

SUNTRUST

Date: April 21, 2021

To: McKnight Brain Research Foundation Trustees
Amy Porter, Executive Director
Henry H. Raattama, Jr. Legal Counsel

From: Melanie Cianciotto

Subject: MBRF Meeting: April 30, 2021

Enclosed you will find the meeting package for the April 30, 2021 Trustee's meeting to be held via WebEx. Included in this package for your review are the following items: the agenda, final draft of the minutes of the February 26, 2021 Trustee's meeting, minimum distribution calculation and other supporting material for the agenda items. The investment review will be sent under separate cover.

/mc

cc: Mike Hill

Enclosures

Leadership Meeting w/ MBRF Trustees
April 29th, 2021
11:30 pm – 12:50 pm

1. Introductions

Trustees

Michael Dockery, M.D.
J.Lee Dockery, M.D.
Madhav Thambisetty, M.D.
Patricia A. Boyle, Ph.D.
Allison Brashear, M.D., M.B.A.
Richard S. Isaacson, M.D.
Susan L. Pekarske, M.D.
Gene R. Ryerson, M.D.
Robert M. Wah, M.D.
Melanie A. Cianciotto, Corp.Trustee
Amy Porter, Exec.Director

Leadership Council

Ralph Sacco, M.D.,M.S. - UM
Tatjana Rundek, M.D., Ph.D. - UM
Bonnie Levin, Ph.D. - UM
Carol Barnes, Ph.D.- UA
Lee Ryan, Ph.D. - UA
Todd Golde, Ph.D. - UF
Jennifer Bizon, Ph.D. - UF
Ronald Cohen, Ph.D. - UF
Ronald Lazar, M.D.,. Ph.D. - UAB
Eric Roberson, M.D., Ph.D. - UAB
David Standaert, M.D.,Ph.D. - UAB

2. Initial Impressions on first day of the Virtual Meeting

3. Multi-Institutional Meetings

- Next In-person Meeting: Arizona March 23-25, 2022 or April 20-22, 2022
- Should we consider changing the meeting to every other year with interval virtual meetings?

4. Update on Inter-Institutional Collaborations identified in First Inter-Institutional meeting (2008), and as recently as the 0th meeting (2018), What has happened to these focus groups, and what has happened to these topics?

A. 2008 Meeting

1. Stem Cells and Neurogenesis
2. Glial Biology
3. Imaging: fMRI/systems, Microscopy (Molecular)
4. Genetics, Epigenetics, Model Systems
5. Cellular Plasticity – Place Cells Synapses
6. Human Cognitive and Systems Neuroscience

B. 2018 Meeting

- | | |
|--------------------------------------|--|
| 1. Perirhinal Cortex | 7. Cerebral Blood Flow |
| 2. Vascular Risk Factors | 8. Epigenetics and emerging areas in Molecular Profiling |
| 3. Inflammation/Blood Brain Barrier | 9. Sleep |
| 4. Exercise | 10. Cognitive Training and Enhancement |
| 5. Neuroimaging Brain Aging registry | 11. McKnight Brain Aging Registry |
| 6. Stress | |

5. Suggestions for Annual Report Revision

6. Report from Foundation

- Education Committee
- Communication Committee

7. Other Updates

MCKNIGHT BRAIN RESEARCH FOUNDATION (MBRF)

Meeting of the Board of Trustees

Friday, April 30, 2021

11:00 am EDT – 4:00 pm EDT

Via WebEx

AGENDA

11:00 am	1.	Call to Order/Roll Call/Welcome	Dr. Michael Dockery
ACTION	2.	Approval of Minutes, February 26, 2021	Dr. Michael Dockery
	3.	Investment Review	Mr. Michael Hill
	4.	Chairman's Report	Dr. Michael Dockery
ACTION		a. Completed Agreement with AFAR	
ACTION		b. 2021 – 22 Goals for the Executive Director	
ACTION		c. Naming of the Mid-Career Research Award	
		d. Recognition of Dr. Gene Ryerson	Dr. Sue Pekarske Dr. Mike Dockery Dr. Lee Dockery Ms. Amy Porter
	5.	Executive Director's Report	
	6.	Corporate Trustee's Report	Ms. Melanie Cianciotto
		a. Minimum Distribution Calculation	
		b. Gifts and Grants Report	
		c. Travel Award Program Report	
		d. Operating Expenses & Budget	
	7.	Committee Reports	
		a. Membership and Governance	Dr. Sue Pekarske
		1. Updated Activity Timeline	
		b. Finance Committee	Dr. Gene Ryerson
		1. Updated Activity Timeline	
		2. Updated UF Financials	
ACTION		3. Updated UAB Financials	
		4. Annual Operating Budget Approval	
		c. Communications Committee	Dr. Richard Isaacson
		1. Updated Activity Timeline	
		2. Update on Sanjay Gupta Video Promotion	Ms. Valerie Patmintra
		d. Education Committee	Dr. Robert Wah
		1. Updated Activity Timeline	
		2. Update on PCP Section of the Website	Ms. Valerie Patmintra
		e. Research Committee	Dr. Madhav Thambisetty
ACTION		1. Updated Activity Timeline	
ACTION		2. MBAR Update and No Cost Extension	
		3. A Pilot Intervention with Near Infrared Stimulation: Revitalizing Cognition in Older Adults Update and No Cost Extension	
	8.	Future Meetings and Events (Attachment 1)	Ms. Melanie Cianciotto
	9.	Other Business	Dr. Michael Dockery
4:00 pm ACTION	10.	Adjournment	Dr. Michael Dockery

**MCKNIGHT BRAIN RESEARCH FOUNDATION (MBRF)
FUTURE MEETINGS AND EVENTS**

Meetings

April 28, 2021

12:00 EDT – 1:00 EDT WebEx meeting with Dr. Ralph Sacco and Dr. Tanja Rundek

1:00 EDT – 5:00 EDT Inter-Institutional Meeting

April 29, 2021

11:30 EDT – 12:45 EDT MBRF Leadership Council Meeting

1:00 EDT – 5:00 EDT Inter-Institutional Meeting

April 30, 2021

11:00 EDT – 4:00 EDT MBRF Trustees' Meeting

July 2021 Trustees' Meeting – to be determined

October 2021 Trustees' Meeting – to be determined

Events

April 17 – 22 AAN 2021 Virtual Meeting (There will be no McKnight Scholars Dinner until AAN 2022)

Fall 2021 Society for Neuroscience Poster/Reception – to be determined

Fall 2021 Luttge Lecture – to be determined

- In fixed income, we foresee a modest rise in U.S. yields, a slightly steeper yield curve and continued demand for credit as sectors with rates exceeding inflation dwindle.

B. Portfolio Review

Asset Allocation: The asset classes of the investments within the portfolio of the MBRF remain within the guidelines established by the trustees in the Investment Policy Statement of the Foundation.

Portfolio Performance: For the one-year period ending December 31, 2020, the total return for the portfolio was up 20.26% versus 15.26% for the Investment Policy Statement Index.

Action Item 1: The committee received the investment review for information (Attachment 1).

2. Approval of Minutes

The minutes of the October 14, 2020, Board of Trustees WebEx Meeting of the McKnight Brain Research Foundation were reviewed and approved as amended (Attachment 2).

Add words "to be held virtually" to Action Item 3.

Correct "as" to "ask" in Action Item 12.

Action Item 2: The minutes of the October 14, 2020, Board of Trustees WebEx Meeting were approved as amended (Attachment 2).

3. Chair's Report

Dr. Mike Dockery provided an overview of the day's meeting which is being held virtually rather than in person.

Dr. Dockery informed the trustees that the Memorandum of Understanding (MOU) with the University of Florida has been executed by all parties and a copy has been posted to the secure website.

Dr. Dockery shared his strategic focus for the MBRF 2020 – 2023 document (Attachment 3) with the trustees. The strategic focus is centered around Communications, Education and Research areas previously identified by the trustees as areas of importance.

Dr. Dockery thanked the trustees for submitting their self-assessment and shared that he spoke with all of the trustees to review their forms. He noted that all the trustees uniformly commented on what a delightful addition Ms. Porter has been and affirmed the committee structure seems to be working well. He asked that everyone try to be more consistently aware of the volume of emails and respond in a timely manner.

4. Executive Director's Report

Ms. Porter provided the trustees with an update on her activities since the last meeting.

Content Development – a great deal of content has been added to the MBRF public facing website.

Partners Search for Mid-Career Award – Ms. Porter reached out to more than a handful of organizations to determine their interest in partnering with the MBRF on the Mid-Career Award. This will be discussed more during the Research Committee update which will be provided by Dr. Thambisetty later in the meeting.

Committee Meetings – Four of the committees met prior to today's meeting. The Communications Committee will meet prior to the April meeting.

American Brain Foundation (ABF) – She worked with the ABF on finalizing the renewal of the partnership for 2023 - 2027

Luttge Lecture Series – The events scheduled as part of the 2021 Luttge Lecture Series are included in the meeting material

NIA Invitation – The trustees have been invited to the NIA's Bilingual Cognitive Reserve Workshop to be held March 2 – 3, 2021.

Research Partnership - The NIA received applications for the Cognitive Super Agers Program; they are currently under review and the award will be made before the end of September 2021.

University of Miami – The department of Neurology has moved up to number 15 for NIH research funding. (UAB is number 16).

ABF 2021 Scholars – The 2021 Scholars will be introduced at the Inter-Institutional Meeting which will be held virtually April 28 – 29, 2021. The 2021 Scholars are Wai-Ying “Wendy” Yau, MD from the Mass General, Department of Neurology and Matthew Burns, MD, PhD, University of Florida, College of Medicine, Department of Neurology.

Pilot grant – Ms. Porter shared that earlier today she forwarded an email to the trustees from Dr. Lazar and Dr. Levin explaining the delay in the most recent pilot grant cycle.

5. Corporate Trustee’s Report

- A.** The trustees reviewed the projected minimum distribution calculation for information (Attachment 3).
- B.** The trustees reviewed the Gift & Grants Report for information (Attachment 4).
- C.** The trustees reviewed the Travel Award Report for information (Attachment 5).
- D.** Ms. Cianciotto shared the 2020 year-to-date Operating Expenses Report with the trustees (Attachment 6).

Action Item 3: The trustees reviewed, for information, the projected minimum distribution calculation (Attachment 3).

Action Item 4: The trustees reviewed, for information, the Gifts and Grants Report (Attachment 4).

Action Item 5: The trustees reviewed, for information, the Travel Award Report (Attachment 5)

Action Item 6: The trustees reviewed, for information, the Operating Expenses Report (Attachment 6).

6. Committee Reports

A. Membership and Governance Committee

Dr. Pekarske provided the trustees with an update of the recent meeting of the Membership and Governance Committee.

Dr. Pekarske reviewed the MBRF Appointment History and Terms Chart (Attachment 7) with the trustees. Dr. Gene Ryerson’s third term as a trustee will end in April 2021, and Dr. Robert Wah’s third term as a trustee will end in August 2021. Dr. Pekarske will be eligible for renewal of a second term in July

2021, and Dr. Thambisetty will be eligible for renewal of a third term in August 2021. Names of possible trustee candidates should be submitted to the Membership and Governance Committee prior to the April Trustees' meeting. There should be no contact with the prospective nominees prior to consideration of the nominees by the Board.

Dr. Pekarske shared the recognition process for Trustees upon completion of service. Ms. Porter will order the Tiffany Bowl and work with Dr. Pekarske and Dr. Lee Dockery to develop a Resolution recognizing Dr. Ryerson's service to be read into the minutes of the April Trustees' meeting.

The trustees discussed the advisory committee member role and introduced the concept of possible compensation. To date, Dr. Robert Krikorian is the only advisory committee member and serves as a non-paid volunteer on the Research Committee. The trustees agree the advisory role is important and that the Communications, Education and Research Committee would benefit from advisory committee members. Ms. Porter and Dr. Pekarske will prepare changes to the Advisory Committee Member's role and proposed compensation to be reviewed by the Membership and Governance committee and recommended to Trustees in a future meeting.

Action Item 7: Ms. Porter and Dr. Pekarske will prepare changes to the Advisory Committee Member's role and proposed compensation to be reviewed by the Membership and Governance committee and recommended to Trustees in a future meeting.

B. Finance Committee

Dr. Ryerson provided the trustees with an update of the recent meeting of the Finance Committee.

Review of Financial Information in MBI Annual Reports

Dr. Ryerson reminded the trustees that it is not the foundations prerogative to micro manage or tell the MBIs how to use the funds but to make sure the funds are used appropriately. With that being said, Dr. Ryerson pointed out how all of the reports did not contain the appropriate information or were missing information and that going forward the financial information provided by the MBI's needs to be provided in a format that is easy to understand.

Dr. Sanjay Gupta Video Promotion

The proposal for up to \$10,000 to support promotion of the Dr. Sanjay Gupta Video was shared with the trustees with a recommendation for approval

(Attachment 8). The trustees discussed ways the video could be cross promoted with the MBIs and the Global Brain Health Council. The request for \$10,000 to support promotion of the Dr. Sanjay Gupta Video was approved.

Action Item 8: The trustees accepted the recommendation from the Finance Committee to approve up to \$10,000 to support promotion of the Dr. Sanjay Gupta Video.

C. Communications Committee

Dr. Isaacson provided the trustees with an update on the activities of the December 2020 Communications Committee which included finalizing the organizational brochure. The website content has grown with the addition of videos, blog posts and additional content pages on brain health and cognitive aging.

The Board approved the plan to promote Dr. Isaacson's video interview with Dr. Sanjay Gupta that was previously approved by the Finance Committee. Ms. Patmintra will work with the website team to post the video to the website and execute the promotion strategy as approved. Updates on traffic to the website secured as part of the paid promotion strategy will be shared with trustees during the April board meeting.

In reference to the 87% statistic used in the key messages and across the website, members of the Education Committee noted the statement is not entirely, factually correct as currently stated and needs to be revised in the key messages and where used on the website.

Dr. Lee Dockery thanked Ms. Patmintra and Ms. Porter for sending out over 350 MBRF Holiday cards to partners and colleagues.

D. Education Committee

Dr. Wah provided the trustees with an update on the recent meeting of the Education Committee.

The revised Education Statement was shared with the trustees (Attachment 9). During the committee meeting, it was agreed that the 87% statistic should be revised in the statement and the language around the statistic be softened on the website.

Content for the new PCP area of the website was shared with the trustees (Attachment 10). Dr. Wah noted that the content was reviewed by members of

the Education Committee and would be posted to the website before the April meeting.

The agenda for the Inter-Institutional Meeting was shared with the trustees (Attachment 11). There will be a leadership council meeting on April 29, 2021 from 11:00 am – 12:45 pm EST. Dr. Wah suggested it would be helpful for an agenda to be created and shared in advance of the meeting.

Dr. Mike Dockery asked the trustees for ideas for his Building on MBRF History to Forge the Future discussion for the upcoming Inter-Institutional Meeting.

E. Research Committee

Dr. Thambisetty provided the trustees with an update on the recent meeting of the Research Committee. The McKnight Clinical Translational Research 2021 Scholars will be introduced at the upcoming Inter-Institutional Meeting.

Dr. Lee Dockery provided a summary of the changes that were requested in the contract with the American Brain Foundation (ABF) for the program renewal for 2023 – 2027 (Attachment 12). The trustees voted to approve the ABF Contract for the program renewal for 2023 – 2027 as presented.

Action Item 9: The trustees voted to approve the ABF Contract for the program renewal for 2023 – 2027 (Attachment 12) as presented.

Dr. Thambisetty shared with the trustees that the Research Committee had reviewed the pilot grant proposals (Attachment 13) and recommend funding the top three (3) highest ranked applications. The top three highest ranked applications are from Dr. Lazar, Dr. Hernandez and Dr. Gomes-Osman. The trustees voted to approve the recommendation of the Research Committee and fund the top three (3) highest ranked applications.

Action Item 10: The trustees voted to approve the recommendation of the Research Committee and fund the top three (3) highest ranked applications.

Ms. Porter provided the committee with an update on outreach to possible partners for the MBRF Mid-Career Research in Cognitive Aging and Memory Loss (Attachment 14). The most promising possible partner is the American Federation for Aging Research (AFAR). AFAR can do everything required to advertise, promote and manage the grant awards. They are developing a proposal for the MBRF to consider. The trustees approved moving forward with

the AFAR partnership. The trustees also discussed possible names for the Mid-Career Research Award.

Action Item 11: The trustees approved moving forward with the AFAR partnership.

7. Review of the Annual Reports

A. University of Alabama – The trustees reviewed the annual report concerning the Evelyn F. McKnight Brain Institute at the University of Alabama at Birmingham (Attachment 15). The report was well organized and provided a good representation of the MBI. The trustees will be interested in receiving an update on the redesign of the “Memory Disorders Clinic” as well as a comprehensive description of the research activities under Dr. Adrienne Lahti and Dr. Junghee Lee in the 2021 annual report.

Action Item 12: Send thank you letter to Mr. Tom Brannon expressing the trustees’ appreciation for the comprehensive report and asking for an update on the redesign of the “Memory Disorders Clinic” as well as a comprehensive description of the research activities under Dr. Adrienne Lahti and Dr. Junghee Lee in the 2021 annual report.

B. University of Arizona – The trustees reviewed the annual report concerning the Evelyn F. McKnight Brain Institute at the University of Arizona (Attachment 16). The report was well organized and the trustees appreciated the consolidation in the report of the scientific achievements by nonhuman animal and human aging experiments and the overall attractive format and impressive content. The trustees would like to be notified when decisions regarding the U19 grants has been made.

Action Item 13: Send thank you letter to Dr. Barnes expressing the trustees appreciation for the report and request the trustees be notified when the decisions regarding the U19 grants have been made.

C. University of Florida – The trustees reviewed the annual report concerning the Evelyn F. and William L. McKnight Brain Institute at the University of Florida (Attachment 17). The scope, depth, and impact of the research and educational activities are to be commended. The trustees offered some suggestions for the 2021 report which include providing all financial information, the inclusion of the customary letters of transmittal and support from the leadership of the Health

Center, the College of Medicine, and the College of Public Health as well as the inclusion of a Table of Contents at the beginning of the report.

Action Item 14: Send thank you letter to Dr. Golde, Dr. DeKosky and Dr. Lewis expressing the trustees' appreciation for the report and sharing the suggestions for the 2021 report.

D. University of Miami – The trustees reviewed the annual report concerning the Evelyn F. McKnight Brain Institute at the University of Miami (Attachment 18). The trustees were pleased with the quality of the report and its thoughtful organization and note the many accomplishments, achievements, awards and presentations of the past year. The trustees look forward to the Inter-Institutional and appreciate all of the work that has been put in to develop an excellent program.

Action Item 15: Send thank you letter to Dr. Sacco and Dr. Rundek expressing the trustees' appreciation for the report.

8. Future Meetings and Events

The Inter-Institutional Meeting will be held virtually April 28 – 29, 2021. The trustees' meeting will be held virtually April 30, 2021, from 11:00 a.m. – 4:00 p.m. EST.

9. Adjournment

There being no further business, the meeting was adjourned at 4:40 p.m. EST.

Summary of Action Items:

Respectfully Submitted,

Melanie A. Cianciotto
SunTrust Bank, Corporate Trustee

GRANT AGREEMENT

This Grant Agreement is entered into between **THE MCKNIGHT BRAIN RESEARCH FOUNDATION** ("Grantor") and **THE AMERICAN FEDERATION FOR AGING RESEARCH** ("Grantee") for the **McKnight Brain Research Foundation Mid-Career Research Awards in Cognitive Aging and Memory Loss**. The amount of the Grant is \$4,615,000, for a duration of five years, as outlined in Attachment 1, and will be paid as outlined in Attachment 2.

RECITAL

This Grant will be used for the support of the McKnight Brain Research Foundation Mid-Career Research Awards in Cognitive Aging and Memory Loss (hereafter referred to as "Grant Program"). The grant will support the following activities conducted by Grantee as described in the attached proposal submitted by the Grantee (Attachment 3.)

AGREEMENT

1. **PURPOSE:** Grantee agrees to use the funds only for the purposes described in Appendix A and to so designate the funds in the Grantee's records. Grantee further agrees to use the funds only for charitable purposes as described in Section 170(c)(2)(B) of the Internal Revenue Code of 1986 (the "Code"), or any successor provision thereto, and equivalent provisions of applicable state law, and not to use the funds in violation of the provisions of the Code governing grantees of private foundations.
2. **FUND RAISING:** No funds awarded through this grant are to be shared with or used to pay fees or wages for the services of fund raising or consulting firms.
3. **EVALUATION:** Grantor may, at its expense, conduct an evaluation of operations under this grant, which may include visits by representatives of Grantor to observe Grantee's program procedures and operations and to discuss the grant with Grantee's personnel.
4. **ACCOUNTING AND FINANCIAL REVIEW:** A complete and accurate record of the funds received and expenses incurred under this grant must be maintained by Grantee and submitted to Grantor in accordance with the Report Schedule described in Paragraph 6 below. Grantor may, at its expense and on reasonable notice to Grantee, audit or have audited the records of Grantee insofar as they relate to the activities funded by this grant.
5. **ADDITIONAL SUPPORT:** By making this grant, Grantor assumes no obligation to provide other or additional support for Grantee. This grant is not to be construed as establishing a precedent for further support of Grantee.
6. **REPORTING:** Grantee shall submit annual narrative and financial reports on the use of the grant to Grantor.

7. **FAILURE TO PERFORM:** Grantee recognizes and agrees that in the event that any of the terms of this agreement were not performed in accordance with their specific terms or were otherwise breached, immediate irreparable injury would be caused. It is accordingly agreed that in the event of a failure by Grantee to perform its obligations hereunder, at its sole election, Grantor will be entitled to either (i) a return of the entire grant amount, or (ii) specific performance through injunctive relief to prevent breaches of the terms of this agreement.
8. **REVERSION OF GRANT:** All or any portion of the amount granted shall be returned to Grantor in the event such portion of the grant is not expended or committed for the purposes authorized by Grantor. By written instrument only, Grantor may, upon written request from Grantee, authorize a modification in the disbursement of funds.
9. **ENTIRE AGREEMENT/MODIFICATION:** This agreement constitutes the entire agreement between Grantor and Grantee. This agreement may be modified only by written agreement of Grantor and Grantee.
10. **APPLICABLE LAW:** The agreement will be construed and governed by the laws of the State of New York.
11. **BINDING AGREEMENT:** This agreement shall be binding and conclusive on the parties and their respective successors in interest and assigns.
12. **COUNTERPARTS:** This agreement may be executed in counterparts. All executed counterparts shall constitute one instrument. Any counterpart that has attached to it separate signature pages, which together contain the signatures of all persons signing this agreement, shall for all purposes be deemed a fully executed instrument.

Executed by or on behalf of Grantor and Grantee as follows:

GRANTOR:

McKnight Brain Research Foundation



Michael L. Dockery, MD
Chair

Date: April 9, 2021

GRANTEE:

American Federation for Aging Research



Stephanie Lederman
Executive Director

Date: April 9, 2021

Address Grantor

Melanie Cianciotto
SunTrust Bank
Post Office Box 620005
Orlando, FL 32862
Email: Melanie.Cianciotto@truist.com

Address Grantee

American Federation for Aging Research
55 West 39th Street, 16th Floor
New York, NY 10018
Email: Stephanie@afar.org

Appendix A

Attachment 1**McKnight Brain Research Foundation - AFAR Budget****McKnight Brain Research Foundation Mid-Career Research Award in Cognitive Aging and Memory Loss**

Budget	Year 1	Year 2	Year 3	Year 4	Year 5	Total
<u>Mid-Career Research Awards*</u>						
Two three-year grants at \$750,000	\$500,000	\$500,000	\$500,000			\$1,500,000
Two three-year grants at \$750,000		\$500,000	\$500,000	\$500,000		\$1,500,000
Two three-year grants at \$750,000			\$500,000	\$500,000	\$500,000	\$1,500,000
Grant Administration AFAR	\$30,000	\$30,000	\$30,000	\$5,000	\$5,000	\$100,000
Indirect Cost @15% (on admin only)	\$4,500	\$4,500	\$4,500	\$750	\$750	\$15,000
Total	\$534,500	\$1,034,500	\$1,534,500	\$1,005,750	\$505,750	\$4,615,000

*institutional match 50/50

Attachment 2**McKnight Brain Research Foundation - Payment Schedule****McKnight Brain Research Foundation Mid-Career Research Award in Cognitive Aging and Memory Loss****Year 1, 2021**

Due April 1 (or execution of contract)	\$34,500
Due November 1	\$500,000

Year 2, 2022

Due April 1	\$34,500
Due November 1	\$1,000,000

Year 3, 2023

Due April 1	\$34,500
Due November 1	\$1,500,000

Year 4, 2024

Due April 1	\$5,750
Due November 1	\$1,000,000

Year 5, 2025

Due April 1	\$5,750
Due November 1	\$500,000

Total	\$4,615,000
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**Proposal by the American Federation for Aging Research (AFAR) to the
McKnight Brain Research Foundation**

for management of

The Mid-Career Research Awards in Cognitive Aging and Memory Loss

Submitted

April 9, 2021

Table of Contents

• Introduction and Rationale	Page 2
• Proposal	Page 2
○ Program Implementation	Page 3
○ Organizational Capacity	Page 6
• Budget	Attachment 1
• Payment Schedule	Attachment 2

Introduction and Rationale

There is a great social, medical and economic challenge of historic proportion due to the dramatic increase in life expectancy. This welcome increase in survivorship brings with it a higher probability that multiple and interactive health problems, both chronic and acute, will occur. For most Americans, staying "mentally sharp" as they age is a very high priority. An estimated 5.8 million Americans age 65 and older are living currently with Alzheimer's dementia in 2020. Even those not affected by Alzheimer's disease will likely undergo cognitive changes due to the normal aging process, impacting abilities like processing speed and decision-making and contributing to some types of memory loss. At this point in time, when the older population is rapidly growing in the United States and across the globe, it is important that we build a network of investigators and support their research on cognitive aging and memory loss.

Mid-career investigators are at a highly vulnerable transitional stage in their careers. This situation is even more precarious in the current research environment and is forcing some investigators to take alternative career options. The rationales for supporting such individuals are that 1) they are proven scientists, with a demonstrated commitment to research on cognitive aging and memory loss; 2) with very rare exceptions, they would already have gained peer-review support and have active laboratories; 3) given the above, they are deemed to be particularly receptive to embarking on research that offers significant promise of yielding transforming discoveries.

By providing research funding to these promising investigators as they continue to grow their careers and research portfolios, the MBRF aims to build a cadre of outstanding research scientists across the United States with the potential to lead transformative research in the field of cognitive aging.

The American Federation for Aging Research (AFAR) is ideally suited to partner with MBRF on this initiative. Since its inception, AFAR's vision has been to fund and nurture talented scientists and physicians and encourage them to pursue lifelong careers in research focused on aging processes and age-related diseases. AFAR proposes to partner with MBRF to manage the grant review and administration for the MBRF Mid-Career Awards program.

Proposal

AFAR proposes to manage the MBRF Mid-Career Research Awards in Cognitive Aging and Memory Loss, and that MBRF funds this effort in the amount of \$4,615,000 over a period of five

years, in support of 6 investigators. The investigators' institutions will be required to provide matching funds. MBRF and AFAR will develop criteria for the level and types of matching funds that are acceptable. There will be three grant cycles, in which each year, one award will be made to support studies focusing on clinical translational research and another award toward understanding basic biological mechanisms underlying cognitive aging and age-related memory loss.

Program Implementation

- **Develop and issue guidelines and application materials**

The application materials will be developed with input from AFAR's scientific leadership, the Selection Committee and MBRF leadership. Once finalized, the materials will be posted on the AFAR website <http://www.afar.org/research/funding/>.

- **Program Announcement Activities**

The program will be promoted through a variety of mailings and e-mail announcements. Through our management of a range of programs in aging research, there are unique opportunities to raise the visibility of the MBRF Mid-Career Awards program. For example, through dissemination channels of our NIA-supported programs, which include websites, twitter feeds and direct communications to more than 100 NIA-supported Centers, we can make opportunities widely known across the NIA aging community. In addition, AFAR has a distribution list that includes more than 8,000 individuals in the aging research community, and beyond. We will also work with several other organizations such as the Health Research Alliance, GSA, IAGG, and NYAS to help promote these programs as well as heads of national research institutes, The Glenn Centers for Research in Aging, the Nathan Shock Centers of Excellence in the Biology of Aging, the Research Centers Collaborative Network, the Clin-STAR Coordinating Center, current and past grantees, and others involved in the aging research community.

- **Review and Selection Process**

AFAR has established nationally respected and scientifically rigorous grant review processes, which ensure that the highest-quality research is supported. AFAR solicits Letters of Intent (LOI), and a small group of key AFAR Scientific Board members and members of AFAR's National Scientific Advisory Committee (NSAC) review the LOIs for program relevance and eligibility. The

NSAC consists of a large network of expert reviewers (about 300 members) with aging-related expertise, and it currently includes about 30 members with specific expertise in cognition and brain aging. A subset of applicants is then invited to submit full applications which are reviewed by a Selection Committee comprised of leading investigators with expertise in brain aging and cognition. The MBRF may designate up to three representatives to serve on the selection committee, provided that they do not represent/have a majority vote on the committee. All applications for MBRF funded Mid-Career Research Awards will be made available to all members of the selection committee. The committee's recommendations will be presented to MBRF and AFAR for final funding decisions.

To be eligible, candidates are to be selected from a national pool of applicants who must meet the following criteria:

- Completed research/clinical training i.e. formal post-doctoral research training post-PhD and/or physicians who have completed post-residency fellowship training.
- a proven track record of research accomplishments in cognitive aging as indicated by their publications in high-impact journals, awards, and other metrics of peer recognition.
- tenure-track faculty in an academic institution in the United States with evidence of long-term institutional support as indicated by commitment of resources including laboratory space, start-up research funds and personnel. Candidates not in a tenure-track position are also eligible and should also demonstrate similar evidence of long-term institutional support and not be in a time-limited appointment.

Candidates are evaluated on the following selection criteria:

- Qualifications of the applicant;
- Quality and promise of the proposed research;
- Excellence of the research environment;
- The commitment by the institution to provide matching funds.

- **Annual Meeting**

Recipients of the MBRF Mid-Career Awards program are invited to the AFAR Annual Grantee Conference, which is one the highlights and key components of our programs. Encouraging scientific exchange and networking among grantees and leadership in aging research is an important aspect of programs that not only supports research, but nurture career development and provide opportunities for collaborations. Grant recipients participate in this Grantee

Conference, which for more than 30 years has provided valuable opportunities to learn from each other and to engage in informative and enriching discussions with peers and senior investigators. Grantees become part of a community, and we support their continued participation in aging research. The meeting is held in Santa Barbara and one day is held jointly with the Glenn Workshop in the Biology of Aging, which provides additional opportunities to interact with leaders in aging research. We propose that the MBRF grantees participate in all the annual grantee conference activities.

- **Dissemination**

AFAR has centralized information on one website, www.afar.org. The grantees are listed on the Grantee page <https://www.afar.org/grantees/years/2020-recipients/>. Individual profiles will be posted for the MBRF/AFAR grantees. AFAR will also include special announcements in the AFAR newsletter and annual report, on its website, in all press kits, and through other regular AFAR communications vehicles, including social media. We further disseminate information through the [Nathan Shock Centers Coordinating Center](#) which serves the biology of aging community, [Clin-STAR Coordinating Center](#), which provides resources for clinician-investigators in aging research, and the [Research Centers Collaborative Network](#), which aims to stimulate cross-disciplinary research networks and serves more than 100 aging research programs across the United States.

- **Grants Management**

AFAR will issue the award materials and grant payments to the grantees who are required to submit annual reports describing accomplishments, updates on research activities and findings, and the impact the program has had on their career development. In addition to allowing AFAR to monitor progress and provide feedback, these reports educate us about new research developments, their potential impact on the aging field and whether results can be disseminated to a larger audience. Relevant grantee data will also be uploaded to the [Health Research Alliance](#)'s HRA Analyzer, which is a grant database for, with functional similarity to NIH Reporter.

- **Evaluation**

AFAR monitors and tracks the progress of its grantees to measure the impact and success of the programs. Grantees with active grants are required to complete a narrative interim report as well as a final narrative report to inform us about their progress and research findings. We also require financial reporting on the grant. AFAR also surveys past and current grantees to

measure the impact of these awards on expanding the aging field, grantees' research accomplishments and career trajectory. Reliable statistics on the research and career paths help determine whether investments are yielding desired outcomes or whether the programs need to be fine-tuned.

The expected outcomes of the program are:

- Build a core group of outstanding investigators who pursue research and academic careers in cognitive aging and memory loss research.
- Research that yields findings to better understand and alleviate age-related cognitive decline and memory loss, which ultimately will enhance the health and quality of life of older adults.

We collect information on so-called “markers of success”, including indicators that demonstrate career development (promotions, appointments, honors, awards, etc.) and research progress (subsequent research support, publications, collaborations, patents, new hypotheses, changes in protocol, changes in standard practice, etc.)

Organizational Capacity

- **Capacity to conduct the proposed project**

The American Federation for Aging Research (AFAR) is a leading national non-profit organization whose mission is to support and advance healthy aging through biomedical research. AFAR is ideally suited to administer this grant program and its staff, advisors and volunteers have the expertise to implement and execute this program. Since its founding in 1981, AFAR has granted approximately \$184 million to more than 4,240 talented researchers and students to help them begin and further careers in aging research and geriatric medicine.

- **Past and current relevant experience**

AFAR has an established national network with most research institutions in the U.S., and we continue to build our networks internationally. We also serve as [Nathan Shock Centers Coordinating Center](#), the [Research Centers Collaborative Network](#), the [Clinician-Scientists in Transdisciplinary Aging Research \(CLIN-STAR\) Coordinating Center](#), and have longstanding partnerships with the [National Institute on Aging](#), [The Glenn Foundation for Medical](#)

[Research](#), and the [Rosalinde and Arthur Gilbert Foundation](#). These partnerships continue to strengthen our ties to and networks within the aging research community. AFAR is also supported by a large network of leaders in aging who volunteer their time and expertise to advance the field.

Organization Relevant Experience:

AFAR's major activities are well-aligned with the goals of the MBRF Mid-Career Research Awards. AFAR focuses its activities on these major initiatives:

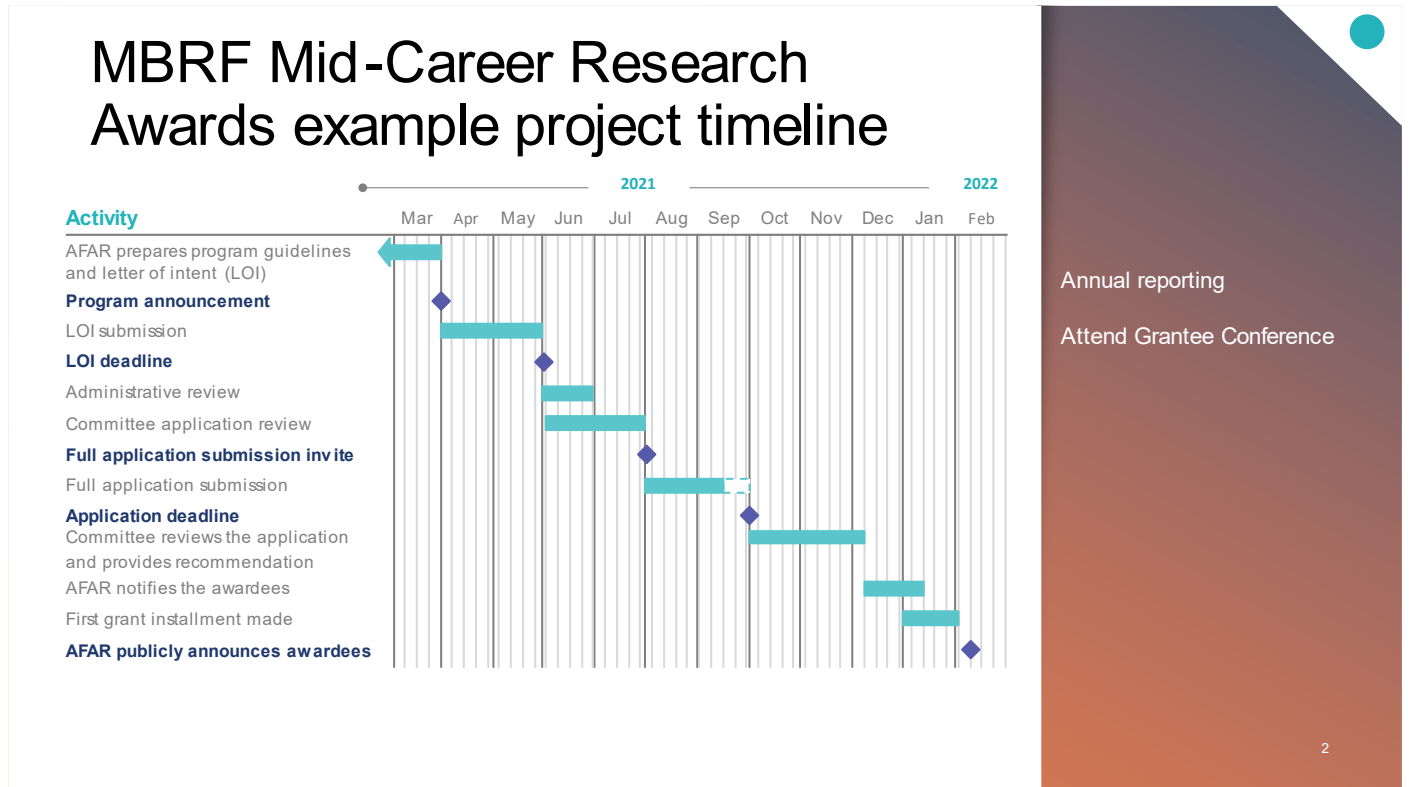
- Identifying and funding a broad range of cutting-edge research most likely to increase knowledge about healthy aging.
- Attracting more physicians to specialize in geriatric medicine to meet the demands of an aging population with expert health care.
- Creating opportunities for scientists and clinicians to share knowledge and exchange ideas to drive innovation in aging research.
- Providing information to the public on new medical findings that can help people live longer lives that are less susceptible to disease and disability.

AFAR offers a range of grant programs, providing grant support to graduate students, postdoctoral fellows, junior faculty and senior faculty in aging and aging-related topics.

- **Key Staff members**

Stephanie Lederman, AFAR's Executive Director, has served in leadership positions in the not-for-profit sector for more than 30 years and has been the Executive Director of AFAR since 1992. Under her leadership AFAR has grown into an organization that has been able to support thousands of new investigators and students conducting biomedical research on the aging process and age-related diseases. Odette van der Willik is the Deputy Executive Director and Director of Grant Programs, and has been with AFAR since 1994. She develops and oversees the organizations' series of grant programs, supporting early and mid-career scientists, physicians, and medical students in the fields of aging research and geriatric medicine. Hattie Herman has been Program Officer at AFAR since 1994 and oversees the day-to-day grant management activities, including scheduling committee reviews, preparing grant agreements, issuing grant payments and organizing annual grantee meetings.

Timeline



Dissemination

AFAR has centralized information on one website, www.afar.org. The awardees will be listed on the Grantee page <https://www.afar.org/2020-grant-recipients> and there will be a link to the profiles of each individual grantee (example here: <https://www.afar.org/grantee-profiles/frederick-bennett>). AFAR will also issue a press release and share investigator profiles and interviews through social media (example: <https://twitter.com/AFARorg/status/1345007304047996930/photo/1>) and the AFAR website (example: <https://www.afar.org/learn#interviewsandcolumns>)

AFAR also shares research findings and other lessons learned through social media (FaceBook, Twitter, YouTube.) and holds webinars, scientific panel discussions and workshops around specific topics. We also provide travel sponsorships for grantees who want to present their AFAR-supported research findings at national and international scientific meetings.

Executive Director Goals for 2021-22

Executive Director Name	Submitted to the Chair and Executive Committee
Amy Porter	March 25, 2021

1. Organizational Goals		
Area	2021-22 Goal to be Reviewed and Approved April 2021	Results to be Reported February/March 2022
Board Development, Membership and Governance	<p>Consider what expertise may be needed on the board and if nominations should be requested for trustee position(s) and when</p> <p>Revisit the idea of compensation for advisors to committees. Identify areas of expertise, short-term priorities or goals for which advisors could be helpful</p> <p>Renew or thank current advisor to the Research Committee</p> <p>Establish regular meeting dates (for example – third Thursday in February, July and October) The spring meeting coincides with the annual inter-institutional meeting</p>	
McKnight Brain Institute Relations	<p>Work with MBIs to request their suggestions for streamlining annual reports</p> <p>Consider effectiveness of inter-institutional block grant program. Can this be made more attractive/helpful to the MBIs? There appear to be significant unspent balances in each of these funds</p> <p>Work with MBIs on their rationale/case for any new submissions. Share budgets with finance committee and proposal with education or research committee</p>	

External Partner Relations	<p>Continue to work closely with current partners</p> <p>Reach out to organizations linked to the MBRF through AFAR</p> <p>Identify and reach out to aligned organizations or individuals to build the MBRF network</p>	
Strategic Development - Communications	<p>Continue to ask for information and ideas from the CWG members</p> <p>Highlight the MBI and MBRF activities, events, news and activities</p> <p>Continue to develop new content for the website that extends the reach and impact of McKnightBrain.org</p> <p>Capture names of experts new to MBRF and send link to McKnightBrain.org</p> <p>Continue to correct and add to email blast list</p> <p>Develop waiting room brochure for PCPs and the public</p>	
Strategic Development – Research	<p>Work with AFAR to launch program and target first grant announcement by Dec. 31, 2021</p> <p>Continue to work with FNIH/NIA on updates regarding the Research Partnership</p> <p>Continue to work with ABF/AAN to promote and announce the McKnight Scholars</p> <p>Schedule the SfN Research Reception in Fall 2021</p>	

Strategic Development – Education	<p>Form PCP focus or advisory group or conduct survey to assess their needs for resources related to age-related cognitive decline and memory loss</p> <p>Develop and disseminate Information to/for Primary Care Physicians (PCPs) and their patients</p> <p>Continue to follow, convene, and highlight McKnight Scholars</p> <p>Continue to assist MBIs in planning for inter-institutional meeting</p> <p>Track success of expanded Luttge Lecture Series</p>	
Finance and Administrative Operations	<p>Continue to monitor with the Corporate Trustee the operations expenses against the current operations budget</p> <p>Continue to monitor funding for the communications plan and related special activities and promotions</p> <p>Continue to monitor with the Corporate Trustee all grant timelines, reports and expenses</p> <p>Support the Corporate Trustee and the trustees in their review of financial and investment reports</p>	

From: [Amy Porter](#)
To: [Cianciotto.Melanie](#)
Subject: To include under Chair's Report (email #2)
Date: Tuesday, April 20, 2021 12:10:43 PM

----- Forwarded message -----

From: **Amy Porter** <aporter@mcknightbrf.org>
Date: Mon, Apr 19, 2021 at 6:01 PM
Subject: Your ideas for Names, Please
To: Mike Dockery <mike.dockery@orthocarolina.com>, <madhavtr71@gmail.com>, J Lee Dockery <jld007@cox.net>, Melanie Cianciotto <Melanie.Cianciotto@suntrust.com>, Sue Pekarske <spekarske@me.com>, Gene Ryerson <gene.ryerson@gmail.com>, Robert Wah <1techdoc@gmail.com>, Richard Isaacson <rii9004@med.cornell.edu>, Allison Brashear <abrashear@ucdavis.edu>, Patricia Boyle <Patricia_Boyle@rush.edu>
Cc: Valerie Patmintra <valerie627@gmail.com>

Dear Trustees,

On April 9, the agreement between the American Federation for Aging Research (AFAR) and the MBRF was finalized. We are already working with AFAR to draft the announcement of the mid-career award program and the criteria for eligibility.

Two names have been suggested to date for the award. They are:

The McKnight Brain Research Foundation Trailblazer Award for Research in Cognitive Aging and Memory Loss

The McKnight Brain Research Foundation Pioneer Award for Research in Cognitive Aging and Memory Loss

Please suggest any names you think appropriate. You will be asked to vote on a name at the meeting on April 30.

Also, I should mention that I've noticed some of you keen-eyed proof readers have a preference for "...on Cognitive Aging and Memory Loss" rather than "...in Cognitive Aging and Memory Loss." This may be something you'd like to discuss at the meeting.

Thank you for giving this some thought. You can send me names in advance if you'd like or share them at the meeting.

--

Amy Porter
Executive Director
McKnight Brain Research Foundation
202-302-9849
www.mcknightbrain.org

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McKnight Brain Research Foundation

Projected Minimum Investment Return Calculations

(As of 2/19/2021 for fiscal year ending 6/30/2021)

Average Fair Market Value	\$58,260,777.93
Less:	
Cash held for charitable purposes (1 1/2 %)	<u>(\$873,911.67)</u>
Net value of non-charitable use assets	\$57,386,866.26
Minimum Investment Return (5%)	\$2,869,343.31

Net Minimum Investment Return Calculation:

Minimum investment return	<u>\$2,869,343.31</u>
sub total Qualifying Distributions	<u><u>(\$2,534,092.00)</u></u>
	\$335,251.31
 Excess distribution carryover (actual for '16,'17, '18, '19)	 \$1,766,605.00
 (estimate for '20)	 <u>(\$335,251.31)</u>
	\$1,431,353.69

McKnight Brain Research Foundation

Minimum Distribution Calculation

Fiscal years 2000 - 2020

<u>Market Value</u> <u>Dec 1999 -\$69,126,583</u>	<u>Tax Year</u>	<u>Distributable Amount</u>	<u>Qualifying</u> <u>Distributions</u>	<u>Excess Distributions</u> <u>Carryover</u>	<u>Undistributed Income</u>
\$51,867,213	7/1/03 - 6/30/04	\$2,352,435	\$1,665,404	\$5,266,241 (last year we could carryover gift to UF)	\$0.00
\$51,898,266	7/1/04 - 6/30/05	\$2,450,345	\$3,026,049	\$575,704	\$0.00
\$55,777,369	7/1/05 - 6/30/06	\$2,620,008	\$2,036,659	\$0	\$7,645.00
\$62,782,831	7/1/06 - 6/30/07	\$2,843,725	\$3,299,931	\$448,561	\$0.00
\$54,753,484	7/1/07 - 6/30/08	\$2,817,569	\$3,110,508	\$292,939	\$0.00
\$39,447,094	7/1/08-6/30/09	\$2,016,762	\$2,517,340	\$500,578	\$0.00
\$39,991,364	7/1/09-6/30/10	\$1,952,550	\$3,789,616	\$1,837,066	\$0.00
\$44,648,921	7/1/10-6/30/11	\$2,058,313	\$3,983,492	\$1,925,179	\$0.00
\$41,206,393	7/1/11-6/30/12	\$1,973,938	\$2,615,808	\$641,870	\$0.00
\$43,820,218	7/1/12 -6/30/13	\$2,020,034	\$2,434,496	\$414,462	\$0.00
\$50,408,385	7/1/13-6/30/14	\$2,246,743	\$2,298,603	\$51,860	\$0.00
\$50,025,982	7/1/14 - 6/30/15	\$2,309,295	\$3,190,468	\$753,267	\$0.00

<u>Market Value</u> <u>Dec 1999 -\$69,126,583</u>	<u>Tax Year</u>	<u>Distributable Amount</u>	<u>Qualifying</u> <u>Distributions</u>	<u>Excess Distributions</u> <u>Carryover</u>	<u>Undistributed Income</u>
\$43,374,433	7/1/15 - 6/30/16	\$2,156,876	\$4,896,096	\$2,739,220	\$0.00
\$45,020,486	7/1/16 - 6/30/17	\$2,197,291	\$3,463,554	\$1,266,263	\$0.00
\$48,399,735	7/1/17 - 6/30/18	\$2,290,460	\$2,662,616	\$372,156	\$0.00
\$46,247,121	7/1/18- 6/30/19	\$2,308,639	\$2,028,707		
\$49,211,422	7/1/19 - 6/30/2020	\$2,393,971	\$2,522,157	\$128,186	
\$62,982,683	7/1/20 - 6/30/2021	\$2,869,343 (estimate)	\$2,534,092 (estimate)		\$335,251.00
			\$67,445,935.13	\$1,766,605	(estimated total excess carryover)

McKnight Brain Research Foundation
Gifts, Grants and Pilot Grants Summary
Fiscal years 2000 - 2029

GIFTS	University of Alabama	University of Arizona	University of Florida	University of Miami	FNIH	American Brain Foundation
	\$5,000,000 (5/15/2004) \$1,000,000 (10/19/2005) \$6,000,000 (8/3/2009)	\$5,000,000 (10/17/2006) \$300,000 (7/10/2008) \$5,600,000 (5/1/2014)	\$15,000,000	\$5,000,000 (7/3/2003) \$2,000,000 (date tbd)**	\$5,000,000 (5/6/2008) \$5,000,000 (10/2013) \$5,000,000 (6/2018)	\$1,650,000 (6/1/2017) \$1,650,000 (3/9/2021)
7/1/99 -6/30/00			\$15,000,000			
7/1/00 -06/30/01						
7/1/01 - 06/30/02						
7/1/02 - 6/30/03						
7/1/03 - 6/30/04				\$1,500,000		
7/1/04 - 6/30/05	\$2,000,000			\$875,000		
7/1/05 - 6/30/06	\$1,000,000			\$875,000		
7/1/06 - 6/30/07	\$1,000,000	\$1,000,000		\$875,000		
7/1/07 - 6/30/08	\$1,000,000	\$1,000,000		\$875,000		
7/1/08-6/30/09	\$1,000,000	\$1,300,000				
7/1/09-6/30/10	\$1,500,000	\$1,000,000			\$1,000,000	
7/1/10-6/30/11	\$1,500,000	\$1,000,000			\$1,000,000	
7/1/11-6/30/12	\$1,000,000				\$1,000,000	
7/1/12-6/30/13	\$1,000,000				\$1,000,000	
7/1/13-6/30/14	\$1,000,000				\$1,000,000	
7/1/14-6/30/15		\$200,000		\$1,000,000	\$1,000,000	
7/1/15-6/30/16		\$1,200,000		\$500,000	\$2,000,000 **	
7/1/16-6/30/17		\$1,200,000		\$500,000	\$1,000,000	
7/1/17-6/30/18		\$1,000,000			\$1,000,000	
7/1/18-6/30/19		\$1,000,000				\$165,000
7/1/19-6/30/20		\$1,000,000				\$330,000
7/1/20-6/30/21					\$1,000,000	\$330,000
7/1/21-6/30/22					\$1,000,000	\$330,000
7/1/22-6/30/23					\$1,000,000	\$330,000
7/1/23-6/30/24					\$1,000,000	\$330,000
7/1/24-6/30/25					\$1,000,000	\$330,000
7/1/25-6/30/26						\$330,000
7/1/26-6/30/27						\$330,000
7/1/27-6/30/28						\$330,000
7/1/28-6/30/29						\$165,000
7/1/29-6/30/30						
Total	\$12,000,000	\$10,900,000	\$15,000,000	\$7,000,000	\$15,000,000	\$3,300,000
Balance	\$0	\$0	\$0	\$0	\$4,000,000	\$2,618,000

Total Gift

\$63,200,000

Remaining Balance of Gifts

\$6,618,000

McKnight Brain Research Foundation
Gifts, Grants and Pilot Grants Summary
Fiscal years 2000 - 2029

[illegible]

Total Grants	\$8,086,049.82
Remaining Balance of Grants	\$4,872,892.19

McKnight Brain Research Foundation
Gifts , Grants and Pilot Grants Summary
Fiscal years 2000 - 2029

PILOT GRANTS	A Novel Invention Tool (Levin) \$60,000 (5/1/2018) \$60,000 (5/1/2019)	Revitalizing Cognition in Older Adults (Bowers) \$60,000 (5/1/2018) \$60,000 (5/1/2019)	Transcutaneous Vagal Nerve Stimulation (Williamson) \$60,000 (10/1/2019) \$60,000 (10/1/2020)	Improving Age Related Cognitive Decline with Exercise in Hypertensive Older Adults(Lazar) \$56,144 (5/1/2021) \$56,144 (5/1/2022)	Reuniting the Brain and Body to Understand Cognitive Aging (Hernandez) \$23,600 (5/1/2021) \$36,800 (5/1/2022)	Harnessing Optimal Mechanisms for Exercise for Cognitive Gains (Gomes-Osmen, Porges) \$60,000 (5/1/2021) \$60,000 (5/1/2022)	Evelyn F. McKnight Neurocognitive Post-Doctoral Fellowship (UM) \$100,000 (6/30/2020) \$100,000 (6/30/2021)
7/1/99 - 6/30/00							
7/1/00 - 6/30/01							
7/1/01 - 6/30/02							
7/1/02 - 6/30/03							
7/1/03 - 6/30/04							
7/1/04 - 6/30/05							
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7/1/14 - 6/30/15							
7/1/15 - 6/30/16							
7/1/16 - 6/30/17							
7/1/17 - 6/30/18							
7/1/18 - 6/30/19	\$11,256.57 UF \$6,895.45 UA	\$6,799.94 UF					
7/1/19 - 6/30/20	\$33,845.70 UF \$40,000 UM	\$14,581.29 UF	\$9,881.16 UF				\$100,000.00
7/1/20 - 6/30/21	\$830.52 UF \$21,604.96 UA	\$1,694.96 UF \$18,363,11 UA	\$12,500.21 UF				
7/1/21 - 6/30/22							
7/1/22 - 6/30/23							
7/1/23 - 6/30/24							
7/1/24 - 6/30/25							
Total	\$120,000.00	\$120,000.00	\$120,000.00	\$112,288.00	\$60,400.00	\$120,000.00	\$200,000.00
Balance	\$5,566.80	\$78,560.70	\$97,618.63	\$112,288.00	\$60,400.00	\$120,000.00	\$100,000.00

Total Pilot Grants
\$852,688.00
Remaining Balance of Pilot Grants
\$574,434.13

Travel Award Program

Date	Name	School	Amount
5/6/2009	Marsha Penner	University of Alabama	\$1,305.43
11/4/2010	Clinton Wright	University of Miami	\$1,005.26
11/20/2010	Gene Alexander	University of Arizona	\$354.39
7/26/2011	Gene Alexander	University of Arizona	\$1,006.74
8/3/2011 - 8/4/2011	Cognitive Test Battery Working Group - Retreat #1	University of Alabama, University of Arizona, University of Florida, University of Miami	\$7,505.06
12/1/2011 - 12/2/2011	Cognitive Test Battery Working Group - Retreat #2	University of Alabama, University of Arizona, University of Florida, University of Miami	\$10,971.11
4/10/2012 - 4/11/2012	Cognitive Test Battery Working Group - Meeting #3	University of Alabama, University of Arizona, University of Florida, University of Miami	\$4,280.42
8/1/2012 - 8/3/2012	MRI Standardization Working Group Meeting	University of Alabama, University of Arizona, University of Florida, University of Miami	\$10,540.91
8/8/2012 - 8/9/2012	Cognitive Test Battery Working Group - Meeting #4	University of Alabama, University of Arizona, University of Florida, University of Miami	\$4,273.80
8/13/2012 - 8/14/2012	Epigenetics Planning Meeting	University of Alabama, University of Arizona, University of Florida, University of Miami	\$7,122.85
1/8/2013 - 1/9/2013	Epigenetics Planning Meeting	University of Alabama, University of Arizona, University of Florida, University of Miami	\$10,684.25
	MRI Standardization - Scanning Project	University of Alabama, University of Arizona, University of Florida, University of Miami	\$1,735.38
4/8/2013 - 4/10/2013	MRI Standardization Working Group Meeting #2	University of Alabama, University of Arizona, University of Florida, University of Miami	\$7,851.43
12/6/2013	MRI Standardization	University of Florida & University of Miami	\$1,094.90
8/2016	Brain and Cognitive Health Working Group	University of Alabama, University of Arizona, University of Florida, University of Miami	\$10,454.20
		Total Spent	\$80,186.13

MBRF Operating Communications Budget
7/1/2020 - 6/30/2021

Operating Expenses			Communications Expenses		
		Year to Date			Year to Date
Board of Trustee Fees	\$240,000.00	\$220,000.00	LookThink	\$50,000.00	\$29,700.00
Legal Fees	\$23,976.25	\$22,750.00	Prajna Strategy		\$4,900.00
CPA Fees	\$21,728.50	\$18,508.50	Moonlight Media	\$1,000.00	
Consulting Fees *	\$114,583.25	\$87,593.28	Neurology Ads	\$4,590.02	\$5,526.11
SunTrust Bank Fees	\$145,996.48	\$139,848.18	Consulting Fees *	\$74,731.26	\$69,069.42
Taxes	\$111,500.00	\$136,000.00			
Meetings	\$19,074.98	\$6,651.15	Total Communications Expenses	\$130,321.28	\$109,195.53
Website Fees	\$1,500.00	\$1,500.00	* represent payment to Senior Communications Advisor		
Memberships	\$765.00	\$780.00			
Insurance	\$1,625.00	\$1,625.00			
Total Operating Expenses	\$680,749.46	\$635,256.11			

* represent payment to Executive Director

Budget approved at the 7/22/2020 Trustees' Meeting

Membership & Governance Committee Activity Timeline
For the One-Year Period July 1, 2020, to June 30, 2021

Updated April 20, 2021

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>“identify, recruit and recommend candidates for appointment or re-election of current Trustees, consistent with applicable qualifications...”</i>	Determine ideal size of Board	Size of 7 Trustees, plus 1 Corporate Trustee and 1 Chair Emeritus established as goal (Maximum 11 Trustees) The Packet required the addition of new material, updated committee and program information	June 27, 2019	DONE
	Update/Revise Orientation Packet for New Trustees		October 5, 2020	Completed and presented to new Trustees and posted on the secure site
	Review appointment and retirement dates	Target for New Trustees: 1 or 2 New Trustees in 2020; 1 or 2 in 2021; 1 in 2024; 1 in 2025 to maintain board size of 7	Summer/Fall 2021 Invite Candidates to Trustees' Meeting in October	Ask for Names by April 30 Meeting M&G Cmte will discuss May/June Present to Trustees in July
	Review, discuss and determine expertise needed on Board	Behavioral Neurologist(s) Expertise Determined as Needed: Primary Care Physicians Geriatric Psychiatrists	Fall 2020 Spring 2021	DONE
	Request Board names from MBRF Trustees, MBI Leadership, CWG Members and NIA contacts Dr. Lee Dockery reached out to Drs. Brashear and Boyle. They sent CVs.	Names and bios of several candidates were provided Both Candidates indicated interest. Interviews held in September 2020. Unanimous Vote to Appoint both Dr. Boyle and Dr. Brashear	Nov/Dec 2019 March/April 2020 Rescheduled for July Meeting- CANCELED Due to Covid-19 October 14, 2020	DONE Names discussed at January 6 Meeting Two selected for Trustee review at Feb 5 Mtg Dr. Brashear and Dr. Boyle DONE

Duty (from Committee Charter)	Activity/Action	Outcome	Date	New Trustees Attended October 14, 2020, Meeting Comments
<i>“identify, recruit, and recommend...” Continued</i>	Develop Process for Recruiting, Vetting, and Recommending Candidates (Summary of Steps Below)	Committee Reviewed and Edited	September 30, 2019	DONE Document was shared with Trustees at October 2019 Meeting
	<i>Names Submitted to/Reviewed by Committee</i>			✓
	<i>Selected Names Forwarded to Board with vetting information and Committee recommendation</i>			✓
	<i>Board selects Candidates to contact</i>			✓
	<i>Nominator and/or Executive Director contact candidate(s) to assess interest and request CV</i>			✓
	<i>Committee conducts further vetting, ranks candidate(s), and makes final recommendation to Board</i>			✓
	<i>Board selects finalist, invites to interview, can invite to attend events or meetings as well. Trustees vote on appointment. Vote must be unanimous</i>			✓
	<i>New Trustee notified and welcomed. Orientation provided by Chair Emeritus with information provided by Corporate Trustee and Executive Director</i>			✓

Page Two

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>“oversee annual Board self-evaluations”</i>	Review of the Committee's charge to conduct and monitor the Trustee Self-Assessment Process	Current Self-Assessment form and Commitment Form reviewed.	September 2019 October 2019 January 2020 Self-Assessment January 2021	DONE The Committee developed new self-assessment form and process. New form was distributed DONE Next Step – Review of Input on Forms and Conversations with the MBRF Chair
	Identify needed questions and revisions to the current Trustee Self-Assessment Form			DONE
	Decide to send either current form or revised form in January with responses due to corporate trustee in one – two weeks		December 2019 January 2020	MBRF Proceeded as has in the past DONE
	Discuss whether to develop Board Self-Assessment to review progress toward Board goals		March 2020 Consider in 2021	Request for Suggestions to improve Board were added to Self-Assessment Form
<i>“...make recommendations on structure, charters, policies, process and practices...”</i>	Align policy with practice for length of service	Board approved change in policy to allow a “maximum of 9 years” service		DONE

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
"...structure, charters, policies, process..." <i>Continued</i>	Approve role of first Chair Emeritus	Board developed and approved by unanimous consent in email	July 2019	DONE
	Approve role of Trustee Emeritus/ae	Board approved; Recognition provided	July 31, 2019	DONE
	Review/revise "Qualifications for Trustees"	Expanded to non-MD, non-PhD candidates to include those..." active in a Field or profession of Value in advancing the mission and purpose of the MBRF."	July 31, 2019	DONE
	Develop criteria and process for review of performance of Trustees for Trustee Reappointment. Base criteria on Board Duties and Responsibilities	Summary of Recruitment, Election and Re-Election document developed in July 2020	DONE Jan. 21, 2021 M&G Cmte will discuss in May/June Recommend Re- Elections in July to Trustees	Trustees to review Summary of Recruitment, Election and Re-election document on July 22. Two re-elections and two retirements will take place in 2021 Discuss Process for Review of Performance for re- election and role of Committee <i>Page Four</i>

	Develop a formal Trustee Recognition of Appreciation for Service	Discuss notification of Trustees completing their service after one, two or three terms. Discuss providing a Board of Trustees Resolution and a Gift of Recognition	Jan. 21, 2021 April 30, 2021	Dr. Ryerson will be retiring April 30, 2021, and will receive recognition from the Trustees on that date <i>Page Five</i>
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Finance Committee Activity Timeline
For the One-Year Period July 1, 2020, to June 30, 2021

Updated January 28, 2021

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>"...shall coordinate the Board of Trustee's Financial Oversight Responsibilities (through monitoring of) ...financial management, assets, and risks ..."</i>	Review Investments and Investment Policy	Asset Allocation Review (Mike Hill)	July 6, 2020	completed
		Efficient Frontier Analysis (Shelly Simpson)	July 6, 2020	completed
		Monte Carlo Simulation		upon recommendation by SunTrust or request of the MBRF
		Investment Performance Review	July 22, 2020	
		Investment Performance & Asset Allocation Review (Mike Hill)	October 13, 2020	completed
		Investment Performance & Asset Allocation Review (Mike Hill)	February, 2021	completed
		Investment Performance & Asset Allocation Review (Mike Hill)	April, 2021	April 30, 2021

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>Financial Oversight... "...Ensure Compliance with Federal, State and other Financial Reporting Requirements..."</i>	Assess and Maintain IRS Required Distribution Amount	Minimum Distribution Calculation Report	July 22, 2020	Completed
			October 13, 2020	Completed
			February, 2021 April, 2021	Completed
	Compensation Review	Examples Presented for Comparison	July 22, 2020	Completed
	Tax Filing	Legal Counsel for the MBRF reviews the completed tax form before filing		7.1.19 – 6.30.20 return was filed on 11.15.2020
	Insurance	MBRF carries D & O Insurance	Renewed annually	Premium paid by Corporate Trustee
<i>Financial Oversight " planning, monitoring and evaluation of ...funding for the McKnight Brain Institutes... and the MBRF Operations"</i>	Monitor Current and Outstanding Gifts and Grants	Gifts and Grants Report	July 22, 2020	Completed
			October 13, 2020	Completed
			February, 2021 April, 2021	Completed
		Travel Award Program Report	July 22, 2020 October 13, 2020 February, 2021 April, 2021	Completed Completed Completed
	Review MBRF Operating Expenses	Year to Date Operating Expenses Report	July 22, 2020 October 13, 2020 February, 2021 April, 2021	Completed Completed Completed
		Review & Approve Annual Operating Budget	April 2021	

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>Financial Review...of reports and requests submitted to the MBRF by the MBIs and Other Partners</i>	Review Financial Reports Submitted with the MBI's Annual Reports		February, 2021	Completed
	Review Financial Information included in Interim and Final Reports for Research Grants		Per terms of the award letter	
	Review Budgets Submitted with Requests for Funding		As submitted	
<i>"...ensure adequacy of MBRF internal controls and compliance with conflict of interest policy..."</i>	Review Signing Authority	MBRF policy is minimum of 2 individuals with signing authority	April, 2019	Dr. Mike Dockery was added to SunTrust Account
	Conflict of Interest	Conflict of Interest Policy signed by all new and re-elected Trustees and by all Advisory Members of MBRF Committees	ONGOING	

Cognitive Aging & Memory Age Related Memory Loss Program

Financial Summary
January 1 to December 31, 2020

UF PeopleSoft Accounts	Amount
Received from McKnight Brain Research Foundation	
1/2/2020	131,525
4/1/2020	135,628
7/1/2020	134,941
10/1/2020	134,941
Total endowment income transferred in	537,036
Program expenditures and commitments:	
Graduate student funding/T32 match	26,323
Cruz Almeida - R01 match	30,000
Bizon Development Funds	100,000
Maurer Development Funds	50,000
Burke Development Funds	100,000
Graduate student funding/T32 match	33,205
Cruz Almeida - R01 match	60,000
Faculty and Staff Salary	302,987
Travel	1,309
Transfers money owed to CTRP	786,329
Total program expenditures and commitments	1,490,154
Net change in UF Peoplesoft accounts	-953,117
Beginning balance, Jan. 1, 2020	1,388,441
Ending balance, Dec. 31, 2020	\$ 435,324

Brief Justifications:

Funds for Dr. Cruz Almeida are to support neuroimaging needs related to her NIA-funded R01.

Development funds for Bizon, Burke and Maurer were used to generate preliminary data for new grants and to build collaborations on age-related cognitive decline with other UF faculty. These funds directly led to three successful R01s, all with collaborators outside our immediate group. These three R01s are slated to receive funding in the next several months and will test the effects of multiple interventions (vagus nerve stimulation, diet, and cannibis) on cognitive function in preclinical rodent models of aging. A 4th R01 (Maurer/Burke) was scored well (19th percentile) and has been resubmitted. Finally, these funds led to an NSF submission (Maurer) with collaborators in engineering.

Graduate student funding was to support a graduate stipend and tuition for a CAM PhD student who is training under a NIA-funded T32 on cognitive aging and Alzheimer's disease.

McKnight Endowed Chair for Brain Research in Memory Loss

Tom Foster, PhD

Financial Summary

January 1 to December 31, 2020

Foundation Spendable Account		Amount
Endowment income transferred in:		
	1/2/2020	35,320
	4/1/2020	36,422
	7/1/2020	36,237
	10/1/2020	36,237
Total endowment income transferred in		144,216
Beginning balance, January 1, 2020		67,996
Ending Balance, December 31, 2020		57,824
UF PeopleSoft Accounts		
Received from foundation spendable account		144,216
Expenditures		
Faculty Salary	154,388	
Lab Services	1,500	
Total Expenditures		155,888
Net change in UF PeopleSoft accounts		(11,672)
Beginning Balance on January 1, 2020		67,996
Ending Balance December 31, 2020 and total funds available to ARML Chair		56,324

Cognitive Aging & Memory
Clinical Translational Research Program
Financial Summary
January 1 to December 31, 2020

UF PeopleSoft Accounts			Amount
Received from McKnight Brain Research Foundation			
	1/2/2020	131,525	
	4/1/2020	135,628	
	7/1/2020	134,941	
	10/1/2020	134,941	
Total endowment income transferred in			537,036
Additional Transfers from due to CTRP from prior years			786,329
			1,323,365
Program expenditures and commitments:			
Faculty, Research Staff, Staff Earnings, Graduate Assistant & Post Doctoral	259,003		
Research equipment, supplies, and services	89,216		
Tuition Waivers	4,931		
Publications	14,713		
Travel and other	11,682		
Total program expenditures and commitments			<u>379,545</u>
			<u>943,820</u>
			<u>577,026</u>
Beginning balance, Jan. 1, 2020			<u>\$ 1,520,846</u>
			<u>\$ 1,520,846</u>

McKnight Endowed Chair for Clinical Translational Research in Cognitive Aging

Ron Cohen, PhD

Financial Summary

January 1 to December 31, 2020

Foundation Spendable Account		Amount
Endowment income transferred in:		
	1/2/2020	35,305
	4/1/2020	36,406
	7/1/2020	36,221
	10/1/2020	36,221
Total endowment income transferred in		144,153
Beginning balance, January 1, 2020		67,380
Ending Balance, December 31, 2020		260
UF PeopleSoft Accounts		
Received from foundation spendable account		144,153
Expenditures		
Faculty Salary	211,273	
Total Expenditures		211,273
Net change in UF PeopleSoft accounts		(67,120)
Beginning Balance on January 1, 2020		67,380
Ending Balance December 31, 2020 and total funds available to CTRP Chair		260

Dr. William G. Luttge Lectureship in Neuroscience

Financial Summary January 1 to December 31, 2020

Foundation Spendable Account		Amount
Endowment income transferred in:		
	1/2/2020	2,495
	4/1/2020	2,495
	7/1/2020	2,508
	10/1/2020	2,432
Total endowment income transferred in		9,930
Beginning balance, January 1, 2020		72,645
Ending Balance, December 31, 2020		81,312
UF PeopleSoft Accounts		
Received from foundation spendable account		9,930
Expenditures		
Lecture Series Expenditures (Honoraria for zoom seminars)		1,262
Total Expenditures		1,262
Net change in UF PeopleSoft accounts		8,668
Beginning Balance on January 1, 2020		72,645
Ending Balance December 31, 2020 and total funds available to Luttge.		81,312

McKnight Brain Research Grant Fund

with related accounts
Balance through June 30, 2020

Evelyn F. McKnight Brain Research Grant	Market Value Balance of Endowment	Fiscal Year Ending	Annual Endowment Transfers from Principal	Total Expenses / Net Transfers	Additional Investment Revenue ³	Ending Spendable Fund Balance
	F008057				F008058	
F008057 / 58	\$ 12,967,682	2000	\$ -	\$ -	\$ -	\$ -
	\$ 12,967,682	2001	\$ 648,384	\$ -	\$ 7,264	\$ 655,648
	\$ 13,157,047	2002	\$ 657,852	\$ (37,840)	\$ 315,280	\$ 1,590,940
	\$ 20,249,996	2003	\$ 651,801	\$ (1,139,621)	\$ 89,549	\$ 1,192,669
	\$ 25,363,355	2004	\$ 729,335	\$ (944,138)	\$ 266,063	\$ 1,243,930
	\$ 26,681,575	2005	\$ 843,131	\$ (502,502)	\$ 174,351	\$ 1,758,910
	\$ 29,091,810	2006	\$ 881,347	\$ (250,000)	\$ 52,383	\$ 2,442,639
	\$ 33,148,130	2007	\$ 1,056,031	\$ (500,000)	\$ 73,172	\$ 3,071,843
	\$ 32,666,165	2008	\$ 1,172,824	\$ (350,003)	\$ 66,972	\$ 3,961,636
	\$ 25,549,465	2009	\$ 1,086,475	\$ (1,300,000)	\$ (479,678)	\$ 3,268,433 ³
	\$ 26,893,099	2010	\$ 941,689	\$ (1,864,217)	\$ 67	\$ 2,345,972
	\$ 30,185,328	2011	\$ 971,846	\$ (2,413,940)	\$ -	\$ 903,877
	\$ 28,834,098	2012	\$ 1,026,301	\$ (1,017,551)	\$ -	\$ 912,627
	\$ 29,845,891	2013	\$ 1,028,384	\$ (1,415,244)	\$ -	\$ 525,767
	\$ 32,801,128	2014	\$ 1,063,533	\$ (920,824)	\$ -	\$ 668,477
	\$ 32,738,048	2015	\$ 1,117,603	\$ (1,596,541)	\$ 169,626	\$ 359,165
	\$ 28,270,285	2016	\$ 1,071,895	\$ (1,231,863)	\$ 167,343	\$ 366,540 ^{1,2}
	\$ 27,773,120	2017	\$ 1,041,290	\$ (1,147,507)	\$ -	\$ 260,322
	\$ 30,479,220	2018	\$ 1,041,290	\$ (1,041,290)	\$ -	\$ 260,322
	\$ 30,570,658	2019*	\$ 1,046,557	\$ (860,277)	\$ -	\$ 446,602
	\$ 32,042,328	2020**	\$ 1,067,240	\$ (1,532,109)	\$ -	\$ (18,356)
Life-to-date Totals			\$ 19,144,808	\$ (20,065,556)	\$ 902,392	

* Initially reported as \$522,401 in error. The total amount transferred from the UF Foundation to the UF Side is \$1,046,577

** Initially reported as \$537,036 in error. The total amount transferred from the UF Foundation to the UF Side is \$1,067,240

CAM		Fiscal Year Ending	Transferred from F008058 (1/2 of MBRF Grant Income)	Total Expenses / Net Transfers	Additional Investment Revenue ³	Ending Spendable Fund Balance
					F016327	
F016327		2010	\$ 1,634,217	\$ (200,000)	\$ -	\$ 1,434,217
		2011	\$ 941,689	\$ -	\$ -	\$ 2,375,906
		2012	\$ -	\$ -	\$ -	\$ 2,375,906
		2013	\$ 784,804	\$ (400,000)	\$ -	\$ 2,760,710
		2014	\$ 652,756	\$ (1,000,000)	\$ -	\$ 2,413,466
		2015	\$ -	\$ (2,413,466)	\$ -	\$ -
Life-to-date Totals			\$ 4,013,466	\$ (4,013,466)	\$ -	

AMENDED GIFT AGREEMENT - reconciliation	Fiscal Year Ending	Endowment Transfers from Principal	1/2 allocated to CAM	Actual transfers to CAM ²	Still due to CAM
Initial Transfer 9/17/2009	2010	\$ -	\$ (1,634,217)	\$ 1,634,217	\$ -
	2010	\$ 941,689	\$ (470,845)	\$ -	\$ 470,845
	2011	\$ 971,846	\$ (485,923)	\$ 941,689	\$ 15,078
	2012	\$ 1,026,301	\$ (513,151)	\$ -	\$ 528,229
	2013	\$ 1,028,384	\$ (514,192)	\$ 784,804	\$ 257,617
	2014	\$ 1,063,533	\$ (531,767)	\$ 652,756	\$ 136,628
	2015	\$ 1,117,603	\$ (558,802)	\$ 415,567	\$ 279,735
	2016	\$ 1,071,895	\$ (535,947)	\$ 684,727	\$ 130,956
	2017	\$ 1,041,290	\$ (520,645)	\$ -	\$ 651,600
	2018	\$ 1,041,290	\$ (520,645)	\$ 781,762	\$ 390,483
	2019	\$ 1,046,557	\$ (523,279)	\$ 390,484	\$ 523,279
	2020	\$ 1,067,240	\$ (523,279)	\$ 921,957	\$ 134,941
Life-to-date Totals		\$ 11,417,628	\$ (7,343,031)	\$ 7,207,963	

¹Endowment market value balance as of Nov. 30, 2015. All other balances as of Dec. 31, 2015.

²The McKnight Brain Research Grant had a spendable account balance of \$332,192 as of Dec. 31, 2015. As of July 1, 2014, the UF

³Distributions from investment income were limited and variable from 2003-2009, resulting in additional revenues (/losses) from the

Evelyn F. McKnight Chair Endowments

Balance through June 30, 2020

Evelyn F. McKnight Chair for Brain Research in Memory Loss	Market Value Balance of Endowment	Fiscal Year Ending	Annual Endowment Transfers from Principal	Total Expenses / Net Transfers	Additional Investment Revenue	Ending Spendable Fund Balance
	F007889			F007890		
F007889 / 90	\$ 1,988,345	2000	\$ 3,438	\$ (9,625)	\$ -	\$ (6,188)
	\$ 1,988,345	2001	\$ 99,417	\$ -	\$ (62)	\$ 93,167
	\$ 2,017,380	2002	\$ 100,869	\$ (7,810)	\$ (1,258)	\$ 184,968
	\$ 3,447,965	2003	\$ 125,768	\$ (52,502)	\$ 237,079	\$ 495,313
	\$ 3,866,391	2004	\$ 124,127	\$ (7,810)	\$ 14,191	\$ 625,820
	\$ 4,068,286	2005	\$ 127,813	\$ -	\$ 4,602	\$ 758,235
	\$ 4,435,787	2006	\$ 134,384	\$ (150,000)	\$ 19,578	\$ 762,197
	\$ 5,054,277	2007	\$ 161,019	\$ (150,000)	\$ 19,448	\$ 792,663
	\$ 4,980,774	2008	\$ 178,827	\$ (200,000)	\$ 14,387	\$ 785,877
	\$ 3,895,655	2009	\$ 165,660	\$ (450,000)	\$ (38,922)	\$ 462,615
	\$ 4,100,525	2010	\$ 143,584	\$ (499,000)	\$ 739	\$ 107,938
	\$ 4,602,508	2011	\$ 148,182	\$ -	\$ -	\$ 256,121
	\$ 4,396,479	2012	\$ 156,485	\$ (200,000)	\$ -	\$ 212,606
	\$ 4,550,752	2013	\$ 156,803	\$ (126,670)	\$ -	\$ 242,739
	\$ 5,001,352	2014	\$ 162,162	\$ (250,000)	\$ -	\$ 154,901
	\$ 5,006,025	2015	\$ 170,407	\$ (282,515)	\$ -	\$ 42,793
	\$ 3,795,851	2016	\$ 143,923	\$ (151,549)	\$ -	\$ 35,167
	\$ 3,729,097	2017	\$ 139,814	\$ (140,027)	\$ -	\$ 34,954
	\$ 4,092,445	2018	\$ 139,814	\$ (139,814)	\$ -	\$ 34,954
	\$ 4,104,722	2019	\$ 140,460	\$ (140,460)	\$ -	\$ 34,954
	\$ 4,302,323	2020	\$ 143,298	\$ (143,298)	\$ -	\$ 34,954
Life-to-date Totals			\$ 2,868,254	\$ (3,101,081)	\$ 269,781	

Evelyn F. McKnight Chair for Clinical Transl. Research in Cognitive Aging	Market Value Balance of Endowment	Fiscal Year Ending	Annual Endowment Transfers from Principal	Total Expenses / Net Transfers	Additional Investment Revenue	Ending Spendable Fund Balance
	F020105			F020106		
F020105 / 06	\$ 3,794,210	2016	\$ 143,861	\$ (108,709)	\$ -	\$ 35,152
	\$ 3,727,485	2017	\$ 139,754	\$ (139,967)	\$ -	\$ 34,938
	\$ 4,090,675	2018	\$ 139,754	\$ (139,754)	\$ -	\$ 34,938
	\$ 4,102,948	2019	\$ 140,460	\$ (140,460)	\$ -	\$ 34,938
	\$ 4,300,463	2020	\$ 143,236	\$ (143,236)	\$ -	\$ 34,938
Life-to-date Totals			\$ 707,065	\$ (672,126)	\$ -	



FUND IMPACT REPORT

McKnight Brain Research Foundation
Evelyn F. McKnight Cognitive Aging and Memory Research
Fund (008057)
Spendable Fund Transfers since endowment inception

FY 2020/2021	\$ 269,883 (09/30/2020 YTD)
FY 2019/2020	\$ 1,067,240
FY 2018/2019	\$ 1,046,577
FY 2017/2018	\$ 1,041,290
FY 2016/2017	\$ 1,041,290
FY 2015/2016	\$ 1,071,895
FY 2014/2015	\$ 1,117,603
FY 2013/2014	\$ 1,063,533
FY 2012/2013	\$ 1,028,384
FY 2011/2012	\$ 1,026,301
FY 2010/2011	\$ 971,846
FY 2009/2010	\$ 941,689
FY 2008/2009	\$ 1,086,475
FY 2007/2008	\$ 1,172,824
FY 2006/2007	\$ 1,056,031
FY 2005/2006	\$ 881,347
FY 2004/2005	\$ 843,131
FY 2003/2004	\$ 729,335
FY 2002/2003	\$ 651,801
FY 2001/2002	\$ 657,852
FY 2000/2001	\$ 648,384
	\$ 19,414,711



FUND IMPACT REPORT

McKnight Brain Research Foundation

Evelyn F. McKnight Chair for Brain Research in Memory Loss (007889)

Spendable Fund Transfers since endowment inception

FY 2020/2021	\$ 36,237	(09/30/2020 YTD)
FY 2019/2020	\$ 143,298	
FY 2018/2019	\$ 140,521	
FY 2017/2018	\$ 139,814	
FY 2016/2017	\$ 139,814	
FY 2015/2016	\$ 143,923	
FY 2014/2015	\$ 170,407	
FY 2013/2014	\$ 162,162	
FY 2012/2013	\$ 156,803	
FY 2011/2012	\$ 156,485	
FY 2010/2011	\$ 148,182	
FY 2009/2010	\$ 143,584	
FY 2008/2009	\$ 165,660	
FY 2007/2008	\$ 178,827	
FY 2006/2007	\$ 161,019	
FY 2005/2006	\$ 134,384	
FY 2004/2005	\$ 127,813	
FY 2003/2004	\$ 124,127	
FY 2002/2003	\$ 125,768	
FY 2001/2002	\$ 100,869	
FY 2000/2001	\$ 99,417	
FY 1999/2000	\$ 3,438	

\$ 2,902,553



FUND IMPACT REPORT

McKnight Brain Research Foundation
Evelyn F. McKnight Chair for Clinical Translational Research
in Cognitive Aging (020105)
Spendable Fund Transfers since endowment inception

FY 2020/2021	\$ 36,221	(09/30/2020 YTD)
FY 2019/2020	\$ 143,236	
FY 2018/2019	\$ 140,460	
FY 2017/2018	\$ 139,854	
FY 2016/2017	\$ 139,754	
FY 2015/2016	\$ 143,861	
	\$ 743,387	



FUND IMPACT REPORT

McKnight Brain Research Foundation William G. Luttge Lectureship in Neuroscience (018093) Spendable Fund Transfers since endowment inception

FY 2020/2021	\$ 2,496 (09/30/2020 YTD)
FY 2019/2020	\$ 9,869
FY 2018/2019	\$ 9,678
FY 2017/2018	\$ 9,628
FY 2016/2017	\$ 9,627
FY 2015/2016	\$ 9,909
FY 2014/2015	\$ 9,386
FY 2013/2014	\$ 9,074
FY 2012/2013	\$ 6,754
	\$76,421



FUND IMPACT REPORT

Evelyn F. McKnight Cognitive Aging and Memory Research Fund

Book Value as of 09/30/2019	\$25,967,781.35
Market Value as of 09/30/2020	\$32,042,327.78
Projected Spendable Income for 2019/2020	\$1,086,961.99

Endowment Management

Endowment assets are invested through the University of Florida Investment Corporation (UFICO, created in 2004 to manage UF's investment portfolios. UFICO is headed by a Chief Investment Officer who reports to the a volunteer Board of Directors and President of the University of Florida



FUND IMPACT REPORT

Evelyn F. McKnight Chair for Brain Research in Memory Loss

Book Value as of 09/30/2019	\$3,995,676.90
Market Value as of 09/30/2020	\$4,302,323.22
Projected Spendable Income for 2019/2020	\$145,946.38

Endowment Management

Endowment assets are invested through the University of Florida Investment Corporation (UFICO, created in 2004 to manage UF's investment portfolios. UFICO is headed by a Chief Investment Officer who reports to the a volunteer Board of Directors and President of the University of Florida



FUND IMPACT REPORT

Evelyn F. McKnight Chair for Clinical Translational Research in Cognitive Aging

Book Value as of 09/30/2019	\$4,000,000.00
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Market Value as of 09/30/2020	4,300,463.17
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Projected Spendable Income for 2019/2020	\$145,883.28
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Endowment Management

Endowment assets are invested through the University of Florida Investment Corporation (UFICO, created in 2004 to manage UF's investment portfolios. UFICO is headed by a Chief Investment Officer who reports to the a volunteer Board of Directors and President of the University of Florida



FUND IMPACT REPORT

William G. Luttge Lectureship in Neuroscience

Book Value as of 09/30/2019	\$250,300.00
Market Value as of 09/30/2020	\$296,300.44
Projected Spendable Income for 2019/2020	\$10,051.98

Endowment Management

Endowment assets are invested through the University of Florida Investment Corporation (UFICO, created in 2004 to manage UF's investment portfolios. UFICO is headed by a Chief Investment Officer who reports to the a volunteer Board of Directors and President of the University of Florida



Quarterly Performance Report

UF Foundation – Endowment Pool

September 30, 2020

UF Foundation – Endowment Pool

Endowment Pool

Since the founding of the University of Florida (UF) in 1853, generous alumni, corporations, foundations, parents and friends have contributed financial resources to assist UF in achieving its long-term mission of providing a superb education for undergraduates while maintaining excellent graduate programs and professional schools. As a result, UF's total endowment market value is among the largest public university endowments in the United States.

The UF endowment assets reside with the University of Florida Foundation (UF Foundation). The UF Foundation is a private, not-for-profit, 501(c)(3) direct support organization of the University that raises and manages all gift money for the benefit of the University of Florida. The management of the Endowment Pool is designed to accomplish two goals:

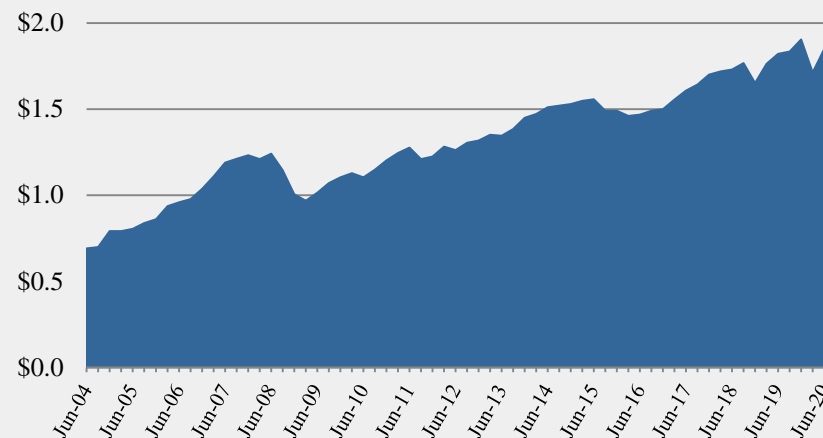
- Provide a total return from assets invested that will preserve or increase the purchasing power of the endowment capital, and;
- Generate the maximum current spendable income stream to support activities of funds held for colleges and units of the University.

Endowments are an irreplaceable source of quality, stability, productivity and creativity for the University of Florida. The thoughtful individuals and organizations who create endowments provide security and confidence for our students and faculty, now and in the future. As such, the UF Foundation invests gift assets to protect the ability of the endowment to provide, in perpetuity, an income stream sufficient to support the University activity designated by the donor, and to ensure the proceeds thereof are used in accordance with their designation.

For the first quarter of the 2021 fiscal year, the Endowment Pool started with a balance of \$1.85 billion. During the quarter, there was \$6 million of cash inflows to the Endowment Pool thanks to the generous support of donors. Endowment investments resulted in a net gain of \$128 million during the quarter and there was \$22 million of cash paid out during the quarter in support of the University of Florida and its programs. The quarter ended with an Endowment Pool balance of \$1.96 billion.

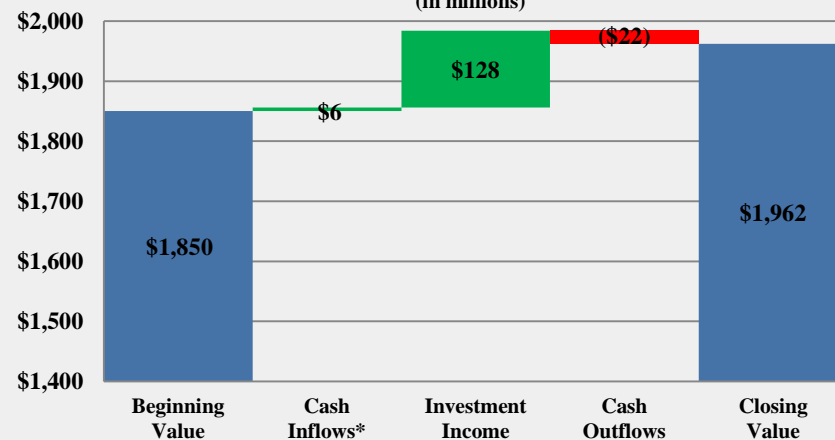
Total Value of the Endowment

(in billions)



Financial Recap Quarter-ended September 30, 2020

(in millions)



* The timing of cash inflows does not always correspond with the timing of endowment gifts.

UF Foundation – Endowment Pool

Investment Objectives

Since the inception of the University of Florida Investment Corporation (UFICO) in June 2004, the investment of the Endowment Pool has been managed by UFICO. Through UFICO's management of the Endowment Pool, the UF Foundation seeks to achieve an annualized real rate of return of at least 5% net of fees to preserve and enhance the purchasing power of the endowment. Returns are measured over the long-term as the Endowment Pool is able to tolerate variability in the short and intermediate-term given its long investment horizon.

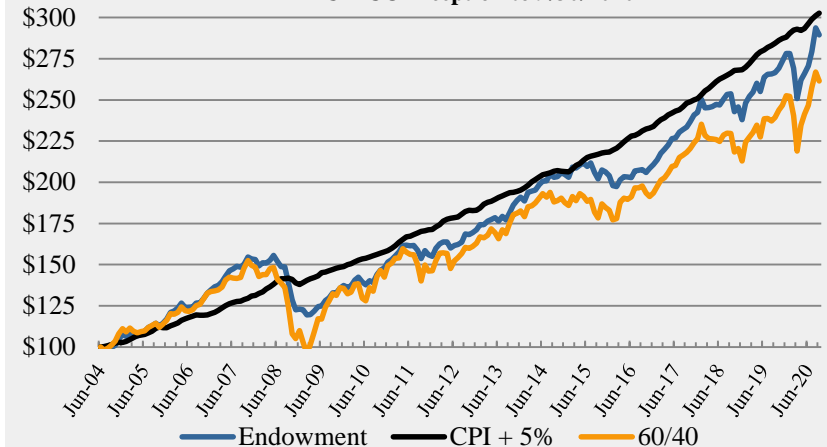
To measure performance results, investment returns are compared against the following benchmarks:

Benchmark	Purpose
CPI + 5%	The consumer price index plus the average gross spending rate for the endowment. This is a long-term growth benchmark that seeks to measure the purchasing power of the endowment over time.
60/40	Comprised of 60% - MSCI All Country World Index and 40% - Barclays Global Aggregate Bond Index, this benchmark represents the investible alternative for the endowment.

UFICO manages the Endowment Pool based on the objectives for the endowed assets as established by the Finance Committee of the UF Foundation Board of Directors. UFICO has constructed a long-term strategic asset allocation for the endowment portfolio based on the prioritization of these requirements including:

- **Positive Real Returns** – Intergenerational equity and maintaining the real purchasing power of the assets
- **Liquidity** – Retaining the ability to fund endowment obligations in all market conditions
- **Good Stewardship** – Maximizing *risk adjusted* returns
- **Growth** – Increasing the endowment's ability to support the University

Growth of \$100 Invested in the UF Endowment
UFICO Inception to 9/30/2020



Note: Based on endowment accounting returns.

Strategic Asset Allocation As of 9/30/2020

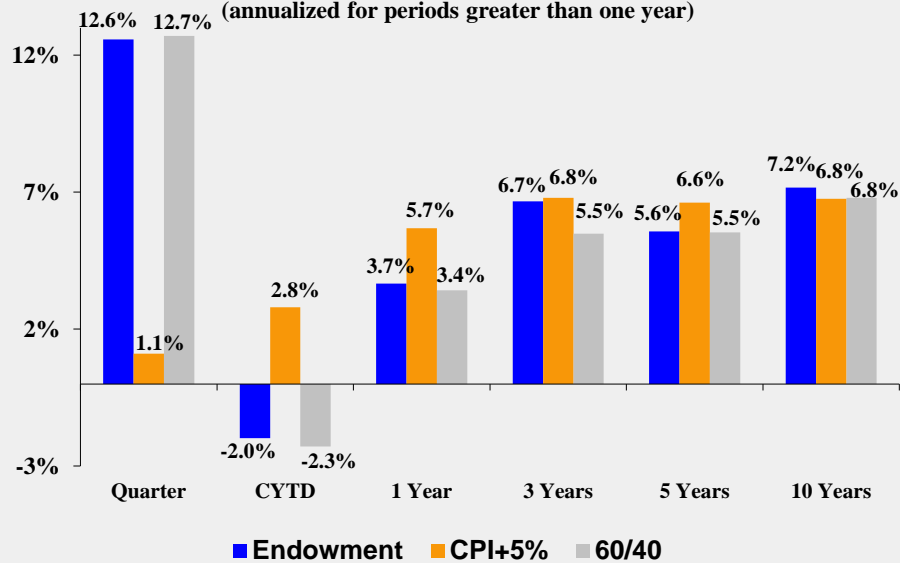
Strategy	Asset Classes	Target Allocation	Actual Allocation
Growth	Public Equities Hedged Strategies Private Equity	80.0%	80.2%
Diversifying	Hedged Strategies	10.0%	8.7%
Liquidity	Fixed Income Cash	10.0%	11.1%

UF Foundation – Endowment Pool

Final Investment Returns

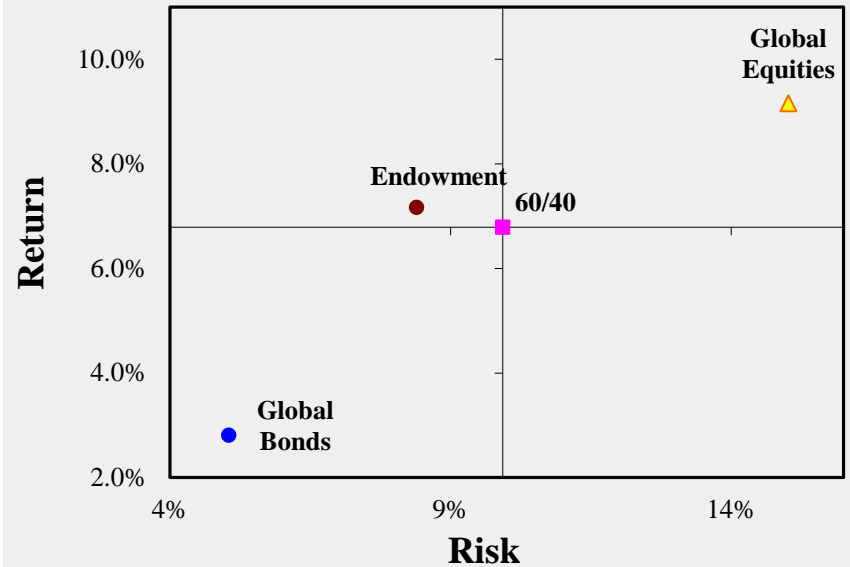
As of June 30, 2020

(annualized for periods greater than one year)



Risk & Return

10 Years ended June 30, 2020



UF Foundation – Endowment Pool

Investment Returns

(annualized for periods greater than one year)

		Preliminary Investment Performance September 30, 2020						Final Investment Performance June 30, 2020						
		(000's) NAV	Asset Allocation Actual	Target	Last 3 Months	Calendar YTD	1 Year	Last 3 Months	Calendar YTD	1 Year	Annualized			
											3 Year	5 Year	7 Year	10 Year
UFF Endowment Total Pool ^{1,2,3}		\$1,962,113	100.0%	100.0%	6.71%	4.59%	10.38%	12.58%	-1.98%	3.66%	6.67%	5.57%	6.57%	7.17%
CPI + 5%					2.20%	5.06%	6.43%	1.10%	2.80%	5.68%	6.79%	6.62%	6.48%	6.76%
60% MSCI ACWI / 40% Barclays Global Aggregate					5.97%	3.56%	9.26%	12.70%	-2.28%	3.42%	5.49%	5.53%	5.85%	6.79%
Growth Allocation	Public Equity	\$788,342	40.2%	40.0%	8.20%	2.69%	12.78%	22.25%	-5.10%	3.79%	6.61%	7.12%	8.21%	9.45%
	Blended MSCI Custom Benchmark ⁴				7.59%	-0.39%	8.52%	18.44%	-7.41%	0.43%	5.07%	5.62%	7.04%	8.53%
	MSCI ACWI				8.13%	1.37%	10.44%	19.22%	-6.25%	2.11%	6.13%	6.45%	7.80%	9.15%
	Private Growth	\$487,826	24.9%	30.0%	6.95%	5.61%	11.13%	8.03%	-1.26%	4.23%	9.54%	7.01%	7.85%	9.26%
	Private Park	\$91,262	4.7%	0.0%	5.73%	-1.26%	6.35%	17.25%	-6.61%	3.04%	n/a	n/a	n/a	n/a
	Market Directional Hedged Strategies ⁵	\$205,179	10.5%	10.0%	11.66%	9.09%	14.94%	13.69%	-2.30%	2.77%	8.13%	5.86%	6.98%	5.96%
	HFRI Equity Hedge Total Index				6.03%	2.52%	8.34%	13.19%	-3.31%	0.65%	2.98%	3.07%	4.27%	4.54%
Diversifying Allocation	Diversifying Hedged Strategies	\$170,364	8.7%	10.00%	1.24%	0.26%	-1.55%	1.53%	-0.98%	-2.43%	-0.14%	-0.96%	1.42%	1.10%
	HFRI Macro Total Index				1.17%	0.48%	0.29%	0.95%	-0.69%	0.83%	1.47%	0.75%	1.34%	1.30%
Liquidity Allocation	Fixed Income	\$119,439	6.1%	6.5%	0.16%	8.92%	8.04%	0.50%	8.75%	10.44%	5.49%	3.95%	2.93%	3.54%
	Fixed Income Benchmark ⁶				0.17%	8.90%	8.04%	0.48%	8.71%	10.45%	5.57%	4.04%	3.39%	3.50%
	Inflation Liquidity	\$79,188	4.0%	2.5%	0.04%	0.96%	1.47%	0.14%	0.92%	2.00%	1.85%	n/a	n/a	n/a
	Citi 3 Month Treasury Bill				0.03%	0.56%	1.02%	0.14%	0.52%	1.56%	1.72%	n/a	n/a	n/a
	Cash	\$20,513	1.0%	1.0%	0.01%	0.37%	0.79%	0.05%	0.36%	1.29%	1.53%	1.00%	0.74%	0.60%
	Citi 3 Month Treasury Bill				0.03%	0.56%	1.02%	0.14%	0.52%	1.56%	1.72%	1.15%	0.83%	0.60%

See Notes on next page

UF Foundation – Endowment Pool

Notes:

Fiscal year ends June 30.

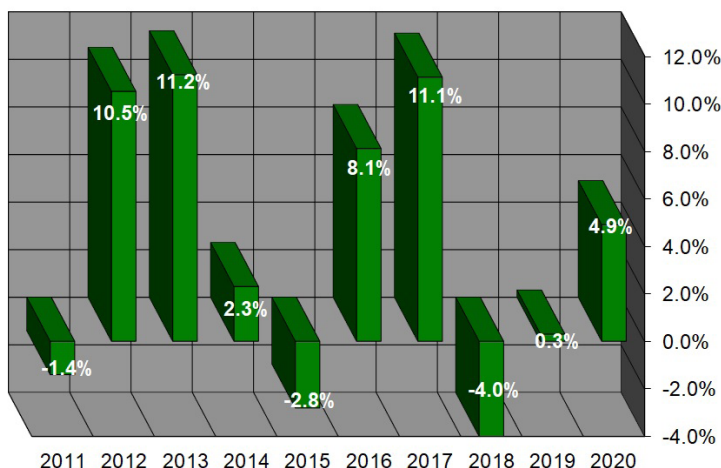
1. Investor Pool returns include all expenses and UFICO fees. Strategy returns exclude UFICO fees but include all manager-level fees and expenses. Hedged strategy returns exclude UFICO expenses. Other strategy returns include UFICO expenses.
2. NAV reflects accounting value. Strategy NAVs exclude cash and accrual balances. Strategy cash and accrual balances are included in
3. Due to the lag in private investment reporting, Preliminary performance reflects 98.0% of September 30, 2020, NAV current as of November 30, 2020.
4. Blended MSCI Custom Benchmark: 42.5% MSCI US; 42.5% MSCI World ex US; 15% MSCI Emerging Markets.
5. Market Directional Hedged Strategies NAV includes hedged strategies sidepockets.
6. Fixed Income Benchmark: 7/1/04-6/30/11 - 100% Barclays Universal; 7/1/11-3/31/15 - 50% Barclays Gov't Index / 50% Barclays US Inflation Protected; 4/1/15-3/31/16 - 100% Barclays Government Index; As of 4/1/16 - 100% Barclays US Treasuries Index.

Investment Report

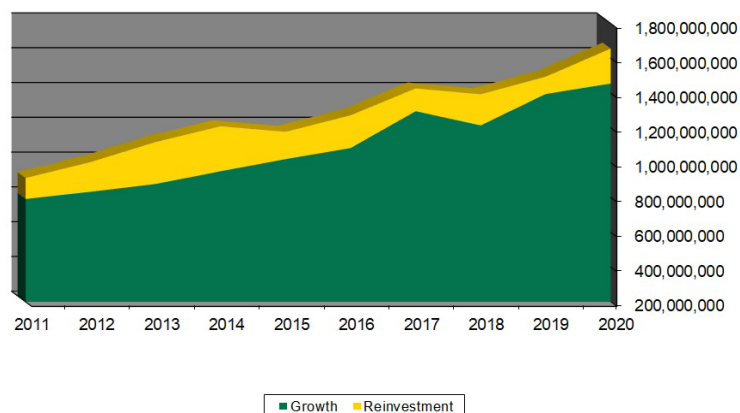
- Created in 1978, the University of Alabama Pooled Endowment Fund (UAPEF) is managed by the Chancellor's Office and is overseen by the Investment Committee of the Board of Trustees.
- As of December 31, 2020, the market value of the UAPEF was \$1.65 billion. Of this amount, 36 percent, or \$593 million, is attributable to UAB and the hospital.
- The UAPEF had a 10-year annualized investment return of 5 percent for the period ending December 31, 2020, compared to a return of 5.15 percent for the custom index.*
- The Investment Committee oversees investment activities, monitors performance of professional money managers, and ensures the prudent control of the investment of funds.
- Participants include all three campuses of the University of Alabama System along with related foundations.
- The Board seeks superior investment returns through professional money management. Assets of the UAPEF are managed by a variety of professional investment firms.
- The UAPEF also utilizes an investment consultant, Fund Evaluation Group, with expertise in investment policy development, spending policy analysis, manager evaluation and selection, and performance evaluation.

* The custom index is a blend of indices that closely represents the actual UAPEF portfolio and is used as a benchmark for comparison, both in terms of return and risk.

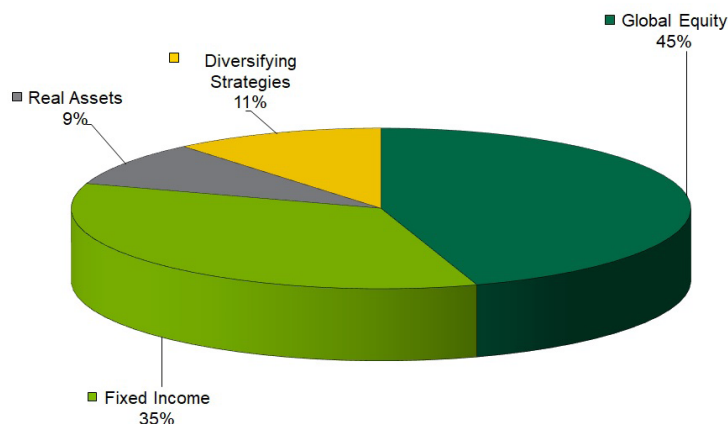
UAPEF Rates of Return
December 31, 2011 - December 31, 2020



UAPEF Growth in Endowment Funds
December 31, 2011 - December 31, 2020



Asset Allocation
as of September 30, 2020



**MBRF Operating & Communications Budget - Proposed
7/1/2021 - 6/30/2022**

Operating Expenses

Communications Expenses

Board of Trustee Fees	\$240,000.00
Legal Fees	\$24,000.00
CPA Fees	\$20,000.00
Consulting Fees*	\$110,000.00
SunTrust Bank Fees	\$170,539.60
Taxes	\$136,000.00
Meetings	\$20,000.00
Website Fees	\$1,500.00
Memberships	\$780.00
Insurance	\$1,625.00
Total Operating Expenses	\$724,444.60

** represent payment to Executive Director*

LookThink	\$55,000.00
Moonlight Media	\$5,000.00
Neurology Ads	\$5,000.00
Consulting Fees*	\$75,000.00
Total Communications Expenses	\$140,000.00

** represent payment to Senior Communications Advisor*

Communications Activity Timeline

(Updated to current status as of April 20, 2021)

Activity	Date/Status	Action	Responsible Party	Comments
Key Messages	✓ April 11, 2019 (COMPLETE)	Messages distribute at 11 th Inter-institutional Meeting Communications Program and Panel	A. Porter V. Patmintra	Key messages document to be used as the basis for communications materials, website content, social media postings, and media speaking points as they relate to the topics of cognitive aging, decline, and memory loss. Key messages include edits/suggestions from the Leadership Council as of Dec. 2018, and were endorsed by the Board of Trustees on Feb. 20, 2019.
Organizational Brochure	✓ January 2020 - December 2020 (COMPLETE) June – October 2020	Draft content and designed the organizational brochure Revised brochure design and content based on feedback secured	V. Patmintra	Content secured from the MBIs and incorporated into a draft of the MBRF organizational brochure. Content was shared with the CWG members on the January 24 th conference call and edited to reflect MBI feedback. Worked with designers to layout and design the MBRF organizational brochure as a complement to the new MBRF website. Look and feel matches the overall website design and include content approved for the website and reviewed by the MBIs. Designed brochure was reviewed by MBRF Education and Communications Committees in June Meetings. The designed brochure was reviewed during the Board's July meeting. Revisions were made to reflect committee and the full Board's feedback and an updated version of the brochure was shared with the communications working group members during their September call.

	<p>✓ October – December 2020</p> <p>(COMPLETE)</p>	Produce and upload organizational brochure	V. Patmintra	<p>The brochure was tweaked and revised to reflect additional design suggestions shared by the MBRF Board and members of the Communications Working Group.</p> <p>Final approval of the brochure content and design was secure in early December. An online reader tool was selected and the brochure was converted to post to the website via the online reader tool.</p> <p>In late December, calls to action were posted to the home page and About Us pages of the website directing people to learn more about the Foundation by downloading and reading the organizational brochure.</p>
McKnight Brain Website	<p>August 2020 COMPLETE</p> <p>February – April 2021 IN PROGRESS</p>	<p>Created content and promotions for the 2021 McKnight Scholarship application window</p> <p>Building out area of the website highlighting the McKnight Scholarship winners and to promote the upcoming application period in advance of the next scholarship application period</p>	V. Patmintra	<p>Created home page ads announcing the application period for the 2021 scholarship</p> <p>Work with AAN and ABF to secure advertising opportunities to announce the scholarship period</p> <p>Drove traffic to the online application via online advertising and social media promotion</p> <p>Drafting press release announcing the 2020 McKnight Scholars to distribute and post in mid-April.</p> <p>Working with AAN and ABF to secure advertising opportunities to announce and drive applications for the 2021 scholarship.</p> <p>New section of the website will be added by the end of April.</p>
	Summer 2020 and ongoing	Develop content to build a dedicated area of the website for PCP education	V. Patmintra	Create web content to educate PCPs on the differences between Alzheimer’s disease and cognitive decline and age-related memory loss. Content will emphasize the need for appropriate patient screening and offer vetted screening tools/resources PCPs can use with patients.

	March – April 2021			Building out pages for the PCP area of the website based on the wireframe and content approved by the Education Committee. Link to review the new section will be shared with the Board by Monday, April 26.
	Spring 2021 - Ongoing	Build out content to announce and promote the new Research strategic focus area	V. Patmintra	<p>Develop content and create dedicated pages of website describing the new mid-career research accelerator awards program, application requirements and relevant dates.</p> <p>Create a dedicated area of the McKnight Brain homepage to announce the new award program and lead to new content pages.</p> <p>Develop web banners the MBIs and other partners can post to their websites linking to the award information and applications on the MBRF website.</p>
	Summer 2020 - Ongoing	Build audience for the new website	V. Patmintra	<p>Worked with web agency on search engine optimization and targeted online advertising campaigns to drive traffic to and build an audience for the new MBRF website.</p> <p>Audience Building plan was presented to the Communications Committee during the June 26 call and presented to the full Board during their July 22 call</p> <p>Additional patient content is being continually added to the site that maps back to the most popular search terms and key content areas of the site.</p> <p>Implemented social media promotion plan to drive traffic to watch Dr. Issacson's video interview with Dr. Sanjay Gupta. Results report will be shared with the Board leading up to the April 30 meeting.</p>
Social Media	March, 2019 - Ongoing (IN PROGRESS)	Launch MBRF Twitter account and Facebook page	V. Patmintra	Use Twitter to share info from MBRF and the MBIs. V. Patmintra shared MBRF Twitter page with Trustees on April 10, 2020 and posts articles and events to the Twitter

				<p>feed regularly. New logo in use on Twitter.</p> <p>Launched MBRF Facebook page in March to use as a tool to drive traffic to the McKnight Brain website to watch the Dr. Sanjay Gupta interview. Content was posted to Twitter and Facebook regularly during the two-week promotion period to promote the video. Updates will continue being made to Twitter and Facebook several times per week going forward.</p>
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Generate Visibility Opportunities	April 2021 - Ongoing	Inter-Institutional Meeting	V. Patmintra	<p>Post/Share press release announcing the Inter-Institutional Meeting on Twitter and new website. Develop meeting summary to post after the meeting with event highlights and photos.</p> <p>Identify stories, scientists, research, news from Inter-Institutional Meeting to highlight on MBRF website, social media platforms or promote to partners and media contacts after the meeting.</p>
Tracking and Quarterly Reports	Began in 2019 Ongoing	Conduct media tracking and provide quarterly updates.	V. Patmintra	Track media and social media metrics and reach throughout the year and provide quarterly updates to the Trustees. Tracking topics include: brain health, age-related memory loss, McKnight Brain Research Foundation, McKnight Brain Institutes.
Communications Working Group	Ongoing Last meeting held December 14	Monthly calls and activities with members of the Communications Working Group	A. Porter/V. Patmintra	<p>Schedule and hold monthly calls with members of the Communications Working Group to engage in ongoing activities, including:</p> <ul style="list-style-type: none"> • Identifying core competencies needed for each MBI to move forward with communications outreach • Reviewing, vetting and approving materials • Providing input on upcoming studies with relevant consumer/medical media angles • Identifying young researchers and studies of note to highlight on the MBRF website

Identify and Train Expert and Lifestyle Spokespeople	Spring 2021	Identify group of expert spokespeople	A. Porter V. Patmintra	Work with members of the Communications Working Group to identify a team of expert spokespeople to speak to media on behalf of MBRF and the MBIs.
	Spring 2021	Develop initial list of possible spokespeople	A. Porter V. Patmintra	Based on CWG input, develop a list of expert spokespeople available for media interviews and to comment on relevant new research and news articles. Suggested list of expert spokespeople/influencers to be shared with the Trustees by summer 2021.
	On Hold	Develop list of lifestyle spokespeople to recruit	V. Patmintra	Decided to focus on MBI Leadership as expert spokespeople for the coming year. Incorporating lifestyle experts to speak on behalf of the Foundation will be evaluated down the road if the decision to engage in large-scale consumer media outreach is made.

Education Committee Activity Timeline
For the One-Year Period July 1, 2020, to June 30, 2021

Updated April 19, 2021

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>"...shall develop information and resources (for the public and scientific community) on prevalence and impact of age-related cognitive decline and memory loss...."</i>	<p>Work toward alignment of messages across the MBIs and MBRF</p> <p>Make substantive judgments on content and quality of educational content/statements developed for or posted on the website</p>	Key Messages Were Approved and Distributed in Spring 2019	<p>July 1 – June 30 ONGOING</p> <p>ONGOING</p> <p>Review of Topics and Content for Primary Care Physician (PCP) pages on website February 2021</p>	<p>The Education Committee reviews content before it is posted on website, published, or included in print materials or slide presentations, ensuring consistency with key messages.</p> <p>The committee reviews for accuracy, soundness, and alignment with the MBRF mission and current scientific understanding and clinical practice. (The Research Committee also reviews content before making public.)</p>
	A top priority for the committee and MBRF, as approved by the Trustees, is to identify and/or develop educational content for primary care physicians and to oversee the ongoing posting of additional information	<p>The committee approved an outline of resources for the PCP Area on McKnightBrain.org</p> <p>The committee approved drafting content for the PCP area of the website based on the approved outline navigation of the section</p>	<p>DONE June 30, 2020</p> <p>DONE September/ October/November</p>	

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
		<p>The committee reviewed proposed navigation and drafted content for the Primary Care Physician (PCP) pages of the website</p> <p>Content will be revised and edited to include feedback from the committee and used to build out a mock-up of the PCP section</p> <p>An Update to the Trustees will be provided</p> <p>The PCP section will be shared with a focus group of PCPs for feedback and suggestions</p>	<p>DONE February 2021</p> <p>DONE February – March 2021</p> <p>April 30, 2021</p> <p>May/June 2021</p>	
<i>And..." assist those living with age-related cognitive decline and memory loss"</i>	Website content developed for individuals, families and caregivers of those with age-related cognitive decline and memory loss	Add links to approved articles as appropriate but development of content is on hold until PCP content is identified and developed.	ON HOLD	
<i>Inform "...how to better maintain brain health..."</i>	Website content developed for individuals on how to protect, maintain brain health	Add links to approved publications and articles	July 1 – June 30 2021 ONGOING	Committee Reviews before Posting
<i>"shall review all educational materials..."</i>	Brochure copy in development to raise awareness and promote the MBIs and MBRF to individuals, partners, donors	Review of Brochure was conducted and committee concurs with suggestions by Communications Committee	DONE Posted on website January 2021	

<p><i>"Identify educational opportunities and implement activities...to encourage MBIs...inspire commitment and shared vision"</i></p>	<p>12th Annual Inter-institutional Meeting</p> <p>McKnight Scholars Will be invited to next Inter-institutional Meeting</p>	<p>2020 Meeting was canceled 2021 Meeting will be virtual</p> <p>Develop Feature on McKnight Scholars on McKnightBrain.org</p>	<p>April 28 & 29 2021 Two half days</p> <p>To be posted after new Scholars are Announced April 29, 2021</p>	<p>Draft Program was reviewed by the committee February 2021</p> <p>Will help promote scholarship and engage scholars</p>
	<p>McKnight Scholars Dinner at AAN</p>	<p>2020 Toronto, AAN Meeting was canceled</p> <p>2021 Virtual AAN Meeting</p>	<p>April 17 – 22, 2021</p>	<p>Held over - MBRF approved funding of \$4,000 to cover travel, hotel for the night, dinner, UM staff travel</p> <p>To be applied in 2022</p>
	<p>William G. Luttge Annual Lectureship in Neuroscience at the University of Florida</p>	<p>Annual Lectureship by research scientist of National or International prestige in the field of neurosciences</p>	<p>Held in March/April each year in conjunction with Brain Awareness week. 7th lectureship was by Dr. George Koop March 11, 2019 2020 Lecture was canceled. 2021 Lecture to be held in Fall 2021</p>	<p>Annual Lectureship established honoring the Founding Director of the Evelyn F. and William L. McKnight Brain Institute at the University of Florida</p> <p>Events as part of the William G. Luttge Lecture Series will be expanded in 2021.</p>
<p><i>"work to elevate the importance of age-related cognitive decline and memory loss on the national agenda...(work toward) greater investment in research and education by federal health agencies...."</i></p> <p>Duty</p>	<p>IOM Study</p>	<p>"Public Health Dimensions of Cognitive Health" was released by the IOM (see attached document)</p> <p>Working Group formed under the lead of Dr. Molly Wagster</p>	<p>DONE April 14, 2015</p> <p>CURRENTLY NOT MEETING</p>	<p>Study funded by MBRF and federal agencies (NIA, CDC, NINDS, HHS), AARP, Retirement Research Foundation</p>

(from Committee Charter)	Activity/Action	Outcome	Date	Comments
	IOM Study (continued)	MBRF has initiated and implemented several of the IOM recommendations.	ONGOING	
		Dr. Lee Dockery was in contact with IOM (now Academy of Medicine) about issuing a report on progress	DONE October 23, 2019	This would be unusual for the Academy of Medicine to do per Dr. Molly Wagster
		Dr. Ralph Sacco, former President of AAN, recommended to AAN that they support adding age-related cognitive decline and memory loss to curricula for requirements	DONE July 11, 2019	Letters were sent from AAN to MBRF, American Board of Psychiatry and Neurology, and ACGME
<i>"work to elevate the importance of age-related cognitive decline and memory loss on the national agenda..." continued</i>		Dr. Robert Wah and Dr. Lee Dockery spoke by phone with Dr. Gordon Smith, Chair, AAN Education Committee, and Dr. Jaffar Khan, Chair, AAN Graduate Education Subcommittee, to discuss collaborative steps	DONE August 8, 2019	

		Follow-up communication with Drs. Smith and Kahn and Kathy Malloy re: schedule for review of special requirements by ACGME	<p>DONE September 16, 2019</p> <p>June 2020</p>	<p>On distribution list for ACGME e-Communication with schedule for review of special requirements</p> <p>Committee feels they've done all they can do at this time.</p>
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Research Committee Activity Timeline
For the One-Year Period July 1, 2020, to June 30, 2021
Updated April 20, 2021

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>"Encourage and assess research at the McKnight Brain Institutes (MBIs)"</i>	Review of the Annual Reports of the MBIs	Information for scientific review includes: scientific achievements, publications, presentations, collaborations	DONE February 5, 2020 DONE June 15, 2020 DONE Review took place at Feb. 26, 2021 Meeting	Reviewers presented at Feb Trustees Meeting Follow up letters were written and sent to each of the MBIs
	Review of all New Funding Requests from MBIs	UM submitted a request for \$200,000 for Neurocognitive Post-Doctoral Fellowship over the next two years Christian Agudelo, MD, was selected	October 23, 2019 Trustees voted to fund -- payable over two years. Position Start Date – July 2020 February 25, 2021 Trustees Meeting A Funding Request was submitted in late April by Dr. Ron Lazar	The notification letter mentioned that future funding should come from other sources. No New Funding Requests were submitted by MBIs. This request will be reviewed by the Research Cmte at their next meeting and be forwarded to the Trustees for decision.
		UA submitted a request for \$244,400 for UM's participation in the Precision Aging Demonstration Pilot	The proposal was reviewed and approved by the Trustees on Feb 5, 2020 The budget was revised and approved June 2020	Dr. Mike Dockery notified UA of the Trustees' approval Trustees were notified of the revised budget and approved no-cost revisions

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
<i>"Encourage and assess research at the McKnight Brain Institutes (MBIs)" continued</i>	Review of Travel Award Fund: Originally established to fund research scholars and faculty to visit other McKnight institutions.	Few applications for travel. The funds allocated for travel have been used to fund the activities of focus groups: Epigenetics, MRI standardization and cognitive test battery working group	Reviewed at each Trustees' Meeting ON HOLD DUE TO UNIVERSITY TRAVEL RESTRICTIONS	Approved in 2009 In the amount of \$100,000 Approximately \$30,000 remains in the fund
	Inter-institutional Block Grants	Cognitive Aging Core Working Groups	N/A	5 Areas: Brain and Cognitive Health Cognitive Aging & Memory Cognitive Testing Battery Epigenetics MRI standardization
	Inter-institutional Block Grants	Bio-Informatics Core (Epigenetics)	Funding period: 9/1/2013-8/31/2015	Tom Foster, UF still lead scientist. \$76,276.49 still unexpended funds
	Inter-institutional Block Grants	Neuroimaging Core	Funding period: 1/1/2015 to 12/31/2017 \$931,759.00	Remaining balance: \$514,229.21
	Inter-institutional Block Grants	Cognitive Assessment and Brain Registry Core	Funding period: 9/1/2015-8/31/2017 Request for another extension was approved at the Feb 5, 2020, Trustees meeting.	Remaining Balance: \$101,275.15 No-cost Extension Request submitted for April 30, 2021, Trustees' consideration

Duty (from Committee Charter)	Activity/Action	Outcome	Date	Comments
	Review of Pilot Grants (Funding Requests and Progress Reports)	A Novel Invention Tool – Levin	Funding Period: 5/1/2018-4/30/2020	Funding for 2-years for total of \$120,000
		Revitalizing Cognition in Older Adults – Bowers	Funding period: 5/1/2018-4/30/2020	Funding for 2-years for total of \$120,000 No-cost Extension Request submitted for April 30, 2021, Trustees' consideration
		Transcutaneous Vagal Nerve Stimulation and Cognition Training – Williamson/Alexander	Approved July 2019 Funding period: 10/1/2019-9/30/2021	Funding for 2-years for total of \$120,000
	Applications for 2021 Pilot Grants	5 Letters of Intent were Submitted	Deadline was extended Research Cmte Reviewed Jan. 29, 2021 Trustees approved 3 grants on Feb. 26, 2021	Bonnie Levin and Ron Lazar forwarded applications and reviewers comments Research Cmte recommended 3 awards be granted
<i>"Identify opportunities...to foster greater interest in cognitive aging and age-related memory loss (in the scientific community)"</i>	Research Partnership with the Foundation for NIH and the NIA. 1 st cycle-2009, 2 nd cycle 2014, 3 rd cycle approved 2019 to begin Spring of 2020	Fund balance of \$1 million from 2 nd five-year partnership returned to MBRF Report received on all FNIH/MBRF activities RFA posted: "Network for Identification, Evaluation, and Tracking of Older Persons with Superior Cognitive Performance for Age"	DONE August 2019 FNIH Report in October 2019 had error. A corrected report resubmitted on Feb. 5, 2020. Posted Feb 2020; Deadline LOI Sept. 1; Application October 1, 2020	History: Established 2009 \$5 M over 5 years from MBRF; match from NIA and partners was \$23 M for total of \$28 M (17 five-year grants funded). 2014 Partnership renewal funded one 5-year project for \$15 million with \$5 M from MBRF and \$10 M from NIA RFA was shared with Communications Working Group for posting and with Leadership Council.

		<p>FNIH Report submitted For information only</p>	<p>October 14, 2020</p>	<p>Valerie connected with Julie Wolf-Rodda and Molly Wagster on promoting STARRS study</p>
<p>Duty (from Committee Charter)</p>	<p>Activity/Action</p>	<p>Outcome</p>	<p>Date</p>	<p>Comments</p>
	<p>Research Partnership with the Foundation for NIH and the NIA (continued)</p>	<p>Research Partnership</p>	<p>Payment due to FNIH by March 31, 2021 -2025</p>	<p>NIA will provide \$14M to be pooled with MBRF \$5 M. A 2.8 Match.</p>
<p><i>"Identify opportunities...to foster greater interest in cognitive aging and age-related memory loss (in the scientific community)" (continued)</i></p>	<p>MBRF Mid-Career Research Award in Cognitive Aging and Memory Loss</p>	<p>Program was Approved by the Trustees</p> <p>Potential administrative and/or funding partners were approached</p> <p>American Federation of Aging Research (AFAR) was identified as a partner organization which could promote and manage the awards while providing rigorous scientific review and oversight. AFAR presented a proposal and draft contract for Trustee review Revised Agreement signed</p>	<p>October 14, 2020</p> <p>December 2020</p> <p>January 2021</p> <p>February 2021</p> <p>April 9, 2021</p>	<p>The McKnight Brain Research Foundation committed \$4.5 million over the next five years to support outstanding mid-career scientists committed to researching the basic biological mechanisms underlying cognitive aging and age-related memory loss.</p> <p>Trustees approved AFAR as the MBRF Partner on the mid-career award</p> <p>Work begins on the Announcement and launching the program</p>

	Cognitive Aging Conference (CAC) 2020	MBRF requested information about sponsoring a panel and/or poster session reception	April & July 2019 No proposals were received. CAC 2020 Mtg CANCELED	MBRF sponsored a successful panel at Cognitive Aging Conference May 2018
	Reserve & Resilience Workshop 2019 Reserve & Resilience Workshop Pilot Grants 2020	Over 300 Attendees (8 MBI researchers) Organizers requested \$30,000 to support (1 – 3) pilot grants	September 9 and 10 th , 2019 Bethesda In-Person Meeting CHANGED TO VIRTUAL MTG September 14 and 15, 2020 January 2021	This is an outcome from Cog. Aging Summit III held in 2017. Research Committee approved support; Trustees were notified; Dr. Yaakov Stern received notification letter and sent appreciation. Dr. Stern sent a report – MBRF Funding supported research proposal from Colombia University – Payment was issued
<i>"Encourage young investigators in this area of research"</i>	McKnight Brain Research Foundation Clinical Translational Research Scholarship with American Academy of Neurology (AAN) and American Brain Foundation (ABF)	Dr. Robert Krikorian has agreed to be the 4 th Reviewer with Drs. Thambisetty, Isaacson, O'Brien in Fall 2020	Reviewers meet in Dec. Two Scholars are selected and alternates were identified. Awardees are notified in January. Funding starts July 1 of each cycle Edits to 2021 RFA were made and approved by Research Cmte. RFA has been posted as of July 4, 2020, on AAN site. Was added prominently to MBRF site in July. Advertising followed 2019 Plan for 2020 Award and begin in August, 2020. 8 applications for 2021 were received.	<u>First Scholarships Awarded</u> January 2018 (McConnell, Albert) <u>Second Scholarships Awarded</u> January 2019 (Camargo, Sedaghat) <u>Third Scholarships</u> Awarded January 2020 (Baxter, Getz) <u>Fourth Scholarships</u> were Awarded in January 2021 to Dr. Wendy Yau Wai-Ying (Brigham and Women's) and Dr. Matthew Burns (UF) Publicly announced in April 2021 <u>Fifth Scholarships</u> will be advertised in summer of 2021;

			October 14, 2020, Renewal for next five years was approved by the Trustees	deadline Oct. 1, 2021, and awarded in January ABF presented report on the program and request for renewal for 2023 – 2027 was approved by the Trustees
<i>"Encourage young investigators..." continued</i>	Poster Reception at 2019 Society for Neuroscience annual meeting	Was held on October 20 th , 5 to 7 pm, Loews Hotel in Chicago 70 submissions were received Dr. Mike Dockery, Dr. Robert Wah, Dr. Gene Ryerson and Amy Porter attended. Dinner followed with Molly Wagster and Jon King of NIH.	October 20, 2019	First Poster Reception held in 2008. (50 submissions received) Sponsored by MBRF. Hosted by Directors of MBIs. Submissions open to researchers at MBIs and invited guests only
	Poster Reception at 2020 Society for Neuroscience (SfN) annual meeting in DC October 24 – 28, 2020	Proposal submitted and reviewed and approved by MBRF Trustees	Feb 5 2020 Trustees meeting	Vicki Hixon was notified of approval
	SfN 2020 Meeting was canceled due to DC pandemic closing guidelines SfN 2021 Meeting TBD	MBI Leadership Council considered but ruled out a virtual poster session	Hotel was canceled at no cost to MBRF.	.

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March 12, 2021

McKnight Brain Aging Registry: Neuroimaging and Cognitive Cores
Progress Report to the Trustees of the Evelyn F. McKnight Brain Research Foundation

Dear Trustees,

We are pleased to provide an update on the McKnight Brain Aging Registry (MBAR) and its Neuroimaging and Cognitive Cores. There was considerable progress on this initiative despite major obstacles and delays associated with the Covid-19 pandemic and the need to pause our planned enrollment of new participants for much of the past year, beginning in March, 2020. Despite this delay, the registry is moving closer to being finalized and we are planning to enroll our final group of oldest old participants, once we are able to move forward and provide a safe environment for our vulnerable 85+ year old research participants. In the interim, we are continuing to take the necessary steps, designed as a two tiered process, to insure reliability and the highest quality control for all data collected at the four sites. This is in addition to double data entry that was performed during the course of the study to establish data quality assurance. Data processing and primary analyses have been initiated and are underway at each of the MBI sites with these analyses focusing on each of the neuroimaging modalities, as well as the cognitive/clinical indices. The results will be presented at the next MBRF annual inter-institutional meeting. Manuscripts are at various stages of development.

The MBAR Steering and Publication Committee has continued to meet during the past year. We created a MBAR Proposal and Data Access Form in order to provide wide access to the MBAR data. This form asks the author/investigator for basic information and key components of the proposed study as well as potential conflicts of interest for the MBAR Publication Committee to review. We have implemented these forms as part of a standard process in order to protect the integrity of the MBAR data set, as we move forward with new data analysis requests. As mentioned in an earlier memo sent to the Board of Trustees, we see our role as working to insure the quality of data to advance studies of cognitive aging. To date, a total of 3 proposals have been approved and these analyses are being initiated. A list of currently approved secondary analysis projects is provided in Appendix A.

To capitalize on the unique nature of the Covid-19 pandemic, an MBAR sub-study was initiated, designed to be administered remotely, and conducted across all four study sites. The study protocol examined the lifestyle, psychosocial, physical health effects in our unique cohort of oldest old adults living in the community during the pandemic. Questionnaires were administered to participants willing to participate. The focus of this phone assessment was to obtain information regarding the effects of social isolation and other consequences of the pandemic, including a determination of cases of Covid

infection in our cohort. An important benefit of this sub-study is that it gave us a chance to visit with our participants and bring them up to date on MBAR and thank them again for their participation. This contact also enabled them to remain invested in the initiative given the possibility of follow-up studies that may be performed as we explore options for NIH or other funding.

We wish to express our sincere appreciation for your continued support in establishing the MBAR and both the neuroimaging and cognitive cores, which have greatly facilitated our collaborative, cross-institutional research in the study of cognitive aging.

Sincerely,



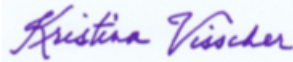
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McKnight Brain Aging Registry Update: Neuroimaging and Cognitive Cores

Vision

A Successful Aging Research Network that will facilitate multi-institutional collaborations across the McKnight Brain Institutes (MBI) to enhance our understanding of cognitive and brain aging and to identify intervention targets to ameliorate age-related cognitive decline.

Mission

Establish and maintain the necessary multi-institutional infrastructure to support and implement a Brain Aging Registry of the oldest old, which includes assessments of particular importance to the field of cognitive aging, including neuroimaging, extensive cognitive and functional assessments, and blood-based biomarkers.

Scientific Progress

The principal investigators, along with co-investigators and study coordinators involved in both the MBAR Neuroimaging and Cognitive Cores have continued to work hard to advance the project and considerable progress has been made over the current reporting period. To date, we have enrolled 176 participants who have been recruited across the four MBI sites, reflecting 88% of our targeted enrollment, and who have been fully engaged in the registry, providing clinical, neuropsychological, and brain imaging data. Given the highly vulnerable status of community-dwelling individuals ages 85+ to Covid-19, we have taken an appropriately conservative approach to new subject enrollment and participation for the MBAR during this past year. We are expecting to be able to resume our planned recruitment and in-person MBAR assessments by the end of the next fiscal year to reach our originally planned cohort of 200 MBAR oldest old participants, once all potential enrollees and research staff are able to be fully vaccinated for Covid-19 and the risk to our new participants is considered minimal. During this period, we have, however, initiated a Covid-19 MBAR sub-study to follow up on our already enrolled participants to remotely assess their cognitive and health status, as well as the psychological and health effects of experiencing the Covid-19 pandemic, while living in the community. This novel remote assessment was initiated and implemented by all four MBI MBAR sites and data was collected on all MBAR registrants who were available and willing to participate. The data collected from this remote assessment will also be entered into our centralized MBAR database to facilitate new cross-institutional, collaborative research.

Since the MBAR and neuroimaging cores were approved by the MBRF and funding began in January 2015, weekly conference calls have been held to discuss and implement the comprehensive assessments for collection of multi-modal neuroimaging, cognitive, and functional data from older adults over the age of 85 years who have been screened to exclude those with MCI or dementia and are showing evidence of successful cognitive aging. Over the last reporting period, the MBAR research activities focused on our ongoing recruitment was limited to the 3 month period prior to the March, 2020 Covid-19 shutdown of clinical research activities across the four MBIs. Although we were able to make progress in increasing our cohort, we were not able to reach our original total target goal of 200 MBAR participants with neuroimaging, clinical and neuropsychological data during this past year. We were however able to continue to work on database modifications, data entry, and conducting interim data analyses and development of plans for submission of findings for publication. Weekly conference calls were held to discuss MBAR related issues. These were organized to include bi-weekly conference

calls, attended by the PIs along with the study coordinators and MR physicists at each site. These calls focused on resolving any logistical, procedural, and data management issues or questions that may have arisen. A great deal of effort has been directed to insure harmonization of acquisition methods and data across sites to optimize quality assurance and quality control procedures. On alternate weeks, we held additional regular conference calls, which were either focused on specific project-related discussions on neuroimaging and cognitive issues or were dedicated for our monthly MBAR Scientific Advisory Committee (SAC) call. The SAC is a representative committee of MBAR PIs and investigators, fully familiar with the MBAR cohort and data collection, with approximately two representatives from each MBAR MBI participating site. The SAC calls provide for discussions of broader issues related to the registry, including plans for new grant submissions, identifying priorities for data analyses and lead investigators for MBAR manuscripts, and plans for enhancing use and accessibility of the growing MBAR dataset.

With our MBAR database infrastructure established, the REDCAP dataset continues to be fully operational and is actively being populated with data from each participant across all MBI sites, including for our new Covid-19 MBAR sub-study. MRI data is uploaded from each site to the HiPerGator super-computer at UF, where it is pre-processed into a unified format enabling different imaging modalities to be more easily examined simultaneously. Cognitive and clinical data are uploaded to UM, where it is double entered into REDCAP with ongoing reliability checks. Data from the physical activity actigraph recordings are sent to Dr. Alexander at UA for processing and analyses. Blood specimens are sent to UF for storage in freezers located in the phlebotomy laboratory. All study coordinators have been trained in use of the database, including how to enter test scores and other clinical information. Several of the tests that are being employed require processing of scores and formatting prior to data entry. We have continued to devote effort in the last reporting period to further develop these tools for automatic data processing. All data is double entered into the REDCAP database and/or checked for outliers and missing values on a regular basis. Data sharing agreements and coordinated IRB approvals have been previously obtained and has been updated as needed for each site to support sharing data across MBI sites. In the sections below, additional progress relative to each core and component of the MBAR project are described.

Neuroimaging Core Progress

- 1) The MBAR neuroimaging protocol continues to be fully operational. As described previously, we are collecting a comprehensive multimodal structural, functional, and metabolic neuroimaging dataset that includes: T1 images for cortical and subcortical volumetric and thickness measures; FLAIR-white matter hyperintensity lesion load; Diffusion Tensor Imaging for white matter integrity and tractography; MRS for cerebral metabolite concentrations, including GABA and glutamate; resting state fMRI functional brain activity at rest to measure functional connectivity; and MRI phase contrast scans for measures of cerebral vascular pulsation and blood flow analyses.
- 2) MR standardization: This has been accomplished and continues with all sites following standard procedures for the MRI protocols and order of administration.
- 3) Pre and post-processing has been initiated for the MRI structural, functional, and connectivity data, as well as for the MR spectroscopy, with quality control procedures in place and assessment of data quality for processed neuroimaging scans ongoing.
- 4) Time constraints: We have maintained the timing of the neuroimaging protocol, which has been typically executed for acquisition within 60 minutes. We have continued to not encounter complaints from the participants about the length of the MRI scan. For the most part, they have not reported finding this assessment burdensome nor do they describe significant discomfort. We believe this protocol continues to provide the opportunity for innovative and cutting-edge

measures of brain structure, function, network connectivity, and neurometabolic and cerebral hemodynamic health.

- 5) The neuroimaging data being acquired in the MBAR project continues to be unique for the field of cognitive aging. There have not been other studies of people over the age of 85 that have assessed participants with such an extensive multimodal MRI scan battery.

Cognitive Core Progress

The Cognitive Core has continued to integrate their conference calls into the regular weekly calls described above to facilitate group communication across the cores and MBI sites. Most discussions have continued to focus on resolving any data entry and analytic questions, as well as occasional queries from the study coordinators regarding minor procedural and scoring questions. However, most of the focus has continued to concern strategic planning regarding the sequence of analyses to be conducted. There have also continued our ongoing discussions to consider adding a few additional cognitive measures or rating scales, which led to implementation of our Covid-19 MBAR sub-study. During the past year we achieved numerous objectives in this core as outlined below:

- 1) Identified cognitive parameters: We have continued to implement our standardized battery of cognitive tests to address assessment of the proposed cognitive domains.
- 2) Battery refinement: We have continued to use our finalized main cognitive and clinical assessment battery, but further developed and implemented measures to assess Covid-19 related effects in the community.
- 3) Standardization of cognitive and clinical assessment procedures: We continued to use our training manuals, training videos that include test administration and scoring, and other tools to insure consistency of the assessment approach across sites and testers. Examples of the manuals and videos we created can be accessed at: <https://labs.uab.edu/visscher/2-uncategorised/48-mbarresearchtraining>
- 4) Certification program: Study coordinators have continued to be certified to insure standardization. To achieve this standardization, we set up a procedure whereby one person (e.g., research associate) at each site is certified for cognitive and clinical test administration and scoring. This, in addition to ongoing oversight by investigators, gives us ongoing confidence that the study protocol is implemented in a systematic and uniform manner across sites.
- 5) NIH-Toolbox expanded domains: These measures continue to be collected, including measures from the motor and sensory domains.
- 6) Expanded memory assessment: The Face-Name Association Test and the Mnemonic Similarities Test continue to be implemented with data being collected on an ongoing basis at all sites.
- 7) Actigraphy: We continue to implement the use of Actigraph actigraphy watches to assess physical activity in our oldest old cohort for a 7-day period, consistent with the Center for Disease Control (CDC) standard research protocol. Processing and analysis software have been developed, updated, and applied at the UA.
- 8) NACC battery: Measures developed and employed by National Alzheimer's Coordinating Centers (NACC) continue to be collected following standardized procedures for all participants and are being used for clinical screening and adjudication of cases with questionable MCI. This data will continue to enable future harmonization with data collected in the NIA Alzheimer's Disease Centers and memory disorder programs at the MBI sites.
- 9) A specialized battery of rating scales and cognitive tests was developed and implemented across the MBI sites to support the new Covid-19 MBAR sub-study. This battery allows for phone administrations of measures for remote assessments on cognitive, health, and psychological effects of the Covid-19 pandemic in our oldest old community dwelling cohort.

Laboratory Measures: Blood Biobanking

The MBAR is also collecting blood samples from participants. These samples are obtained using standard protocols and procedures across sites and are stored for future use for genetic, metabolic, and other analyses.

- 1) Blood samples from participants are continuing to be drawn on most participants across the MBI sites. These samples are centrifuged, frozen, and then sent to UF for central storage in the CAM freezers.

Despite the enormous challenges of the Covid-19 pandemic, we have continued to make great progress over the past year. The time and effort directed at the MBAR project has resulted in the collection of important clinical, cognitive and neuroimaging data that we fully expect will make a significant contribution to the clinical neuroscience of cognitive and brain aging. With the accumulation of the MBAR data, we are planning initial interim manuscripts for submission as we continue to close in on our target sample of 200 participants. We further expect that a increasing number of analyses and manuscripts will be developed towards the end of the next fiscal year using data from the fully recruited cohort.

Deliverables

Leveraging the infrastructure and opportunities for inter-institutional collaborations provided by the MBAR, the MBAR leadership and investigators have had a number of achievements, including collaborative grant awards, manuscript publications, presentations at scientific meetings, and the continued MBRF pilot project program. In addition, many MBAR investigators from each of the MBI sites have benefited from the inter-institutional interactions facilitated by the MBAR effort, leading to numerous grant submissions and manuscripts that are not reflected by the cross-institutional grants and papers listed below. The specific deliverables showing cross-institutional collaboration are described below:

Frontiers in Aging Neuroscience Special Edition: The core and affiliated faculty of the four MBIs have generated a special edition, with additional articles submitted for publication in the last year, of the journal focusing on the use of neuroimaging for the study and assessment of cognitive and brain aging. The editors for this special edition include several PIs and investigators for MBAR (Cohen, Alexander, Visscher, Wright, Woods). All manuscripts planned for this special edition have now been published and we successfully concluded this special issue, which can be accessed online at <https://www.frontiersin.org/research-topics/4049/neuroimaging-approaches-to-the-study-of-cognitive-aging>.

Augmenting Cognitive Training in Older Adults (ACT) Project Update: This five-year, \$5.7M NIA-funded, R01 multicenter Phase III RCT continues to be actively recruiting the planned 360 healthy older adults between the ages of 69-90 years. This project utilizes the infrastructure created by MBAR for this multisite trial between the MBIs at UF and UA (MPIs: Cohen, Marsiske, Woods; UA Site PI: Alexander). The effects of transcranial direct current stimulation (tDCS) given in conjunction with cognitive training is being examined to determine if tDCS increases neuroplasticity (as measured using neuroimaging methods) and ultimately whether it leads to improved cognitive outcomes as measured by the NIH-Toolbox. This study continues to be the largest tDCS study of its kind ever conducted or supported by NIH. This study fits fully with the MBAR mission and the MBRF more broadly, and is a direct byproduct of the inter-institute collaborative work initiated within the MBAR. It is a major deliverable resulting from this inter-institute collaboration. Recent manuscripts from this cross-institutional, collaborative RCT protocol have been published or submitted (Hausman et al., 2020; Kraft

et al., 2020; Hardcastle et al., 2020; Evangelista et al., 2021; Boutzoukas et al., Submitted). Additionally, abstracts for international research meetings (Boutzoukas et al., January, 2020; Evangelista et al., January, 2020; Hardcastle et al., January, 2020; Hausman et al., January, 2020; Kraft et al., January, 2020; Kraft et al., February, 2021; Boutzoukas et al., February, 2021; Langer et al., February, 2021; Kraft et al., July, 2021), using the baseline assessment and neuroimaging data, have been presented or submitted (see references below).

Near Infrared Brain Stimulation Study: A new \$3.8M NIA R01 RCT grant proposal was awarded in August, 2019 and continues to examine the effects of near infrared brain stimulation on cognitive and brain function in older adults to determine its ability to augment cognition during aging. This highly innovative multisite proposal between UF and UA (MPIs: Woods, Alexander, Bowers) directly utilizes the collaborative, multi-institutional infrastructure created by MBAR and represents the largest study to apply this novel method to enhance brain and cognitive performance during aging.

Vagal Nerve Stimulation Study: As part of the McKnight Interventions Core, a pilot study was awarded in October, 2019 by the MBRF to investigate the potential for using vagal nerve stimulation to enhance cognitive function in healthy older adults. This work directly leverages the infrastructure established as part of the MBAR with UF (Williamson (PI), Cohen, Woods, Lamb, Porges) and UA (Alexander) MBI teams, to support the investigation of this novel intervention pilot study. With the essential pilot data from this study, we would plan to pursue a larger scale subsequent NIA grant submission.

MBI Inter-Institute MBAR Grant Initiative: The MBI sites continue to discuss and plan for new grant proposals to NIA that will expand on findings from MBAR. Following discussions and recommendations from NIA program, the MBAR PIs have been working to establish access to PET imaging, fluid biomarker, and neuropathology follow-up across MBI sites to enhance this proposal effort. We are planning to further develop this initiative into one or more NIA grant submissions in the coming year.

Manuscripts: With the MBAR sample now reaching well over 150 participants, we are currently also planning two manuscripts for publication from the MBAR data. One manuscript is being led by Dr. Alexander and his team on the physical activity data using actigraphy in relationship to cognitive and brain aging. A second analysis is underway examining the initial GABA MRS data in this cohort. Additionally, a graduate student working with Dr. Visscher is planning her dissertation research with the MBAR data, which is expected to lead to three new manuscripts for publication. We anticipate a series of additional manuscripts based on data from the registry to be developed in the coming year from both primary and secondary MBAR analyses.

Meeting Presentations: Progress for the MBAR was presented at the 2019 McKnight Inter-institutional meeting at UF with slide presentations by Drs. Alexander (UA), Porges (UF), and Visscher (UAB), reporting efforts and progress in the recruitment and acquisition of neuroimaging and cognitive data for the registry cohort. Since the 2020 McKnight Inter-Institutional meeting was cancelled due to Covid-19, we are looking forward to presenting our progress and plans in the upcoming 2021 virtual meeting.

Challenges and Barriers

While we have been quite productive and made significant progress on our MBAR goals for the past year, we have had to overcome major challenges and barriers due to the Covid-19 pandemic.. However, we believe the study continues to run efficiently, and we are closing in on our original target goal of 200 MBAR participants in the coming year. To reach this goal and to resume enrolling new potential recruits of cognitively unimpaired oldest old adults, we are planning to re-initiate our collective enrollment with a focus on ensuring minimal risk re-entry of our research efforts for this highly vulnerable age-cohort by including only those who have received full vaccination to work with fully

vaccinated staff, while using a full complement of CDC-recommended personal protective equipment and distancing procedures. With the availability of Covid vaccines, we are expecting to engage new participants to complete our enrollment in the coming year, following conservative IRB-approved research protocols at each MBI site. To identify potential participants, we plan to continue to enhance our community outreach, use newspaper ads, and use population databases in the public domain (e.g., voter registration rolls) or other sources for targeted mailings. Going forward we plan to continue to leverage the data collected to support new publications that will contribute to the scientific literature, will advance translation and implementation of the assessments for clinical use, and will continue to support the development of multiple inter-institute grant proposals that capitalize on the unique McKnight dataset of successful aging oldest old adults.

Summary

Despite past and recent challenges, the MBAR continues to be fully operational. With our necessary pause in recruitment during most of last year due to the Covid-19 pandemic, our plans to reach our target enrollment total has been delayed, but we do expect to resume enrollment in the coming year, with the availability of Covid vaccinations and our implementation of conservative research participation protocols. During this time, however, we initiated a new Covid-19 MBAR sub-study with remote follow up assessments of our participants. We fully expect that our substantial progress will continue over the coming year. To support our goals and plans for the MBAR cohort, we kindly request a continued no cost extension for the combined Neuroimaging and Cognitive Cores through the next fiscal year, so we can continue our MBAR progress to reach our original target enrollment goal at no additional cost through December 31, 2022. During this time, we will also continue to examine in conjunction with the Clinical Interventions Core, opportunities for new and emerging studies, manuscripts, and grant proposals that fully leverage the collaborative inter-institutional infrastructure and expertise created by the MBAR.

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- Kraft JN, O'Shea A, Albizu A, Evangelista ND, Hausman HK, Boutzoukas E, Porges E, Alexander GE, Marsiske M, Cohen R, Woods AJ. (January, 2020) Structural neural correlates of speed of processing. Abstract for presentation at the International Neuropsychological Society meeting, Denver, CO.
- Kraft JN, Albizu A, O'Shea A, Hardcastle C, Evangelista ND, Hausman HK, Boutzoukas E, Nissim NR, Van Etten EJ, Bharadwaj PK, Song H, Smith SG, Porges E, DeKosky S, Hishaw GA, Wu S, Marsiske M, Cohen R, Alexander GE, Woods AJ. (February, 2021) Functional neural correlates of the Useful Field of View (UFOV) task in older adults. Abstract for presentation at the International Neuropsychological Society meeting, San Diego, CA.
- Boutzoukas, EM, O'Shea A, Albizu A, Evangelista ND, Hausman HK, Kraft JN, Van Etten EJ, Bharadwaj PK, Smith SG, Song H, Porges E, Hishaw AG, DeKosky S, Wu S, Marsiske M, Alexander GE, Cohen R, Woods AJ. (February, 2021) Effects of frontal white matter hyperintensities on executive function tasks in older adults. Abstract for presentation at the International Neuropsychological Society meeting, San Diego, CA.
- Langer K, Britton M, Kraft J, Albizu A, Ou A, OritHardcastle C, Evangelista ND, Hausman HK, Boutzoukas E, Van Etten EJ, Bharadwaj PK, Song H, Smith SG, Porges E, Dekosky S, Hishaw GA, Wu S, Marsiske M, Alexander GE, Cohen R, Woods AJ. (February, 2021) Factors Predicting Chronological vs Brain Age Discrepancies in Healthy Older Adults. Abstract for presentation at the International Neuropsychological Society meeting, San Diego, CA.
- Kraft JN, Albizu A, O'Shea A, Hausman HK, Evangelista ND, Boutzoukas E, Hardcastle C, Van Etten EJ, Bharadwaj PK, Song H, Smith SG, Porges E, DeKosky S, Hishaw GA, Wu S, Marsiske M,

Cohen R, Alexander GE, Woods AJ. (July, 2021) The Impact of Accuracy on Functional Neural Correlates of the Useful Field of View (UFOV) Task. Abstract for presentation at the Alzheimer's Association International Conference meeting, Amsterdam, Netherlands.

Budget Expenditures

For Expenses from October 1, 2019 – January 31, 2021

University of Arizona Expenditures

Personnel:

Research Coordinator \$10,726

Graduate Research Assistant \$18,423

Other:

Research Supplies \$220

MRI & Blood Collection \$4,269

Subject Pay & Parking \$850

University of Arizona total expenditures this period: \$34,488

University of Alabama at Birmingham Expenditures

Personnel:

Co-Investigator \$ 10,747.75

Neurologist \$ 14,998.54

Research Coordinator \$ 18,489.47

Graduate Research Assistant \$ 1,691.39

Other:

Research Supplies \$ 662.21

MRI & Blood Collection \$ 5,583 *paid by an internal UAB CCTS grant

Subject Pay & Parking \$ 2,952.23

Staff Travel \$2,841.63

University of Alabama at Birmingham expenditures this period: \$ 57,966.22

University of Florida Expenditures

Personnel:

Research Staff \$ 37,225.68

Other:

Mailing \$ 5.51

University of Florida total expenditures this period: \$ 37,231.19

University of Miami Expenditures

Given the University of Miami MBAR funds have been expended, all MBAR efforts for this budget period were completely covered by complementary UM institutional funds. Of course, please note that we are fully committed to continuing to support our UM MBAR efforts with our UM institutional funds to complete the originally planned target enrollment.

Appendix A: Listing of currently approved projects for secondary analyses

- 1) Relationship of Predicted Brain Age to Neurocognition; Rohl and Britton; Collaborators: Cohen, Porges, Visscher, Woods, Gullett, Cole, Alexander, Levin, Rundek

- 2) Relationship of Time-Shifted BOLD Signal to Crystallized-Fluid Cognition Discrepancy and Predicted Brain Age; Britton; Collaborators: Cohen, Porges, Cole, Alexander, Levin, Rundek
- 3) White matter Integrity mediates age-related neuropsychological performance in the oldest old; Gullett; Collaborators: Cohen, Porges, Chen, Britton, Trouard

April 1, 2021

Dear Amy and other McKnight Trustees:

We would like to provide the McKnight Brain Research Foundation and Trustees with an update on our McKnight Inter-Institutional Pilot Grant entitled, "A Pilot Intervention with Near Infrared Stimulation: Revitalizing Cognition in Older Adults" and to kindly request an additional no-cost extension for the project through April 30, 2022. This pilot project established a strong collaboration between investigative teams from the University of Florida (UF; MPIs: Dawn Bowers; Adam Woods) and the University of Arizona (UA; MPI: Gene Alexander). The funding for this pilot grant began in July 2018 and we received a no-cost extension last year through April 30, 2021. Early in the project, we were able to make great progress in further developing and refining our methods, as well as in initiating our efforts in collecting pilot intervention data. This initial pilot work was essential in supporting our collaborative, multi-site grant submission for this novel near-infrared photobiomodulation stimulation intervention trial, which was funded by NIH (NIA R01AG064587; \$3.8M total costs; MPIs: Bowers, Woods, Alexander). Additionally, two trainees have attained funding related to this R01 including a post-doctoral diversity supplement (Dr. Stacey Alavarez) and a diversity predoctoral NRSA (F31-AG071264) awarded spring 2021 (Francesca Lopez). Both are designed to test independent hypotheses related to the baseline imaging and cognitive data and can fold in data from the McKnight project. Finally, we have an article for publication describing this novel intervention protocol currently in preparation.

During this past no-cost extension year, however, the Covid-19 pandemic substantially slowed our progress, as we paused all research activities at both the UF and UA sites in March, 2020 and have only gradually been able to fully engage older adult research participants for our research studies since the fall 2020 and more so in the first couple of months in 2021. With our staff at both UF and UA now fully vaccinated and many eligible research participants from the Gainesville and Tucson area communities also having vaccinations increasingly available to them, we expect to fully resume our research efforts over the coming weeks and months. To date, our total expenditure on the project is \$40,672 (UF: \$23,076; UA: \$17,596). We would be most grateful for an additional no-cost extension for this pilot project through April 30, 2022, so we can reach our planned target enrollment of 26 participants from each site in the coming year.

We wish to thank you again for your ongoing support and the funding provided by this McKnight Inter-Institutional Pilot Grant. As noted previously, this pilot grant award has already been instrumental in providing the essential methodological developments and initial pilot data to help support our successful cross-institutional, collaborative NIA R01 grant award and we very much look forward to further advancing the return on the investment provided by the McKnight Brain Research Foundation, as our findings continue to emerge from this novel aging intervention effort. Of course, please let us know if any additional information or clarification would be needed in your consideration of this no-cost extension request.

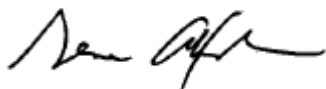
Cordially,



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