

Appendix B

Review Document

The review document prepared by the Director of the Centre/Institute should include:

- an application of the specific performance metrics found in the centre/institute's foundation documentation, including a discussion of progress on meeting performance objectives
- evidence of dissemination and knowledge translation
- an assessment of the impact of outreach or public service activities attributable to centre/institute activities
- a list of contributions to undergraduate, graduate or internship training (names, thesis titles, current position)
- actions the centre/institute has taken to incorporate the principles of equity, diversity and inclusion (EDI) into its operations
- a university-year financial statement noting all monies received and expended by the centre/institute in each of its University accounts (i.e. FOAPALs)
- an assessment of the status, continued viability, and need for the centre/institute
- an assessment of the centre/institute's progress since the most recent review, based on the specific performance metrics found in the centre/institute's foundation documentation
- an analysis of the centre/institute's fit within the University's strategic research priorities
- a list of equipment and infrastructure that is the responsibility of the centre/institute
- membership list and criteria
- benefits of centre/institute status with respect to revenue, collaboration, entrepreneurship, and external partnerships that likely would not have been possible without the centre/institute.
- an assessment and recommendation as to whether any of the centre/institute's foundation documentation, management structure, membership categories, or performance measures should be amended to respond to new realities
- a summary of all revenues and expenditures since the most recent review
- an analysis of challenges and opportunities over the next three to five years
- a strategy for the next three to five years to address challenges and opportunities
- a recommendation as to the continuance, restructuring, or disestablishment of the centre/institute