External Review Report

Peter Wall Institute for Advanced Studies

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Executive Summary

Following an examination of the programs, operation and facilities of the Peter Wall Institute for Advanced Study at the University of British Columbia, and two days of meetings with administrators, faculty and staff (21-22 November '02), the External Review Committee offers the following recommendations.

Administrative:

1. Prepare a strategic plan and Vision Statement outlining present and future goals of the Peter Wall Institute.

2. Formalize the Advisory Committee – currently constituted at the will of the Director – as part of the structure of the Peter Wall Institute.

3. Revise the Major Thematic Grants program to provide greater flexibility of funding and improve accountability.

4. Re-structure or eliminate the Visiting Junior Scholars program.

5. Provide increased and more flexible funding for Early Career Scholars to include the possibility of more equitable teaching buyouts.

6. Establish a multi-pronged communications strategy, which provides the Peter Wall Institute with more public exposure in the surrounding community (both UBC and Vancouver) while offering a convenient way to highlight important research accomplishments. Possibilities include, but are not limited to, a technical report series, improved and regularly updated web site, newsletters (electronic or print) and frequent public lectures.

7. Eliminate or reconfigure the residential facility attached to the Peter Wall Institute. Incorporate a portion of this space for an increased number of Distinguished Scholars in Residence.

8. Institute a yearly luncheon or dinner meeting of Trustees, Advisory Committee, and Distinguished Scholars in Residence with selected presentations from Workshops, Major Thematic Grants, Distinguished Scholars and Early Career Scholars.

9. Appoint an internationally distinguished academic/administrator with a proven record in interdisciplinary research as the new Director of the Peter Wall Institute, after a fully publicized national and international search.
Financial

1. Conduct an immediate review of the funding arrangements to ensure stable funding to allow for proper budgeting and programming, while resolving apparent discrepancies between funds promised in the original Deed of Trust Agreement and funds received.

2. Explore how additional funding from other sources, including those outside the University, might be obtained for the Peter Wall Institute.

3. Eliminate the $5.5 Million debt of the Peter Wall Institute through fundraising, special gifts, grants or other means.
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INTRODUCTION

The Peter Wall Institute for Advanced Studies is a unique organization that is achieving national and international status as a centre for interdisciplinary studies, faculty inter-action and project development. No other institute like it exists in Canada and in its short history the Peter Wall Institute has built a solid reputation on the UBC campus for innovative programming and faculty-based research. Through its diversified opportunities, ranging from thematic program grants to support for scholars-in-residence, the Peter Wall Institute provides faculty members at the University of British Columbia a rare opportunity to undertake new research, interact with scholars from around the world and then share their knowledge with local and international communities. This Review outlines ways in which the Peter Wall Institute can become even more successful in attaining its goals.

REVIEW PROCESS

Professor Frieda Granot, Dean of the Faculty of Graduate Studies, UBC, formed an External Review Committee of the Peter Wall Institute for Advanced Studies in the fall of 2002. It consisted of Professor Stephanie Forrest, Department of Computer Science, University of New Mexico, Professor Robert Root-Bernstein, Department of Physiology, Michigan State University, Professor John Grace, Department of Chemical and Biological Engineering, UBC and Professor Ira B. Nadel, Department of English, UBC (Chair).

The Committee held two days of meetings (21-22 November 02) with individuals and committees including the current Director and Staff of the Peter Wall Institute, Members of the Advisory Committee, Adjudication Committee, Selection Committee for the new Director, current and recent Distinguished Scholars in Residence, current and past grant holders, the Dean of Graduate Studies and others. The terms of reference for the External Review included an overall assessment of the Institute, its financial structure, governance, organization, programs and facilities. In preparation for the
Review, a background document was prepared by the Director and made available to all
Review Committee members. Noteworthy is the critical moment in the history of the
Wall Institute for this review as the first Director, Professor Ken MacCrimmon retired on
31 December ‘02 and a new director is soon to be appointed. This review is partly meant,
therefore, to provide guidance with respect to the future of the institute.

HISTORY

The Peter Wall Institute for Advanced Studies was established in 1991 through
a generous gift of $15 million from Peter Wall to UBC. He made it clear that he wanted
to fund people and programs, not buildings, and the then University President, Dr. David
Strangway suggested and Institute for Advanced Study. The first programs were
instituted in 1994 and in July 1996 the first Director was appointed: Professor Ken
MacCrimmon. The declared mandate of the Institute is “to support fundamental,
interdisciplinary research and creative activities which have the potential to result in
significant advances to knowledge.”

Originally housed in Green College (1994-98) and then St. John’s College (1998-
1999), the Institute relocated to the Leon and Thea Koerner University Centre in 1999
where it is currently based. Administrative offices, Scholars in Residence Offices (4), a
meeting room, lounge and lecture area, which comprise the top floor of the Koerner
University Centre, serve as its headquarters.

VISION

The original vision of the Peter Wall Institute was multi-disciplinary, drawing
together leading academics from various disciplines to develop new and formerly
unexplored avenues of research. A highly visible and successful faculty member or
members would hold the Peter Wall Distinguished Professorship. Originally, this was
Professor Michael Smith, winner of a Nobel Prize, appointed in 1994 and held until his
death in 2001 and Professor Raphael Amit, appointed in 1994 and held until his
resignation from UBC in 2000. The current holder is Brett Finlay, Professor of
Biochemistry and Molecular Biology and Microbiology. The Institute would also sponsor
weekly colloquia, Associate Forums, Exploratory Workshops and a small number of exciting, interdisciplinary, Major Thematic Grant programs, interdisciplinary involving colleagues from various disciplines. Maximum funding for each such program was set at $500,000 over three years. On the initiative of Professor Ken MacCrimmon, the first Director, other new programs were started: Exploratory Workshops, Catalytic Visitors, Visiting Junior Scholars and Early Career UBC Scholars. Over the last five years, the Institute has placed more emphasis on programs involving productive younger scholars.

Nevertheless, no consensus exists within the UBC community about what the Wall Institute is about or can be reasonably expected to achieve. To some extent at least, this results from inadequate program monitoring and inadequate reporting. The absence of a newsletter, publicity for its major programs, and a Wall Institute Archive for published papers, books and reports that have emerged from the Workshops, Major Thematic Grants or resident or visiting scholars contributes to this lack of knowledge, although the website of the institute maintains a portion of this material. The Wall family, in particular, seems to have been inadequately informed of the significant and often exciting “products” and publications which have originated at, or through, the Wall Institute.

The resulting lack of knowledge causes confusion which is not healthy. While a vision of the Wall Institute was first stated in the August 13, 1993 Memorandum by the committee which visited other Institutes for Advanced Study and then in the Oct 1993 "Excerpts from Proposed Operating Mode for the Institute." A 1998 Vision Statement of four sentences appears (unlabelled) in the Annual Reports of the Wall Institute. However, this vision needs to be re-evaluated in the light of current operations, reeds, and future goals. An expanded Vision Statement by the next Director, formulated in conjunction with the Advisory Committee, Staff and others, is an essential document for the future of the Wall Institute. In particular, such a Vision Statement needs to explain what is interdisciplinarity and why it is central to the Wall Institute and UBC; how is interdisciplinarity to be implemented and fostered through the programs of the Institute; and what steps should be taken to establish the international reputation of the Institute as a centre of advanced study?
A distinct and recognizable research profile of the Peter Wall Institute is needed, as well as a method to document the impact of the Institute on university life on and beyond the campus. In addition, UBC’s expectations of the Peter Wall Institute needs to be clarified. Only with such clarity in place can an accurate evaluation of the Institute take place. Such a strategic plan should also include explicit goals in terms of both processes and “products” that can be expected to originate in the Institute through its programs so that its success can be identified and encouraged. A further step would be the establishment of an External Advisory or Evaluation Committee for the Institute comprised of leading academics from outside UBC to provide periodic assessments of the Institute’s status, programming and success.

PROGRAMS

Programming at the Wall Institute has evolved into a variety of funding opportunities including Major Thematic Grants to a maximum of $500,000 to Exploratory Workshops to a maximum of $25,000. In addition to these programs and the Peter Wall Professorship, there are Peter Wall Distinguished Scholars in Residence, Visiting Junior Scholars (normally in the Summer), Early Career Scholars, Faculty Associates, Theme Development Workshops, Weekly Colloquia, Faculty Associates Forums and a Catalytic Visitor Program (suspended in 2002). The Institute loosely divides these programs into thematic or topic based, and residential or “people-based.” Several programs are directed at UBC faculty only, while others are designed to attract outstanding researchers to UBC. Still other programs seek to blend the two. A table of these myriad programs and the budgets for each appears in Section 4 of the Preparatory Document organized for the Review Committee.

The programs have had varied success and require a rigorous review led by the new Director. A number of faculty, ranging from Associate Deans of Research, as well as members of Adjudication Committees, voiced concern over the multiplicity of programs which seem to have shifted in purpose and, in some instances, have lost intellectual focus. The Visiting Scholars program, for example, appears to be acting as an early recruitment program for the university, while the Early Career UBC Scholar
program is functioning as a retention and morale building program, as well as an opportunity for new UBC faculty to meet peers in other disciplines and, on occasion, establish research links. These are valuable indirect benefits of the original program concepts which been made possible over the years by Hampton funding.

The Major Thematic Grants program consumes a notable percentage of the PWIAS budget (1999-00: 30%; 2000-01: 40%; 2001-02: 44%; 2002-03: 39%) but has achieved some significant further funding from CFI and Genome Canada totaling 27 million dollars. Nevertheless, our cursory review of the program revealed several apparent problems (see below), and we suggest that the program should be reviewed and possibly reorganized. On the other hand, this program has the potential to confer dramatic long-term benefit to PWIAS, as the size of the grants allows researchers to undertake large high-risk projects involving many interacting communities that are “ahead of their time,” and thus, not easily funded through other sources. One or two spectacular successes from this program could make the reputation of the Peter Wall Institute for Advanced Studies.

Among the problems noted by some of those interviewed are the following: a complicated and laborious application process (added requirement for investigators is to first run a successful Exploratory Workshop); the at-times artificial joining of cross disciplines to meet interdisciplinary criteria; inadequate definition of what constitutes a Major Thematic Grant Proposal; inadequate organization and follow-through on the part of principal investigators. Only five Major Thematic Grant projects have been funded since its inception: Crisis Points (1996); Electron Motion (1997), An interdisciplinary Inquiry into Narratives of Disease, Disability and Trauma (1999), Pathogenics (1999) and Acoustic Ecology (2000). Although several projects have succeeded in obtaining larger funding through CFI or NSERC programs, this has not been well documented. The percentage of dollars from the overall budget required to fund these limited projects does not appear to be fully justified. The Review Committee suggests a more flexible funding program for the Major Thematic Grants, possibly either increasing the funds available to encourage more successful applications or providing alternate amounts so that smaller projects can be funded and the number of awards potentially increased.
Workshops on how to prepare a Major Thematic Grant proposal, one purpose of the Thematic Development Workshop, should be expanded. To date only 5 of 49 requests for a Major Thematic Grant have been supported.

One of the more useful requirements of a Major Thematic Grants, however, is the establishment of a web site to reflect the nature of the overall program, organization, principal participants, stages of major research and significant conclusions. The web site, we recommend, should be frequently updated following the completion of the grant program, a requirement for all Exploratory Workshops to sustain their existence and extend their identity to a broader constituency.

The Exploratory Workshops established in 1997 to prepare researchers for Major Thematic Grant projects. The program provides support from $15,000 to $25,000 for researchers at UBC to join experts from around the world to explore a new field and, where possible, lead to an application for major funding. Usually from 5-10 external experts are invited to participate in the workshops of several days duration. The variety and number of Exploratory Workshops attest to their success and importance, although there has been limited follow-through with submissions for Major Thematic Grants; the link between the two has become tenuous. However, a key purpose of the Major Thematic Grant program is to serve as seed money to develop a significant research agenda to be funded by an outside agency. The following sample of Workshop topics illustrates the program’s diversity: Unreal Cities: Religion, Urbanism and Imaginary Community; Linking Sustainability to Aesthetics; Outsmarting the Superbugs - Responding to the Antibiotic Resistance Crisis; Innovations in Molecular Biophysics; Cross-Cultural Perspectives on Women, Food and Identity. Yearly costs for the Workshops have varied: $158,000 for eight in 1998-99; $108,000 for six in 1999-2000; $92,250 for five in 2000-01 (source: P.Wall Institute Annual Reports). This appears to be a valuable program, worthy of continued support. Submission of new projects should be encouraged, although more rigorous criteria for approval should be instituted, as well as a more clearly enunciated intellectual focus.
Another area where change should occur is the Catalytic Visitor program. Only one of three applicants was supported in the period 1999 to the present. This program is not functioning properly and should be eliminated.

The Distinguished UBC Scholars in Residence program is one of the most valued on the campus helping to make the Wall Institute unique and creating a nucleus of grateful and loyal faculty members. There is universal support for the program. If possible, it should be expanded, if not in actual numbers then in financial support allowing larger grants to release faculty from their teaching responsibilities in order to pursue their research. The current infrastructure budget of $12,000 is too small to do this adequately. It would be wonderful if the number of Scholars could be doubled from four to eight per year using space in the current residential facility.

Similarly, the Early Career UBC Scholars program is successful and should be retained. Its importance in networking junior faculty at the university is unquestioned; those who have participated celebrate its success long after their appointments at the Wall Institute have terminated. The informal program of dinners and gatherings has sustained initial contacts among junior faculty from many fields. The program currently supports ten Assistant Professors and has also supported six Associate Professors. We would welcome a modest expansion of the program to twelve Assistant Professors and eight Associates and increasing the infrastructure grant from $5500 to $7500.

The Visiting Junior Scholars program for up to sixteen promising recent PhDs nominated by departments across campus for a month-long, expense-paid retreat in the summer at UBC. This program has proven to be a valuable, if indirect, small-scale recruiting tool. However, there is little evidence of long term UBC benefit from the majority of visitors since the commencement of the program in July 1999; indeed, some guests noted that the over-scheduling of activities prevented them from actually spending research time in their discipline areas and departments.

The goal of early contact with UBC is admirable, but the benefits to UBC do not seem to be commensurate with the cost of the program which includes accommodation, food, two weekend excursions and an expense allowance of $6000 (to include travel), as well as enormous indirect costs through the time being spent by the Director and Institute
staff. The committee therefore recommends that the program be eliminated or significantly re-vamped.

Other Institute programs – Associates’ Gatherings, Theme Development Workshops (informal meetings to allow researchers to meet other colleagues to share initial ideas on researching particular themes), Weekly Colloquia – appear to run successfully and should be continued.

The Peter Wall Institute is at a moment of transition as the first director, Professor Ken MacCrimmon – who has done an excellent job – has retired and a new director is being sought. One of the first tasks of the new director should be to review programming with the goal of making adjustments where necessary. That said, the programs at the Peter Wall Institute are unique and, on the whole, have been extremely successful. They have clearly had a positive and extremely beneficial impact on the quality of the academic experience at UBC for hundreds of faculty members. The committee heard various anecdotes showing that the programs have demonstrably improved morale, recruitment, and retention among UBC faculty.

In addition, the programs have led to increased research funding from sources beyond the Peter Wall Institute (probably bringing in several dollars for every dollar of Institute money invested). They have also enhanced academic productivity, as measured by books, articles, conference proceedings, abstracts, and other means, although this needs to be publicized much more effectively. Yearly Annual Reports are not enough, especially when these appear well after the end of the year covered. Perhaps a combined publication of a Guide to the Peter Wall Institute with its Annual Report should appear.

An active and public celebration of the Wall Institute’s work through the documentation and reports to the university community and community at large is essential. Institution of a newsletter, timely publication of the Annual Report, public lectures by Distinguished Scholars in Residence and a yearly or semi-yearly publication containing a summary of the research efforts and projects of Distinguished Scholars are definitely needed. Without such efforts, misconceptions easily emerge such as that the Wall Institute supports projects largely in the sciences not the arts. A careful review of all
funded projects shows that there is an almost equal split between support for the arts and sciences.

FINANCING

A Management Committee formed by the Trustees, consisting of the Dean of Graduate Studies, the Institute Director, the VP-Finance and Administration, and the CEO of the Wall Financial Corporation, is responsible for the financial oversight of the Institute. This Committee reviews a budget prepared by the Director which is then brought to the Trustees for approval at a Spring meeting. The Board of Trustees, Chaired by the University President and including four other voting members, two appointed by the donor and two by the University, with five ex-officio (non-voting) observers (VP Academic, VP Finance, Dean of Graduate Studies, Director of the Institute and the Peter Wall Distinguished Professor) meets twice yearly.

The Review Committee, which did not meet with the Management Committee, heard conflicting accounts with respect to the finances of the Institute. The Deed of Trust of the Peter Wall Endowment specified a minimum level of annual funding of $1.5 million prior to 1996 and then $1 million (in 1991 dollars) starting in 1996. Because the donation was in the form of 6.5 million shares of the Wall Financial Corporation, a privately held corporation, the expectation was that share dividends would provide the required funding to operate the Institute. In 1994, UBC dedicated $10 million of the Hampton Endowment to the Peter Wall Institute to provide additional support for the Institute primarily to fund the thematic research programs. Since then, funding for the Institute has come from both endowments: the Peter Wall and Hampton.

The Director and his staff reported to the Committee that a financial problem for the Wall Institute has been created by the less than specified dividends from the Wall Financial Corporation, contributing to a major long-term debt. In addition, the payout rate on the Hampton Endowment is to be cut from 6% to 5.5% in 2003 and 5% in 2004, while the overall value of the endowment has fallen because of the recent general deterioration of financial markets nationally and internationally. Furthermore, in 1991, at
the time the shares were donated, UBC established a ten-year loan for the Institute in order to pay off a cash debt of $2.75 million associated with the donated shares. During the term of the loan, no payments were made on the principal or interest (at 10% per annum); in June 2001, the due date for the loan, the Institute faced repayment of the accumulated $5.5 million debt, although the University has since approved a repayment agreement that the loan could be payed back over an additional 10 years without added interest. Repayment of the loan is conditional on the Institute receiving dividends of more than $650,000, deemed to be the minimal level to fund its core programs. However, a general reduction in the funding for the Wall Institute seems to be very likely over the foreseeable future.

The Institute generates a modest rental income from its conference and residential facilities, although it is offset by lease costs. In the 2002-3 fiscal year, for example, the Institute will earn ca. $198,000; all rental income is credited against facilities costs but the lease cost alone for space at the Koerner University Centre (paid. to UBC) is ca. $210,000. Additionally, considerable staff time is required to service the facilities. There is little or no prospect of breaking even on facilities’ costs, although if the Visiting Junior Scholars Program is eliminated July rental of the residence and conference rooms would generate up to a further $20,000. Details on the budget are found in section 2 of the Preparatory Document. The Wall institute receives no GPO funds from UBC.

Furthermore, we were told that the Trustees of the Wall Institute, beginning with the 2001-02 budget and acknowledging the dividend shortfall and loan repayment, have capped the Wall Endowment budget component at $650,000, less than half of the amount specified in the Deed of Trust. This amount barely covers essential expenditures. Additionally, extra Trustee initiatives, costing ca. $100,000 for the preceding and current fiscal year, were imposed on the core budget.

Dividends from the Wall Financial Corporation should support the Residential Program and a portion of the Institute’s administrative and facilities costs. However, the promised level of funding has not been realized: the cumulative dividends and associated interest has been only about 60% of the anticipated amount ($5 million rather than $9 million). A major impediment to the Institute’s stability is a funding shortfall
combined with the uncertain and irregular dividends from the Wall Financial Corporation. The Dean of Graduate Studies, however, believes the situation is manageable and that steps have been taken to provide at least adequate funding for the Institute.

It is clearly important to reconcile the differing financial views of the Institute and to assure its financial well-being. However, the Review Committee was not afforded the opportunity to meet with the Vice-President Finance of UBC, the Management Committee, nor the Board of Trustees and did not have time or the background to unravel the complex financial history relating to the Institute. To encourage resolution and action, however, we offer three areas for consideration:

**One:** Clarify how payments from the Endowment are generated: only when a dividend is declared by the Wall Corporation, or yearly, as Dean Granot suggested, from the income generated by the entire diversified portfolio of the University? Why is the letter of the Trust Deed not being enforced? If the income from the Wall Endowment is irregular, could it not be regularized by treating it as the Hampton funds are treated, thereby generating a guaranteed minimum yearly payment that could be supplemented by dividends declared on the stock?

**Two:** Why have the Trustees approved budgets that have resulted in a yearly increase in the accumulated debt with no apparent attempts to limit it or pay it down? The debt appears to jeopardize the future of the Institute. Is the university benefitting, e.g., from a tax break from the debt on its books? Would it be possible for the University to retire the debt as a *quid pro quo* for the retention and recruitment services provided by the Institute?

**Three:** The endowment needs to be increased and diversified. Every successful Institute for Advanced Studies has a significantly larger endowment than the Peter Wall Institute for Advanced Studies. How can a larger endowment be achieved?

**GOVERNANCE**

**Academic integrity** is fundamental and essential to the present and future of the Wall Institute, both within UBC and nationally and internationally. Any Institute for Advanced
Study will be judged primarily by the excellence of its senior members. The selection of anyone but academics of the highest caliber as Director or Peter Wall Distinguished Professors would be a direct threat to the integrity of the Institute and its programs. The University (i.e., the President) and the Trustees MUST be clear on this issue, or it is very unlikely that they will be able to attract or retain a Director of distinction in the future or build upon the existing programs.

The **Advisory Committee** should be given a formal role in the running of the Institute (as recommended in the original vision statement prepared by the original committee chaired by the previous Dean of Graduate Studies). The Advisory Committee is an essential mediator between the Institute, the Director and the Board of Trustees. It should be enlarged to represent all academic constituencies served by the Institute: including post-doctoral fellows, professors of all ranks, and administrators.

The Advisory Committee would be further strengthened by the addition of exceptional external members constituting either an extended group which might be convened infrequently, e.g. every two years to review Wall Institute programs, or as "corresponding" members to be tapped for advice by mail and email. Such an extended Advisory Committee would also help to promote the international reputation of the Peter Wall Institute.

**CHANGE**

The following suggestions balance financial goals or their realignment with academic values.

1. **Visiting Junior Scholars.** This summer program for post-doctoral fellows is costly. Is it worth the time and effort devoted to it? The interdisciplinary collaborations formed seemed to benefit the participants without benefitting UBC, other than by providing a possible recruiting opportunity. This recruiting function can be retained by incorporating post-doctoral fellows from outside UBC into other Wall Institute programs. It is possible that this program has enhanced the international reputation of the Wall Institute, but the Review Committee found no documented evidence of this. Elimination of this program will save considerable money and, more importantly, reduce
the summer need for the hotel facilities associated with the Wall Institute and the associated administrative time and costs on the part of the staff. A portion of the residence facilities may be used for an expanded Scholars in Residence program, while maintaining their current use throughout the year for Exploratory Workshops, Early Career Scholars programs and Major Thematic Grants projects.

2. The hybrid model adopted by the Wall Institute in its original form has led to some odd tensions. On the one hand, there is a "star" system with Peter Wall Distinguished Professors of the highest caliber and Scholars in Residence; on the other, there is an attempt to create trans-disciplinary programs among faculty across UBC at every academic level. The next Director should consider ways to integrate the "stars" into the other programs. Professor Brett Finlay, the newly appointed Peter Wall Distinguished Professor appears to be willing to participate within his limited available time. All Wall Professors and Distinguished Scholars should have clearcut responsibilities as an explicit condition of their positions. These responsibilities need not be onerous (as, indeed, Finlay's are not), but they would ensure a level of participation that is necessary in order to make the system work.

3. The Early Career Scholars program might be enhanced by providing more flexible funding, particularly funds that might make reduced teaching loads possible (negotiated separately between the scholar and his/her department). It is clear from our interviews that the ability to take full advantage of this program depends on the ability to focus on research (fulfilling the mandate of the Institute). Departments have different policies on buying out teaching, particularly with respect to the amount of money required. The next Director should work with department heads and Deans to find ways to maximize administrative cooperation on this issue.

4. Although the current Director is in favour of discontinuing the Major Thematic Grants, the Review Committee suggests that in view of their being one of the most successful and distinctive components of the Wall Institute programs and one area most
likely to contribute to the Wall Institute developing an international reputation for interdisciplinary work, they should be modified rather than dropped. An alternative would be to provide variable amounts of funding. Additionally, better reporting is necessary. We propose that the last installment of any major grant be withheld until an acceptable final report has been submitted. It might also be useful to have the international external reviewers, used to assess Major Thematic Grant proposals, provide a short review of each Grant upon its completion.

5. Confusion seems to exist concerning the meaning of the term interdisciplinarity and the criteria being used to evaluate it for almost all of the programs. This needs to addressed through the proposed Vision Statement. Clearer statements of how grants, programs, and nominated scholars will be evaluated should be included in their publicity, as well as on the Wall Institute website. Such criteria would serve not only to clarify the vision of the Institute, but bring in better focused and appropriate proposals.

6. Programmatic efforts seem to have been largely directed to the UBC community thus far (with, of course, invited participation from selected external scholars in major programs). It might be useful from both an interdisciplinary perspective, as well as for purposes of achieving greater programmatic impact, to encourage proposals focused on broader Vancouver, British Columbia, or Canadian issues with appropriate participation from these communities. Indeed, such a mandate is part of the original vision statement for the Peter Wall Institute.

**FACILITIES**
The attempt to create inter- and trans-disciplinary programs across campus must be recognized to be a sociological and social experiment as well as an intellectual one. It is therefore essential for the Wall Institute to have an environment that facilitates this social and sociological role. The facilities of the Wall Institute create a unique space that alters normal modes of work and interaction for faculty associated with its programs. Bringing
faculty together physically and socially knocks down disciplinary walls and creates bridges necessary for collaboration.

Some points to consider:

1. The current office facilities are excellent and appropriate for the current programs, but may be limiting in the future. Consideration should be given to transforming the accommodations into more offices and meeting rooms. This would allow Assistant and Associate professors to have more access to Wall Institute amenities and allow for additional Wall Professors in the future.

2. It is clear that the social aspects of the facilities and programs have been a fundamental reason for the academic and intellectual success of the Institute during the period when Professor MacCrimmon has been Director. It is therefore important that the Sage Bistro provide continuing and hospitable service.

3. The Committee is not convinced that the hotel facilities are essential to the mission of the Institute and therefore suggests that these facilities be converted to other uses (see above).

GENERAL COMMENTS: Cocktail Lounge or Laboratory?

A small number of critics of the Peter Wall Institute for Advanced Studies complain that it is no more than an intellectual cocktail lounge, a casual gathering place for smart colleagues and outside experts to share ideas and exchange emails with an occasional project discussed. They argue that it is not an Institute for Advanced Studies but, rather, a source of funding for individual and joint research projects largely utilizing UBC resources. We also heard that it is no more research-intensive than other institutes on campus and that it currently has only one permanent research chair and no rotating distinguished visiting chairs. This view suggests that large grants have gone to marginal projects and that such funds could have been better directed to one or two permanent research chairs or four or five distinguished external visitors per year. These individuals could serve as a resource for UBC faculty and increase the level of research excellence at UBC. The proponents of such views believe that readjustment of funds, attached to a revision of programs, is needed.
A majority view, however, sees the Institute as a laboratory generating new ideas in fresh and original forms, drawing on the principles of cross-discipline exchange leading to new ways of approaching and solving problems. This understands the uniqueness of the academic and intellectual programs of the Peter Wall Institute, providing a firm base for growing an Institute that will achieve the highest rank and gain an international reputation. Adherents of this view understand that not all of the grants will lead to success, but that some small fraction of them should be spectacularly successful. Moreover, the programs are such that they can be modeled at other universities, thereby spreading the Institute's influence and impact. Nevertheless, the existence of these two differing views suggests an indefiniteness concerning the Institute's mission and recalls the first recommendation of this report: that there is a need for an extensive Vision Statement that charts the future, while celebrating the significant successes of the first eight years of the Institute.

As argued above, it is important that uncertainties over future funding be fully resolved, providing at the very least the income promised in the Deed of Trust. Secure funding is needed so that the Institute can reach its full potential. The Board of Trustees can be assured that a jewel has been created that deserves support and the degree of intellectual independence from interference which will allow it to succeed as an Institute for Advanced Studies and attract a first-rate Director. Intellectual excellence and integrity are the coin of the realm among academics. Finally, the Institute has already grown to the limits of its facilities. While these facilities do not yet constrain activities, they will certainly do so if there is any growth in the programs or in the number of faculty associated with the Institute.

It must also be noted that the contribution of the founding Director, Professor Ken MacCrimmon has been instrumental in the success of the Institute to date. He has not only initiated programs but has made the Institute a hospitable home for scholars from diverse disciplines and countries, adding an openness and warmth to Institute activities that distinguishes it on an often “balkanized” and unfriendly campus. Time and time again those interviewed by the Review Committee underscored Professor MacCrimmon's enthusiasm, efficiency, and participation at every level. It is hoped that
his successor will exhibit a similar level of energy and excitement over one of UBC’s most unique creations.

The future of the Wall Institute depends upon four key factors: financial stability, a clear and exciting Vision Statement, better information flow highlighting the Institute’s achievements and the selection of an internationally distinguished new Director with imagination, research drive and an ability to foster excellent research. Without taking these steps, the impression of some that the Wall Institute lacks focus will grow. All possible means of utilizing public channels to celebrate the research, publications and further successes of Peter Wall Scholars, researchers and associates must also be developed to link the Peter Wall Institute and its programs to the community, Canada and the world. Celebrating the successes of the Institute will be critical to any future fund-raising, facilities development, and program growth to fulfill the mandate of the Peter Wall Institute for Advanced Studies.

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