



March 7, 2024

Carol A. Barnes, PhD

Director, Evelyn F. McKnight Brain Institute

Evelyn F. McKnight Chair for Learning and Memory in Aging | University of Arizona Regents Professor
University of Arizona | PO Box 245115 | Tucson, AZ 85724

*Established by
Evelyn F. McKnight
to Alleviate Memory Loss
in the Aging*

Dear Dr. Barnes,

At the February 20, 2024, meeting of the McKnight Brain Research Foundation (MBRF), the trustees reviewed the 2023 annual report submitted by the Evelyn F. McKnight Brain Institute (EMBI) of the University of Arizona (UA). The report is a comprehensive overview of the productivity, collaborations, and impressive scientific accomplishments of the EMBI in 2023.

The UA EMBI continues to thrive under Dr. Barnes' leadership, and her international presence and oversight of many exciting initiatives, including the Precision Aging Network (PAN) and the Resiliency and Reserve Collaboratory, which held its final workshop this year. The trustees are impressed by the great progress made with the *MindCrowd* participants surpassing 447,000 test takers.

Overall, the trustees commend the EMBI members' active engagement in grant submissions and success across multiple important areas that include drug discovery, data collection and new technology, as demonstrated by some of the recent research accomplishments by Drs. Ryan, Hay, Brinton, Mehl, and others. A remarkable level of productivity, publications, patents, and awards demonstrate the strong collaboration across the EMBI members and its affiliates, resulting in 25 existing awards and 9 new awards in 2023. The trustees commend the large number of partnerships with other EMBIs and research institutions, including PAN; the "Revitalizing Cognition project" co-led by Drs. Alexander, Bowers, and Woods (University of Florida); and multiple collaborations with Dr. Huntelman (TGEN).

As a follow up to this letter, the trustees request an updated organizational chart of the EMBI. We note that a similar request was made last year. Additionally, the trustees would appreciate receiving a letter from the Associate Director of the EMBI – which we hope to receive each year as part of the report – and updates on the advisory committee in light of last year's letter stating that Dr. Barnes was considering restructuring this group. The trustees also noted the large number of trainees and request that you provide more information on the EMBI's strategies and programs related to the education and mentorship of early career investigators, including a better understanding of who oversees training grants, such as K awards. Finally, the trustees seek a description of the EMBI's leadership structure supporting the Director and any pathways or opportunities for leadership development for more senior members of the EMBI.

The trustees also noted the significant progress made this past year to meet the balance of the match requirement for the EMBI's endowment. Given the remaining balance of approximately \$174,061, the MBRF anticipates the 2024 annual report will reflect completion of the matching fund requirement and the EMBI will receive our appreciation for this dedicated effort and commitment.

The trustees send their collective appreciation to you for your leadership and the tremendous efforts in continuing to advance the research initiatives of the MBRF, leading to the understanding and alleviation of age-related cognitive decline and memory loss.

Sincerely,

Angelika Schlanger

Angelika Schlanger, PhD | Executive Director | MBRF

CC: Robert Robbins, MD, President, UA; J.P. Rocznik, President and CEO, UA Foundation; Lee Ryan, PhD, EMBI Associate Director; Peggy Nolt, EMBI Executive Assistant and Administrator; MBRF Trustees

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Evelyn F. McKnight Brain Institute at University of Arizona

Responses provided by Carol Barnes, PhD, via email

The original purpose of the Tucson External Advisors was to offer guidance on the way in which the expendable McKnight endowment match funds were to be dispersed. Because these “tax match dollars needed to be completely spent within a year” this required careful monitoring, and these individuals were very helpful with respect to my decision-making process at the time. The current funds available to the Tucson EMBI are now from interest accrued from the endowment, and are at a significantly lower level, and the Director can easily make decisions on the allocation of these dollars on the basis of the framework that was previously established. This is why I believe that the role of the External Advisors, as originally conceived, is no longer necessary, and they are removed now from my Organizational Chart (see attached).

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To address educational strategies, the large number of trainees are all being mentored and directed by the programs that support their positions in the various Departments across campus. I do not have on salary a specific Education Director who oversees all the graduate and postdoctoral students, and this would be a very difficult position to fill, as these students are highly multidisciplinary with very specific individual fields of study. The young faculty in the Psychology Department in EMBI all have been assigned senior mentors to monitor their career progress. I am the only holder of a T32 training grant in Aging, and as PI I oversee the postdoctoral trainees that are filling slots in this program.

....

Thanks for the clarification on the report, that both Lee and I will contribute to constructing the Yearly Executive Letter beginning next year.

...

With respect to the question of eventual leadership transition, Lee and I have been speaking quite a bit about this recently, and have an idea that we will want to run by the Trustees for their consideration in the future. My first thought about who would be the perfect younger McKnight scientist to lead the Tucson EMBI, would, of course, be my student Sara Burke. But I would not think of trying to steal her from Gainesville, and there would be two positions involved, not just one.

Lee and I have discussed at great length a possible leadership transition plan for the Tucson EMBI when it is time for me to leave my position as Director. Lee has thought a lot about her future plans after she has stepped down as Head of the Psychology Department, and she is not

thinking of taking on another major Administrative role upon her departure. At this point there are no obvious senior individuals (or those a bit more junior) who would be able or willing to take on the EMBI from within the University of Arizona. This, of course, could change, but one thing we are both potentially excited about is the possibility of attracting a senior scientist to Tucson that has appropriate qualifications in the normally aging brain and cognition, and we have some concrete ideas about who this could be. But right now, the atmosphere at the University of Arizona, because of its financial difficulties recently, has been discouraging with respect to any new recruitment. If we were able to attract a senior individual who wanted to take this on, we would have to create a plan for how this would be funded. And we are continuing to think about how to accomplish this, but truthfully have not figured out exactly how to make this happen. This is just to let you know that it isn't because we are not thinking about the future, but instead that we currently have nothing concrete to propose. I know this is less than what you may have hoped for, but it is as truthful an answer as I can give. I have no intention of stepping down as Director in the near future, in case that was a question that you didn't want to directly ask.

Response provided by Craig Barker, CPA, via email

Dear Melanie and Angelika:

I hope you both are well.

Here is your quarterly report. Please note that during the quarter ended March 31, 2024:

\$51,694 Amount raised towards the \$5MM match.

\$122, 366 Amount remaining to be raised towards the \$5MM match.

Please let me know if you have any questions.

Best wishes,

Craig

J. Craig Barker, CPA
Sr. VP Financial Services and CFO
University of Arizona Foundation
1111 N. Cherry Avenue
Tucson, AZ 85721