Annual Performance Report

Date submitted (dd/mm/yyyy):   **Project no.:**

Institution:

Title of the Major Science Initiative (MSI):

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 MSI Board members have seen and approved the report.

Chair of the MSI Board

Name: _____

Signature: _____   Date: _____

President or authorized signatory of MSI lead institution

Name: _____

Signature: _____   Date: _____

NSERC/MRS principal investigator, where applicable

Name: _____

Signature: _____   Date: _____

Part 1 – Performance report

1. Summary of performance indicators for the MSI

Standard indicator	Target for 2014	Value of indicator for 2014	Target for 2015
Number of users			
Number of HQP*			
Number of scientific contributions (e.g., journal publications, conference proceedings, etc.) linked to the use of the MSI. 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 MSI			
Level of use			
User satisfaction			
MSI specific indicators	**Target for 2014**	**Value of indicator for 2014**	**Target for 2015**

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

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Guiding principles for PIs:

Should include no more than 10-12 indicators (including 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 MSI (operations and research) as well as their outputs & outcomes. This could include:

- Access, for example, number or success rate of access requests
- Capacity and use, for ex. level of use (use delivered vs availability of infrastructure), number & growth in users, user retention, user satisfaction
- Quality/Reliability, for ex. total time lost from unplanned events
- Finance/Sustainability, for example leveraging of funds (through ratios such as CFI or CFI+MRS

MSIs will be allowed to discuss if they wish to do so 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 MSI during the period extending from April 1, 2014 to March 31, 2015 and compare it to that of the previous year including the proportion of new users. Disaggregated data should allow assessing the use of the facility among researchers:

- within and outside of Canada,
- from within and outside the MSI,
- from different sectors (academic and non-academic organizations),
- and from various disciplines.

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

ii. Please compare the current level of use by HQP to that of the previous year including the proportion of new HQP? If possible, disaggregated 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 MSI 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 Strategic and Management Plans, please provide an update relative to specific objectives and targets last approved by the MSI Board:

A1. Based on the MSI's performance during the period extending from April 1, 2014 to March 31, 2015, 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 MSI during the period extending from April 1, 2014 to March 31, 2015. 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 MSI during the period extending from April 1, 2014 to March 31, 2015. These changes may result from a review of plans, priorities and procedures, unforeseen events, or the adoption of best practices.

C. Users access and training of HQP

C1. Please outline the activities undertaken by the MSI during the period extending from April 1, 2014 to March 31, 2015 to increase the awareness of the potential user communities of the activities and opportunities offered by the MSI.

C2. If applicable, please describe any changes that have been made during the period extending from April 1, 2014 to March 31, 2015 to the MSI'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 during the period extending from January 1 to December 31, 2014.

C4. Please describe the activities undertaken by the MSI during the period extending from April 1, 2014 to March 31, 2015 to keep abreast of scientific and technical advances and support the development and training of its staff.

D. Risk Assessment

D1. Please describe the results of any risk assessments completed during the period extending from April 1, 2014 to March 31, 2015. If a risk assessment was completed over the past year, please describe any mitigation or monitoring strategies developed as a result to reduce the MSI risk profile.

E. Research and technology transfer

E1. Please provide a brief summary of the main research activities of the MSI during the period extending from April 1, 2014 to March 31, 2015.

E2. Please describe any new partnerships or key collaborations that the MSI has developed during the period extending from April 1, 2014 to March 31, 2015 with the aim of maintaining and enhancing its research capacity.

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

E4. Where applicable, please describe any IP or technology transfer with significant contribution from the MSI during the period extending from April 1, 2014 to March 31, 2015.

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 during the period extending from April 1, 2014 to March 31, 2015.

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 specific objectives and targets for the period extending from April 1, 2015 to March 31, 2016. Please indicate how these objectives are anticipated to contribute to achieving the MSIs strategic goals.

B. Management

B1. If applicable, please describe any major actions that will be taken to enhance or improve the management of the MSI for the period extending from April 1, 2015 to March 31, 2016. 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 MSI for the period extending from April 1, 2015 to March 31, 2016 to increase the awareness of the potential user communities of the activities and opportunities offered by the MSI.

C2. If applicable, please describe any changes that will be made for the period extending from April 1, 2015 to March 31, 2016 to the MSI'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 for the period extending from April 1, 2015 to March 31, 2016.

C4. Please describe the activities that will be undertaken by the MSI for the period extending from April 1, 2015 to March 31, 2016 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 during the period extending from April 1, 2015 to March 31, 2016.

E. Research and technology transfer

E1. Please provide a brief summary of the planned main research activities of the MSI for the period extending from April 1, 2015 to March 31, 2016.

E2. Please outline the main opportunities that will be pursued by the MSI for the period extending from April 1, 2015 to March 31, 2016 to maintain or enhance its research capacity, including the establishment of new partnerships and collaborations.

E3. Where applicable, please describe any opportunities the MSI will pursue to promote the use of MSI-developed IP / technology for the period extending from April 1, 2015 to March 31, 2016.

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 for the period extending from April 1, 2015 to March 31, 2016.

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)

Part 2 – Financial report

1. Please complete the financial report templates provided. Any departure from the budget items that were presented in the updated operations and maintenance budget must be explained.

2. Please discuss the strategy to secure the operations and maintenance budget 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 and MRS funds for the next fiscal year (April 1, 2015 to March 31, 2014).