of project design, team composition and impact of proposed solution.

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

1. Challenge Area Alignment (Maximum of 750 words, approx. 1.5 pages)

1.1. Objectives

Provide a brief statement of objectives that would enable this project to support healthy aging in the short term and long term.

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

1.2 Approach

Describe how older adults and/or caregivers will be involved in the project (e.g., research and development, guidance, validation etc.). Applicants must identify a Knowledge User with relevant lived experience and expertise.

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 proposal.

Describe how your project will encourage collaboration between sectors, if applicable (e.g., community-based organizations and industry). If partner organizations are included in proposed project plans, including as part of any knowledge mobilization or commercialization plans, these organizations and their activities should be described in the application.

Project Team and Partnerships: Please ensure that the main AICE: Validate Application provides sufficient information about the team and stakeholders supporting your project, including any Knowledge Users (i.e., older adults) or those providing letters of support.

C. Use of Funds: AGE-WELL Funding (Maximum of 500 words, approx. 1 page)

Please describe in narrative form the anticipated use of AGE-WELL Funding in this project. This narrative should reference entries in the Work Plan and Budget Workbook. You should clearly describe the types of anticipated expenses and activities that AGE-WELL funding will help support.

D. SUPPORTING DOCUMENTS (UPLOADS)

- References (PDF)

APPENDIX A - Glossary

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

"**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 based at post-secondary institutions, such as undergraduate and graduate students, postdoctoral fellows, research associates, research assistants, and technicians based at post-secondary institutions.

"**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.

"**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.

"**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 project 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)** • 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	• 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	• 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 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	• Most-favoured-customer cost for 1 license 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	• Cost of access to the facility • Internal rates for use of specialized equipment • Internal rates for value of lost production, resulting from downtime	