



Canada's national centre for
particle and nuclear physics
and accelerator-based science

Five-Year Planning and PPAC Proposals

R. Kruecken

TUG AGM, Science Week
July 14, 2017





- **Purpose:**
 - Define updated Vision and Mission for TRIUMF
 - Communicate goals and priorities for 2020-2025 & beyond
 - Lay out an action plan on how these goals can be achieved, including a high level budget
- **Audience:**
 - Community
 - International Peer Review Committee
 - NRC
 - Government of Canada
- **Timeline:**
 - Consultation and internal planning through 2017
 - Main elements defined in Spring 2018
 - **Report released in September 2018**

- Five-Year Plan 2020-25 will have several components
 - A high-level summary for Government (for Ministers)
 - A short (~20 page) strategic plan (for Analysts)
 - A longer (~50 page) implementation plan (for ACOT, Peer Review Committee)

- Additional background material on a new TRIUMF website for the International Peer Review Committee and research community
 - Facility information
 - Science highlights 2013-2018
 - CVs of Research Scientists

Plan will go public in September 2018

**Communication and promotion done in conjunction with
50th Anniversary Celebration in 2018**

- **Input:**
 - **internal strategic planning exercises** on the divisional and institutional levels
 - **broad community consultation** via **Science Week** and submissions to the Policy and Planning Advisory Committee (**PPAC**).

- **Governance of the development process:**
 - **Internal Executive Committee** drives planning and writing in consultation w/ Leadership Team
 - **Steering Committee** oversees the process and provides guidance
 - **ACOT** reviews main elements of the plan
 - **Board of Management** approves the plan

Charge

- Oversee the consultation process and solicit input from the relevant stakeholder communities
- Provide critical feedback on the priorities and initiatives, ensuring that they align with stakeholder interests
- Act as review panel for the final plan and the associated communications strategy
- Act as rehearsal review panel (Red Team) for International Peer Review

Jonathan Bagger (Chair)	Director	TRIUMF
David Castle	Vice President Research	University of Victoria, Deputy Chair TRIUMF Board
Rod Clark	Division Deputy	Lawrence Berkeley Lab, former SAP-EEC chair
Robert Dunlop	Former ADM (retired)	(Industry Canada)
Kathryn Hayashi	President and CEO	TRIUMF Innovations
Ritu Kanungo	Professor	Saint Mary's University, CINP president
Oliver Kester	ALD - Accelerator Division	TRIUMF
Suzanne Lapi	Associate Professor	University of Alabama, Birmingham
Kyle Leach	Assistant Professor	Colorado School of Mines, TUEC chair
Graeme Luke	Professor and Chair	McMaster University
Scott Oser	Professor	University of British Columbia
Nigel Smith	Director	SNOLAB
Brigitte Vachon	Associate Professor	McGill University
Michelle Wong	Director, Research	University of British Columbia

	Monday	Tuesday	Wednesday	Thursday	Friday
	10-Jul	11-Jul	12-Jul	13-Jul	14-Jul
AM	Nuclear Physics with ARIEL & ISAC	Molecular and Materials Science with Assorted Probes	Life Sciences with Isotopes and Particle Beams	Particle Physics, Nuclear Physics, and Beyond	TUG AGM
PM			Accelerator Science and Applications		
Evening		Innovation Pathways		BBQ	

- Thank you to the Organizers:
 - Convener Teams
 - Andie Lippingwell
 - Jens Dilling

Iris Dillmann	Iain McKenzie
Alex Gottberg	David Morrissey
Adam Garnsworthy	Petr Navratil
Greg Hackman	Valery Radchenko
Mark Hartz	Monika Stachura
Kathryn Hayashi	Oliver Stelzer-Chilton
Cornelia Hoehr	Victor Verzilov
Rob Kiefl	

➔ Proponents now work toward PPAC submission of '3-pagers'

Question: What role should TUG and/or ARIEL User Group play in coordinating further discussions?

- Corina Andreoiu (SFU)
- Jean-Francois Arguin (U. de Montreal)
- Sampa Bhadra (York U.)
- Paul Garrett (U. Guelph)
- Darren Grant (U. Alberta)
- Brigitte Guerrin (U. de Sherbrooke)
- Garth Huber (U. Regina)
- Hae Young Kee (U. of Toronto)
- **Bob Kowalewski (UVic) - Chair**
- Alison Lister (UBC)
- Andrew MacFarlane (UBC)
- Juliette Mammei (U. Manitoba)
- Tony Noble (Queen's U.)
- Rachid Ouyed (U. Calgary)
- Frank Prato (Western U.)
- Jeff Quilliam (U. de Sherbrooke)
- Ralf Schirmacher (U. Calgary)
- Jeff Sonier (SFU)
- Vesna Sossi (UBC)
- Hiro Tanaka (U. of Toronto)
- Manuela Vincter (Carleton U.)
- David Asgerisson (TRIUMF Innovations)

- The TRIUMF Policy and Planning Advisory Committee (PPAC) advises the Director on scientific policy and facilitates two-way communication with the research communities at the member universities.
- PPAC meets at least once per year **to provide advice on the scientific direction of TRIUMF and on major policy documents, including the 5-year plan**, in order to help the laboratory meet the needs of the university research community. **A written report is submitted to the Director and the Board of Management.**
- The following is a representative list of topics that are especially relevant for the Committee's consideration: relations between TRIUMF and the university research community, **university involvement in the 5-year plan and its implementation**, CFI applications, graduate student engagement at TRIUMF, promotion of TRIUMF as a sabbatical option, specialized workshops relevant to university researchers.
- The Policy and Planning Advisory Committee is selected by the Director, and **includes at least one faculty from each full member university.**
- To ensure representation from all areas of scientific interest to the laboratory, the Director, in consultation with the Chair, may appoint a limited number of members from the larger TRIUMF community, including the possibility of an additional person from a member university.

- **TRIUMF's Policy and Planning Advisory Committee (PPAC)** will prioritize the submissions and offer recommendations to the TRIUMF Director.
 - The PPAC review will be completed in December 2017.
 - For all submissions of new project commitments, the PPAC review constitutes the Gate 0 review of TRIUMF's [project governance process](#).
 - **In particular, all initiatives that will involve a proposal to the next round of calls by the Canada Foundation for Innovation (CFI), anticipated for ~2019, and involve TRIUMF resources are expected to submit a proposal to PPAC.**
 - **For initiatives that might go forward to future CFI funding rounds before 2025 we also expect a proposal submission to PPAC now, if the resources requested from TRIUMF (cash and manpower) are near or above \$1M.**

Instructions for Five Year Plan Proposal Template

Length of the Proposal: The length of the submission depends on the size of the proposed commitment. For commitments requesting from TRIUMF less than \$1M cash contribution and/or less than 10 FTE-years, sections 1-4 shall not be longer than 2 pages. For projects above this limit, sections 1-4 shall not be longer than 4 pages.

What Makes a Good Proposal?

When developing your proposal, it is most important to communicate how your commitment will advance science and support TRIUMF's Vision and Mission. With that, a strong proposal will be written concise but in sufficient detail to allow reviewers to readily understand:

- **Project/Commitment Description:** What does the activity hope to accomplish and how does it plan to achieve that?
- **Justification:** How does the activity support TRIUMF's Vision and Mission? What scientific, technical or other goals are being pursued? Why is it timely? How does this activity draw upon or expand TRIUMF's core capabilities?
- **Canadian and International Context:** How does the activity fit into the broader Canadian university research program and any related strategic plans? How does it integrate or distinguish itself from related international activities?
- **Broader Impacts:** What broader impacts would this activity have? Describe potential social and economic benefits of the activity, including training, knowledge mobilization, as well as potential technology transfer and commercialization. Please also consider interdisciplinary connections or opportunities that could be made possible by this proposal.

<http://www.triumf.ca/sites/default/files/2017-TRIUMF-PPAC-Input-Template.docx>

Cash Flow Requirements: The cash flow for the project breaks down by year. Please identify the necessary in the estimates (e.g. a 30%).
From TRIUMF: This should include all cash contributions required from TRIUMF but should not include salaries that are captured on the bottom part of the table.
External: The total cash contribution from non-TRIUMF sources. This includes NSERC, CDR, CFI and foreign contributions.
Total: Total cash flow for the commitment. For the last column, the total should include funding for all years not just those years in the table.

TRIUMF Non-Cash Resources: Indicate the TRIUMF resources required by type and year. For labour, the resource name should be taken from the Staff List and used in the form. Administration Communications for example. In most cases, the appropriate unit will be FTE-staff. If different units are used, please indicate. Where appropriate also include non-labour resources such as beam time. For projects, the **TOTAL** should include all years not just those in the table.

External Funding Information: List the amount of all external funds and their source. Indicate the current status of the funding requests: funded, requested, or application planned. If the external funds are yet to be awarded, indicated the expected date of the funding decision.

Ongoing Operational Requirements: If the project involves building a device or bringing one to TRIUMF what operational requirements will it place on TRIUMF after it is commissioned? For ongoing commitments what are the steady state resource requirements?

Decommissioning Requirements: If the project involves building a device or bringing one to TRIUMF, what are the resources required to decommission the device after its useful lifetime?

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Here are some additional instructions for the Proposal Template

Please adhere to the length limits outlined above.

Date: Date the form was submitted to TRIUMF.

Title: The title the commitment will be known by. Provide commitment number for existing commitment.

Propositor: Name of the spokesperson or principle investigator for the proposal.

TRIUMF Contact: Name of a person located at TRIUMF who can act as a liaison person between TRIUMF and the proposer if different from the Propositor.

Principal Collaborators: A list of the principal faculty and professional collaborators. Both TRIUMF and external. The list should ideally include collaborators who will devote more than 20% of time to the commitment or who will make a major contribution.

Major Milestones: As applicable, a list of the major milestones for the activity including the delivery date for each major deliverable. The degree of uncertainty in the dates should be indicated. This should also include proposal deadlines and external funding agency decision dates. For existing commitments that have completed Gate 1 Review, please include milestones already reached.

- Identify value TRIUMF brings to users, universities, funders, tax payer
- Identify opportunities for high-impact science based on TRIUMF leadership, facilities, contributions
- Determine the evolution of the scientific portfolio of TRIUMF:
 - Identify the priorities within different sub-fields based on these opportunities
 - Accelerator Science
 - Life Sciences
 - Molecular and Materials Science
 - Nuclear Physics
 - Particle Physics
 - Identify the priorities for ongoing activities and major new initiatives
- **Key questions:**
 - What are the strengths and weaknesses of the current areas of activity?
 - What are potential new areas of activity?
 - Which ongoing activities should be strengthened?
 - Which of the ongoing activities should be reduced or phased out?

<http://www.triumf.ca/FYP2020-25>


TRIUMF | FIVE-YEAR PLAN 2020-2025

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Five-Year Plan 2020-2025

TRIUMF's core operations revolve around a five-year planning cycle. This is articulated in a Five-Year Plan (5YP), a report that defines TRIUMF's mission and vision, communicates the lab's goals and priorities, and lays out an action plan for the specified planning cycle and beyond. The [2015-2020 5YP](#) started April 1, 2015, and ends March 31, 2020.

It is now time to proceed along the path to envisioning, developing, and sharing the next 5YP for 2020-2025. This webpage serves as the primary online resource for information about the 2020-2025 5YP development process and the various consultations with stakeholders.

Ultimately, the proposed 5YP is transmitted to the Government of Canada by the Director of TRIUMF on behalf of laboratory's member universities. It is TRIUMF's commitment that the plan be developed in a transparent, open, deliberative process that puts forward the strongest possible program for Canada under realistic resource constraints.

[Policy and Planning Advisory Committee](#) (PPAC) **Call for Proposals is now open.** The deadline for submission is **Monday, October 16, 2017.**

We request that you complete [the template](#) and submit the information to 5YPSC@triumf.ca. More information [here](#).

May 26, 2017

Request for Proposals for TRIUMF Commitments, 2020-2025

Dear Colleagues,

TRIUMF is starting to prepare its Five-Year Plan 2020-2025, a report that will define TRIUMF's vision and mission, communicate the lab's goals and priorities, and lay out an action plan for the period 2020-2025 and beyond. Covering the full breadth of activities undertaken by TRIUMF, the Five-Year Plan will underpin TRIUMF's request for operational funding from the Government of Canada.

TRIUMF has published this webpage to serve as the primary online resource for information about the 2020-2025 Five-Year Plan development process and the various consultations with stakeholders.









Canada's national laboratory for
particle and nuclear physics

Laboratoire national canadien
pour la recherche en physique
nucléaire et en physique des
particules

Thank you!

Merci!

TRIUMF: Alberta | British Columbia | Calgary |
Carleton | Guelph | Manitoba | McGill | McMaster |
Montréal | Northern British Columbia | Queen's |
Regina | Saint Mary's | Simon Fraser | Toronto |
Victoria | Western | Winnipeg | York