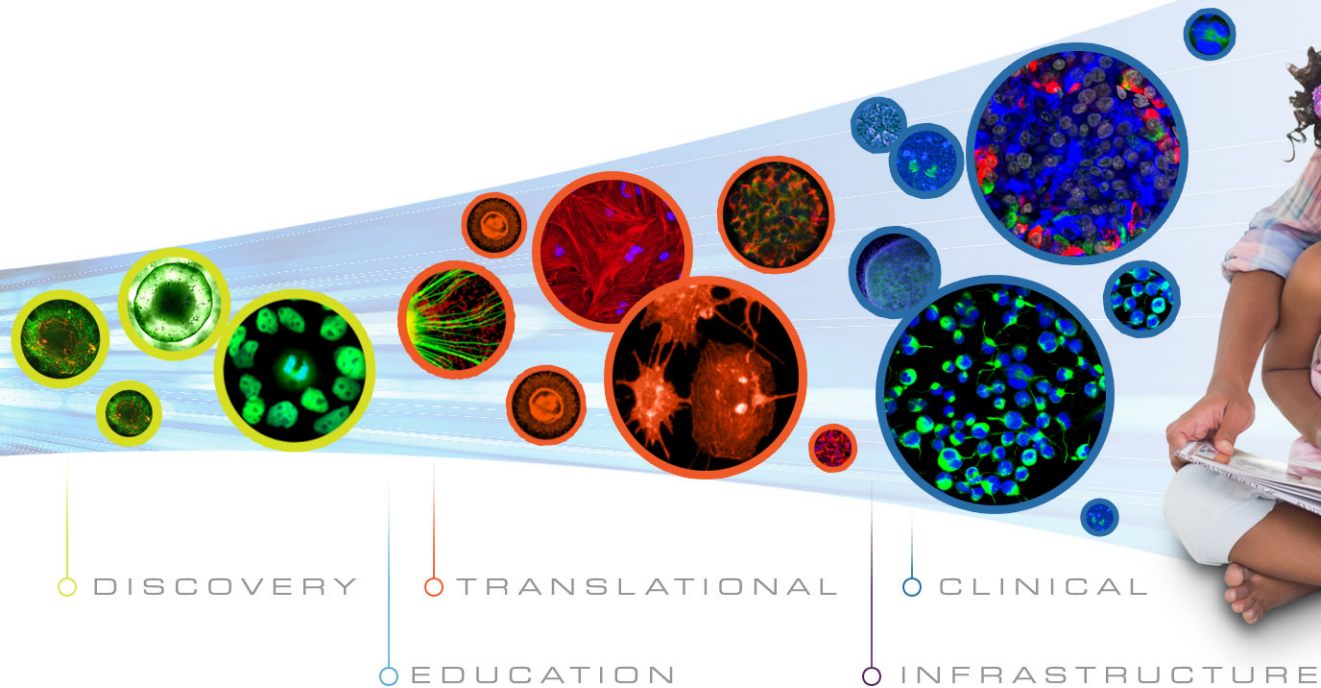


October 1, 2015

CIRM 2.0

CALIFORNIA'S STEM CELL AGENCY



Jonathan Thomas, Ph.D., J.D.

Chairman, Independent Citizens Oversight Committee
California Institute for Regenerative Medicine

California Institute for Regenerative Medicine (CIRM)



DISCOVERY
TRANSLATIONAL
CLINICAL
EDUCATION
INFRASTRUCTURE

- Created by the people of California to accelerate stem cell treatments to patients with unmet medical needs
- We act with a sense of urgency commensurate with that mission
- Our team of professionals actively partners with academia and industry to fast-track the development of today's most promising technologies
- With \$3 billion in funding and 300 active programs, CIRM is the world's largest institution dedicated to helping people by developing cell therapies

Our Mission

Accelerating stem cell treatments to patients with unmet medical needs.

668 Awards Since Inception Totaling \$2 Billion

Education

\$415 Million

Infrastructure

\$439 Million

Discovery

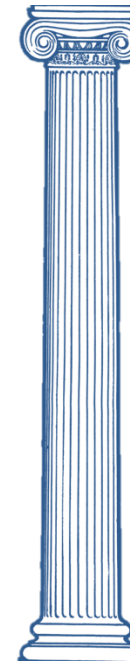
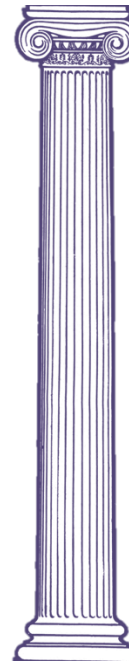
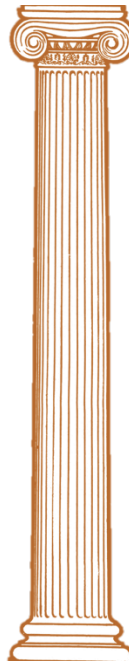
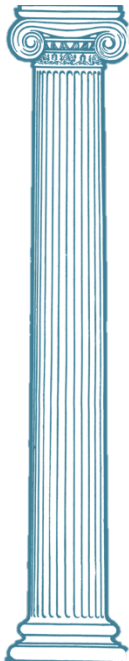
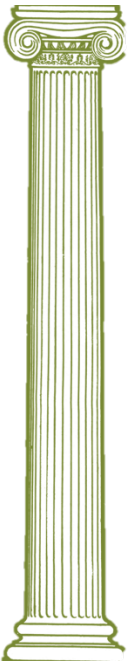
\$332 Million

Translational

\$301 Million

Clinical

\$589 Million



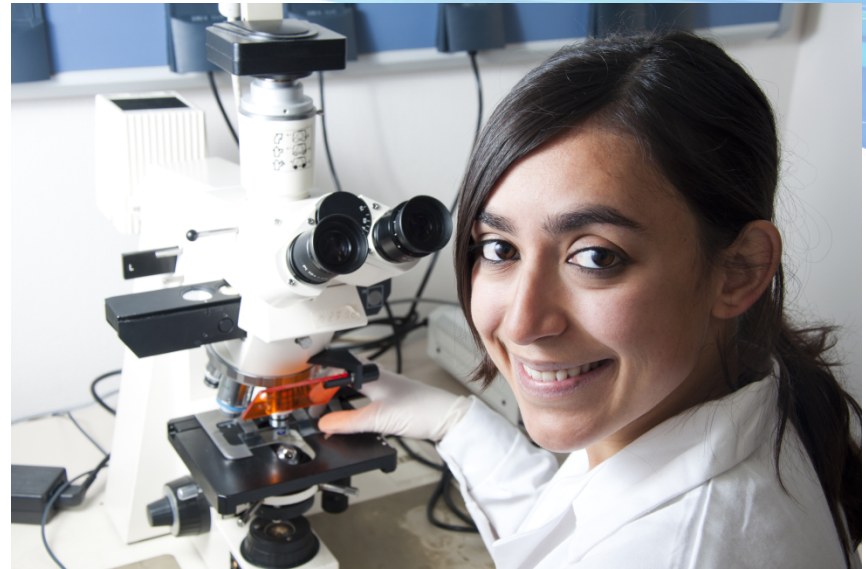
CIRM Impact: Infrastructure

- 12 Major Facilities statewide
- \$271 M CIRM Investment
- \$844 M Leverage
- \$200 M tax revenue
- 25,000 jobs



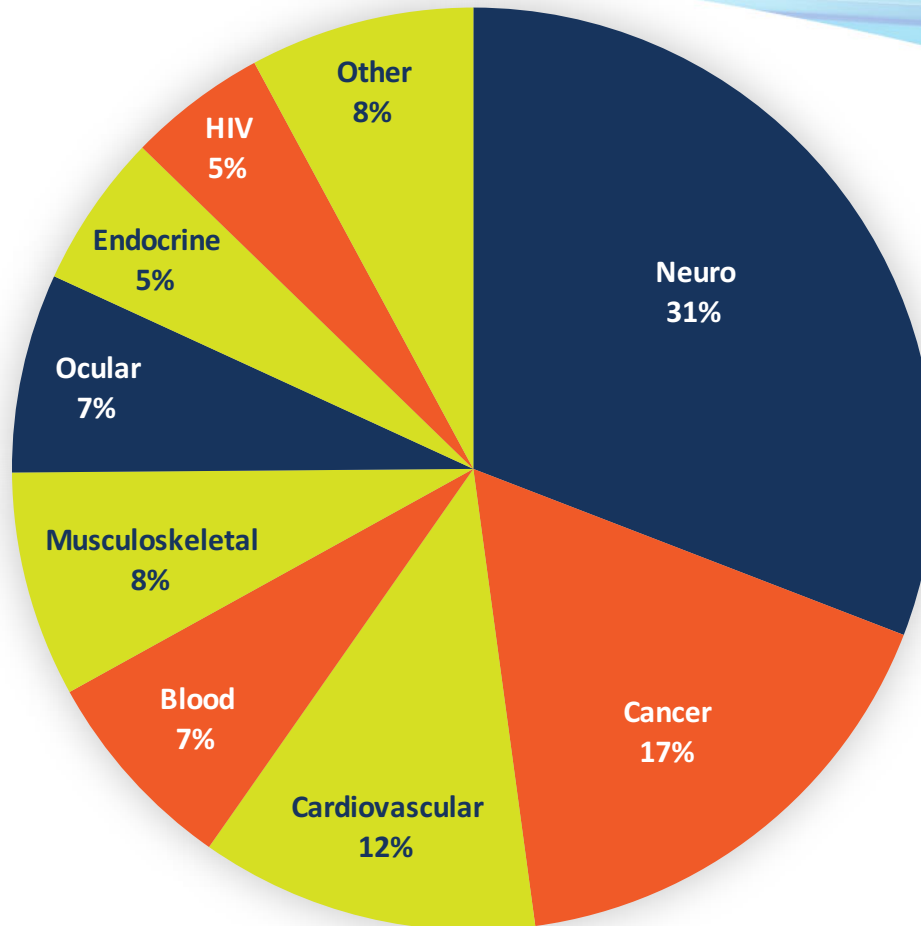
CIRM Impact: Growing the Field

- Research Leadership Awards
- New Faculty Awards
- Training Awards
- Bridges Awards
- Creativity Awards



CIRM Impact: Portfolio

\$1.3 billion invested in disease specific research including 15 clinical trials



CIRM Impact: Clinical Trials

- HIV/AIDS (3)
- Solid Tumors (2)
- Heart Failure
- Leukemia
- Sickle Cell Anemia
- Spinal Cord Injury
- Type 1 Diabetes
- Macular Degeneration
- Retinitis Pigmentosa
- Malignant Melanoma
- Chronic Granulomatous Disease
- Glioblastoma

Funding Runway

Current levels sufficient to last approximately 5 years



Award Budget
\$2.75 Billion

- \$2 billion awarded or spent
- \$775 million uncommitted
- \$190-200 million in new awards per year
- Estimated \$20 million in award reductions annually
- Projected NET commitment rate of \$170 million per year

What is CIRM 2.0

- A radical overhaul of the way the Institute does business
- Introduces faster, more efficient systems
- Places added emphasis on:
 - ✓ Speed
 - ✓ Partnerships
 - ✓ Patients

CIRM 2.0 Purpose

Greater Number
of High Quality
Applications

Faster
Progression of
Funded Projects

Applications

Cycle Time

Progression

Clarity

Reduced
Cycle Time

Features of CIRM 2.0



DISCOVERY
TRANSLATIONAL
CLINICAL
EDUCATION
INFRASTRUCTURE

- Faster process to produce a better product
- True partnership
- Real patient participation
- Open to a variety of therapeutics (cells, biologics, small molecules)
- Opportunities for California and Non-California organizations
- Ready when you are
- Highly competitive

The Strategic Planning Process

Where are we now?

- Evaluate environment
- Confront brutal facts
- Confirm mission

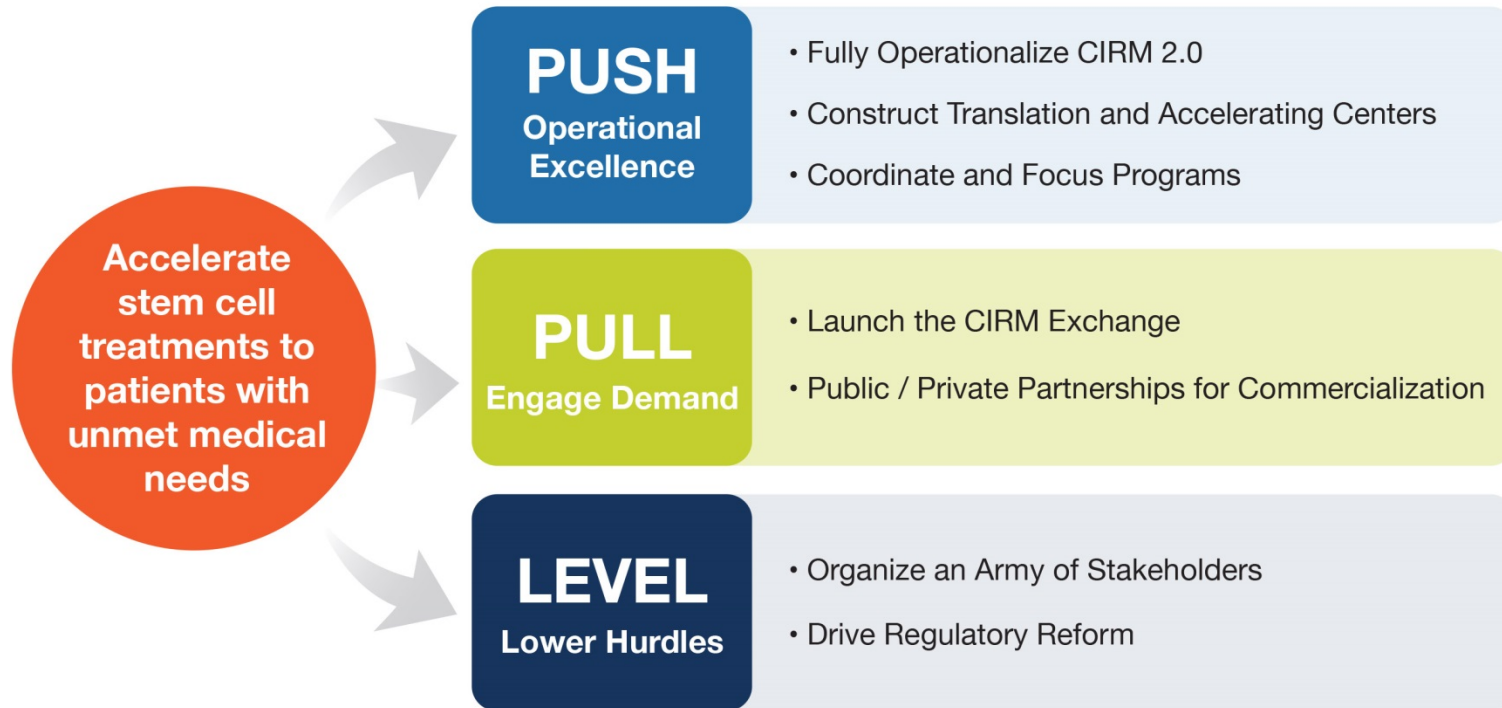
Where do we want to go?

- Brainstorm options
- Benchmark
- Create a unique vision

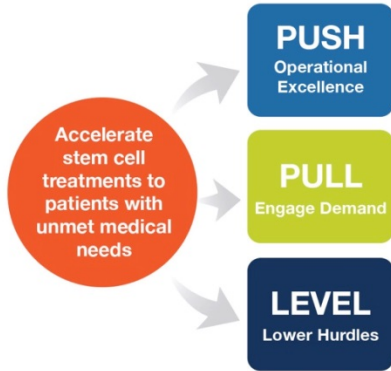
How do we get there?

- Determine strategy
- Establish milestones
- Document the plan

Strategic Plan Implementation



Financial Outlook



Program	2016	2017	2018	2019	2020	Total
Education	10	10	10	10	10	50
Discovery	15	50	50	35	30	180
Translation	25	40	45	35	30	175
Clinical	100	85	75	75	65	400
Infrastructure	15	15	20	20	15	85
Totals	165	200	200	175	150	890

CIRM Strategic Goals

MISSION/VISION

STRATEGIC
THEME

SPECIFIC ACTIONS

Accelerate
stem cell
treatments to
patients with
unmet medical
needs

PUSH
Operational
Excellence

PULL
Engage Demand

LEVEL
Lower Hurdles

INTENDED OUTCOMES

50 new clinical trials

20 unique diseases in clinical trials

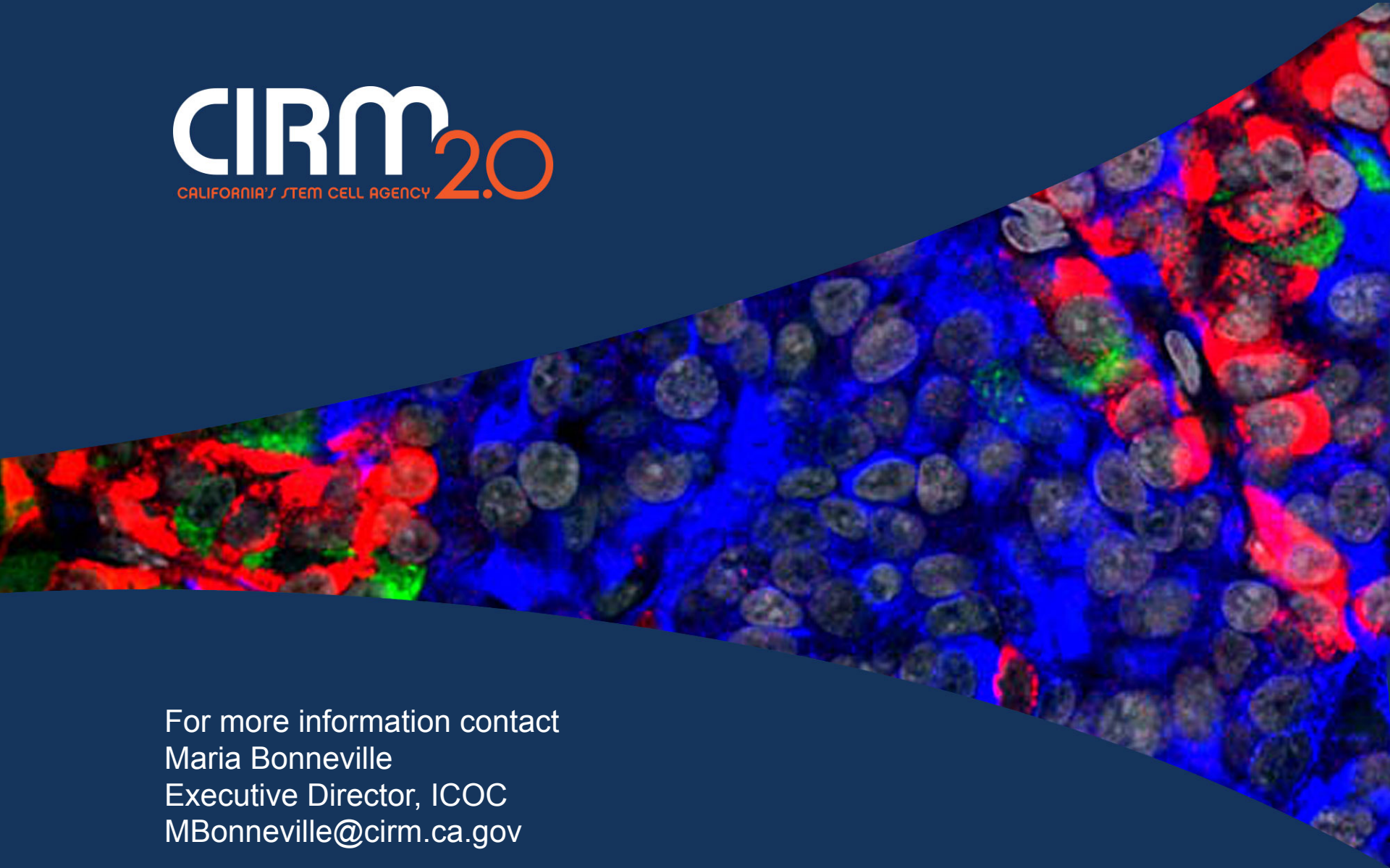
5 pediatric and 10 orphan indications in trial

Increase progression events to 33%

Reduce preclinical time by 50%

Drive implementation of new FDA paradigm

Partner >50% of unpartnered clinical projects



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