

Major Science Initiatives 2014 special competition

Annual performance report (April 1, 2014 to March 31, 2015)

Date submitted (dd/mm/yyyy):	Project no.:
Institution:	
Title of the national research facility:	
Signatures:	
By signing below, you acknowledge having received and read a copy of this report and further certify that all information incorporated in the document is true, accurate and complete, and that facility's Board members have seen and approved the report.	
Chair of the facility's Board	
Name: _____	
Signature: _____	Date: _____
President or authorized signatory of the lead institution	
Name: _____	
Signature: _____	Date: _____

Due by June 15, 2015

Part 1 – Performance report

1. Summary of performance indicators for the facility

Standard indicator	Value of indicator for 2013/14	Value of indicator for 2014/15	Target for 2015/16
Number of users			
Number of HQP*			
Number of scientific contributions (e.g. journal publications, conference proceedings, etc.) linked to the use of the facility. Please provide the list as an appendix to the report.			
Number of technical contributions (e.g. patents filed, spin offs, etc.), where applicable, linked to the use of the facility. Please provide the list as an appendix to the report.			
Level of use			
User satisfaction			
Facility-specific indicators	Value of indicator for 2013/14	Value of indicator for 2014/15	Target for 2015/16

* HQP includes students, post-doctoral fellows, technicians, research associates, professionals

Guiding principles for performance indicators:

Facilities are required to identify, in consultation with their CFI Senior Programs Officer, three to six facility-specific indicators. The total should include no more than 10-12 indicators (including both standard and specific).

Indicators should be:

- Collectable
- Measurable (quantitatively or qualitatively)
- Useful/actionable
- Standardizable within the international community --- comparable
- Clearly defined

Selected indicators will cover the key activities of the facility (operations and research) as well

as their outputs and outcomes. This could include:

- Access (e.g. number or success rate of access requests);
- Capacity and use (e.g. level of use (use delivered versus availability of infrastructure), number and growth in number of users, user retention, user satisfaction);
- Quality/reliability (e.g. total time lost from unplanned events);
- Finance/sustainability (e.g. leveraging of funds (through ratios such as CFI contribution/total operations and maintenance funding, revenues from industry/total funding), cost-recovery ratio, etc.)
- Training (could overlap use)
- Research activity/productivity,(e.g. number of distinct research projects enabled, number of publications in peer-reviewed journals, number of new partnerships between the facility and outside organizations, number of occurrences of direct participation by the facility or its employees in formal collaborations/networks/consortia at the national and international level, number of projects with public or private sector participants, number of international faculty and students involved in facility projects
- Outcomes (e.g. number of patents, number of jobs created)

If applicable, please discuss any issues raised by the measure(s) including deviation from expected performance, contingencies and corrective actions.

i. Please provide information regarding the distribution of users* of the facility during the period extending from April 1, 2014 to March 31, 2015. Disaggregated data should be provided to allow the CFI to assess the use of the facility by researchers in the following categories:

- The distribution of users from within and outside of Canada;
- The local, regional and provincial distribution of Canadian users;
- The distribution of users across different sectors (academic and non-academic organizations); and,
- The distribution of users across various disciplines.

** Students, post-doctoral fellows, technical and professional personnel should not be included in this section.*

ii. Please provide the current level of use by HQP. If possible, disaggregate the data by category of HQP as follows:

- Students
- Post-doctoral fellows
- Technical and professional personnel

iii. Please describe any national or international recognition the facility has gained during the period extending from April 1, 2014 to March 31, 2015.

2. Past year achievements (activities, successes and challenges) during the period extending from April 1, 2014 to March 31, 2015.

A. Governance and strategy

With reference to the facility's strategic plan and to the facility's management plan, please provide an update relative to specific objectives and targets last approved by the facility's Board:

- A1.** Please list the key strategic objectives and targets that were approved and indicate if they were met. If an objective or target was not met or only partially met, the report should discuss the challenges faced and note any corrective actions taken or planned.
- A2.** If applicable, please describe any major actions taken to enhance or improve the governance of the facility. These changes may result from a review of plans, priorities and procedures, unforeseen events, or the adoption of best practices.

B. Management

- B1.** If applicable, please describe any major actions taken to enhance or improve the management of the facility. These changes may result from a review of plans, priorities and procedures, unforeseen events, or the adoption of best practices.

C. User access and training of HQP

- C1.** Please outline the activities undertaken by the facility to increase the awareness of the potential user communities of the activities and opportunities offered by the facility.
- C2.** If applicable, please describe any changes that have been made to the facility's mechanism for user access and/or to the user fee policy towards the various types of users (e.g. internal or external, academic or non-academic).
- C3.** Please outline any training opportunities provided to students and post-doctoral fellows.
- C4.** Please describe the activities undertaken by the facility to keep abreast of scientific and technical advances and support the development and training of its staff.

D. Risk assessment

- D1.** If a risk assessment was completed over the past year, please describe the results and any mitigation or monitoring strategies developed as a result to reduce the facility's risk profile.

E. Research and technology transfer

- E1.** Please provide a brief summary of the main research activities of the facility.
- E2.** Please describe any new partnerships or key collaborations that the facility has developed with the aim of maintaining and enhancing its research capacity.

E3. Please outline any other opportunities pursued by the facility to maintain or enhance its research capacity.

E4. Where applicable, please describe any IP or technology transfer with significant contribution from the facility.

F. Benefits to Canada

F1. Please outline achievements that have led to benefits to society, health, the economy and the environment through the development of new or improved products, processes, services, public policies, and/or sustainable job creation.

3. Upcoming year activities for the period extending from April 1, 2015 to March 31, 2016.

A. Governance and strategy

A1. Please list and describe the facility's specific objectives and targets. Please indicate how these objectives are anticipated to contribute to achieving the facility's strategic goals.

B. Management

B1. If applicable, please describe any major actions that will be taken to enhance or improve the management of the facility. These actions may include a review of plans, priorities and procedures or the adoption of best practices.

C. Users access and training of HQP

C1. Please outline the activities that will be undertaken by the facility to increase the awareness of the potential user communities of the activities and opportunities offered by the facility.

C2. If applicable, please describe any changes that will be made to the facility's current mechanism for user access and/or to the current user fee policy towards the various types of users (e.g. internal or external, academic or non-academic).

C3. Please outline any new training opportunities that will be provided to students and post-doctoral fellows.

C4. Please describe the activities that will be undertaken by the facility to keep abreast of scientific and technical advances and support the development and training of its staff.

D. Risk assessment

D1. If applicable, please describe any risk assessment activities that will be undertaken.

E. Research and technology transfer

- E1. Please provide a brief summary of the planned main research activities of the facility.
- E2. Please outline the main opportunities that will be pursued by the facility to maintain or enhance its research capacity, including the establishment of new partnerships and collaborations.
- E3. Where applicable, please describe any opportunities the facility will pursue to promote the use of facility-developed IP/technology.

F. Benefits to Canada

- F1. Please outline any anticipated achievements that will lead to benefits to society, health, the economy and the environment through the development of new or improved products, processes, services, public policies, and/or sustainable job creation.
- 4. Provide an update on the strategic plan, management plan and decommissioning plan (only if changes were made in the past year and if it has not already been addressed in the above sections). *N.B.* Not applicable for 2014/15.**
 - 5. If applicable, describe any progress made towards meeting the condition or conditions imposed by the CFI as identified in the Board decision and *Award agreement*.**

Part 2 – Financial report

Please complete the financial report in the CFI Awards Management System ([CAMS](#)). In addition to the online form, please attach a document to the financial report to address the following:

1. Please complete the detailed financial report template provided. Any departure from the budget items that were presented in the application or, if applicable, the updated operations and maintenance budget must be explained.
2. Please discuss the strategy to secure funds for the operations and maintenance of the facility for the upcoming year. This should include all anticipated and committed revenues from other sources: user fees, if applicable, and contributions from universities and other organizations.
3. Please describe plans for the use of the CFI funds for the next fiscal year (April 1, 2015 to March 31, 2016).