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| **2017 Catalyst Grant Competition – Medication Optimization**  **Application Instructions** |  |

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| **Please read the instructions below, and the Program Guidelines before completing the Catalyst Grant Application online.**  **A sample application is also available for your information only, so that you may prepare your application before inputting online.**  CFN competitions follow the Tri-Council Guidelines. Please consult these Guidelines ([http://www.nserc-crsng.gc.ca/NSERC-CRSNG/policies-politiques/index\_eng.asp)](http://www.nserc-crsng.gc.ca/NSERC-CRSNG/policies-politiques/index_eng.asp)A) for all questions related to partner eligibility, budget considerations (e.g. in-kind eligibility), etc. Applicants should also direct these and similar questions to their host institutions’ research services office/unit for further assistance.  *Please note that all information in the Intent to Apply and Application must be provided in English.* |

1. **Intent to Apply: Information and Instructions**

* **DEADLINE: The Intent to Apply must first be submitted via email (to** [**apply@cfn-nce.ca**](mailto:apply@cfn-nce.ca)**) by 5 pm ET on October 6, 2017**.
* An Application will only be considered if the Intent to Apply has been properly submitted by the deadline.
* The Intent to Apply is for administrative purposes only and will not be adjudicated.
* The Intent to Apply can be found on the CFN website (<http://www.cfn-nce.ca/research-evidence/funding-opportunities/2017-catalyst-medication-optimalization-grant-program/>).
* A CFN File Number (e.g., CAT2017-##) will be emailed to the Project Leader once the Intent to Apply has been received by CFN. The CFN File # must be used for all future correspondence (see below for further details).
* **Please note**: after submission of the Intent to Apply, no additional Principal Investigators or Co-Investigators may be added to the project.
* See <http://www.cfn-nce.ca/media/66477/cfn-project-team-roles-2016-07-07.pdf> for definitions of project team roles.

1. **Application: Information and Instructions**

* **DEADLINE: The Application must be submitted online by 5 pm ET on November 13, 2017.**
* **Go to Forum, CFN’s online application and reporting site to complete the full application** (<https://forum.tvn-nce.ca/index.php/Main_Page>)**.**
* Also refer to Appendix A: Application Tips
* The complete Application consists of the following:

1. Project Team Information (completed Excel document to be uploaded onto Forum)
2. Application Form (To be completed online)
3. Partner Letter(s) (PDF document(s) to be uploaded onto Forum)
4. Principal Investigator CV(s) (CCV to be uploaded onto Forum)
5. CV(s)/Resume(s) for Other Project Team Member(s) (CCV or PDF document to be uploaded onto Forum)
6. Budget – for each Principal Investigator (completed Excel document to be uploaded onto Forum)
7. Required Signatures – for each Principal Investigator (PDF document to be uploaded onto Forum)
8. Proof of study submission to the applicable Research Ethics Board (REB) – We are requiring that all applicants demonstrate that they have submitted their study for REB approval. For applicants whose REB will not review studies prior to CFN funding approval, please provide a letter from your REB stating that reviews will only take place after funding is confirmed.

**Document 1: Project Team Information**

Submit a single Excel file named **CAT2017-##\_Surname\_TeamList.xlsx**

(Note: Unless otherwise noted, when naming documents, “CAT2017-##” refers to the CFN File # you will receive from CFN after submission of the Intent to Apply. The Surname refers to the Project Leader’s surname.)

* Complete using the Project Team template (Excel document) downloadable from Forum.
* Upload the completed Excel document onto Forum.
* DO NOT CHANGE formatting of the template.
* CFN is not a funding agency, and so our definitions of project roles may not be the same as other funding you apply for. **Please take the time to review the Project Team Roles for CFN Funded Grant Programs** to ensure that you use the correct roles for team members (See Appendix A)**.**
* There is no limit on the number of team members each project may have.
* Please note that after submission of the Intent to Apply, no additional Principal Investigators or Co-Investigators may be added to the project.
* If you plan to hire HQP, but do not have the names, use “TBD” in the First Name and Surname fields, but complete the remaining fields regarding role on the project, educational level/year, expected duration and % of time, etc.

**Document 2: Application Form**

* The application can be completed online by accessing Forum (<https://forum.tvn-nce.ca/index.php/Main_Page>)
* To prepare your application in advance, please see the Sample Application available on the CFN website (<http://www.cfn-nce.ca/media/577999/cfn-cat2017-application-questions-for-information-only.pdf>). Note Appendix B for guidance on writing a lay summary.

**Document 3: Partners’ Letters**

Submit a single PDF file named **CAT2017-##\_Surname\_Partners.pdf** (The Surname refers to the Project Leader’s surname).

* In a single PDF document please provide letters of support for each partner, collaborator etc. Upload the single PDF document onto Forum. Make sure that each letter of support within the PDF is on the organization’s letterhead, detailing the partnership and specifically indicating their cash and/or in-kind contribution. The letter should specifically include reference to CFN, the proposed study, and any conditions placed on funding. Each letter should be signed by a person at the partner organization with the appropriate authority to authorize the contribution.
* Please order letters in sequence as listed in Section 10 of Application Form. Each letter should match the details provided in the Application Form. Where information differs between the letter and the information provided in the Application Form, the information in the letter will be considered to be accurate and used for review of the application.
* Individuals from the partner organizations that will be participating as project team members must also be listed in the submitted Project Team Information document.
* All financial information provided in the table below must also appear in the submitted budget document.
* Where a researcher has a “financial interest” (as defined by NCE Conflict of Interest Guidelines) in a partner, the potential conflict of interest should be declared in the table. This does not preclude the partnership in any way, but provides transparency during the review process. Please see CFN Conflict of Interest Policy and Guidelines for additional guidance http://www.cfn-nce.ca/media/23963/cfn-conflict-of-interest-policy.pdf

**Document 4: Budget**

Please download the template Excel document and upload a single ZIP file containing completed excel budget documents for each Principal Investigator. Name the ZIP file **CAT2017-##\_Surname\_Budget.** (The Surname refers to the Project Leader’s surname).

* Complete using the Budget template (Excel document) downloadable from Forum.
* For budget purposes use April 1st 2018 as the fiscal start date.
* Upload the single ZIP file containing all the budget Excel documents for each Principal Investigator. Note: All Principal Investigator receiving funds directly from CFN must submit a budget.
* For instructions on how to create a zip file please visit http://www.wikihow.com/Make-a-Zip-File
* **Please note**: The Excel file contains four (4) worksheets. Refer to the first worksheet for budget instructions.

**Document 5: Principal Investigator CVs**

Submit a single PDF file named **CAT2017-##\_Surname\_PI\_CVs.pdf** (The Surname refers to the Project Leader’s or Principal Investigator’s surname as applicable).

* Upload the single PDF document onto Forum.
* Single PDF must contain CVs for all Principal Investigators, in the order they appear in the Project Team List spreadsheet (Document 1 above)
* Full Canadian Common CV in the CIHR format (Academic CV Type) - do not submit the CV online; save as a PDF

**Document 6: CVs for remaining project team members**

Submit single PDF file named **CAT2017-##\_Surname\_TeamCVs.pdf** (The Surname refers to the Project Leader’s surname).

* Upload the single PDF document onto Forum.
* Single file must contain summary CVs (or resumés for non-academic team members) for other team members (i.e. not a Principal Investigator), in the order they appear in the Project Team List spreadsheet (Document 1 above)
* Each summary CV or resumé cannot be more than 5 pages and should highlight relevant KT, research, education, and work or volunteer related experience.

**Document 7: Signatures**

Submit a single PDF containing signature documents for each Principal Investigator. Name the PDF document **CAT2017-##\_Surname\_Signatures.pdf.** (The Surname refers to the Project Leader’s surname).

* Complete using the Signature template (PDF document) downloadable from Forum.
* Upload onto Forum a single PDF document containing all signed documents for each Principal Investigator.
* Signatures on each form are required from:
  + Principal Investigator
  + Vice-President of Research at host institution of Principal Investigator (or designate)

**Document 8: Proof of Study Submission to Research Ethics Board**

Submit a single PDF containing proof of ethics submission for each investigator. Name the PDF document **CAT2017-##\_Surname\_REB.pdf**. (The Surname refers to the Project Leader’s surname).

* Submit separate documents for each investigator (Principal Investigator or Co-Investigator) where approval from a Research Ethics Board is required for any component of the project.
* If ethics submission is not permitted prior to funding approval or final funder review, please provide a letter from your REB stating that reviews will only take place after funding is confirmed.

**Document 9: Proof of Completion of one of CIHR Institute of Gender and Health’s (IGH) online sex- and gender-based analysis training modules**

Submit the PDF certificate that you (Project Leader) received after completing one of the IGH’s online sex- and gender-based analysis training modules. Name the PDF certificate, CAT2017-##\_Surname\_IGH.pdf, where Surname = investigator’s surname.

* To access IGH’s online sex- and gender-based analysis training modules please visit http://www.cihr-irsc-igh-isfh.ca/.

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| **Appendix A**  **Application Tips** |

The tips that follow are based on the questions we most frequently receive from investigators. We strongly suggest that you also refer to the Catalyst Program Guidelines, and the Tri-Council Guidelines, and speak to your host institution’s research services unit before completing any part of the Application.

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| **Document 1** | **Project Team Information** |
| Role on Project Team | CFN is not a funding agency, and so our definitions of project roles may not be the same as other funding you apply for. **Please take the time to review the Project Team Roles for CFN Funded Competitions** to ensure that you use the correct roles for team members**.** |
| Institution/Organization employed by or representing on project team | Many researchers and other team members are involved with different organizations, and have different titles at each. For this application, list the organization most closely tied to the individual’s role on the project team. This is the organization that will be shown in any public communications, and in NCE reporting.  Principal Investigators should list the organization/institution that will receive and administer funds from CFN. |
| Sector of Institution/ Organization  Primary Role that the individual plays relative to improving care of frail elderly Canadians  Discipline which most closely reflects the role cited | As an NCE, CFN is required to report on various statistics concerning participation in our Network.  Many team members play multiple roles, or may want to enter a choice not listed.  The choices provided in these columns are not intended to be exhaustive, but include those most pertinent to CFN’s activities.  Please enter the one choice in each column that most closely aligns with the role the individual will play on the project team. |
| % Time individual will allocate to project during the life of the project  # weeks individual will participate in project | For the purpose of NCE reporting, please list the average percentage time (based on a 40-hour work week) that an individual will spend on the project, during the life of the project.  For each CFN fiscal year during the course of the project, please include the estimated number of weeks during which the individual will participate in the project. |
| “For HQP Only” columns | Training and experience for the next generation of HQP is a key mandate for CFN as an NCE, and HQP participation is an item we must report to the NCE on.  However, HQP must be directly involved in a meaningful way in the research and/or KT components of a project.  All projects must also include HQP who will participate in the CFN Training Program, in varying degrees based on the length and depth of their project involvement. |

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| **Project Leader** | Where there are multiple Principal Investigators, the project must select ONE Principal Investigator to act as Project Leader. All Principal Investigators will be listed in public communications, but the Project Leader acts as the primary contact with CFN and is responsible for all CFN reporting requirements. |
| **Principal Investigator** | A Principal Investigator is an investigator that will be receiving KT or research funds directly from CFN. A Principal Investigator must hold an academic or research appointment at a CFN network member institution, or other Canadian university, affiliated institution or organization eligible to administer CIHR funds. The Principal Investigator must also be eligible to receive CIHR funding. His/her appointment must be in place by the effective date of funding and must not expire before the end date of funding; must allow the individual to pursue the proposed research project, to engage in independent research activities for the entire duration of the funding, to supervise trainees, and to publish the research results; and must oblige the researcher to conform to institutional regulations concerning the conduct of research, the supervision of trainees, and the employment conditions of staff paid with Tri-council funding.  A Principal Investigator leads and is responsible for a KT or research project or defined portion of a KT or research project, with primary responsibility for the intellectual direction of the KT or research, and accountability for the reporting and achievement of related deliverables. She/he assumes administrative and financial accountability for the project or his/her component, including applicable CFN reporting. She/he may supervise students, ensures the participation of students in CFN-funded KT or research projects and the CFN Training Program, and assumes a leadership role with respect to collaboration and networking with other Network Investigators and with partners.  Principal Investigators receive CFN funding and must have the funds sent directly to a research account at his/her institution, and the institution must report directly back to the Network on use of those funds (filing an SOA Form 300 report) each year as part of the NCE reporting requirements. Each Principal Investigator must also report details and costing of in-kind and cash contributions each year. |
| **Host Institution** | The Project Leader and any other primary investigators must each hold an academic or research appointment at a Canadian university, affiliated institution or organization [eligible to receive and administer CIHR funds](http://www.cihr-irsc.gc.ca/e/36374.html). If your institution is not currently CIHR-eligible, you may consult the [Institutional Eligibility Requirements to Administer CIHR Funds](http://www.cihr-irsc.gc.ca/e/36770.html) and discuss with the responsible official at your institution.  As well as being eligible to receive and administer CIHR funds, the institution must also be willing to execute a Network Agreement with CFN, through which the institution and investigator will become CFN members, and take on all of the associated rights and obligations. It is not necessary for an institution to be a party to the Network Agreement before applying. When an award decision is made, the process to execute a Network Agreement will take place.  Where a research project has international co-investigators or collaborators, the international counterparts must support the international portions of the project. Funds can only go towards the Canadian portion of the initiative and cannot be transferred to non-Canadian institutions. |

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| **Appendix B**  **CFN Guidelines for Lay Summaries** |

**What is a lay summary?**

A lay summary is an overview of a research project described in a way that can be easily understood by those without prior experience of the subject. It is not a slight modification of the abstract or a simplification of the research; a well-written lay summary allows the public to understand research and its value, impact, and applications. Lay summaries also help juries evaluate research grant applications and facilitate use of the research by government, the public and private sectors, and the community at large.

**How are lay summaries used at the Canadian Frailty Network (CFN)?**

CFN uses lay summaries to:

* communicate the nature and importance of research on frailty and older adults living with frailty, to the general public,
* inform prospective citizen members on CFN committees, research teams, and projects CFN supports,
* help adjudicators score grant applications, and
* encourage multidisciplinary work by helping those in unrelated disciplines fully understand each other’s research.

**How to write a lay summary**

Using plain language, clearly describe in simple language:

* what question the researchers are asking,
* why they are asking the question
* what they will do to find the answer,
* what do they expect to find out,
* why the anticipated findings matter, and
* how they plan to use the findings.

The summary should be as brief as possible, which is about the same length as the abstract or in compliance with the requirements outlined by the grant application. The lay summary should also aim to be written at a grade 8 level or lower, in compliance with the standard for CFN’s public documents.

**Tips:**

* Define any technical terms used
* Refrain from using jargon
* Refrain from using acronyms, but if some are necessary, spell them out in full when first mentioned in the text
* Have someone from outside the field of study read the summary before submitting it to CFN for review
* Read the summary aloud to catch errors or awkward expressions
* Provide simple, relevant examples when describing the research
* Use people-first language by focusing on the person, not the disability; for example, say “people who are blind” rather than “the blind”, or “older adults living with frailty” rather than “frail older adults”

**Lay Summary Template:**

1. **Title**
   * Short and simple
2. **What is the research question?**
3. **Why are the researchers proposing this study?** 
   * Describe how the study addresses the relevant evidence gap
   * How many older adults living with frailty would be affected by this research?
   * Why is the study needed? Highlight the direction of the research
4. **How are they proposing to do it?**
   * Describe the study methods, the study setting, and the study population
5. **How long will it take?**
6. **What are the expected outcomes?**
7. **How would it make a difference in the lives of the population being studied?**
   * The potential applications of the research
   * The relevance and benefits of the research to the wider population, to the quality of life, health and care of the older adults living with frailty, and to the body of knowledge about frailty
   * Suggestions on how these findings could impact older adults living with frailty and/or their family caregivers and how this might be measured
8. **One- or two-sentence summary of the project**

**Some websites for reference…**

* From the Plain Language Association International: <http://plainlanguagenetwork.org/plain-language/what-is-plain-language/>
* From the Canadian Literacy and Learning Network: <http://www.literacy.ca/research-and-resources/clear-writing-tools/>
* Examples to assist with writing lay summaries, from the Heart and Stroke Foundation: <http://hsf.ca/research/en/4-lay-reviewers-and-structures-lay-summaries>
* *Plain Language, Clear and Simple*, a handbook intended for government authors that outlines how to write using plain language, available in English and French: <http://publications.gc.ca/site/eng/9.644871/publication.html>
* Plain Language Online Training from the National Institutes of Health (NIH): <https://plainlanguage.nih.gov/CBTs/PlainLanguage/login.asp>

**Readability tests**

Use the online tools below to generate a readability score for your text.

* Read-able: <http://read-able.com>
* Text Readability Consensus Calculator: <http://www.readabilityformulas.com/free-readability-formula-tests.php>
* Readable.io: <https://readability-score.com/text/>

**Lay Summary Examples**

*Two examples of lay summaries are provided below. The “before” example was prepared by a researcher, who was surprised to learn it was written at a grade 14 level. This example was revised, with help from a group of citizens and provided below as the “after” example.*

Before: Original lay summary prepared by researcher

(Word count: 250, Grade level 14)

Those who provide care at home for a dying family member often face tremendous burden. Attention to family caregivers needs for support is therefore important to help protect their health. Home care nurses provide such support but because they are pressed for time, they tend to focus on the patient, and consideration of the family caregiver’s needs is often informal and not written down in the chart. Family members are also reluctant to express their own needs. To address this gap, we have developed a brief intervention for assessing the support needs of family members providing care to dying persons at home. The Carer Support Needs Assessment Tool (CSNAT) intervention has the potential to benefit the health and well-being of family caregivers. In this project we will train home care nurses to use the CNAT intervention with a group of family caregivers (intervention group) and compare their quality of life, burden and other outcomes, to a group of family caregivers whose home care nurse is not using CSNAT. We will also interview family caregivers and home care nurses to gain a better understanding of how the CSNAT works in practice. Findings will allow us to determine the effectiveness of using the CSNAT as an intervention to identify, monitor and address family caregiver support needs in palliative home care.

**After: Revised lay summary**

(Word count; 223, Grade level 8)

Those who care for a dying family member or friend at home often carry a heavy burden. Although these caregivers rarely convey their own needs, they too need support and to take care of their own health.

Home care nurses can provide support to family and friend caregivers. However, they usually do not have time to. Most of their focus is on the patient.

We have created a tool that nurses can use to support caregiver needs. This intervention is called the Carer Support Needs Assessment Tool (CSNAT). We do not know if it will affect the health and well-being of caregivers yet. Therefore, we will assess the use of the CSNAT in practice for the first time, in this study.

To do this, we will compare two groups of caregivers. One group will receive support from a trained home care nurse using the CSNAT. The other group will receive support from a nurse that is not using the CSNAT. The quality of life, burden, and other outcomes of caregivers will be compared after the nurse intervention. We will also interview caregivers and home care nurses about how the CSNAT works in practice. This will help us understand if the CSNAT can help support and improve the lives of caregivers at home with a dying family member or friend.

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