Summary of Main Conclusions From

2011 KPMG Program Evaluation and Performance Audit
of Perimeter Institute for Theoretical Physics

Main conclusions drawn from the KPMG Evaluation Report to Industry Canada include:

- Perimeter Institute has made a sizeable impact on the Canadian theoretical physics landscape.
- PI has made Canada a visible and respected world player in theoretical physics, with Canadian science capacity and reputation markedly improved mainly due to PI.
- Research conducted within PI’s core fields are of great importance and of consequence.
- Some of the research is reaching groundbreaking, revolutionary, and transformative levels and international experts have strong positive opinions of both the research and PI researchers.
- PI has created an international hub for the gathering of researchers, facilitating stimulating formal and informal discussion and collaboration that is inviting and productive and is seen as being better than some of the world’s other leading research institutions.
- It is clear PI has been able to attract top talent from around the world at all levels, many from other high-profile institutions.
- A high quality training environment is in place wherein PI is improving students’ research programs through their ability to produce better quality and quantity of publications and presentations, increased numbers of collaborations, and exposure to a combination of disciplines and fields.
- Recognizing the importance of a dynamic program in the dissemination of research outcomes, PI has encouraged and been successful at research dissemination activity over and above typical academic activities.
- PI’s engagement in high impact communications and outreach goes beyond that of typical research institutions.

Main conclusions drawn from the KPMG Performance Audit to Industry Canada include:

- PI has designed and implemented practices and processes that promote economy and efficiency in the use of resources and that are effective in supporting the achievement of PI objectives and expected results.
- The audit identified a number of positive practices within PI including:
  - An award-winning outreach program.
  - A management and operating structure that promotes and facilitates multi-disciplinary collaboration among PI researchers.
  - Programs and partnerships that attract world renowned physicists and talent to PI.
  - Mechanisms through which research results and discussion can be quickly shared with the international community in a cost-effective manner.
  - Strategies to continue PI’s funding success.
- PI is clearly perceived to be a unique and valuable organization in promoting interest and awareness in science and in creating an environment that is conducive to fostering future scientific breakthroughs.
- The Institute and the calibre of PI talent are highly regarded by both internal and external stakeholders, as are the Institute’s culture of innovation and focus on new ideas and opportunities that depart from traditional approaches and models.
- Under the leadership of the Institute Director, PI has grown significantly over the past three years, and has put in place a defined vision that calls for further growth over the next five years on a national and international scale.
**Background**

This summary of key findings flows from an independent and in-depth assessment of Perimeter Institute for Theoretical Physics as conducted by KPMG for Industry Canada.

The objectives of Industry Canada were to gain third party evaluations of the activities, projects and value-for-money performance of Perimeter Institute in full accordance with the public funding agreement between the Government of Canada and Perimeter Institute for Theoretical Physics.

Throughout the period of 2010 to 2011, KPMG assessed Perimeter Institute based on a wide array of information gathered from many sources – including scientific papers, personal interviews and surveys relating to Perimeter Institute’s research, training and outreach operations. The findings, which include input from an expert panel of 19 scientists from various research organizations, were compiled in two parts consisting of:

1. **An Evaluation Report** to assess PI’s advancements in scientific research, attraction of top talent, the research environment, mechanisms for scientific interactions, outreach to the public and students/teachers across Canada, the international positioning of Canada in basic research, dissemination of research outcomes, provision for high level training opportunities, and the securing of public and private support.

2. **A Performance Audit** to assess the economy, efficiency and effectiveness with which PI applies public funds. This includes a review of PI’s strategies to attract top research talent, mechanisms to sustain funding support, management structure, and outreach process and practices.

The complete findings by KPMG to Industry Canada are available at the following links:

- The **Final Evaluation Report** of June 14, 2011, with:
  - Executive Summary
  - Introduction
  - Methodologies
  - Findings on Issues 1 through 9
  - Conclusions
  - Appendices

- The **Performance Audit Final Report** of January 31, 2011, with:
  - Executive Summary
  - Background
  - Audit Approach and Objectives
  - Observations and Recommendations