

# Robert E. Leet and Clara Guthrie Patterson Trust Mentored Research Award

Office Hours

June 25, 2025



HRiA partners with individuals, organizations, and communities to transform the practices, policies, and systems that improve health and advance equity.



# Agenda

- Program Goals
- Program Overview
- Geographic Eligibility
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- Review Criteria

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- Common Pitfalls
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# Program Goals

The Patterson Trust was created to support

**“research relating to human diseases, their causes and relief thereof”.**

The goal of the program is to support pilot studies and innovative research conducted by early stage mentored investigators and promote their transition towards independence.

# Program Overview

Award Duration: 24 months

Maximum Award Amount: \$200,000 for 2 years (must be equally distributed across both years)  
(no indirect costs)

Application Deadline

Award Start



Award Notifications

Award End

**Online submission portal opens July 8, 2025**

**<https://hria.org/grants/patterson/>**

# Geographic Eligibility

- Applicants must work in a non-profit academic, medical, or research institution in the states of **Connecticut (CT), New Jersey (NJ) or Rhode Island (RI)**
- No institutional limitations

# Eligibility Criteria

- Applicants must have a doctoral degree (MD, MD/PhD, PhD, DO, DMD, PharmD, DPT, or equivalent)
- Postdoctoral researcher OR Clinician scientist :
  - 1) without clinical training – must have at least three (3) years and no more than six (6) years of full-time postdoctoral research experience
  - 2) with clinical training – must have no more than 6 years full-time postdoctoral research experience since completion of residency
- Clinician scientist applicants – completed residency and clinical training by the time of the funding start date



- Must not have a tenure-track faculty position
  - 1) Candidates may hold a junior faculty appointment that are not tenure track appointments
  - 2) Contact program staff for eligibility questions
- Must not have previously been a Patterson Award recipient

# Clarifications to eligibility in 2026

Award	Patterson Eligibility Determination
R	Ineligible, except R03 (see below)
K	Ineligible, except K12 (see below)
DP2	Ineligible
P01	Ineligible
Pioneer Award	Ineligible
New Innovator Award	Ineligible
Early Independence Award	Ineligible
T32	Eligible, as long as 50% salary requirement is met
R03	Eligible, as long as 50% salary requirement is met
K12	Eligible, as long as 50% salary requirement is met



# Review Criteria

## Significance & Impact

- Advance knowledge relating to human diseases, their causes, and relief
- Hypothesis is novel and innovative
- Proposal describes the impact and value of the research
- Work demonstrates transparency in the sharing of research findings and/or project outcomes
- Project and career development activities support the training and growth of the applicant and the project goals

## Investigator

- Applicant is fully capable of carrying out the proposed research based on background, experience, and current academic position
- Role of the mentorship team is appropriate, well-defined, and aligns with the research aims and career goals
- Applicant has meaningfully contributed/engaged in activities that benefit the wider research community and shows a strong commitment to fostering a positive research culture, including activities that support a diverse, equitable, and inclusive research environment
- Applicant has shown research productivity and potential for a career in research based on research time and opportunities to date
- The mentor's LOS describes commitment to support the applicant during the research period and in subsequent career transitions, including the applicant's ownership of the project and resources
- Strength of additional LORs

## Project & Related Activities

- Proposed scope is a logical extension of the literature review
- Objectives are well conceived and realistic
- Research methodology, data collection, and analytical plan are feasible and appropriate
- Recruitment plan for the study participants is appropriate and feasible and shows sensitivity toward the target population. Human subjects' protections and study participant inclusion are clear and justified
- Proposal suggests next steps in terms of positive, negative, or null results
- Timeline and budget are realistic and appropriate (including IRB approvals, if needed prior to funding start date)

# Application Tips

- Make sure your proposal reflects the review criteria and program goals
- Tell the story and provide explicit reasons and statements regarding why your approach is promising. Recruit the right team: Include appropriate collaborations and/or shared leadership if it benefits the project
- Be realistic (in timeline, budgets, etc.)
- Avoid jargon and abbreviations; should be understandable to scientific generalists
- Be concise and clear (make it easy to read!)
- Point out pitfalls and include contingencies
- Seek feedback (internally, externally, and across disciplines)

# Common Pitfalls

- Research plan and training plan does not compliment the applicant's background
- Mentorship team – does not reflect the needs for the applicant to be successful in completing the work
- Poor grantsmanship: jargon, abbreviations, no clear hypothesis
- Overlap in funding

# Common Features of Successful Projects

- The proposed scope of work is a logical extension of the literature review.
- Objectives are well conceived and realistic.
- Research methodology, data collection, and analytical plan are feasible and appropriate to the proposal's aims.
- Any recruitment plan for the study participants is appropriate and feasible and shows sensitivity towards the target population. Human subjects' protections and study participant inclusion are clear and justified.
- Proposal suggests next steps in terms of positive, negative, or null results.
- Timeline and budget are realistic and appropriate (including IRB approvals, if needed prior to funding start date).

# Example Reviewer Feedback - Critiques

- **Approach:**

- “Research aims lack sufficient detail in numerous areas including details of datasets including number of patients included, inclusion/exclusion criteria, variables available in datasets, definitions of outcomes, and follow up periods.”;
- “Sex as a biological variable is not addressed; this is important since sex has a significant impact on XXX.”

- **Sample Size & Statistics:**

- “No power analysis is offered indicating that the samples to be recruited will be sufficient to detect the effects proposed”

- **Budget & Feasibility:**

- “The investigator states that they will send out samples for *amazing* profiling, but this is not listed in the budget”

# Example Reviewer Feedback – Critiques

- **Career Development & Independence:**

- “Additional career development goals are not discussed; the applicant should speak to their future plans conducting research as an independent investigator.”
- “The application would be strengthened by evidence of applicant conducting independent research.”

- **Publication Record:**

- “The applicant has a limited publication record and this should be addressed through inclusion of research in progress and potential future publications.”

- **Mentorship:**

- “The applicant should seek additional mentorship to help provide further guidance and skill building”

# Example Reviewer Feedback – Strengths

- **Approach:**

- “This is an interesting and important area of study. The work is a logical extension of the literature”.

- **Sample Size & Statistics:**

- “Sample size justifications are provided for all of the aims.”
- “Aims, in general, are well described with appropriate analytic plans.”

- **Budget & Feasibility:**

- “Timeline appears sufficient, and samples and databases are already approved for collection and analysis.”

# Example Reviewer Feedback – Strengths

- **Career Development & Independence:**

- “The career development plan is well designed and will likely scaffold the applicant towards independence.”

- **Publication Record:**

- “The candidate has excellent prior clinical and research training. Has had prior funding and a good publication record. Has papers with their primary mentor.”

- **Mentorship:**

- “Strong mentorship team demonstrating adequate support with appropriately allocated independence for this specific project.”



# New online system: HRiA Award Manager – Key Changes

## 1. Individual Attachments rather than one PDF upload

## 2. Using the Invitations feature

Role Name	Permissions/Requirements
Authorized Institutional Representative (pre-award)	Required to Certify application
Institutional Officer (post-award)	Required to submit ACH if funded
Mentor	Required to submit Letter; has view access
Recommender	Required to submit Letter; has no access
Collaborator (grant writing staff; project personnel/co-investigator)	Not required to submit Letter; has edit access

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Agreement

Reports

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Payment

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Submission Manager > Grant

Authorized Institutional Representative

You are **required** to invite an Authorized Institutional Representative who must "Accept" the invitation and complete the "Certification" tab prior to your submission.
 

- Biomedical research applicants - The Authorized Institutional Representative is responsible for research oversight and is often in the Office of Sponsored Programs. This person signs off on the application to ensure that you and the Institution have met the eligibility requirements.
- Community-based organization applicants - The Authorized Institutional Representative may be the Chief Executive Officer/Executive Director or other senior leader and signs off on the application to ensure that the lead applicant and project team have met the eligibility requirements.

Collaborator/Multi-PI

Users added as this role will be able to make changes to the application but will not be able to submit.
 

- Collaborators: Collaborators include anyone who will help you write/edit this grant. This may include grantwriting/pre-award staff and/or project personnel.
- Multi-PI: If you are applying for a biomedical grant, please refer to the Program Guidelines for further information on use of these roles, as some HRIA grant programs do not recognize a multi-PI.

Prefix	First Name	Last Name	Email	Role	Status
	Test	Test AIR3	LCarver+TESTAIR3@hria.org	Authorized Institutional Representative	Accepted
<div>+</div>					

Save

Invite

How should I approach the online application if I have multiple mentors? How should I assign my other recommenders?

If an individual is invited to your online application as a...	then they...	and before <i>you</i> can submit your application, they...
<b>Mentor</b>	can view (but cannot edit or submit) application	must upload a letter.
<b>Recommender</b>	cannot view, edit, or submit application	must upload a letter.
<b>Collaborator</b>	can view and edit application but cannot submit;  cannot upload a letter.	N/A

# A known bug:

- Incorrect institution may auto-populate when applicant registers (e.g., Yale University vs. Yale School of Public Health)

Email [PattersonAwards@hria.org](mailto:PattersonAwards@hria.org)

# Questions?

**Contact Us:**

**[PattersonAwards@hria.org](mailto:PattersonAwards@hria.org)**

**<https://hria.org/tmf/patterson>**