Board of Governors Meeting (Public) - April 30, 2026

Notice of Meeting

Thursday, April 30, 2026

10:00 a.m. to 12:00 p.m.

Western Interdisciplinary Research Building, Room 3000

Members of the community who wish to view the open session remotely may request the Zoom meeting details by contacting secretariat@uwo.ca.

Board of Governors Meeting (Public) - April 30, 2026

AGENDA

	1.0 Land Acknowledgement	
5 min	**2.0 Approval of Agendas and Minutes**	
	2.1 Adoption of Agenda - Open Session	Approval
	2.2 Approval of the Open Session Minutes of the Previous Meeting	Approval
	2.3 Business Arising from the Minutes	No Report
15 min	**3.0 Report of the President**	Information
	4.0 Committee and Senate Reports	
	4.1 Report of the Property and Finance Committee	
15 min	4.1(a) Introduction of MAPP Policy 2.32-Responsible Investing	Approval
10 min	4.1(b) Revisions to MAPP Policy 2.26 – Statement of Investment Objectives, Policies and Governance for the Short-Term Portfolio, Mid-Term Portfolio and Operating and Endowment Fund	Approval
45 min	4.1(c) University Operating and Capital Budgets and Fees for 2025-2026	Approval
5 min	4.1(d) Revisions to Resolution re: Banking	Approval
30 min	4.1(e) Campus Development Plan and Open Space Strategy Update	Information
	4.2 Report of the Audit Committee	
5 min	4.2(a) Campus Safety & Emergency Services Annual Report	Information
5 min	4.2(b) Health, Safety and Employee Well-Being Annual Report	Information
5 min	**5.0 Unanimous Consent Agenda**	Approval
	5.1 Items from the Property and Finance Committee	
	5.1(a) New Scholarships, Awards, and Prizes	Information
	5.1(b) Standard and Poor's (S&P) Global	Information

Ratings Report	
5.1(c) Annual Public Report re: Bill S-211 – Fighting Against Forced Labour and Child Labour in Supply Chains Act	Approval
5.1(d) Chair in Leader Character	Information
5.2 Item from the Governance and By-Laws Committee	
5.2(a) Board of Governors Election Results (2026)	Information
5.3 Items from the Senior Policy and Operations Committee	
5.3(a) University Discipline Appeal Committee Membership	Approval
5.3(b) Rescission of MAPP 1.7 - Chaplains to the University Community	Information
5.4 Items Referred by Senate	
5.4(a) Senate Advice re: 2026-27 University Operation and Capital Budgets	Information
5.4(b) Subcommittee on Enrolment Planning and Policy (SUEPP) Report	Information
5.4(c) Report of the Academic Colleague	Information
5.4(d) Academic Administrative Appointments	Information
5.4(e) Western Libraries Annual Report	Information
5.4(f) Annual Report on Faculty Recruitment and Retention	Information
5.4(g) Honorary Degree Recipients – Spring 2026	Information
5.4(h) Report of the Subcommittee on Teaching Awards (SUTA): Recipients of Western's Excellence in Teaching Awards for 2025-26	Information
5.4(i) Annual Report of the Office of Academic Quality and Enhancement	Information
5.4(j) School of Graduate and Postdoctoral Studies: Introduction of a Doctor of Health Sciences in Interdisciplinary Health Sciences	Approval

6.0 Items Removed from the Consent Agenda

7.0 Questions from Members for the Open Session

8.0 Other Business

9.0 Adjournment to the Closed Session

Board of Governors Meeting
Land Acknowledgement Volunteer Schedule 2025-2026

November 20 – Terry Rice
February 5 – George McAuley
April 30 – Leslie Oliver
June 17 – Ken Yeung
June 18 – Michelle Banik

Leslie Oliver will offer a land acknowledgement or reflection.

Executive Summary:

Dr. Christy Bressette, the Vice-Provost and AVP (Indigenous Initiatives), has indicated that it is important to remind ourselves regularly of our commitment to reconciliation and decolonization, and to ensure that these objectives remain central in our collegial decision-making.

In the spring of 2021, the recommendation to offer a land acknowledgement was extended to the Board's committees.

Members of the Governance and By-Laws committee were broadly supportive of this practice, while also being mindful that land acknowledgments should be meaningful and dynamic, and not simply a rote exercise.

Some suggestions for practices that might be most meaningful and relevant to the Board and committees are:

- a land acknowledgement
- a reminder of one or more of the TRC Calls to Action, particularly those relating to education
- a reminder of elements of Western's Indigenous Strategic Plan
- a reference to local Indigenous culture or narratives

Western Land Acknowledgement:

We/I acknowledge that Western University is located on the traditional lands of the Anishinaabek (Ah-NISH-in-a-bek), Haudenosaunee (HO-den-no-SHOW-nee), Lūnaapéewak (Len-AHPAY-wuk) and Chonnonton (Chun-ONGK-ton) Nations, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. This land continues to be home to diverse Indigenous peoples (e.g., First Nations, Métis and Inuit) whom we recognize as contemporary stewards of the land and vital contributors of our society.

Adoption of Agenda – Open Session

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That the agenda for the open session be approved as circulated.

MINUTES OF THE MEETING OF THE BOARD OF GOVERNORS

FEBRUARY 5, 2026 – OPEN SESSION

The meeting was held at the Western Interdisciplinary Research Building, Room 3000 and on Zoom.

Present:	Sarah Shortreed, Chair Amy Bryson, Secretary	
	Cameron Bailey	Kelly Meighen
	Michelle Banik	Lesley Oliver
	Susan Clarke	Geoff Pollock
	Greg Dick	Stephen Poloz
	Ed Goehring	Terry Rice
	Lee Greenberg	Alan Shepard
	Ayesha Hassan	John Simcoe
	Lori Higgs	David Simmonds
	Elizabeth Maccabe	Jane Toswell
	Beth MacDougall-Shackleton	Joel Welch
	Marlene McGrath (Vice-Chair)	Noah Zabian
Regrets:	George McAuley, Josh Morgan, Ken Yeung	
By Invitation:	Karen Bertrand, Althea Blackburn-Evans, Ruban Chelladurai, Paul Eluchok, David Foster, Lynn Logan, Eric Mallory, Penny Pexman, Caroline Whippey	
Secretariat Resource:	Bonnie Brown	

Chair S. Shortreed called the meeting to order at 10:00 a.m.

S. Shortreed welcomed John Simcoe to the Board of Governors, noting he was appointed to the Board by the Lieutenant Governor-in-Council.

1.0 Land Acknowledgement

A. Bryson offered a land acknowledgement.

2.0 Approval of Agendas and Minutes

2.1 **Adoption of Agenda – Open Session**

Moved by N. Zabian, seconded by M. Banik:

That the agenda for the open session be approved, as circulated.

CARRIED

2.2 **Approval of the Open Session Minutes of the Meeting of November 20, 2025**

Moved by J. Toswell, seconded by T. Rice:

That the open session minutes of the meeting of November 20, 2025 be approved, as circulated.

CARRIED

2.3 **Business Arising from the Minutes**

None.

3.0 **Report of the President**

In addition to the written report provided with the agenda materials, A. Shepard, President & Vice-Chancellor, provided a verbal report on several positive items regarding students and faculty. He began his report by commenting on Western Alumni and faculty that are active in the upcoming Olympics; and highlighting several recent media stories on Western researchers.

A. Shepard shared information on a public lecture being hosted this evening by the Faculty of Information & Media Studies. Katie Simpson, Foreign Correspondent for CBC News, is the guest speaker.

A. Shepard continued his report by providing an update on recent funding by the Canada Foundation for Innovation. He further reported on several funding opportunities that Western is taking advantage of to recruit international scholars, post-doctoral students, and research Chairs.

A. Shepard commented on the recent QS India Summit noting Western's sponsorship and the attendance at the summit by the Provost and the Associate Vice-President (Strategic Partnerships).

In concluding his report, A. Shepard reported on the application numbers for domestic and international students and highlighted the Open House being hosted on campus on March 28, 2026.

In response to a question, A. Shepard advised there has not been any news from the Ministry about grant or tuition increases.

4.0 COMMITTEE AND SENATE REPORTS

4.1 REPORT OF THE PROPERTY AND FINANCE COMMITTEE

4.1(a) Key Financial Indicators Report

L. Logan, Vice-President (Operations & Finance), presented the Key Financial Indicators report noting it is a culmination of the financial monitoring/compliance reporting that is provided throughout the year.

L. Logan reported Western continues to have a solid financial position and it is expected that Western's S&P credit rating will not change this year. In concluding, L. Logan, advised they continue to monitor employee future benefits and are now monitoring the fundraising results.

4.1(b) Climate and Sustainability Strategy

H. Hyde, Director (Office of Sustainability), and J. Cordes, Manager - Sustainability Engagement (Office of Sustainability) joined the meeting.

L. Logan provided an overview on the development of the Climate and Sustainability Strategy. Appreciation was extended to H. Hyde, J. Cordes, and the members of the President's Advisory Committee on the Environment and Sustainability (PACES).

H. Hyde presented an overview of the Climate and Sustainability Strategy. The presentation included information on sustainability efforts at Western, the vision and guiding principles for the strategy, the key priorities identified, the community engagement process, the community feedback received in response to the draft strategy, and the development of the action plan.

In response to a comment regarding the stewardship of Western's land, L. Logan advised that the campus development strategy is the best place to have conversations around how we think about Western's developable and non-developable land. She advised that consultation is set to begin in April/May.

In response to a concern that the work of PACES operates outside of Western's governance structure, it was noted that the committee is considered a working group. It was confirmed that Senate was provided with the same presentation at its January

16, 2026 meeting.

L. Logan and H. Hyde responded to questions of clarification regarding Western's climate action goals and progress to date on those goals; the survey questions; and the demographics of the survey respondents.

H. Hyde advised that detailed information about the survey and the consultation sessions may be found on the Climate and Sustainability Strategy website.

Moved by G. Dick:

> That, on the recommendation of the Property and Finance Committee, the Board of Governors approve the Climate and Sustainability Strategy.

CARRIED

H. Hyde and J. Cordes left the meeting.

4.1(c) **Revisions to MAPP Policy 7.7 – Overhead on Contract Research and MAPP Policy 7.11 – Over-Expenditure of Research Accounts and Rescission of MAPP Policy 7.1 – Sundry Donations for Research**

P. Pexman, Vice-President (Research), presented for approval revisions to MAPP Policy 7.7 – Overhead on Contract Research and
MAPP Policy 7.11 – Over-Expenditure of Research Accounts, and rescission of MAPP Policy 7.1 – Sundry Donations for Research.

P. Pexman highlighted the consultation completed on the review of these policies. She noted that MAPP Policy 7.1 – Sundry Donations for Research is presented for rescission as its contents are sufficiently covered under MAPP Policy 2.1 – Gift Acceptance and its procedures.

Moved by G. Dick:

> That, on the recommendation of the Property and Finance Committee, the Board of Governors approve:
>
> the rescission of MAPP 7.1 – Sundry Donations for Research;
>
> the revised MAPP 7.7 – Overhead on Contract Research, as shown; and

the revised MAPP 7.11 – Over-Expenditure of Research Accounts, as shown.

CARRIED

4.2 REPORT OF THE FUND RAISING AND DONOR RELATIONS COMMITTEE

4.2(a) Revisions to MAPP Policy 1.12 – Advertising and Commercial Activity

K. Bertrand presented for approval the revisions to MAPP Policy 1.12 – Advertising and Commercial Activity.

Moved by M. McGrath:

That, on the recommendation of the Fund Raising and Donor Relations Committee, the Board of Governors approve the revisions to MAPP Policy 1.12 – Advertising and Commercial Activity, as shown.

CARRIED

4.2(b) Revisions to MAPP Policy 2.2 - Fund Raising and Canvassing and Rescission of MAPP Policy 2.27 - Issuing Receipts for Charitable Events

K. Bertrand presented for approval revisions to MAPP Policy 2.2 - Fund Raising and Canvassing and the rescission of MAPP Policy 2.27 - Issuing Receipts for Charitable Events.

In describing the changes to the policy, K. Bertrand advised on the removal of references to ‘canvassing’ noting that a separate policy will be created in this regard.

Moved M. McGrath:

That, on the recommendation of the Fund Raising and Donor Relations Committee, the Board of Governors approve the proposed revisions to MAPP Policy 2.2 – Fund Raising and Canvassing, as shown; and

approve the rescission of MAPP Policy 2.27 - Issuing Receipts for Charitable Events.

CARRIED

4.3 REPORT FROM SENATE

4.3(a) **Recommendation from Senate re: Western's Investment and Responsible Investing Policy (within MAPP 2.26)**

A. Shepard presented, for information, the advice of Senate to the Board in relation to Western's investment and responsible investment policy. He noted that the UWO Act provides Senate with the ability to give advice to the Board on various matters.

A. Shepard advised that a new draft responsible investing policy currently is out for feedback from the university community. He noted that plans for this consultation process were shared with the community in September 2025. The draft policy was posted in late January, alongside an online survey that is open to March 27 to collect written feedback from the university community. Invitations have since been circulated for in-person and virtual consultation sessions scheduled for late February.

In terms of the governance process, S. Shortreed advised that the revised policy will be submitted to the Investment Committee, then to the Property and Finance Committee and then to the Board for approval.

As part of the discussion, a Board member expressed the importance of listening to the community as there has been a strong voice asking that a human rights lens be applied to investment decisions as they relate to weapons of destruction.

In response, there was a comment regarding the production of weapons in support of freedoms around the world and the need for that kind of investment.

In response to a question, L. Logan advised the revised policies are expected to come forward to the Board at their April meeting.

In terms of the consultation process, there was a request that the timeline allow for consultation with Senate and there be as many townhall opportunities as possible to allow for fulsome participation.

5.0 UNANIMOUS CONSENT AGENDA

Moved by S. Shortreed, seconded by M. McGrath:

That the items listed on the consent agenda, with the exception of Item 5.1(f), be approved or received for information by the Board of Governors by unanimous consent.

CARRIED

5.1 ITEMS FROM THE PROPERTY AND FINANCE COMMITTEE

5.1(a) New Scholarships, Awards, and Prizes

A report on the terms of reference approved by the Property and Finance Committee for the new donor-funded scholarships, awards, and prizes was received for information.

5.1(b) Update on the 2025-26 Operating Budget as of December 31, 2025

A report providing an update on the 2025-26 operating budget as of December 31, 2025 was received for information.

5.1(c) Update on the 2025-26 Ancillary Budgets as of December 31, 2025

A report providing an update on the 2025-26 ancillary budgets as of December 31, 2025 was received for information.

5.1(d) Annual Report on Trademark Licensees doing Business with the Dellelce Family Bookstore

The annual report on trademark licensees doing business with the Dellelce Family Bookstore was received for information.

5.1(e) Investment Committee Membership

A report on the approved reappointments of David Stenason and Doug Porter to the Investment Committee was received for information.

5.1(f) Report of the Investment Committee

Removed from consent. See Item 6.1

5.2 ITEM FROM THE AUDIT COMMITTEE

5.2(a) Annual Report of the Office of the Ombudsperson

The annual report of Western's Office of the Ombudsperson was received for information.

5.3 **ITEM FROM THE SENIOR POLICY AND OPERATIONS COMMITTEE**

5.3(a) **Rescission of Procedures for Joint Appointments within the University**

By unanimous consent and on the recommendation of the Senior Policy and Operations Committee, the Board of Governors approved the rescission of the Procedures for Joint Appointments within the University.

5.4 **ITEMS REFERRED BY SENATE**

5.4(a) **Academic Administrative Appointments**

A report on the academic administrative appointments as of December 5, 2025 was received for information.

5.4(b) **Report of the Academic Colleague**

A report summarizing the October 2025 meeting of the Academic Colleague was received for information.

6.0 **ITEM REMOVED FROM THE CONSENT AGENDA**

6.1 **Report of the Investment Committee**

The report of the Investment Committee was received for information.

In response to a question, L. Logan described the rationale for separating out the current policy into two separate policies.

7.0 **QUESTIONS FROM MEMBERS FOR THE OPEN SESSION**

None.

8.0 **OTHER BUSINESS**

None.

9.0 **ADJOURNMENT TO CLOSED SESSION**

On motion, the meeting adjourned at 11:01 a.m.

_____ _____

S. Shortreed
Chair

A. Bryson
University Secretary

Business Arising from the Minutes

Action: ☐ Approval ☐ Information ☐ Discussion

Executive Summary:

There is no business arising from the minutes of the previous meeting.

Report of the President

To: Board of Governors

From: Alan Shepard

Date: April 24, 2026

Re: Quarterly report for April 2026

Dear Members of the Board,

Following are some of the noteworthy developments since my last report for the Board meeting of February 5, 2026.

Spring Convocation 2026 will take place from June 8 to 12 at Canada Life Place. Information for students, guests, faculty, and staff can be found on a refreshed convocation website, including academic procession and volunteer registration. The registration deadline to participate in the academic procession is **June 1, 2026**.

Top employer rankings: for the third consecutive year, Western was named among the top 50 employers in Southwestern Ontario, one of only five organizations in London and the only educational institution to make the list published annually by Mediacorp Canada Inc. Western was also ranked as one of Canada's Greenest Employers by Mediacorp in a separate national competition and was the only organization in London named in the ranking.

2026 QS World University Rankings by Subject: Western ranked among the world's top 400 universities in 40 subjects. Our Department of Philosophy was tied for second in Canada, and 34 subjects ranked in the top 10 nationally. In the ranking's broad global categories, Western climbed 34 spots in arts and humanities, 32 spots in social sciences and management, 31 spots in natural sciences, and seven spots in life sciences and medicine.

Ivey MBA ranked first in Canada, 74th globally in *The Financial Times* Global MBA Ranking. Ivey climbed 12 spots from 2025, reaching its highest ranking since 2012. The ranking evaluates programs by career outcomes, research quality, international diversity, and alumni success.

$21.5M from Canada Foundation for Innovation: four projects at Western received funding in the latest round of grants from CFI. Congratulations to principal investigators **Shawn Whitehead** (Schulich), **Yolanda Hedberg** (Science), **Paul Ragogna** (Science), **Susan Scollie** (Health Sciences), and **Joy MacDermid** (Health Sciences/Schulich), along with their

interdisciplinary colleagues across Western and other institutions.

$4.4M (USD) grant from Oberkotter Foundation fuels ALLEars, a large collaboration between Western and Boys Town National Research Hospital (Nebraska). Led by **Susan Scollie** (Health Sciences) and supported by **Joshua Pearce** (Engineering/Ivey), the project will use AI and 3D printing to redefine how children's earmolds for hearing aids are developed, with a big impact to hearing health as well as speech, language, and social development.

Accolades: Congratulations to the following Western community members who, among others, have received special honours and awards in recent months:

- Named to the Order of Ontario:
  - **Amanda Grzyb (**BA'94, MA'96) (Information & Media Studies)
  - **Cameron Bailey** (BA'87, LLD'18)
  - **John B.W. Carmichael** (BA'74)
  - **Bernard Lawless** (MD'95)
  - **Tracy Moore** (MA'00)
  - **Edward Rogers** (BA'94)
  - **Richard Rooney** (BA'77, MBA'81)

- 2026 Distinguished University Professors:
  - **Gregory Kopp (**Engineering)
  - **Susan Scollie (**Health Sciences)

- 2026 Faculty Scholars named:
  - **Anne Schuurman, Jackie Sullivan** (Arts and Humanities)
  - **Katina Pollock** (Education)
  - **Katarina Grolinger, Reza Najafi, Ayan Sadhu** (Engineering)
  - **Lindsay Nagamatsu, Angela Roberts** (Health Sciences)
  - **Lauren Cipriano, Wren Montgomery** (Ivey)
  - **adam bell** (Music)
  - **Arlene MacDougall** (Schulich)
  - **Chris Kapulkin, Catherine Neish, Doug Woolford** (Science)
  - **Laura Batterink, Lindsay Bodell, Natasha MacBean** (Social Science)

- Annual Western Staff Award of Excellence recipients:
  - **Marc Lalonde**, Manager, The Grad Club
  - **Nanette Love**, Faculty of Law
  - **Tara MacCrone,** Faculty of Engineering
  - **Jenna Smith**, Sports and Recreation
  - **Courtney Swinden**, Institute for Earth and Space Exploration

- **Angela Wilson,** Robarts Research Institute
- **Nina Zitani**, Faculty of Science

- **Convocation Interdepartmental Team**
  - **Abigail David-Adjah**, **Patricia de Wit**, **Caitlin Price, Caroline Whippey** (University Secretariat)
  - **Hamza Khattar, Steve Krupa**, **Lauren Lee**, **Alicia Payne**, **Andrew Pocock**, **Valerie Sarkany**, **David Scriver**, **Amy Thornton** (Office of the Registrar)

- **Michael Kim** (Music) appointed Dean of Mason Gross School of the Arts at Rutgers University, starting July 1, 2026.

- **Yang Zhao** (Engineering) awarded the Bao and Zhu Innovation Award from the *Canadian Society of Chemical Engineers*.

- **Penny Pexman**, Vice-President (Research), named recipient of the Donald O. Hebb Award for Distinguished Contributions to Psychology as a Science from the *Canadian Psychological Association*.

- **David Dozois** (Social Science/Schulich) named recipient of the Award for Distinguished Contributions to the International Advancement of Psychology from the *Canadian Psychological Association*.

- **Adam Harmes** (Social Science) received the *Ontario University Student Alliance* (OUSA) Teaching Excellence Award.

- **Tim Wilson** (Schulich) named a Fellow of the *American Association for Anatomy.*

- **Terry Rice (BFA'98, MA'00)**, staff leader and Board of Governors member, received the 2025 Changemaker Award for Outstanding Workplace Champion from United Way Elgin Middlesex.

- Ten members of **Mustangs Women's Rowing** set a world record by continuously rowing one million metres in 72 hours. The effort also raised funds for *Tree Canada*, *Alzheimer Society*, *London and Middlesex Humane Society*, and *Anova*.

- Law student **Max Adams** selected to clerk for Chief Justice Richard Wagner (DCL'25) at the Supreme Court of Canada.

- **Gillian Riley** (BA'89) appointed President of *The Conference Board (Canada)*.

- **Doug Ferguson** (BCom'78, LLB'81), former Director, Community Legal Services, named a 2026 recipient of the *Ontario Law Society* Medal. **Michelle Alton** (LLB'07) named recipient of the Law Society's J. Shirley Denison Award.

- **Stephanie Ouellette** (JD'09) appointed judge of the Superior Court of Justice of Ontario, Family Court. **Kathleen Stevenson MacDonald** (LLB'02) appointed judge in the Ontario Court of Justice.

- **John Tessier** (MMus'96) was a featured tenor soloist on *Ukrainian War Requiem*, which won a Juno Award for Classical Album of the Year (large ensemble).

- Appointed to the Prime Minister's Advisory Committee on Canada-US Economic Relations: **Cameron Bailey** (BA'87, LLD'18), **Darryl White** (HBA'94, LLD'23), **Erin O'Toole** (Huron)

- **Darryl White** (HBA '94, LLD '23) named 2026 Ivey Business Leader.

Leadership updates:

Nicole Haggerty appointed Acting Dean of Ivey Business School effective April 8, 2026, to September 30, 2026, while Dean Julian Birkinshaw is on medical leave.

James Voogt named Acting Dean of the Faculty of Social Science beginning July 1, 2026, following the conclusion of Dean Nick Harney's term, and while the search for a new Dean is underway.

Active academic leadership review/selection committees are underway for Deputy Provost, and the Faculties of Arts & Humanities, Information & Media Studies, and Social Science.

Introduction of MAPP Policy 2.32 - Responsible Investing

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of the Property and Finance Committee, the Board of Governors approve MAPP Policy 2.32 – Responsible Investing.

Executive Summary:

The introduction of the Responsible Investing policy as a stand-alone policy is reflective of industry best practice and Western's commitment to responsible investing practices. Previously, responsible investing was included as a section of the Statement of Investment Objectives, Policies and Governance (proposed to be renamed - Investment Policy).

The Responsible Investing policy has evolved in this current iteration to reflect the following significant changes:

- Inclusion of the Principles for Responsible Investment, and associated integration taken by the university. Western became a signatory to the principles in 2023.
- Increase the sustainable investment allocation to 15% (from 10%), after achieving the 10% allocation in 2024.
- Inclusion of Proxy Voting Guidelines, which are voting expectations to be shared with Managers.

Although it is not typical for wide community consultation regarding financial policies, given the interest in responsible investing, the policy was subject to community consultation for two months, earlier this year. Several amendments were made to the policy as a result:

- Purpose – Repositioning of the Responsible Investing policy as a side-by-side policy with the Investment policy (MAPP 2.26), removing the previous language that subordinated it to the Investment policy in the event of a conflict.
- Section 2.0 – Clarifying that the responsible investing principles relate to all Portfolios, and not simply the sustainable investment allocation.
- Section 3.2 – Adjusting the definition and scope of sustainable investments to provide greater clarity on the types of verification and validation required in order to count as such an investment.
- Section 3.3 – Clarifying that carbon emissions relate to Scope 1 and 2 emissions.
- Section 6.0 – Re-ordering section 6 of the Proxy Guideline to alphabetical order.
- Section 6.5 – Updating the Land Acknowledgement.

The Investment Committee approved the draft Responsible Investing policy at its April 10, 2026, meeting. The Investment Committee has provided a Responsible Investing Policy Consultation Report summarizing the consultation process and its recommendation to the Board of Governors and the Property and Finance Committee.

Documentation Provided:

Responsible Investing Policy Consultation Report

MAPP Policy 2.32 – Responsible Investing

Responsible Investing Policy (presentation)



Investment Committee:

Draft Responsible Investing Policy Consultation Final Report

April 2026

Western
UNIVERSITY · CANADA

Land Acknowledgement

We acknowledge that Western University is located on the traditional territories of the Anishinaabek (Ah-nish-in-a-bek), Haudenosaunee (Ho-den-no-show-nee), and Lūnaapéewak (Len-ahpay- wuk) Nations, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. This land continues to be home to diverse Indigenous Peoples (First Nations, Métis and Inuit) whom we recognize as contemporary stewards of the land and vital contributors of our society.

As Western consulted with members of the campus community on the draft Responsible Investing Policy, we held present that decisions about how resources are managed carry long-term impacts for people, communities, and the environment. In that spirit, we approached this conversation with a commitment to responsible stewardship, thoughtful dialogue, and respect for the land and communities that sustain us.

Executive Summary

Western University has a long-standing commitment to responsible investing, a commitment that has evolved over nearly two decades and continues to reflect industry best practices, the Board of Governors' (and, within it, the Investment Committee's) fiduciary responsibilities; and our institutional capacity. The new Responsible Investing Policy strengthens this commitment while ensuring that investment decisions remain grounded in Western's financial and legal obligations (fiduciary duty and prudent investment standard) and the practical realities of our externally managed, globally diversified portfolios.

Over the last 15 years, Western has been a leader in the Canadian higher education sector in advancing responsible investing practices. The University has progressively implemented environmental, social and governance factors into investment policy and decision-making processes, evolving in line with global industry supports such as the introduction of regulatory, accounting and disclosure frameworks, and the Principles for Responsible Investment.

Responsible investing is a topic some members of our community feel passionate about, and with that in mind the Investment Committee took steps beyond the typical process for investment policy governance, creating an opportunity for the Western community to share their views in a fulsome way.

Throughout this consultation process, the Investment Committee considered feedback from 679 community participants reflecting a wide range of perspectives. We appreciate the time and thoughtfulness of all who contributed. Feedback indicated that the policy is largely on the right track, while highlighting the range of views from those who believe environmental, social and governance should be scaled back or eliminated entirely to focus on risk and return objectives to those who feel Western should pursue explicit values-based divestment or implement broad screening requirements. This range of views reinforces the complexity of responsible investing and the importance of balancing principled integration with disciplined financial oversight.

In reviewing this feedback, the Investment Committee carefully considered the practical limitations inherent in divestment requests framed in broad, open-ended, or highly subjective terms. Such approaches require determining and monitoring fluctuating criteria that cannot be consistently applied and would demand assessments far beyond the University's capacity or mandate. As a manager-of-managers investor operating predominantly through pooled funds, Western cannot impose ongoing, security-specific

divestment requirements without fundamentally restructuring the investment program—at significant cost, reduced diversification, and long-term financial and legal risk.

While Western already provides sector-leading disclosure, including holdings, mandates, climate reporting, annual reporting and responsible investing practices, much of the feedback reflected limited awareness of these materials or difficulty accessing and interpreting them. This underscores both the inherent complexity of global investment structures and the need for continued communication.

The Investment Committee believes the new Responsible Investing Policy offers the strongest foundation for Western to meet its obligations: it upholds responsible investing principles, provides flexibility as standards evolve, and avoids prescriptive restrictions that would inappropriately transform the investment portfolio into an arbiter of social and political issues.

The Investment Committee reaffirms that the role of Western's endowment and operating funds is to support Western's teaching, research and scholarship mission – not to serve as a mechanism for addressing complex geopolitical issues. Doing the latter would be inconsistent with fiduciary obligations and introduce material investment risks.

Western's endowment currently contributes approximately $47 million each year to Western in support of student aid, faculty salaries, research and other academic priorities. Given our current investment structure, which emphasizes lower implementation costs, the endowment payout is projected to reach $68 million annually within the next five years. This trajectory reflects the exponential growth enabled by our cost-efficient approach. Any change to the cost structure has implications for the trajectory of the endowment payout now, and compounds in perpetuity.

We thank all members of the Western community who participated in this significant consultation. While overall engagement was low relative to the scale of the outreach and overall size of the community (less than 1% of our community), the perspectives shared were meaningful and have informed changes to the draft policy (outlined on page 37) and the Investment Committee's recommendation of the new Responsible Investing Policy to the Board of Governors.

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Introduction

Western University is responsible for stewarding its financial resources in a manner that creates financial sustainability in support of the institution's long-term teaching, research and scholarship mission.

In fulfilling this mission, Western has various legal and fiduciary responsibilities that necessitate prudent investment standards based on good governance, strong management, and thoughtful investment policies. Western has been an institutional investor for nearly 50 years and throughout this time has evolved its approach to keep pace with modern investment practices, such as the integration of responsible investing practices in investment decisions.

Western has been a leader in the Canadian higher education sector in advancing responsible investing practices, taking principled and thoughtful approaches that align with our mandate and are appropriate for an institutional investor of our size and type.

For example:

- Since 2021, Western has been one of only a few universities to publish annual responsible investing reports and carbon disclosure in line with the recommendations from the globally recognized Task Force for Climate Related Financial Disclosures (TCFD - now adopted by International Sustainability Standards Board - ISSB).
- In 2021, Western was the first Canadian university to apply a total portfolio carbon footprint, a practice that others have now adopted.
- In 2022, Western was the first Canadian university to lead a private markets impact investment search.

Over the last 15 years, Western has progressively implemented environmental, social and governance (ESG) factors into investment policy and decision-making processes, evolving in line with global industry supports such as the introduction of regulatory, accounting and disclosure frameworks, and the Principles for Responsible Investment (PRI). Responsible investing is a consideration in the investment decision-making process alongside other factors necessary for prudent financial management of the University's resources.

Western's investment policies are updated about every five years, consistent with a review of the portfolios' Strategic Asset Mix, which is used to respond to long-term market conditions.

The Committee commenced a review of the Strategic Asset Mix in April 2025, and in doing so updated the investment policy, and created a stand-alone responsible investing policy. Previously, responsible investing was a section of the investment policy. The stand-alone policy reflects industry best practice and Western's ongoing commitment to responsible investing.

The Responsible Investing (RI) Policy is the subject of this report from the Committee.

The University is committed to transparency, publishing for the campus community its investment mandates, performance, holdings, climate disclosures, and annual report on responsible investing. This is in addition to the University's external responsibilities as a signatory to the PRI.

While Western does not typically undertake community consultation for financial policies, we acknowledge the impact that geopolitical conflicts have on some members of the Western community. With this in mind, we have responded to calls for open dialogue and opportunities for feedback as we contemplate the appropriate investment policy framework going forward.

Background

The Board of Governors (Board) is responsible for the University's investments. As a governance body, the Board has a fiduciary duty to act in the best interests of the University and, as a trustee to donors, the Board has a legal responsibility for the prudent financial management of University resources.

The Board is ultimately responsible for the investments and their financial outcomes and is supported by an expert Investment Committee (Committee) that recommends policy and strategy, appoints external investment managers, and monitors performance. Updating the investment policy is required from time to time to reflect modern investment practices and remain in line with the University's long-term investment objectives.

The introduction of a stand-alone RI Policy is reflective of Western's long-standing commitment integrating responsible investing principles as they evolve in the industry (as shown in Figure 1). With each advancement, the Board carefully balanced its fiduciary and trustee responsibilities.

Figure 1

Western's history of advancing responsible investing integration



In response to the 2023 Israel-Gaza conflict, some members of Western's community demanded divestment from fossil fuels and military companies, and any companies that were "directly involved in the illegal and ongoing occupation of Palestine, and the apartheid system that Israel continues to uphold[1]." Demands for divestment have expanded to include consideration of human rights and international law, leading to a recommendation from Senate to the Board. This recommendation and considerations will be dealt with separately as part of the Investment Committee's Response to Senate's Recommendation to the Board (see page 35).

Again, Western does not typically undertake community consultation for financial policies; however, we responded to calls for open dialogue and opportunities for feedback understanding the impact that geopolitical conflicts have on some members of the University's community.

In September 2025, Western notified community members the draft RI Policy consultation process would begin in January 2026.

As planned, Western posted the draft RI Policy on its website on January 26, 2026, to allow community members adequate time to provide feedback on the draft policy prior to it moving through Western's governance approval process, starting with the Investment Committee, before moving to the Property and Finance (P&F) Committee and finally to the Board in April 2026.

- [1] Schiefler, S. and Toporowski, F. (2024, March 29). *Student groups protest investments in fossil fuels, tied to occupied Palestinian territories.* Western Gazette. https://westerngazette.ca/news/student-groups-protest-investments-in-fossil-fuels-tied-to-occupied-palestinian-territories/article_9fb2b774-ede4-11ee-b51a-570166273318.html#:~:text=As%20they%20marched%20around%20campus,campus%2C%20March%2027%2C%202024.&text=In%20February%202022%2C%20the%20University,power%20is%20in%20the%20collective.%E2%80%9D

Western's Investment Funds

As of December 31, 2025, Western managed more than $3.5 billion in various pools of assets. This value excludes pension assets, which are not governed by the Investment Policy or RI Policy.

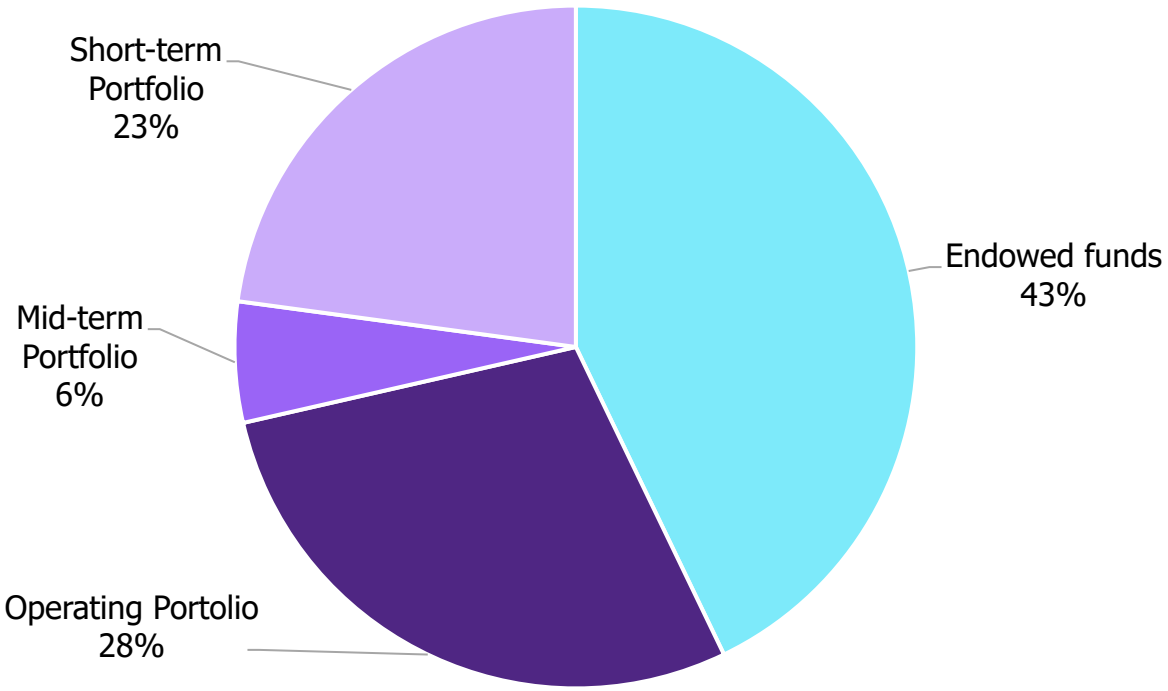
Western's investments are from two broad sources of funds: endowed and non-endowed funds (see chart 1). Endowed funds are given to Western by donors, which are managed in trust in perpetuity. Non-endowed funds encompass everything else that can be invested, coming from a variety of sources, like purpose-specific donations, ancillary revenues and grants.

Tuition fees are non-endowed funds allocated to short-term investment products making them available for the delivery of education in the upcoming year. Tuition fees are not invested in the Mid-Term or Operating Portfolios.

The remaining non-endowed funds (excluding tuition, research and other restricted funds) not required for immediate use in University operations can be invested based on a longer time horizon, similar to endowments.

Chart 1

Western's Endowed and Non-endowed Investment Portfolios



The variety of uses for endowed and non-endowed funds necessitate multiple investment portfolios. All of Western's investments exist as part of one of the following portfolios:

1. **Endowed Portfolio ($1.5 billion)**

   Endowments provide the University with ongoing financial support for a particular purpose that is identified by the donor and may include support for scholarships, bursaries, chairs, fellowships, research work and/or various other academic activities. The portfolio objective is to maintain purchasing power after payout over the long term so that future generations can benefit in the same manner as the current generation. The required return, at a minimum, should meet the University's Investment Payout Policy (MAPP 2.11).

2. **Operating Portfolio ($1.0 billion)**

   The Operating Portfolio includes the core portion of non-endowed assets (excluding tuition fees) and is managed alongside the Endowed Portfolio using the same investment policy. These portfolios are referred to collectively as the Operating & Endowment Fund (Fund).

3. **Mid-Term Portfolio ($0.2 billion)**

   The Mid-Term Portfolio includes non-endowed assets and is managed using a level of risk and liquidity that is between those of the Fund and the Short-Term Portfolio. Assets are typically invested in public equity and fixed income securities.

4. **Short-Term Portfolio ($0.8 billion)**

   The Short-Term Portfolio includes tuition and other non-endowed assets and funds the annual expenditures in support of teaching, research and scholarship. This portfolio is managed to provide the highest level of liquidity and safety. Assets are typically invested in bank accounts, high-interest savings accounts and high-quality money market securities. The Short-Term Portfolio is the only place where tuition may be invested.

As of December 31, 2024, Western had the eighth largest Endowment Portfolio among Canadian universities. Western's Endowment Portfolio has grown by 8.59% annually over the past five years, the second largest increase among the top 10 Canadian university endowments. The Endowment Portfolio has grown from $267 million in 2006 to $1.5 billion in 2025.

As of December 31, 2025, Western's annualized 10-year return in the Fund was 9.5%. Although comparisons with other universities as of December 31, 2025 were not

available at the time this report was published, this Fund has consistently ranked in the first quartile among its peers over a 10-year horizon.

The University maintains a small, dedicated, professional investment team of 4.5 full-time equivalent individuals. To manage investments at this scale, Western invests using a manager-of-managers approach, a common investment approach for institutional investors of Western's size. Under this method of investing, the University selects best-in-class managers to manage a portion of the portfolios. This provides Western access to investment products that would otherwise not be available, diversifies risk, and reduces the cost of investing to ensure the greatest possible investment returns go towards our mission. Western has been investing using a manager-of-managers approach since the Board approved the shift from internally managed mandates to externally managed mandates in 1984.

Western's investment portfolios have a long-standing practice of not employing negative or exclusionary screens. In line with our established practices, investment decisions are guided by fiduciary responsibilities, prudent investor standards, diversified risk management, and professional manager expertise rather than restricting the investment universe. Shrinking the investment universe through screens can reduce the number of qualified managers and diversification, leading to less optimal portfolios and returns. Further, geopolitical issues are typically complex and lack global or even community consensus on solutions.

Consultation Process

On January 26, 2026, the Committee opened the draft RI Policy consultation process, led by Western's Investment Team. This activity took place over two months and included a mix of in-person and online meetings as well as an online survey. Consultation opportunities were promoted through direct email invitations to all students, faculty, librarians and archivists, staff, alumni and donors (184,280 emails sent); digital newsletters targeted to these audiences (61,854 impressions); and opportunities for discussion at in-person meetings including Senate.

At the outset of the consultation process, several constituted groups were also identified for focused engagement to gather their perspectives. As the process progressed, additional priority groups emerged and were engaged responsively.

234,000+
total impressions

Groups that participated included:

- Campus Council (membership includes leaders of employee groups, leaders of the undergraduate and graduate student bodies, administrative leaders, affiliate leaders, and more)
- Deans' Council
- Human Rights Office
- Office of the Associate Vice-President, Equity, Diversity & Inclusion
- Office of the Vice-Provost, Indigenous Initiatives
- Society of Graduate Studies (SOGS) Executive
- University Students' Council (USC) Executive
- Vice-Provosts

While we used email to directly communicate with our community members to promote consultation opportunities, some groups also promoted them on their social media channels.

Through the consultation process, 679 community members shared their feedback on the draft RI Policy. This includes 132 individuals who attended in-person meetings or Town Halls (in-person or virtual), and 547 individuals who provided feedback through the online survey.

Prior to providing feedback, community members were asked to review the draft RI Policy and an educational presentation on University investments. These materials were available on the draft RI Policy Consultation website for students, faculty, and staff, and through an email to alumni and donors. Given the complexity of the topic, we hoped a high number of community members would reference these materials. Of the 547

survey respondents, 142 indicated they were familiar with how the University invests its endowment and other funds, and 357 respondents indicated they reviewed the materials prior to providing their feedback; however, 70 of the 357 respondents provided responses that were identical to a proposed response shared through a social media advocacy campaign.

To ensure the views that contributed to our draft RI Policy reflected our internal community, survey responses were confidential but not anonymous. Prior to analyzing responses, respondents' identifiable information was removed. The collection of personal information was only used in the consultation process to verify community membership.

Survey Methodology

We used a parallel analytic design that combined conventional qualitative analysis with AI-assisted thematic synthesis. This approach was intended to strengthen the robustness of interpretation through analytic triangulation: themes were identified independently through manual coding and through a structured consensus-based review using multiple contemporary AI models, and then manually compared for convergence.

Conventional analysis of the survey data was conducted using Qualtrics and MS Forms. Open-ended survey responses were reviewed and coded manually, allowing themes to emerge inductively from the data (see Appendix B: Codebook).

Although demographic information was collected, no subgroup analysis by constituency was undertaken. In addition, as responses to individual questions were highly heterogeneous and frequently raised cross-cutting issues, themes were identified across the full survey rather than on a question-by-question basis. Key themes from this analysis are shared below.

The AI-assisted component involved providing a fully de-identified version of the qualitative data to three frontier AI models—GPT-5.2 Pro, Claude Opus 4.6, and Gemini 3—using a standardized prompt. Each model was asked independently to identify the principal themes in the data and to provide supporting evidence in the form of direct quotations. The three independent outputs were then consolidated into a single comparative document and returned to each model with a second prompt asking it to identify a consensus thematic structure across the prior analyses. Following this second round, all three models converged on the same core thematic interpretation. That consensus informed the final thematic summary outlined in the report.

The AI-assisted analysis was used to augment, not replace, human qualitative judgment. Its role was to support theme extraction, test for convergence across analytic approaches, and help ensure that both strongly represented themes and less frequent but potentially important "weak signals" were captured in the final interpretation.

Table 1 summarizes high-level information about the data collected.

Table 1

Draft RI Policy Consultation Survey Data Summary

Data Point	Number
Total Number of Survey Respondents	547
Number of Respondents Who Made Comments	363
Identical Comments	70

Consultation Themes

Survey comments included in this report represent the diverse range of opinions held by survey respondents; however, they are not intended to capture all views within a given theme.

Diversity of Opinion

Feedback indicates that the community is not working from a single definition of what "responsible investing" should do. When considering the feedback from respondents who mentioned the integration of ESG in the policy, 36 of 82 comments supported ESG integration compared to 46 that were against. Likewise, 46 of 63 comments were generally supportive of the policy compared to 17 that showed opposition.

Verbatim survey comments:

- Investing needs to prioritize rate of return…
- We have to be careful not to get caught up in political and social trends. Having a financially stable institution and faculty support is most critical.
- ESG shouldn't be the primary focus of an investment policy.
- I do not support the standalone ESG mandate within Western University's endowment policy. The endowment's primary obligation is fiduciary: to maximize long-term, risk-adjusted returns in support of the University's academic mission.
- Overall, I am uncomfortable with how this policy may create openings for politically motivated decisions. I do not want strategic ESG considerations to be

conflated with politically contested frameworks (for example, the Boycott Divestment Sanctions movement).
- I like the incorporation of ESG considerations.
- The draft contains no commitment to uphold human rights or comply with international law in investment decisions. It does not commit to divesting from weapons manufacturers, despite the Western Senate formally recommending exactly that.
- I would like to see something more concrete in terms of divestment due to ethical concerns.
- Please continue to engage alumni and donors in these types of conversations as many of us have strong interest in Western's success and we may have different perspectives than current students.

Transparency, Reporting, and Communication

Feedback points to a desire for clearer disclosure about holdings, implementation, oversight, and how the community can understand progress over time, with respondents noting the importance of transparency in 34 comments.

Verbatim survey comments:

- I support socially conscious investing, but I hope reporting is led by proven investment experts, with a clear focus on investment performance and growth, rather than solely on environmental or social objectives.
- As a faculty member, my primary interest is ensuring that university investments ultimately strengthen research capability through sustained support of advanced technology and core facilities. Clear pathways from investment performance to reinvestment in institutional infrastructure would help demonstrate practical value to the academic community.
- It is good that Western publishes a list of recent-past holdings in the endowment fund.
- How will we pursue the whole transparency thing - where is tuition going? Who exactly is Western investing in?
- ...it's good that the university is consulting the campus community before the policy goes to the Board of Governors for approval.
- I saw no mention of reporting. Therefore, ensure in the future that you provide annual executive reports to the stakeholders, us the students, professors, and support personnel, that enable this place to exist.

Financial Performance and Maximizing Returns

Fifty-two (52) comments are focused on Western's financial health, noting that endowment investing exists first to support the university's mission through prudent financial performance and long-term financial sustainability.

Verbatim survey comments:

- Please stay fixated on generating the best risk-adjusted returns.
- The goal of investing should be a good return on investment, not pushing a certain political agenda.
- We need to be practical and cognizant of our ongoing financial difficulties. The only responsible investment strategy is to maximize returns on the investment.
- The endowment's primary obligation is fiduciary: to maximize long-term, risk-adjusted returns…
- What I value most in the new draft policy is that it treats ESG as a driver of long-term performance rather than an end in itself.
- It is quite important to include environmental and social and governance factors into investment, and this is indeed important for long term financial sustainability.

Divestment and Exclusion

Of 169 comments specifically related to divestment, 159 were in favour of Western divesting from specific stocks, and 145 comments referenced divesting from military and defence companies.

Notes:

- Some comments referenced more than one aspect of divestment (e.g., divesting from specific stocks and military companies).
- Of the 159 comments related to divestment, 70 were duplications of responses shared through social media over the consultation period.

Verbatim survey comments:

- Divesting in the genocide in Gaza.
- Complete boycott of American products.
- I would like the university not to invest in: tobacco, gambling, weapons manufacture.
- Inclusion of divestment as an effective tool for achieving the objectives Western states is important.
- Immediate divestment from weapons manufacturing or tech related to war proliferation.

- The only thing I agree with in the policy is in 3.7 where it says engagement is preferred to divestment.
- If BDS of Israel is part of the policy, I plan to boycott Western.
- As an alumni and donor I want to make sure that Western is not afraid to invest in companies based out of, or having operations in, Israel.
- I like the draft policy, I prefer engagement over divestment.
- Invest responsibly, not socially.

Governance Model, Accountability, and Policy Authority

Thirty-six (36) comments focused on who should make decisions, how accountability should work, and whether the draft gives the University enough direct responsibility relative to external managers. There is no consensus on any of these points. Respondents, as noted through 24 comments, worry that ethical rules will lower investment returns or hurt the endowment.

Verbatim survey comments:

- Focus more on ensuring good governance, from a standpoint of being a responsible corporation while having management and the board fully aligned in maximizing shareholder value over the long term.
- Depoliticize investment decisions.
- The University should try it's [sic] hardest to avoid being caught in issues that have become political and it should strive to just focus on a statement of maximizing returns.
- I would much prefer an investment policy whereby the goal was to make money and we used that money to make an impact.
- …it would be prudent to publicly state that the university will not participate in divestment from investments that are connected to Israel, as it's such a politically divisive issue.
- I think somewhere in the policy it should be made clear that there is no political influence.
- I believe the university's focus should be on education, and the endowment fund's focus should be on enabling that education.
- The board has fiduciary obligations to act in the best long-term interests of the whole university. Establishing such a committee would undermine good governance practices and institutional neutrality for the sake of catering to narrow special interests.
- I agree that decision-making on individual securities is best left to professional managers.
- It should not be subordinate to any other policy such as MAPP 2.26

Complexity of Investments

Through 42 comments it is apparent that respondents feel the draft RI Policy's intent is understood but that the mechanics are not always clear. Respondents ask for clearer definitions, more implementation detail, and better explanation of how the model works across pooled funds, proxy voting, monitoring, and performance trade-offs.

Verbatim survey comments:

- ...helpful attempts at making this an accessible document.
- Passive investing has a lot of benefits… There will be trade-offs as we get into more sustainable investing…
- I do no [sic] believe that mangers [sic] of both private and institutional capital in our country that are looking to maximize returns and help grow our Canadian economy, have the luxury of trying to incorporate ESG initiatives into their investment decision-making process.
- If there is no impact on returns, the policy is redundant because it implies the market will already reward ESG forward companies and there is no merit towards overweighted consideration.
- …one can be against war and strongly support the military and military preparedness ac [sic] current priority – even weapons development companies, since they often work on protective equipment and offensive equipment…if we are attached [sic] having military capacity is essential to protect our democracy.
- It's crucial that those involved have a high level of expertise in the field of investments as well as in the appropriate investment management.

Alignment with Institutional Values

Through 18 comments, respondents wanted to see an alignment to personal values, and through 154 comments, respondents speak to aligning investments based on social justice values and human rights.

Verbatim survey comments:

- Issues change with time, but the need for financial stability is constant.
- It will be very difficult to satisfy the diverse Western community on the social aspects of the ESG policy. Everyone has different expectations of what is acceptable or tolerable. These investments should not be perceived as political actions.
- Once one moves beyond returns for investors, investments become a matter of values. Western has no business investing in this way.

- Your first commitment as an educational institute is not to maximizing investment strategies or to building capital wherever possible. As a university, you have a duty to reflect the ideals and values taught in your classrooms…
- Human rights and indigenous rights are not explicitly identified in the main body of the policy…
- The social goals including 'diversity, equity and inclusion, and Indigenous rights' should have no part of this policy. These factors are irrelevant for making investment decisions.
- Let society as a whole work out social issues and Western and its leaders should be squarely focused on developing and maintaining excellence in higher learning.
- The draft policy fails to commit to upholding human rights under international law.

Support for Draft Policy Direction

Respondents demonstrated general, high-level support for the draft RI Policy direction through 46 comments. While through 17 comments, respondents expressed general opposition to the policy.

Verbatim survey comments:

- It's a responsible investment framework that still keeps performance, fiduciary duty, and disciplined capital allocation at the core.
- I like that the climate change portion of the new draft policy has clear and specific goals…
- Improving investment in sustainable investments from 10-15%… proxy voting to enforce values in investments.
- It clearly sets governance and accountability, aligns with PRI commitments… and the commitment to annual transparent reporting…
- It attempts to make a good faith effort at defining these difficult issues.
- I like that it is open to review and alteration periodically.
- I like that international politics does not influence the manager's decisions.
- Clearly addresses decision making criteria, planned action, and responsibilities. Definition section is also helpful.
- It appears to be extremely thorough and professional giving me confidence in the process used to create it.
- I like that Western is taking this initiative seriously and has incorporated PRI into their policy. I like that Western has a plan for net zero by 2050 (wish it was sooner, but understand the complexities). Agree that education and advocacy are important parts of this policy.

Reflections on Themes from the Consultation Process

Members of the Investment Committee carefully considered the wide range of perspectives held by the Western community regarding responsible investing and offer the following reflections.

Diversity of Opinion

It is evident that there is no unified view on how environmental, social, and governance considerations should be incorporated into investment decision-making. Feedback reflected a lack of consensus, with views ranging from full divestment to eliminating ESG integration altogether. This polarization confirms that no single policy approach will satisfy all stakeholders.

Many respondents believe ESG factors should not influence investment choices at all, placing exclusive emphasis on financial performance. Others feel our existing approach does not go far enough and advocate for explicit screens or divestment strategies based on ethical or values-driven criteria. These opposing viewpoints illustrate the breadth of expectations within the campus community and underscore the absence of a shared understanding of the scope, purpose, and application of responsible investing. In a diverse academic environment, full consensus on complex social issues is neither expected nor feasible.

In evaluating these perspectives, we have focused on the critical distinction between issues that are within the scope of financial investment and those that arise primarily from broader societal or political debates. Capital markets generally incorporate financially material risks into security pricing over time, including those related to certain ESG factors. When these risks are clearly defined and recognized by the market, investment managers can integrate them responsibly and consistently with prudent oversight. However, when issues emerge primarily as societal or geopolitical concerns rather than established financial risks, incorporating them into investment processes risks transforming the portfolios into vehicles for expressing positions on social debates rather than pursuing financial objectives. Such an outcome is not aligned with our mandate or legal responsibilities for investment governance.

Fiduciary Responsibilities

A number of respondents pointed directly to the university's fiduciary duty.

The Board and the Committee's fiduciary duty requires that we advise on the management of the university's investments in a manner that is honest, in good faith, and considers the best interests of the University as a whole. As a charitable institution, the Board and the Committee have a duty to prudently invest the university's charitable assets and to protect and conserve those assets for the benefit of future generations. Central to these obligations is the prioritization of financial performance. While the responsible management of ESG-related risk factors is an important component of our work, it remains one set of risks and opportunities among many. We therefore require our external investment managers to integrate ESG considerations, but we do not elevate these factors above other fundamental drivers of risk and return.

Implications of Divestment & Exclusion

Part of the community's feedback focuses on matters of current societal debate, and matters between nation states, like armed conflict. The Committee is sensitive to matters of societal importance; however, we remain conscious of the risks that arise when investment decisions become vehicles for political expression. When exclusions or divestment actions are pursued for reasons unrelated to financial merit, the investments risk becoming instruments for articulating political or moral viewpoints. This shift in purpose creates expectations that the portfolios respond to an ever-expanding array of societal debates, each marked by disagreement and evolving norms. Such expectations would distract from the central obligation to steward financial resources in support of Western's long-term academic mission.

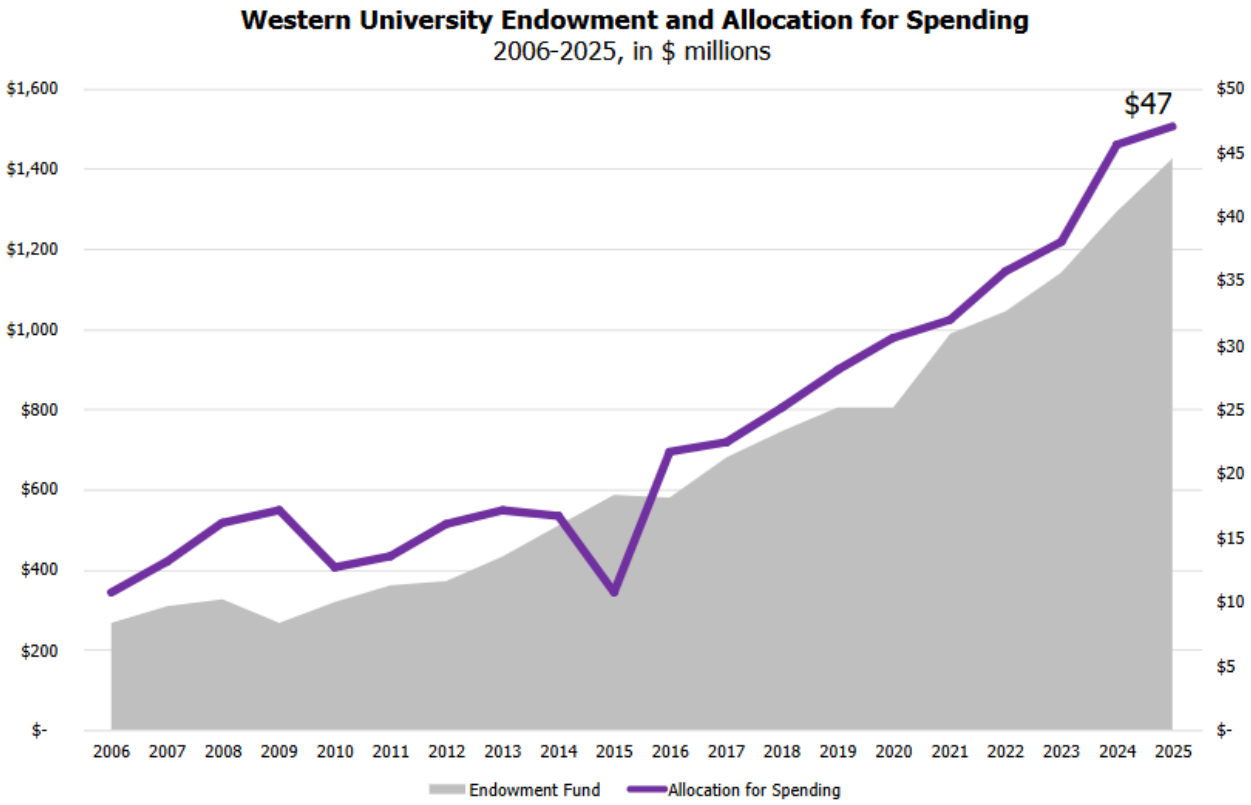
The practical consequences of exclusionary screens or divestment strategies must be recognized. Restricting the investable universe reduces diversification and limits external managers' ability to construct efficient portfolios. Customized screens increase complexity and raise costs in ways that are difficult to predict. Investment theory and experience are clear: reduced diversification combined with higher implementation costs lowers expected returns.

These impacts are not confined to individual years. Reduced diversification and higher costs create long-term structural constraints that permanently lower the expected performance of the portfolios. These effects may be modest in any single period but become increasingly significant when compounded over time. Each year's endowment payout then begins from a lower base, resulting in a cumulative reduction in the funds available to support Western's academic mission. This long-term compounding effect underscores why prudent management requires ongoing attention to maintaining diversification and controlling costs.

For Western, lower returns directly reduce the financial resources available to University budgets. Currently, the endowment contributes about $47 million each year to Western in support of student aid, faculty salaries, research and other academic priorities. Given our current investment structure, which emphasizes lower implementation costs, the endowment payout is projected to reach $68 million annually within the next five years. This trajectory reflects the exponential growth enabled by our cost-efficient approach. Any change to the cost structure has implications for the trajectory of the endowment payout now, and compounds in perpetuity (see Chart 1).

Chart 1

Western University Endowment and Allocation for Spending



ESG Integration

We understand that some community members are seeking visible progress on social issues within the portfolios and perceive a gap between these expectations and our current approach. Comparisons between social and environmental factors were sometimes drawn since Western has made decarbonization commitments with annual disclosures on carbon measurements. These climate commitments should not be taken to reflect a lack of concern for social or governance issues. Instead, they reflect

advances in the market to create reliable carbon reporting frameworks that enable investors, like Western, to incorporate this data into investment analysis.

Governance-related considerations have similarly strong foundations, without the same visibility, as these often relate to corporate actions. In contrast, social factors remain at an earlier stage of development across the industry. While progress has been made in areas such as labour rights, diversity, equity and inclusion, and Indigenous rights, there is not yet a consistent framework for assessing the financial materiality of the wide range of social issues raised by stakeholders. Through the feedback, some community members have also encouraged alignment with screens or lists issued by organizations, such as the United Nations. While these bodies play an important role in articulating global norms and assessing humanitarian concerns, their mandates are not designed to guide institutional investment decision-making. Their lists are not constructed to reflect risk-return considerations, sector exposures, diversification needs, or the operational realities of managing institutional portfolios. Therefore, they cannot serve as tools for evaluating financial materiality or aligning with Western's investment mandates. Using them prescriptively would be inconsistent with our fiduciary responsibilities.

Complexity of Investments

The Committee notes that public discourse often characterizes divestment as a simple action: remove a holding deemed objectionable. In reality, Western's investment structure – like those of most universities and other institutional investors – makes this far more complex; the University invests primarily through pooled funds managed by external specialists, each operating under distinct mandates and strategies. Western's exposure to individual companies is indirect and dispersed, determined by the decisions of these external managers rather than by security-specific choices made by the university. While transparency through the disclosure of underlying pooled holdings is important, through the feedback received, it is clear that such disclosures have unintentionally created the impression that Western directly selects individual securities. This is not the case.

Because Western employs a manager-of-managers approach, mandating divestment from a specific company or imposing prescriptive screens would fundamentally alter our relationship with our external managers. Such directives are often impossible to implement within pooled vehicles, requiring the University to exit entire funds or move to separately managed accounts. Exiting funds for new relationships because of specific holdings is impractical as it does nothing to restrict new managers' investments. In our discussions with others who have implemented screens (e.g., for fossil fuels), the investment manager universe is quite narrow. Screening and divestment approaches

are likely to require separately managed accounts, which, while customizable, introduce new costs and increase operational complexity which have implications for the expected returns.

Values-Based Investing

Throughout the consultation process, participants noted that Western should be investing in step with its institutional "values." This raises important questions about how such values would be defined and applied across a complex institution. Universities are defined by pluralism, with their purpose to foster debate, inquiry, and the coexistence of diverse viewpoints. Individuals and groups may hold deeply rooted values, but these are personal or collective, not institutional. The consultation feedback highlighted the extent to which views and values across the University community are diverse and, at times, in tension with one another.

The Committee considered values-based investing, like some foundations that exist to serve their purpose. Even if it were possible to define such values for Western, significant practical questions would immediately arise:

- whose values would prevail,
- who would determine which values are institutional,
- how would conflicting values be resolved, and
- how would values be applied to investments across industries, revenue sources, supply chains, customers, and geographies.

There are no accepted standards for answering these questions. Attempting to do so would draw the University into a perpetual process of adjudicating social and political debates, well outside of the Board's fiduciary mandate.

These challenges illustrate why Western's approach to responsible investing remains grounded in financial materiality and prudent oversight. Our role is not to express moral judgment or to use the endowment to respond to evolving social debates, but to ensure that financial resources remain stable and supportive of Western's teaching, research and scholarship mission. Responsible investing, as we apply it, is not about asserting a singular moral stance. Rather, it is ensuring that external managers integrate all financially relevant risks, including ESG factors, into their investment processes.

Transparency, Education and Engagement

The Committee acknowledges that Western's disclosures, while extensive and best-in-class among Canadian universities, can sometimes be difficult to interpret without additional context. For example, the aggregated list of holdings may create misunderstandings about Western's indirect role in the investment relationship. Similarly, confusion persists regarding the funding source of long-term assets and the fact that tuition revenues are not invested in equity markets. The consultation feedback confirmed that many community members did not access or understand the investment education materials available. Misunderstandings persist about core concepts, including the use of tuition, the structure of pooled funds, and what ESG integration does and does not mean. These misunderstandings highlight the importance of enhanced communication and messaging around core concepts, within the context of existing reporting.

Tuition revenues are not invested in equity markets; tuition is available for the delivery of education in the upcoming year

The Committee will continue refining how information is framed and presented to ensure that disclosures more clearly reflect Western's position as a manager-of-managers investor. Enhancing the educational context surrounding our investment practices will help the community better understand pooled fund realities, external manager responsibilities, and the practical constraints inherent in global diversification.

During the consultation process, some community members sought greater insight into engagement undertaken by external managers. Engagement is typically a long-term process that does not yield immediate or highly visible outcomes, yet it remains one of the most meaningful ways investors can influence corporate behaviour. The Committee will continue highlighting engagement activities in the annual Responsible Investing Reports and look for opportunities to enhance these disclosures going forward.

The Committee's commitment is to provide transparent, thoughtful, and contextual information that helps the community understand how Western participates in the investment ecosystem, where meaningful influence can occur, and how responsible investing practices align with Western's mission and fiduciary obligations.

Divestment: A Deeper Look

As one of the themes identified in the consultation process dealt with Divestment and Exclusion, the Committee thought commentary on the concept and practical implications of divesting was warranted.

Concept of Divestment

Divestment is the exiting of an investment position and divestment campaigns broadly have one or more of the following goals:

1. **Exerting changes at targeted companies**

   The objective is to put pressure on a company's stock by having investors sell their shares. Investment theory states that this in turn would make raising capital more difficult and expensive, lower the value of stock options, and generally make remaining shareholders unhappy, prompting them to pressure management to stop the activity or behaviour prompting the divestment request.

   The success of such an endeavour depends on the number of shareholders divesting their holdings. Given that Western is a relatively small institutional investor, on its own it can't influence the stock price of most large publicly traded companies, and there can be no assurance that other investors will follow suit.

   Furthermore, if the divestment campaign focus is core to the company's activities, it would require a company to cease its core business to meet the objectives of the divestment campaign.

2. **Creating attention on a targeted sector to cause government or regulators to act**

   The objective is to generate enough attention on a specific sector to force governments to legislate the sector in a certain way. Such regulation or legislation brings all companies operating in the sector, and subject to rules, into compliance.

3. **Preventing an organization from financially benefiting from the controversy**

   Perhaps in response to the limited impact of approaching divestment through the previous two goals, groups promote divestment to prevent an organization from financially benefiting from the controversy. The main issue for a large and diverse organization such as Western is that there is no consensus on a defined set of values, making it difficult to assert a clear mandate to implement a call for divestment.

The potential impact of divestment on targeted companies is difficult to measure. However, divestment requests could have unintended consequences for the company and investing organizations.

- By divesting, investors lose their right to engage the company (or engage the investment manager in the case of Western) on specific matters.
- Taking a specific position in response to geopolitical issues would be largely symbolic for the investing organization, and for Western may divide our campus community, including donors and alumni.
- Divestment campaigns may cause companies to go private and avoid the scrutiny of public disclosures. Insights into company activities become far more challenging when companies are privately held, but the activities may remain the same.

The most important condition for a successful divestment campaign is to find broad market consensus on the issue among investors, government officials and regulators. For example, following Russia's invasion of Ukraine on February 24, 2022, there were global calls for divestment from Russian companies. Western did not take a specific position on these divestment calls; however, the markets acted to essentially reach divestment. On February 28,2022, MSCI, a provider of financial markets indices, launched a consultation with international institutional investors on the accessibility and investability of the Russian equity market. On March 2, 2022, MSCI announced that it would remove Russia from its main indices. Managers also took these market conditions into consideration and adjusted portfolios. This example demonstrates that when there is market consensus, divestment occurs naturally.

Implications of Divesting

The preferred structure for investing in public equities for small institutional investors the size of Western is to invest in pooled funds, which provide diversification benefits and lower costs. As a result, it is not possible to remove individual securities from a portfolio. If the investment manager does not choose to remove the company from its portfolio, the only way to divest is by terminating the manager. There can be no guarantee that the replacement manager will never invest in that same company or similar companies, unless the portfolio's guidelines specifically exclude it.

The only feasible way to deal with divestment is to create separately managed accounts and add exclusions to the investment strategy guidelines – a process that would effectively dismantle the university's entire investment model to address a very small percentage of assets. There are several issues that come with this decision:

- Not all investment managers will agree to manage the strategy in separately managed accounts instead of a pooled fund, reducing the available managers
- Creating separately managed accounts entails legal fees and possibly additional staff
- Investment management fees can be expected to increase
- New investment custodian and safeguarding fees will be required
- International investments will require registration with local securities regulators, and ongoing compliance costs to Western. These are currently spread out over many pooled fund investors.
- Restricting an investment universe for non-investment related reasons can lead to suboptimal portfolio risk and return
- Net returns can be expected to decline by moving from pooled funds to separately managed accounts, with a compounding negative effect over time.

For Western, a move to separately managed accounts is not recommended.

History of Divestment at Western

To date, the University has not implemented divestment in any scenario.

During the 1980s, there was a significant campus debate regarding the South African apartheid, which included several considerations by the Board in relation to divestment from South Africa.

In 1986, the Board adopted a selective investment policy related to South Africa that followed increasing Government of Canada economic pressure between the nation states. In Canada, businesses with transactions in South Africa faced specific compliance requirements, which were subject to monitoring by the Government of Canada. This approach reflected a selective divestment framework rather than full divestment, whereby investments were restricted to companies that met Government of Canada standards of conduct, and companies not meeting those standards were deemed not investable.

The adoption of the selective policy did not result in divestment by Western, as companies held in Western's portfolio at the time met the Government of Canada standards. Further, during this time Western was implementing a significant change in how the University invested funds. In 1984, the Board approved moving from an internal investment office selecting companies and making direct investments, towards a manager-of-managers approach, selecting external managers who then make

investment selections. This change was reflective of investment industry developments and is how the University continues to invest today.

Divestment was subsequently revisited through Board and committee processes in the late 1980s, with the Board reaffirming its selective investment policy and declining to adopt full divestment. Instead, the Board added educational commitments towards students and South Africa, which aligned with the core mission of the university.

In the late 2000s, a student group at Western advocated for investment screens to restrict investment in companies working with or for the Government of Sudan. In 2008, the Board received advice from Senate on the matter, which focused on a specific list of companies doing business with Sudan. After Board consultation with the Committee, the University did not divest from the specific list of companies. The resulting action was the formalized integration of ESG factors in the investment decision-making processes, a practice that coincided with accelerating investment industry developments. For example, the PRI was launched in 2005 with a growing number of asset owners and investment managers signing on to the investor initiative. This is also when Western started to formalize its responsible investing practices, which have been progressively integrated into the university's investment strategy and have since evolved along with investment industry practices.

Since 2009 the university's approach has emphasized principled, standards-based investment decision-making, reliance on governance processes, and the progressive integration of ESG considerations (Figure 1 on page 10).

Additional Considerations

Peer Institution Research

The Committee conducted research of the decisions by 7 other Canadian universities in Canada and multiple others in the United States on divestment (Appendix C).

Most Canadian universities have declined divestment from military companies or companies purported to be complicit in human rights violations. While there had been two universities who committed to review their policies as part of an agreement to end encampments in 2024, no university has made the decision to divest as of March 2026. In the United States, the vast majority of universities have reviewed their policies and declined divestment requests.

Canadian Sovereignty and Defence

Canada's new Defence Industrial Strategy sets ambitious targets to rebuild military readiness and reduce reliance on foreign suppliers.

Research-intensive universities like Western have an important role to play in this effort – contributing knowledge across many disciplines to develop dual-use technologies that support innovation in areas including artificial intelligence, climate change and resilience, autonomous systems, and clean technology.

In terms of institutional investments, responsible investment in defence-related industries does not represent an endorsement of conflict but recognizes the role that legitimate defence capabilities and companies play in protecting democratic societies, national sovereignty, and international stability.

Universities across North America and Europe are facing increasing advocacy to divest from companies involved in the defence industry. At the same time, geopolitical developments—including the wars in Ukraine and Iran, increasing Arctic security concerns, and growing North Atlantic Treaty Organization (NATO) commitments—have renewed attention to the importance of national defence capacity.

Canada's security environment and international alliances, including participation in NATO operations and United Nations peacekeeping missions, depend in part on a functioning defence industrial base supported by private sector companies.

Defence companies develop technologies used for deterrence, peacekeeping, cyber defence, and protection of national sovereignty. These industries support democratic governments and international alliances responsible for maintaining global stability.

Many technologies originating in the defence sector also contribute to civilian innovation, including aerospace systems, satellite communications, cybersecurity infrastructure, and emergency response technologies. Universities frequently collaborate with aerospace, cybersecurity, and advanced technology firms that operate within the broader defence ecosystem. These partnerships support research funding, innovation, and student opportunities.

A blanket divestment approach could create inconsistencies between institutional investment policies and academic collaborations.

Investment Committee's Response to Senate's Recommendation to the Board

The Committee would like to acknowledge the Senate Motion that was passed in January, 2026. This motion was then forwarded to the Board in February 2026.

> "*Be it resolved that: The Senate recommend to the Board of Governors through the President & Vice-Chancellor, that Western University's Investment and Responsible Investing Policy(within MAPP 2.26) be expanded to include commitments to upholding human rights and international law in all investment practices, including divestment from weapons manufacturers, and companies that are involved in violations of international law or internationally recognized human rights.*
>
> *Furthermore, that the Senate recommend to the Board of Governors to establish a Special President's Committee on Ethical and Human-Rights-Aligned Responsible Investing, composed in a manner that is representative of the Western community, including students, faculty, staff, and community members, and mandated to develop and oversee the implementation of the aforementioned policy amendments in a suitable manner."*

While Senate shared its advice prior to the availability of the draft RI Policy and educational materials, it was reviewed carefully by the Committee. The Senate recommendation seeks to use international law as a standard to be applied to the conduct of businesses in which the University invests. The recommendation does not consider the complexity and cost of implementing an investment policy that measures investments against international legal standards. International law is not an appropriate tool for this purpose.

International law generally applies to state actors, not businesses. International human rights law in particular is directed at protecting people from excesses of state power, not at regulating business activity.

To assess the appropriateness of corporate conduct against international legal norms would involve:

- an assessment of the international legality of a given state's conduct, and
- a determination as to whether a given business' activities within or with that state contributed to the state's international law violations.

This would lead to a complex, rolling assessment of all businesses within the university's ever-evolving investment portfolio against a vast set of international norms and would require specific expertise in international law; this is a task not suited to a committee of non-experts in international law. Further, decisions to divest could be politically charged and could potentially expose the University to liability.

Divestment from the apartheid in South Africa has been put forward as a precedent. However, there is a distinct difference between a country-specific, violation-specific divestment campaign and the non-specific, open-ended, international-law-based divestment proposed by the Recommendation. With specific regard to weapons manufacturing, the Senate recommendation suggests that weapons manufacturing in and of itself is a violation of international law and human rights. This is not the case. The manufacture and use of lawful conventional weapons is not contrary to international law.

Some in the University community see weapons manufacturing as a high-risk sector for the violation of human rights while others regard weapons manufacturing as desirable to preserve national sovereignty and self-defence in a time of growing instability and increasing threats in international affairs. To divest from weapons manufacturing is therefore a policy decision.

The Investment Committee does not support such a policy decision for two reasons:

- It is a decision antithetical to other actions taken by the university. The University has recently announced a defence research partnership with TKMS, a German provider of integrated system solutions in maritime defence technologies and hosts General Dynamics on its campus as part of its career fair. The University is also seeking other opportunities to partner or research in the areas of defence. In removing weapons manufacturers from its investment portfolio, the University would be sending a mixed message to the defence industry which could potentially impact future research and academic opportunities.

- It is a decision that does not align with the fiduciary duty of the Board and the Committee or with their responsibility to prudently invest charitable assets. The University would lose high-performing assets in a legal business activity at a time when the value of such assets is expected to increase due to a renewed focus on defence spending. The University would also be limiting its investment universe and therefore creating a diversification risk. Finally, the cost to sell and/or screen out such assets can result in higher transaction costs and create logistical complexity for our external managers.

The Committee is obligated to ensure its decision and recommendations, if implemented, align with its and the Board's fiduciary duties. All recommendations, including the Senate recommendation, must be reviewed in the context of what is best for the University as a whole, taking into account the best available information to the Committee and the Board. After reviewing the available information and consulting with both legal and financial experts, the Committee does not support the Senate's recommendation for the reasons noted above.

Investment decisions should not be made to achieve a particular group or constituency's political or moral objectives without due regard to the financial cost or risk to the University. Rather, investment decisions must be made in accordance with the our fiduciary duties, following a prudent investor standard that prioritizes the University's mission and long-term sustainability.

Conclusion

The draft RI Policy reflects what the Committee believes is the appropriate balance for Western's circumstances. It embeds responsible investing principles in a manner that aligns with our investment structure, leverages the expertise of external managers, and focuses our influence where it can be most effectively applied. The draft RI Policy ensures flexibility, allowing for the incorporation of financially-material ESG factors as industry standards evolve. At the same time, it avoids rigid screens or values-based divestment approaches that would impose impractical constraints, reduce diversification, increase costs, and diminish long-term financial resources.

The draft RI Policy has evolved since 2022 to further reflect our commitment to responsible investing practices. Changes include:

- The creation of a stand-alone policy, reflective of over 15 years of development in responsible investing practices.
- The integration of the PRI, and University actions in response to them.
- The enhancement of the sustainable investment allocation to 15% for the Fund, a $375 million commitment.
- The inclusion of the first set of proxy voting guidelines, reflective of the focus on engagement and where Western has influence with its managers.

The Committee is appreciative of the diverse feedback received from the Western community and has taken this feedback into consideration in adjusting the draft RI Policy. Several revisions have been incorporated into the updated draft policy since its release in January, including:

- PURPOSE – Repositioning of the RI Policy as a side-by-side policy with the Investment Policy (MAPP 2.26), removing the previous language that subordinated it to the Investment Policy during a conflict.
- Section 2.0 – Clarifying that the responsible investing principles relate to all Portfolios, and not simply the sustainable investment allocation.
- Section 3.2 – Adjusting the definition and scope of sustainable investments to provide greater clarity on the types of verification and validation required in order to count as such an investment.
- Section 3.3 – Clarifying that carbon emissions relate to Scope 1 and 2 emissions.
- Section 6.0 – Re-ordering section 6 of the Proxy Guideline to alphabetical order.
- Section 6.5 – Updated the Land Acknowledgement.

In our judgment, the updated draft RI Policy represents a responsible, prudent, and forward-looking approach. It maintains the Board's commitment to diligent governance and fiduciary responsibility, while supporting the practical integration of responsible investing principles committed to in signing the PRI. Most importantly, it preserves the core purpose of the investment portfolios: to provide stable, risk-adjusted financial support for the university's teaching, research and scholarship mission today and into the future.

Investment Committee Recommendation to Property and Finance, and the Board

Based on the analysis presented, the Investment Committee recommends that the Property and Finance Committee recommend the Responsible Investing Policy to the Board of Governors for approval.

Appendix A: Glossary

Administration	University staff responsible for day-to-day management of the Portfolios
Board	Western's Board of Governors
Divestment	Exiting of an investment position
Endowed Portfolio	Endowed assets invested to generate income to fund endowed chairs, scholarships, bursaries, research, etc.
Engagement	The practice of inquiry, interaction and dialogue between parties along an investment value chain, such as Administration, Managers, collaborators, policymakers and companies. Engagement typically relates to investment risk/return, ESG issues, and other investment responsibilities and issues and its goals include influencing practices, improving disclosure and enhancing long-term value
ESG	Environmental, Social, Governance Refers to a strategy that evaluates companies based on these non-financial criteria to inform investment decisions. Environmental issues relate to the quality and functioning of the natural environment and natural systems, identified or assessed in responsible investment processes. These include but are not limited to risks related to greenhouse gas emissions, climate change, natural resources, and waste. Social issues relate to the rights, well-being, and interests of workers, communities, customers / end-users for corporate entities, and citizens/populations for sovereign entities, identified or assessed in responsible investment processes. These include but are not limited to risks related to human rights, labour rights,

	child and slave labour, diversity, equity and inclusion, and Indigenous rights. Governance issues relate to the rules followed and actions taken by companies and other investee entities, identified or assessed in responsible investment processes. These include but are not limited to board oversight and structure, independence, company disclosures, shareholder rights, accountability, operational strategies, executive pay and performance evaluation.
Fiduciary duty	The duty of members of the Board and Investment Committee to act honestly, carefully, in good faith, and in the best interests of the University as a whole. In the investment context, this means that members of the Board and Investment Committee must exercise the care, skill, diligence and judgment that a prudent investor would exercise in making investments, with a long-term view to maximize returns at an acceptable level of risk to support the University's mission.
Fund	The combined Operating Portfolio and Endowment Portfolio of the University
Investment Committee	A sub-committee of the P&F Committee with expertise in investments and investment management
Managers	The external investment managers who invest portions of the Portfolios
MTP	The mid-term investment portfolio of the University
Operating Portfolio	The long-term portion of non-endowed funds not included in the MTP and STP.
P&F Committee	The Property and Finance Committee of the Board
Policy	Means this MAPP Policy 2.XX – Responsible Investment Policy

Portfolio	collectively, the STP, the MTP and the Fund
PRI	Principles for Responsible Investment, a global investor initiative to advance responsible investing practices
RI	Means "responsible investing", an approach which integrates ESG considerations into investment decisions
SDGs	Sustainable Development Goals, a set of 17 global goals adopted by the United Nations in 2015 as a universal call to action
STP	The short-term investment portfolio of the University
University	The University of Western Ontario, operating as Western University

Appendix B: Codebook

Code	Description
Accountability	References enforcement of the policy
Ambiguity/Clarity	Asks for policy and/or some of its elements to be further explained
Climate/Environment	Focuses on carbon footprints, environmental impact, fossil fuels, and global warming
Divestment	Mentions selling off or exiting certain stocks
ESG/Responsible Investing	Uses general statements about investing properly or following industry standards
Fiduciary Duty	Worries that ethical rules will lower investment returns or hurt the endowment's growth
General Opposition	Denotes high-level dislike without callout to a specific reason
General Support	Denotes high-level praise without callout to a specific reason
Governance/Voice	Addresses how the policy is adjudicated
Institutional Values/Ethics	Focuses aligning the policy and other institutional frameworks to personal values
Military & Defence	Comments regarding the manufacturing, sale, or distribution of weapons, firearms, or defense-contracting services. This includes mentions of divesting from war, defense contractors, military equipment, or international conflict funding
Negative Screening	Mentions maintaining a "blacklist" of prohibited industries
Omission	Identifies subjects/topics missed completely in the policy
Philanthropy/Donations	Mentions how the policy affects alumni giving, major gifts, or the university's ability to attract new donors
Positive Screening	Suggests proactively investing in "good" companies (green energy, affordable housing)
Reputation	Focuses on the impact the policy has on Western's image
Returns/Performance	Focuses on the financial health, growth, or bottom line of the endowment. This includes mentions of maximizing returns, protecting the fund, market performance, or long-term financial sustainability
Shareholder Engagement	Suggests the University should use its influence to change companies rather than divesting
Social Justice/Human Rights	Mentions human rights, international law, labor practices, DEI, and/or community impact
Transparency	Wants the University to publish exactly what it owns and how it votes, as well as disclose governance and consultation processes
Other/Unique	Identifies comments that have nothing to do with RI policy or consultation
N/A – No Comment	No comment

Appendix C: Canadian and U.S. Post-Secondary Institutions Defence Divestment Considerations

Source: Johns Hopkins University Public Interest Investment Advisory Committee (PIIAC), Final Report (January 2025), Appendix IV. *modified to include Canadian post-secondary institutions

Canadian Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
University of Guelph	Request that the university freeze its investments in five companies described in the request as 'complicit in the ongoing occupation, genocide, and ethnic cleansing of Palestinians.' The Named Entities are: BAE Systems, Honeywell, Siemens, AXA, Teva.	Ad Hoc Committee on Special Action Requests	**Decline (5/2025)** *Board of Governors*	**Fiduciary Duty** – the proper exercise of fiduciary duty prevents the Board form making investment decisions solely to express a position on social or political issues. **Social Injury** – the Committee found the evidence of social injury presented to be insufficient. **Cdn Gov't** – no material actions have been taken by the Cdn gov't or other government entities against the Named Entities or related industries.
McGill University	Divest the endowment's direct investments from companies that derive a dominant portion of revenues from the weapons industry	Committee on Sustainability and Social Responsibility (standing committee BOG)	The committee is not recommending any action on the part of the Board in relation to the mandate. The CSSR is satisfied that McGill's overall investment approach is well positioned to preserve the capital of the MIP, within the social and ethical norms of the University.	Arms are used around the world for **multiple purposes**, including security and humanitarian efforts. A decision to divest *at this time* would be perceived as one **motivated by geopolitical considerations** linked to current world conflicts on which the university has taken a neutral stance in line with its mission. Inconsistent with **fiduciary duties** of Board Such a move would set **unwarranted precedent** for future decisions
McMaster University	As part of the agreement to end the encampment the University agreed to review its	Instead of amending the policy, the University prepared a draft	The updated Principles do not restrict investment in any particular company or	The goal is to provide a high-level framework to assist the Board in its fiduciary duty to make investment-related decisions that are in the best interest of the university and that support research,

	Social Responsibility and McMaster's Investment Policy	*Principles of Responsible Investment* to compliment it. Most feedback on the principles responded to the current situation in Israel/Palestine and called for divestment from defence technologies.	industry, or include any blanket commitments to divestment. A process has already been established to review of individual investments, which will continue with the Principles as a guide	teaching, faculty, students and the university as a whole. Principles do not support divestment but instead prioritize the fiduciary responsibilities of the Board and support the long-term health of the institution.
Queen's University	Divest from the State of Israel and put screening in place for future investments	Principal's Review Committee for Responsible Investing (provide written response to Principal detailing Committee's recommendations) – in accordance with the RI Policy	**Decline (2/2025)** *Board of Trustees*	**Fiduciary Responsibility:** Divestment would breach legal investment obligations. **Role of the University and Academic Freedom:** Institutional neutrality is a key factor. **Effectiveness of divestment:** Divestment and negative screens as agents for behavioural change are generally ineffective. **Lack of consensus**: Level of disagreement and complete lack of consensus on this topic sets the request apart from past divestment decisions. Canadian gov't has not imposed sanctions on Israel.
University of Ontario Institute of Technology	A negotiated settlement was agreed upon to end an on-campus encampment by addressing student demands for investment transparency and ethical divestment.	The administration established a working group to review investment policies and committed to annual public disclosure of all direct/indirect holdings.	No formal vote was held by the Board of Governors of Senate.	As of March 2026 UOIT had not made any actual divestments. Audit and Finance Committee meeting, November 21, 2024: "There are some limitations on responsible investing action that asset owners investing through pooled funds can take in response to ESG concerns relating to specific portfolio holdings. For example, divestment may not be feasible, since the assets are managed together with those of other asset owners and according to the same rules. Where significant ESG concerns emerge relating to portfolio holdings in a pooled funds context, good practice for asset owners is to engage external investment managers regarding how they are addressing the concerns."
University of Waterloo	In response to global conflicts/community concerns, the UW	The investing task force's mandate does not ask for a review of existing	**May 6, 2024** UW Senate heard a motion that 'Senate	Recommendations: **Investment disclosure practices –** The university should disclose as much as possible, while ensuring that contractual

	launched 2 task forces: •Task Force on Social Responsibility in Investing •Task Force on Principles for Institutional Partnerships	investment holdings, nor make pronouncements on specific investments.	recommend the BOG divest from all weapons manufacturers and all organizations that supply military equipment to Israel.' Vote to add motions to agenda **defeated**. **June 10, 2024** Senate passed motions to board, re: investment disclosure, partnership frameworks, elevating certain ESG factors.	commitments were made. All holdings should be disclosed. **Priority Social Factors to Incorporate into RI Policy** – Human rights should be a priority social factor in RI policy – applies to endowment and pension funds (definitions expanded to include: Anti-oppression/racism, Indigenous reconciliation, equity & diversity, adherence to UNCCW). **Process for receipt/review of inquiries related to investments** – Establish a policy that defines process to review stakeholder feedback related to endowed investments. **Updates to RI Policy** – add international human rights, expand reporting requirements, link to policy on feedback.
University of Windsor	As part of the agreement to end the encampment the University signed an agreement with The University of Windsor's Student's Alliance (UWSA) and The Windsor Liberation Zone Team (LZT)	The agreements embedded human rights criteria into investment policies as well as full annual disclosure of all holdings. No immediate divestment.	No formal vote was held by the Board of Governors of Senate.	Did the University agree to outright divestment? No. Why didn't the University agree to divest? The purpose of the university's investments is to generate income to advance our mission-related objectives. University of Windsor – FAQ

U.S. Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
Amherst College	"Divest from companies aiding Israel's military operations in Gaza"	Board Review Only	**Decline (6/2024)** *Board of Trustees*	**Community Consensus:** "perspectives in the Amherst community are both deeply held and extremely polarized" **Fiduciary Responsibility:** "These actions could have significant immediate and long-term negative impacts on returns" **Politicization:** "would amount to the College endorsing the moral and political position of some... and rejecting the... position of other members"
Brown University	"Divestment from Companies that Facilitate the Israeli Occupation of	• Special Advisory Committee	**Decline (9/2024)** Advisory Committee on	**Lack of Corporate Impact:** "investment is de minimis and... too distantly removed from "social harm" to thus justify divestment action"

U.S. Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
	Palestinian Territory"	• Board Review	University Resource Management **Decline (10/2024)** Brown Corporation	**Politicization:** "Brown's mission doesn't encompass resolving or adjudicating global conflict" **Community Consensus:** "deep feelings and beliefs have resulted in tension and division within the Brown community"
Columbia University	"Divest from companies profiting from Israeli apartheid"	• Special Advisory Committee Board Review	**Decline (3/2024)** *Advisory Committee on Socially Responsible Investing* **No Board Vote** (stopped with committee)	**Community Consensus:** "significant opposition... as evidenced by the actions of many students, faculty, and alumni."
Cornell University	Divest from "companies supporting the ongoing war in Gaza"	• Standing Governance Committee • President Review • Board Review	**Decline (5/2024)** President Martha Pollack **No Board Vote** (stopped with president)	**Politicization:** "Purpose of our endowment is not to exercise political or social power" **Targeting of Israel:** "Troubled by the fact that this... singles out companies for providing arms to Israel" **Illegality of Divestment:** "in violation of New York state's executive order 157, which prohibits investment activity intended to penalize Israel"
Duke University	"Divest from companies profiting from Israel's violence in Palestine"	• Special Advisory Committee • Board Review	**Did Not Receive the Proposal** *Advisory Committee on Investment Responsibility* **No Public Response to Proposal**	**Politicization:** The administration claims political neutrality
Harvard University	Implement a human rights investment policy and a task force to audit investments	No formal divestment process	**Decline (10/2024)** President Alan Garber **Posted a copy of President's correspondence** with students he met with to website (did not send a public message)	**Community Consensus:** "Will not use [Harvard's] endowment funds to endorse a contested view on a complex issue that deeply divides our community" **Politicization:** "the investment strategy is designed to support the academic mission, not to serve as a direct instrument of social or political change"

U.S. Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
Northwestern University	"Divest from all defense stocks... and from all companies that support Israeli apartheid"	• Special Advisory Committee • Board Review	**Did Not Receive the Proposal** *Advisory Committee on Investment Responsibility* **No Public Response to Proposal**	No reasons given
Occidental College	Divest from four companies supporting "human rights violations by the Israeli military"	Board Review Only	**Decline (6/2024)** Board of Trustees	**Community Consensus:** "The proposal would be divisive and damaging to the College community" **Lack of Corporate Impact:** "no expectation that divestment would significantly or adversely impact the targeted companies" **Politicization:** "taking a position on a complex geopolitical situation would potentially chill the expression of diverse opinions"
Princeton University	"Divest from Israel's violations of international law and human rights"	• Standing Governance Committee • Board Review	**Awaiting Decision** *Council of the Princeton University Community Resources Committee*	**Community Consensus:** Guidelines state there must be a "strong consensus regarding what to do"
Stanford University	"Divest from companies invested in Israel's war crimes"	Board Review Only	**Decline (10/2024)** Special Committee on Investment Responsibility (a committee of the Board of Trustees)	**Community Consensus:** "The events in Gaza and Israel have been a deep source of division in the Stanford community."
University of California System	Divest from firms that do business with Israel and ensure tuition dollars are not invested in Israel	No formal divestment process	**Decline (4/2024)** *University of California Office of the President*	**Academic Freedom:** "boycott of this sort impinges on... academic freedom... and the unfettered exchange of ideas on our campuses"
University of Chicago	Divest from financial support for Israel	No formal divestment process	**Statement Reiterating Prior Decisions (4/2024)** *University Administration*	**Politicization:** Stance "against taking collective positions on political or social issues outside its core mission, including calls for divestment"
University of Michigan, Ann Arbor	Divest companies profiting from Israel's military campaign in Gaza	Board Review Only	**Decline (3/2024)** Board of Regents Finance, Audit &	**Fiduciary Responsibility:** "to [divest] would be to increase our investment risk and decrease our investment returns"

U.S. Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
			Investment Committee	**Politicization:** "We will continue to shield the endowment from political pressures"
University of Minnesota System	Divest from companies with ties to Israel and defense spending	Board Review Only	**Decline (8/2024)** *Board of Regents*	**Community Consensus:** "our community is divided on the topic" **Fiduciary Responsibility:** "possible financial challenges of divestment"
University of Pennsylvania	"Divest from any security that enables, facilitates, or profits from the... growth of Israeli settlements"	• Standing Governance Committee • Special Advisory Committee • Board Review	**Decline (10/2024)** *University Council Steering Committee* **Decline (6/2024)** *Interim President Larry Jameson (leaked email)*	**Flat Rejection:** "Penn does not support boycotts, divestment, or sanctions against Israel."
University of Virginia	"Divest... from companies that profit from... human rights violations" ("including... Israel's apartheid regime")	• Special Advisory Committee • Board Review	**Did Not Receive the Proposal** Advisory Committee on Investment Responsibility **Decline (9/2024)** UVA Investment Management Company (at a meeting of the Board of Trustees)	**Fiduciary Responsibility:** "Do not utilize divestment for non-financial reasons" **Politicization:** "Do not like using our investment strategy for expressing a moral or political opinion" **Illegality of Divestment:** "May not be legal to consider non-pecuniary factors"
University of Washington	Divest from companies that support "the Israeli occupation of Palestinian land"	Board Review Only	**No Decision Made Due to Interruption** Board of Regents	
Wesleyan University	Divest from companies supporting the war in Gaza	• Special Advisory Committee • Board Review	**Advance (9/2024)** Committee on Investment Responsibility **Decline (9/2024)** Board of Trustees Investment Committee	**Impracticality:** "divesting from an ever-changing list of companies... would be impractical and irresponsible" **Impact on the Endowment:** "fiduciary responsibility... over a multigenerational horizon... requiring us to manage the endowment with prudence" **Politicization:** "Wesleyan endowment... should not be treated as a political football"
Williams College	Divest from companies that support the Israel Defense Forces and	• Special Advisory Committee	**Decline (5/2024)** Advisory Committee on	**Politicization:** "the endowment... is not a vehicle for expressing views on world affairs or conducting advocacy"

U.S. Schools				
University	**Proposal**	**Process**	**Voting Outcome**	**Rationale for Decision**
	adopt ESG standards	•Board Review	Shareholder Responsibility **Decline (6/2024)** Board of Trustees	**Fiduciary Responsibility:** "Subordinating overall investment strategy... to the volatility of geopolitical events... would introduce significant new risk"
Yale University	Divest from military weapons manufacturers with a focus on those supporting the conflict in Gaza	• Special Advisory Committee • Board Review	**Decline (4/2024)** Advisory Committee on Investor Responsibility **Decline (4/2024)** Yale Corporation Committee on Investor Responsibility	**Socially Necessary Uses**: Military weapons manufacturing supports socially necessary uses, such as law enforcement and national security

POLICY 2.32 – Responsible Investing

Policy Category:	Financial
Subject:	Investment Policies
Sections:	Purpose; Definitions; Policy
Approving Authority:	Board of Governors
Responsible Officer:	Vice-President (Operations & Finance)
Responsible Office:	Financial Services
Related Procedures:	*
Related University Policies	Policy 2.26 – Investment Policy 2.14 – Disclosure of Information on Western Investments
Effective Date:	April 30, 2026
Supersedes:	*

I. PURPOSE

The University is a long-term investor, responsible for making prudent investments that generate financial results in support of the University's mission. This policy establishes the University's Responsible Investing ("RI") principles as they relate to University investment practices.

University investments are subject to MAPP Policy 2.26 (Investment Policy), which outlines the Portfolio, principles, objectives and governance practices.

II. DEFINITIONS

Administration:	The administrative staff of the University responsible for day-to-day management of the Portfolio.
Board:	The Board of Governors of the University.
Endowed Portfolio:	Endowed assets invested to generate income to fund endowed chairs, scholarships, bursaries, research, etc.

Engagement: The practice of inquiry, interaction and dialogue between parties along an investment value chain, such as Administration, Managers, collaborators, policymakers and companies. Engagement typically relates to investment risk/return, ESG issues, and other investment responsibilities and issues and its goals include influencing practices, improving disclosure and enhancing long-term value.

ESG: **“**Environmental, social, and governance,” and refers to a strategy that evaluates companies based on these non-financial criteria to inform investment decisions. The following definitions are based on the Principles for Responsible Investment.

Environmental issues relate to the quality and functioning of the natural environment and natural systems, identified or assessed in responsible investing processes. These include but are not limited to risks related to greenhouse gas emissions, climate change, natural resources, and waste.

Social issues relate to the rights, well-being, and interests of workers, communities, customers / end-users for corporate entities, and citizens/populations for sovereign entities, identified or assessed in responsible investing processes. These include but are not limited to risks related to human rights, labour rights, child and slave labour, diversity, equity and inclusion, and indigenous rights.

Governance issues relate to the rules followed and actions taken by companies and other investee entities, identified or assessed in responsible investing processes. These include but are not limited to board oversight and structure, independence, company disclosures, shareholder rights, accountability, operational strategies, executive pay and performance evaluation.

Fiduciary Duty: The duty of members of the Board and Investment Committee to act honestly, carefully, in good faith, and in the best interests of the University as a whole. In the investment context, this means that members of the Board and Investment Committee must exercise the care, skill, diligence and judgment that a prudent investor would exercise in making investments, with a long-term view to maximize returns at an

	acceptable level of risk to support the University's mission.
Fund:	The combined Operating Portfolio and Endowment Portfolio of the University.
Investment Committee:	A sub-committee of the PF Committee with expertise in investments and investment management.
Managers:	The external investment managers who invest portions of the Portfolio.
MTP:	The mid-term investment portfolio of the University.
Operating Portfolio:	The long-term portion of non-endowed funds not included in the MTP and STP.
PF Committee:	The Property and Finance Committee of the Board.
Policy:	MAPP Policy 2.32 – Responsible Investing Policy
Portfolio:	Collectively, the STP, the MTP and the Fund.
PRI	Principles for Responsible Investment, a global investor initiative to advance responsible investing practices.
RI:	Responsible Investing, an approach which integrates ESG considerations into investment decisions.
SDGs	Sustainable Development Goals, a set of 17 global goals adopted by the United Nations in 2015 as a universal call to action.
STP:	The short-term investment portfolio of the University.
University:	The University of Western Ontario operating as Western University.

III. POLICY

1.0 Roles and Responsibilities

The PF Committee is responsible for periodic review of this Policy and, on the advice of the Investment Committee, recommends any changes to the Board for approval.

The Investment Committee is responsible for the establishment, oversight and periodic review of this Policy. The Investment Committee provides oversight of the Administration in carrying out its Policy responsibilities.

The Administration is responsible for integrating the Policy with the Investment Policy and reporting on RI activities.

Managers, as investment experts, are hired by the University to carry out investment mandates, incorporate ESG factors into their decision making, and report RI activities to Administration for monitoring purposes.

Pension assets are not subject to this policy.

2.0 Responsible Investing Principles

The University is committed to integrating ESG considerations throughout investment decision-making processes of the Portfolio. Integration of ESG factors allows for the inclusion of relevant and material risks as part of the overall investment process, including Portfolio decision making, monitoring and active ownership. RI and ESG issues will vary in their degree of relevance and materiality by asset class, strategy, sector, and time horizons, but ultimately, they provide a broader lens for understanding emerging and long-term systemic issues that may impact Portfolio financial returns.

The Board has a Fiduciary Duty. Incorporating ESG factors into investment financial risk assessment is in keeping with this duty. However, investment decisions must be made by investment professionals and guided by financial risk and return assessments only.

To guide integration of RI into its investment approach, the University is a signatory to the PRI, a global investor initiative to which the University committed in 2023. In becoming a signatory, the University has committed to integrating the PRI global principles into our investment processes. The six principles, and the University integration thereof, are as follows:

University Integration	
Principle 1 - Incorporation We will incorporate ESG issues into investment analysis and decision-making processes.	• In the Portfolio and their strategic asset classes • Into the selection, evaluation, and monitoring of Managers • Into University decarbonization priorities, and using industry standards to measure, monitor, and plan for strategic needs • Implement an ESG questionnaire for Managers, and monitor their integration capabilities

	• Provide training opportunities for Administration and the Investment Committee to increase and maintain ESG industry knowledge and practices
Principle 2 - Active Ownership We will be active owners and incorporate ESG issues into our ownership policies and practices.	• Develop proxy voting guidelines that integrate ESG factors, and communicate the guidelines to Managers • Monitor Manager voting activity and include results as part of regular Manager reviews • Engage with Managers on results of questionnaires, carbon metrics, information quality and other emerging issues • In addition to Manager engagements, employ a collaborative engagement program that leverages scale across the sector
Principle 3 - Appropriate disclosure We will seek appropriate disclosure on ESG issues by entities in which we invest.	• Obtain Manager reporting on ESG related engagement with companies, and discuss with the Manager • Discuss Manager views on ESG issues, their engagement activity, and investment response • Support, through collaborative engagements, initiatives that improve ESG reporting
Principle 4 - Promote acceptance We will promote acceptance and implementation of the principles within the investment industry.	• Collaborate with other institutions, to share integration best practices and knowledge • Support collaborative initiatives that develop sector expertise in implementing the principles • Take leadership roles within collaborative initiatives to promote acceptance • Communicate our ESG expectations with Managers through selection, evaluation, and monitoring (e.g. ongoing questionnaires, reviews and RFPs)
Principle 5 - Work together We will work together to enhance our effectiveness in implementing the principles.	• Actively participate in learning networks, such as the PRI, to develop internal capabilities with respect to integration. • Learn from peers, Managers and service providers. Seek knowledge and learn about opportunities that may enhance integration

	• Support collaborative engagements to build collective scale and influence on matters of engagement
Principle 6 - Report activities We will report on our activities and progress towards implementing the principles.	• Report on our RI activities to the Board • Disclose how ESG issues are integrated within our investment process • Publish our annual PRI reports • Publish annually, our RI report, including progress, challenges and climate-related financial disclosures

3.0 Integration and Stewardship

3.1 Training and Education

The University recognizes the importance of being up to date on RI issues and peer institutional best practices, requiring an adaptive approach and ongoing learning and improvement. In our experience, ESG issues can vary from being more developed and quantifiable, to developing, to more subjective and less quantifiable. Integration is more practical and less subjective when ESG issues have been more developed by industry and can be incorporated into financial risk management processes.

The University will incorporate training and education opportunities, to advance learning for integration of material and relevant ESG issues into risk management processes.

3.2 Sustainable Investment Opportunities

The University takes a broad and dynamic approach to sustainable investing and believes having a commitment to this area presents new opportunities for investors and could enhance the University's long-term investment returns.

The University has committed a capital allocation in the Fund of at least 15% to sustainable investments, intended for strategies with the intention to achieve positive, measurable social and environmental outcomes alongside competitive financial returns. The sustainable investments should align with the SDGs, and their social and environmental outcomes should be verified through an external label or certification issued by an independent third party industry organization or an entity authorized to issue such labels on behalf of an independent organization.

Administration shall seek sustainable investments within the Fund's strategic asset classes, meaning that the allocation is an overlay to the existing strategic asset mix, and not an asset class itself.

Recognizing the interconnected nature of the SDGs, the University would evaluate these investment opportunities through systematic assessments of ESG criteria to ensure alignment with different SDGs.

3.3 Climate Change

The University has committed to net zero by 2050, or sooner. As a systemic risk, periodic analysis of the Portfolio in relation to climate change (i.e., scenario analysis), and annual measurements of emissions will be undertaken.

As a medium-term target towards net zero, the University has committed to a 45% reduction in carbon intensity by 2030, using 2020 as a baseline measurement.

The University measures its metrics annually, which include Scope 1 & Scope 2 greenhouse gas emissions. Scope 3 greenhouse gas emissions will be considered as part of the assessment once accurate measurement and reporting standards are available and readily adopted.

3.4 Selecting and Monitoring Managers

As part of its due diligence process when selecting Managers, the University assesses the extent to which they incorporate ESG factors into their investment approach, including in the evaluation of portfolio companies, portfolio construction, and stewardship and engagement activities.

Following the appointment of Managers, the University conducts ongoing monitoring of their ESG-related practices. The Portfolio holds pooled funds which in turn hold a high number of smaller-sized investments in underlying securities. It is impractical for the University to directly engage with these underlying securities.

The University relies on the Managers to undertake engagement activities, as outlined in Section 3.5.

The cornerstone of the process by which the University monitors its Managers is an annual ESG due diligence questionnaire. The ESG questionnaire should cover the following areas:

- Description of policies, core beliefs and initiatives supported
- Commitment of resources both financial and personnel;
- Transparency of process, including individual company;
- Evolution and advancement of Manager expertise in ESG consideration;
- Appropriate Manager marketing to the public;
- Policies and initiatives specific to climate change and social issues;
- Policies and practices around the Managers' shareholder engagement activities, as part of an overall RI strategy. Managers are to assess companies' management practices in contributing to the long-term health of each investee company.

3.5 Engagement

Engagement occurs along the investment value chain. Typically, the University engages with Managers, and Managers engage with companies.

Company engagement activities, such as dialogue with management, proxy voting or shareholder resolution filing are delegated to the Managers. Managers are expected to report to the University on a regular basis on their engagement work and provide a rationale for their decision to alter a Portfolio position based on ESG factors.

The University provides proxy voting guidelines to Managers that incorporate ESG considerations, as indicated in Appendix A.

The University engages on ESG matters through routine Manager reviews, targeted Manager discussions on emerging issues, collaborative initiatives with peers, and through engagement service providers.

The University will evaluate the outcomes of engagement efforts to determine Managers' effectiveness in driving meaningful improvements.

The University may also participate in collective engagement services, where a collaborative engagement strategy is desirable and may lead to positive change on specific ESG related topics with a company. The University's participation in collective engagement services provides opportunities to participate in collaborative letter-writing with other shareholders in the program. The Administration will conduct research on the issues presented in investor letters and evaluate their materiality. The research and recommendations will be submitted to the Chair of the Investment Committee for review and final decision regarding participation.

When specific issues arise with Managers or within certain markets or sectors, the Administration may cooperate with peer asset owners for informal discussions, group meetings, or collaborative campaigns to engage with Managers as deemed appropriate.

3.6 Advocacy and Collaboration

The University endeavours to remain up to date on RI and the impact of ESG factors on its investments. To maintain its knowledge of the field of RI and to contribute to its development, the University will liaise with other institutional investors and industry associations to share information and discuss key issues.

3.7 Divestment

The University leaves the decision to exclude a security to the Managers hired to manage a portion of the Portfolio, as they possess the necessary expertise and information to make the decision that is in the best interest of the Portfolio.

The University believes that, in most situations, engagement is a superior approach to divestment in effecting changes on ESG-related issues. Engagement allows investors to retain their voice in terms of voting on shareholder resolutions and maintaining or escalating, as needed, a dialogue with portfolio company management.

If a Manager's stance on ESG factors is not compatible with the University's goals in those matters, demonstrated through persistent, systemic misalignment, the Investment Committee will consider replacing the Manager, but such a decision will be guided only by the Investment Committee's Fiduciary Duty.

3.8 Transparency and reporting

As a member of the PRI, the University will publicly report its progress on the principles.

RI activities and metrics will be reported to the University community on an annual basis through the University Investments website. The University is committed to reporting along the lines of investment industry standards, as they develop, such as climate-related financial disclosures.

The University will make available to the University community, the most recent list of Portfolio investments, subject to blackout periods imposed by the underlying Managers. Requests need to comply with MAPP Policy 2.14 - Disclosure of Information on Western Investments.

4.0 Review

This Policy will be reviewed at least every five years.

Appendix A: Proxy Voting Guidelines

1.0 As a fund shareholder, the University holds units of the fund and maintains economic exposure to stocks (and other securities) held within the fund. The University does not directly hold portfolio company shares or exercise voting rights for those shares. Managers cast proxy votes on behalf of the University.

2.0 The purpose of the guideline is to establish expectations for Managers when they vote proxies for a commingled vehicle in which the University invests.

3.0 While the University acknowledges each Manager's independent proxy voting policies, the University shall encourage Managers to align their voting practices with the principles outlined in these guidelines, where possible.

4.0 The guidelines are not exhaustive. For issues not explicitly addressed herein, voting decisions are expected to be guided by the Statement of Investment Committee Beliefs appended as Appendix A to the Investment Policy (MAPP 2.26) from time to time.

5.0 The University may conduct proxy voting audits and Manager policy reviews to monitor and evaluate Managers' voting practices, the outcomes from which may inform the engagement of the University with its Managers.

6.0 The University takes the following positions as they relate to the following matters:

6.1 Audit

The University believes auditors should provide an independent assessment and assurance that financial reports reflect the company's performance.

The proxy voting position of the University on issues related to audit include:

Auditor independence

Do not support the reappointment of an audit firm if its non-audit fees are excessive compared to its audit fees.

6.2 Board of Directors

The University believes that effective governance requires appointing directors with relevant skills and experience with a corporate culture that encourages meaningful contributions to boardroom discussion.

The proxy voting position of the University on issues related to the board of directors include:

Director accountability for ESG issues oversight

When voting proxies, the position of the University is to not support the election of the chair or returning members of the relevant board committee where material failures of governance, stewardship, or risk oversight (including assessment and management of material ESG risks) have occurred, or where corporate ESG performance, including climate change performance, has been unsatisfactory.

Board diversity

When voting proxies, the position of the University is to not support the election of the chair of the nominating committee if a board lacks adequate diversity of thought, which may be delivered by factors such as diversity of gender, race, culture, economic background and experience.

Board and key committee independence

When voting proxies, the position of the University is to not support the election of non-independent nominees serving on the audit committee and compensation committee.

When voting proxies, the position of the University is to not support the re-election of the chair of the nominating committee if the audit committee and compensation committee are not fully independent.

6.3 Compensation

The University believes compensation should align management interests with shareholder interests. It should balance the need to attract, retain, and motivate qualified talent while avoiding excessive detriment to investor interests.

The proxy voting position of the University on issues related to compensation include:

Pay Equity

Support conducting pay equity analysis, including gender and/or race pay gap assessments, on a case-by-case basis.

Support proposals calling for a pay disparity disclosure on a case-by-case basis.

Incentive compensation linked to ESG targets

Support linking executive incentive compensation to clearly defined and measurable ESG targets on a case-by-case basis.

Incentive compensation linked to long-term performance

Do not support incentive compensation that misaligns with long-term value creation and/or incentivizes excessive risk-taking.

Excessive compensation

Do not support excessive compensation or structures that exacerbate income inequality.

6.4 Mergers, Acquisitions and Reorganizations

The University believes mergers, acquisitions, reorganizations and the corporate structure should align with long-term value creation and shareholders' interests.

When voting proxies, the position of the University is to support corporate transaction proposals that foster sustainable long-term growth while appropriately considering ESG factors.

6.5 Shareholder Proposals

The University believes that incorporating appropriate ESG factors can mitigate risks and create long-term shareholder value. The University supports analyzing proposals on a case-by-case basis, considering the specific facts and circumstances of both the issuer and the proposal.

When voting proxies, the position of the University is to generally support ESG proposals that demonstrate materiality and align with sustainable, long-term value. This includes proposals related to enhanced disclosure, board composition and compensation considerations, and company initiatives such as target-setting and policy development. The University does not support proposals that are overly prescriptive, excessively costly, or redundant with existing company disclosures or measures.

Environmental Risks

The proxy voting position of the University on issues related to environmental risks include:

Biodiversity

Support proposals contributing to biodiversity conservation and sustainable use of natural resources on a case-by-case basis.

Climate change

Support proposals contributing to meeting the goals of the Paris Agreement, reducing carbon intensity, and achieving net-zero absolute carbon emissions by 2050, on a case-by-case basis.

Water preservation

Support proposals contributing to water preservation and promoting efficient water use to reduce unnecessary consumption.

Social Risks

The proxy voting position of the University on issues related to social risks include:

Child labour

Support proposals that contribute to prohibiting child labour.

Conflict-Affected and High-Risk Areas

Support proposals conducting heightened due diligence for companies or assets with potential geographic, operational, or relational exposure to conflict-affected and high-risk areas (regions experiencing or at high risk of experiencing armed conflict, widespread violence, or similar forms of instability).

Forced labour and modern slavery

Support proposals that contribute to prohibiting forced labour and modern slavery.

Indigenous rights

The University is located on the traditional territories of the Anishinaabek (Ah-nish-in-a-bek), Haudenosaunee (Ho-den-no-show-nee), and Lūnaapéewak (Len-ahpay-wuk) Nations, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. This land continues to be home to diverse Indigenous Peoples (First Nations, Métis and Inuit) whom we recognize as contemporary stewards of the land and vital contributors of our society.

As part of its ongoing commitment to reconciliation, the University is dedicated to establishing and upholding responsibility and accountability to Indigenous Peoples.

Support proposals that strengthen and build relationships with Indigenous communities on a case-by-case basis.

Support proposals that establish formal policies and processes to obtain informed consent sufficiently in advance and without coercion, intimidation or manipulation, through due diligence, consultation, participation in decision-making, and remediation where business activities may cause, contribute to, or be directly linked to adverse impacts on Indigenous peoples' rights, on a case-by-case basis.

Support proposals for implementing culturally relevant education and training on Indigenous rights.

6.6 Shareholder Rights

The proxy voting position of the University on issues related to shareholder rights include:

Dual Class Share Structures

In dual class share structures, one class of shares has more votes per share than other shares. These structures give a group of shareholders, usually the founding investors, voting control for a relatively low level of equity ownership and can have a negative performance impact over time.

When voting proxies, the position of the University is to support proposals that align with the principle of one-share, one-vote.

Last Reviewed:



Western
UNIVERSITY · CANADA

Responsible Investment Policy

Board of Governors – April 30, 2026

Presentation Overview

1. Introduction to Western's Investments
2. Governance
3. Policy Introduction
4. Consultation Process
5. Reflections on Themes
6. Recommendation



Western's Investments Governance Policy Introduction

Western's Investments

As of December 31, 2025

$3.5 billion

across STP, MTP, O&E Fund

$1.5 billion

Endowment, up from $0.3 million in 2006

9.5%

10-year gross returns

$53 million

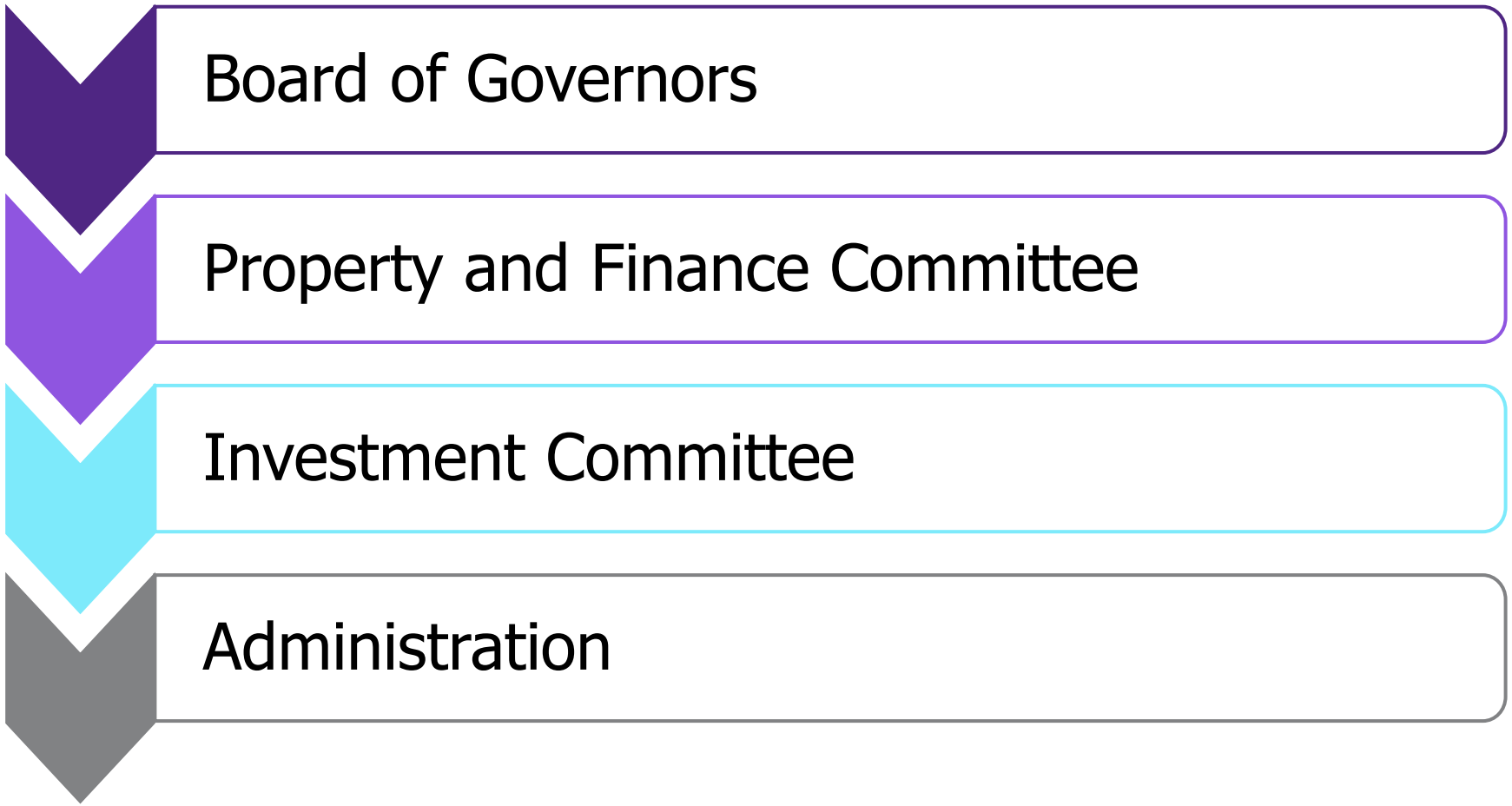
2026 endowment allocation for spending
(2025 - $47 million)

2,500+ unique gifts

supporting student aid, chairs, professorships, fellowships and other activities like research and academic achievement

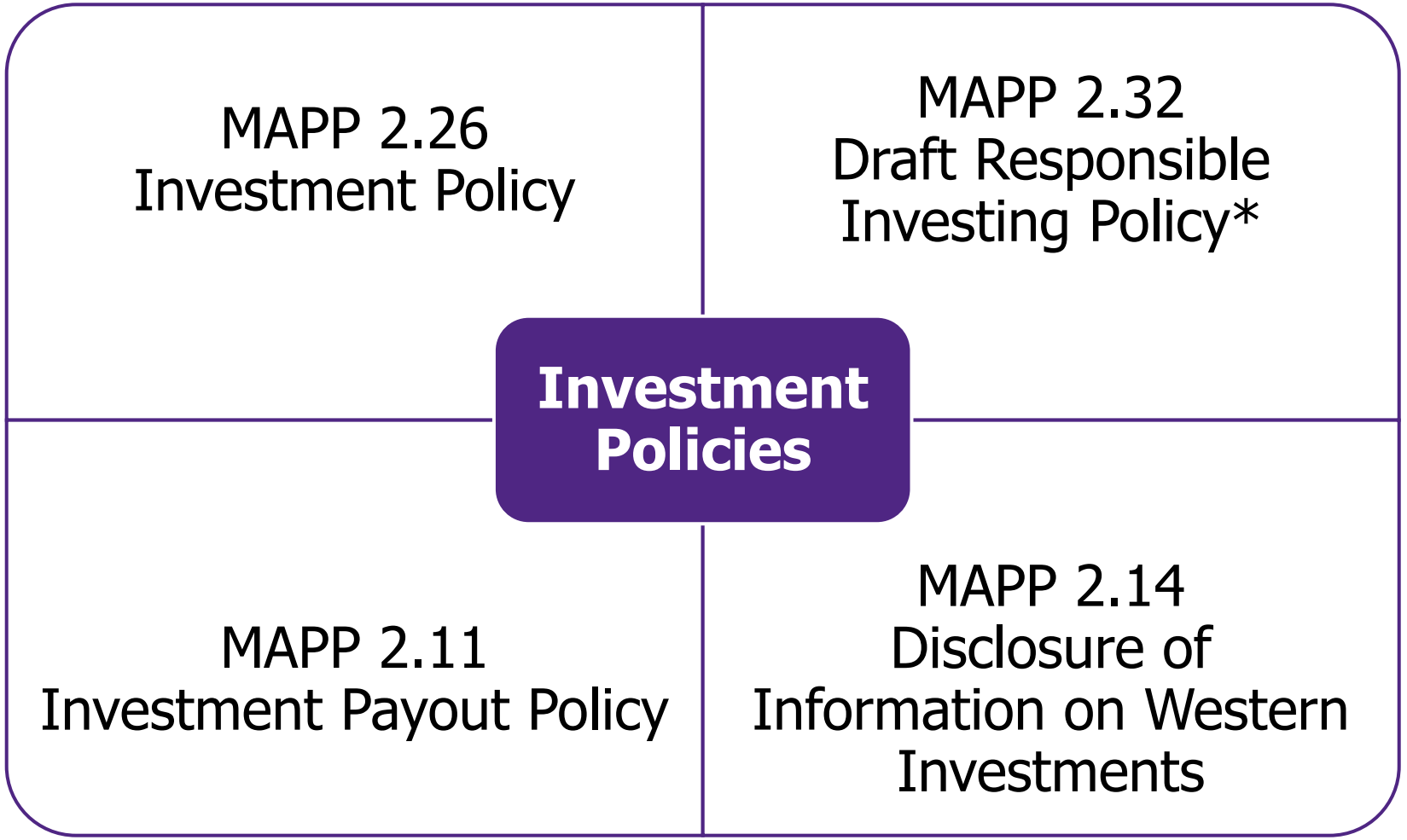
Western

Investment Governance



Western

Investment Policies



* Subject to consultation

Western

Introduction of the Draft Responsible Investing Policy

2009	Began incorporating ESG considerations into formal Investment Manager reviews
2014	Began our first ESG questionnaires to Investment Managers, which have evolved and broadened in scope, reflecting our commitment to diversify ESG factors with our managers
2015	Initiated the first carbon metrics analytics
2016	Established the first generation of our RI Policy
2017	Established the Working Group on Responsible Investing, a sub-committee of the investment committee. As time progressed, responsible investing has become a standing topic for every investment committee meeting
2020	Signed the *Charter for Canadian Universities* to address climate change, and committed to allocate 10% of the Operating and Endowment Fund (Fund) to sustainable investments
2021	Adopted decarbonization targets outlined in Western's Strategic Plan: *Towards Western at 150*
2022	Joined the University Network for Investor Engagement (UNIE) to bolster engagement activities and collaboration. In 2023, we joined the UNIE Advisory Group to help steer efforts on climate engagement
2023	Became a signatory to the PRI
2024	Exceeded our 10% commitment to sustainable investments in the Fund, ahead of the 2025 target

Western

Consultation Process

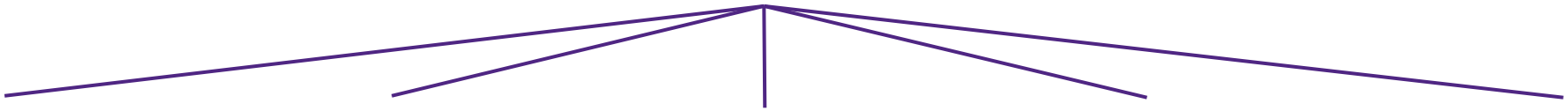
Consultation Process

- Consultation period: January 26 – March 27, 2026
- Mix of in-person and online meetings, and online survey
- Promotion included:
  - Direct email to all students, faculty, librarians, archivists, staff, alumni and donors – nearly 185,000 e-mails
  - Digital newsletters
  - Total of 234,000 impressions
- 679 community members shared their feedback

Over the consultation period...

547

community members took the survey



213	51	58	3	222
students	faculty	staff	librarians	alumni/donors

that's <**1%** of the Western community

Consultation Themes

- Diversity of Opinion
- Transparency, Reporting, and Communication
- Financial Performance and Maximizing Returns
- Divestment and Exclusion
- Governance Model, Accountability, and Policy Authority
- Complexity of Investments
- Alignment with Institutional Values
- Support for Draft Policy Direction

Western

Reflections on Themes

Reflections on Themes

- Diversity of Opinion
- Fiduciary Responsibilities
- Implications of Divestment & Exclusion
- ESG Integration
- Complexity of Investments
- Values-Based Investing
- Transparency, Education and Engagement

Western

Senate Motion

Be it resolved that:

The Senate recommend to the Board of Governors through the President & Vice-Chancellor, that Western University's Investment and Responsible Investing Policy(within MAPP 2.26) be expanded to include commitments to upholding human rights and international law in all investment practices, including divestment from weapons manufacturers, and companies that are involved in violations of international law or internationally recognized human rights.

Western

IC Response to Senate Motion

- Diversity of Opinion
- International Law as a standard
- Complexity and cost of implementation

- IC does not support such a policy decision for the following reasons:
  - It is a decision that does not align with other actions taken by the university
  - It is a decision that does not align with the Committee's or the Board's fiduciary duty or with the university's duty to prudently invest charitable assets

Western

Conclusion

- The draft RI policy reflects what the Committee believes is the appropriate balance for Western's circumstances
- RI principles align with our investment structure and leverage expertise of external managers
- RI policy ensures flexibility as standards evolve

Western

Conclusion continued

- Draft policy reflects evolution since last approved in 2022:
  - The creation of a stand-alone policy, reflective of over 15 years of development in responsible investing practices.
  - The integration of the PRI, and University actions in response to them.
  - The enhancement of the sustainable investment allocation to 15% for the Fund, a $375 million commitment.
  - The inclusion of the first set of proxy voting guidelines, reflective of the focus on engagement and where Western has influence with its managers.

Western

Summary of Revisions

- Policy revisions include:
  - PURPOSE – Repositioning RI Policy side-by-side policy with Investment Policy (MAPP 2.26), removing subordinated language
  - Section 2.0 – Clarifying that RI principles relate to all Portfolios
  - Section 3.2 – Adjusting the definition and scope of sustainable investments
  - Section 3.3 – Clarifying that carbon emissions relate to Scope 1 and 2 emissions
  - Section 6.0 – Alpha-ordering section 6 of the Proxy Guideline
  - Section 6.5 – Updated the Land Acknowledgement

Western

Recommendation

Investment Committee Recommendation

- The Investment Committee recommends that:
  - The Property and Finance Committee recommend the Responsible Investing Policy to the Board of Governors for approval.

Thank you.

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Western

Revisions to MAPP Policy 2.26 – Statement of Investment Objectives, Policies and Governance for the Short-Term Portfolio, Mid-Term Portfolio and Operating and Endowment Fund

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of the Property and Finance Committee, the Board of Governors approve the revisions to MAPP Policy 2.26 – Statement of Investment Objectives, Policies and Governance for the Short-Term Portfolio, Mid-Term Portfolio and Operating and Endowment Fund as set out in this Item 4.1(b).

Executive Summary:

The Investment Policy is updated periodically, primarily to reflect changes resulting from a strategic asset mix review, which was completed by the Investment Committee in 2026. The policy has also been renamed to reflect modern naming conventions.

The changes proposed to MAPP Policy 2.26 reflect the following significant changes:

- Separation of the Investment Policy into a Policy and Procedure document, conforming to University practice on policy structure.
- Updates to reflect the new Asset Mix because of the strategic asset mix review.
- Separation of the Responsible Investing section into its own Policy document.

The Investment Committee approved the draft Investment Policy at its April 10, 2026, meeting.

Documentation Provided:

Revised MAPP Policy 2.26 – Statement of Investment Objectives, Policies and Governance for the Short-Term Portfolio, Mid-Term Portfolio and Operating and Endowment Fund (redlined copy)

MAPP Policy 2.26 – Investment (clean copy)

Procedure for Investment Policy (for information)

POLICY 2.26 – Investment ~~Statement of Investment Objectives, Policies and Governance for the Short-Term Portfolio, Mid-Term Portfolio and Operating and Endowment Fund~~

Policy Category:	**Financial**
Subject:	**Investment Policies**
Sections:	**Purpose; Definitions; Policy**
Approving Authority:	**Board of Governors**
Responsible Officer:	**Vice-President (Operations & Finance)**
Responsible Office:	**Financial Services**
Related Procedures:	**Procedure for Investment Policy**
Related University Policies:	**Policy 2.32 - Responsible Investing** **Policy 2.11 - Investment Payout** **Policy 2.12 – Acquisition of Investment Services** **Policy 2.31 – Major Strategic Opportunities Fund**
Effective Date:	**April 30, 2026**
Supersedes:	**April 28, 2022**

~~Section 1~~I. ~~Purpose and Background~~PURPOSE

~~1.1 Introduction~~

The purpose of this Policy is to document the investment policies of the University for the Portfolio.

This Policy sets out the considerations and processes for:

(i) The investment objectives for the Portfolio; and
(ii) The prudent and responsible management of the Portfolio.

~~The purpose of this Statement of Investment Objectives, Policies and Governance is to document the investment beliefs, principles and policies of Western University (the "**University**" or "**Western**") for the Short-Term Portfolio (the "**STP**"), the Mid-Term Portfolio~~

~~(the "**MTP**") and the Operating and Endowment Fund (the "**Fund**"). The STP, MTP and the Fund are collectively referred to as the "**Portfolios**". This document is a management tool and is not designed to satisfy any specific legislation but is expected to demonstrate prudent management of the Portfolios and provide a framework for University investments. The authority and responsibilities of decision-making bodies are also documented herein.~~

II. DEFINITIONS

Administration: The administrative staff of the University responsible for day-to-day management of the Portfolio.

Board: The Board of Governors of the University.

Custodian: A specialized financial institution (typically a major bank) responsible for the holding and safekeeping of an asset of the Portfolio.

Endowed Portfolio:
Endowed assets invested to generate income to fund endowed chairs, scholarships, bursaries, research, etc.

ESG: "Environmental, social, and governance," and refers to a strategy that evaluates companies based on these non-financial criteria to inform investment decisions. The following definitions are based on the Principles for Responsible Investment.

Environmental issues relate to the quality and functioning of the natural environment and natural systems, identified or assessed in responsible investing processes. These include but are not limited to risks related to greenhouse gas emissions, climate change, natural resources, and waste.

Social issues relate to the rights, well-being, and interests of workers, communities, customers / end-users for corporate entities, and citizens/populations for sovereign entities, identified or assessed in responsible investing processes. These include but are not limited to risks related to human rights, labour rights, child and slave labour, diversity, equity and inclusion, and indigenous rights.

Governance issues relate to the rules followed and actions taken by companies and other investee entities, identified or assessed in responsible investing processes. These include but are not limited to board oversight and structure, independence, company disclosures, shareholder rights, accountability, operational strategies, executive pay and performance evaluation.

Fiduciary Duty: The duty of members of the Board and Investment Committee to act

honestly, carefully, in good faith, and in the best interests of the University as a whole. In the investment context, this means that members of the Board and Investment Committee must exercise the care, skill, diligence and judgment that a prudent investor would exercise in making investments, with a long-term view to maximize returns at an acceptable level of risk to support the University's mission.

Fund: The combined Operating Portfolio and Endowment Portfolio of the University.

Investment Committee: A sub-committee of the P&F Committee with expertise in investments and investment management.

Investment Consultant: Means an external, third-party professional or firm retained by the Investment Committee and/or Administration to provide objective advice, research, and recommendations regarding the management of an investment or proposed investment for the Portfolio.

Managers: The external investment managers who invest portions of the Portfolio.

MTP: The mid-term investment portfolio of the University.

Operating Portfolio: The long-term portion of non-endowed funds not included in the MTP and STP.

PF Committee: The Property and Finance Committee of the Board.

Performance Measurement Consultant: A specialized third-party service provider retained to independently calculate, verify, and analyze the returns and risks of one or more investments in the Portfolio.

Policy: Means this MAPP Policy 2.26 – Investment Policy

Portfolio: Collectively, the STP, the MTP and the Fund.

RI: "Responsible investing", is an approach which integrates ESG considerations into investment decision making processes.

STP: The short-term investment portfolio of the University.

University: **The University of Western Ontario operating as Western University.**

III. POLICY

~~Section 8 Governance~~1.0 Roles and Responsibilities

The Board has a Fiduciary Duty with respect to investing the Portfolio. To fulfill its Fiduciary Duty, the Board has assigned r~~R~~esponsibilities **for the management of the Portfolio among the** ~~are divided among P&F~~**PF Committee**, the **Investment** Committee, and **the** Administration**.** ~~as noted below. Additional stakeholders involved with the Portfolios include~~**The University may obtain additional expertise from one or more** Managers, ~~a~~ Custodian**s**, Investment Consultant**s** and ~~a~~ Performance Measurement Consultant**s**.

~~8.1~~1.1 ~~Property and Finance~~The PF Committee

~~The Property & Finance Committee is a standing committee of the Board of Governors constituted for the review and approval of policy, and decision-making in respect of the property and financial resources of the University~~. As it relates to ~~the Portfolios and the Investment Committee, P&F:~~**this Policy, the PF Committee shall:**

i) ~~makes recommendations to the Board on investment policies and governance as recommended by the Investment Committee;~~

ii) appoint~~s~~ members of the Investment Committee; ~~and~~

iii) report~~s~~ investment activities to the Board**; and**

iii) regularly review this Policy and recommend any changes to the Board, on the advice of the Investment Committee.

~~8.2~~1.2 The Investment Committee

The Investment Committee shall oversee the effective management of the Portfolio consistent with its fiduciary duty and the approved fund objectives indicated in this Policy.~~The Committee is a sub-committee of P&F. The overall objective of the Committee is to bring expert advice and knowledge to bear on the effective management of the Portfolios consistent with the approved fund objectives.~~ Within this general mandate, the **Investment** Committee **shall**:

i) establish~~es~~ **a Statement of Investment Beliefs based on the considerations within this Policy, which shall be appended as Appendix A to this Policy;** ~~and regularly reviews investment policy, objectives and strategy;~~

ii) manage the risk profile of the Fund and the MTP by recommending for approval each portfolio's asset mix policy to the PF Committee;

iii) regularly review this Policy and its objectives and make recommendations to the PF Committee on any changes to this Policy;

~~ii~~**iv)** appoint~~s~~ Managers and retain~~s~~ **Performance Measurement Consultants** ~~a fund measurement service~~ and other **I**~~i~~nvestment **C**~~c~~onsultants as appropriate; ~~and~~

v) establish strategies, guidance and/or principles for investing to aid Administration;

vi) on recommendation of the Administration, approve investments;

vii~~iii~~) regularly review~~s~~ the Portfolio~~s~~ and the performance of the Managers and ~~takes action as may be~~ **act as the Investment Committee may be** deemed appropriate **in relation thereto;**~~.~~

viii) on recommendation of the Administration, hire or terminate Managers; and

ix) report to the PF Committee as appropriate or at the request of the PF Committee.

~~8.3~~**1.3 The Administration**

i) ensure~~s~~ compliance with legal and University requirements;

ii) rebalance~~s~~ the Portfolio~~s~~ by transferring funds among Managers and asset classes appropriately according to **guidance and principles established**~~policies approved~~ by the **Investment** Committee and report~~s~~ such activity to the **Investment** Committee;

iii) manage~~s~~ University cash flows and any short-term borrowing of the Fund in accordance with the objectives and policies outlined in ~~Sections 6 and 5.10 of this document. Reports to the Committee about the University's cash flows and short-term investing activities on a periodic basis;~~**this Policy;**

iv) report to the Investment Committee about the University's cash flows and short-term investing activities on a periodic basis;

~~iv)~~**v)** execute~~s~~ investment**s approved** ~~decisions made~~ by the **Investment** Committee;

~~v)~~**vi)** report~~s~~ to the **Investment** Committee on the performance of ~~individual m~~**M**anagers and of the Portfolio~~s. Keeps the Committee informed of all other issues and developments relative to the management of the University Portfolio~~

and any issues related thereto;

~~vi)~~**vii)** work~~s~~ closely with and direct~~s~~ the **Investment** Consultant**s**, **Performance Measurement Consultants,** the Custodian**s** and the Managers as appropriate;

~~vii)~~**viii)** report~~s~~ to the **Investment** Committee on **any** other University activities that ~~have an~~ impact ~~on~~ the ~~investment~~ **P**~~p~~ortfolio;

~~viii)~~**ix)** periodically meet~~s~~ with each member of the **Investment** Committee to discuss any concerns~~, additional information requirements and~~**or** ~~-~~suggestions for improvement;

~~ix)~~**x)** maintain~~s~~ an awareness of progressive investment management policies and practices at other Canadian and US universities;

~~x)~~**xi)** report~~s~~ to the **Investment** Committee and to the ~~P&F~~**PF Committee** on the ratio of investments to obligations for the non-endowed portion of the ~~p~~**P**ortfolio; ~~and~~

xii) make~~s~~ recommendations to the **Investment** Committee concerning terminating Managers and hiring new Managers**; and** ~~.~~

~~xi)~~**xiii) make recommendations to the Investment Committee and/or PF Committee, as appropriate, on changes to this Policy.**

~~8.4~~1.4 Managers

The University may hire one or more Managers who shall:

i) manage a specific investment mandate according to a set of investment guidelines **established and approved by the Investment Committee** and maintain compliance to those guidelines;

ii) aim to achieve a performance objective;

iii) report to the University on performance **of the investment** by providing attribution analysis~~,~~**;**

iv) ~~but also~~**report to the University** on changes at the firm in terms of organizational structure, personnel and investment process; and

iv) vote proxies on behalf of the University**, where applicable**. ~~according to proxy voting guidelines.~~

~~8.5~~1.5 Custodian**s**

The University may hire one or more Custodians who shall:

i) holds assets owned directly by the University and provides monthly valuation of those assets;

ii) executes instructions provided by authorized representatives of the Administration; and

iii) coordinates securities lending, if any.

1.6 Investment Consultants

The University may hire one or more Investment Consultants who shall:

i) assists the **Investment** Committee in the development of **strategies, guidance and principles related to investments**governance structures, policies and procedures;

ii) assists the **Investment** Committee in identifying the objectives and risks to be managed and in implementing the appropriate asset mix;

iii) provides research on emerging investment strategies **to the Investment Committee**;

iv) maintains**provide** research on **the** Managers employed by the University**to the Investment Committee**;

v) assists **the Administration** with m**M**anager searches by giving the University access to its database of M**m**anagers, narrowing the universe, providing performance analysis, preparing questionnaires and attending finalist meetings;

vi) provides quarterly opinions on **the performance of** the Fund's and **the** MTP's performance;

vii) informs the **Investment** Committee on successful, seasoned, and state-of-the-art **beneficial** investment management technologies where relevant and appropriate; and

viii) attends **Investment** Committee meetings, at the invitation of the **Chair of the** Investment Committee Chair.

8.71.7 Performance Measurement Consultants

The University may hire one or more Performance Measurement Consultants who shall assist Administration by providing:

i) ~~provides~~ performance measurement services and analytical services through research reports, data and/or database(s) ~~to be delivered by electronic means or hard copy format~~;

ii) ~~provides~~ total fund, individual Manager and asset class return on a monthly basis; and

iii) ~~provides~~ quarterly performance reports that include capital market commentary, market indexes, asset class summary by class and Manager, returns over selective time periods by class and Manager, returns attribution analysis, and comparative analysis measurement for active Managers.

~~1.2~~2.0 General Description of the Portfolio~~s~~

The University maintains various investment portfolios, grouped according to their intended objectives.

The total investment Portfolio is as follows:

- **The Short-Term Portfolio (STP)**
- **The Mid-Term Portfolio (MTP)**
- **The Operating Portfolio**
- **The Endowment Portfolio**

~~The Fund consists of:~~

~~i) endowed assets that are invested to generate income sufficient to meet the payout rate established by the Board of Governors (the "**Board**") under the Investment Payout Policy ("**Policy 2.11**") to fund endowed chairs and scholarships, among others (the "**Endowed Portfolio**"); and~~

~~ii) excess cash related to non-endowed funds (the "**Operating Portfolio**").~~

The ~~two components are~~ **Operating Portfolio and Endowment Portfolio shall be** invested according to the same investment policy as described in Section 5. **The combined Operating Portfolio and Endowment Portfolio is referred to as the Fund.** The ownership share of the Fund between the Endowed Portfolio and the Operating Portfolio ~~is~~ **shall be** tracked on a monthly basis and investment returns are **to be** allocated based on the pro-rata share each month.

~~The University also holds two additional portfolios:~~

- ~~the STP generally invested in a bank account, a money market fund and a high-interest savings account; and~~
- ~~the MTP invested mainly in liquid stocks and fixed income securities.~~

The STP and MTP provide the University with the liquidity necessary for the allocation

of spending from endowments. As a result, the University is able to manage the Fund with a very long-term focus, with little need for liquidity. ~~In fact, t~~**T**he horizon of the Fund is perpetuity, and it is invested to withstand volatility in returns from quarter~~-~~to~~-~~quarter and year~~-~~to~~-~~year.

~~Section 3~~3.0 Investment Objectives and Policies – ~~Short-Term Portfolio~~STP

3.1 ~~Portfolio~~ STP Objectives

The objectives of the STP are:

i) to preserve capital and minimize risk in order to meet the University's liquidity needs; **and**

ii) to obtain a reasonable level of return commensurate with risk, terms and liquidity.

3.2 Risk Tolerance

Given the ~~portfolio~~ **STP** objectives ~~listed above~~, risk tolerance is low and therefore investments should be limited to bank accounts, high interest savings accounts and high-quality money market securities.

3.3 Liquidity

Liquidity needs are high given that the STP is used to fund day-to-day operations. Only investments that can settle into cash within a short period of time should be used.

~~Section 4~~4.0 Investment Objectives and Policies – ~~Mid-Term Portfolio~~MTP

4.1 ~~Portfolio~~ MTP Objectives

The objectives of the MTP are:

i) to outperform the FTSE 91-Day T-Bill Index by 300 basis points over a 3~~-~~to~~-~~5 year period**, gross of fees**; **and**

ii) to generate investment returns that can be used to make additional allocations in relation to University priorities and needs.

4.2 Risk Tolerance

The risk tolerance is moderate, and the standard deviation of returns should normally fall between 3% and 7%. Preservation of capital over the investment horizon (3 to 5

years) is preferred. Liquidity and currency risks are to be minimized. As the MTP will be the next source of liquidity should short-term assets be exhausted, the risk tolerance will fluctuate over time based on the position of the Operating Portfolio and its reserve ratio and should be reassessed periodically.

4.3 Asset Mix Policy

The asset mix policy of the MTP will be reviewed on an annual basis. Given the portfolio's objectives, risk tolerance and constraints, assets will be invested mostly in liquid equities and fixed income. The current target asset mix policy is 30% ~~E~~**e**quities and 70% ~~F~~**f**ixed ~~I~~**i**ncome.

The MTP's objectives can be achieved by gaining exposure to the following risk factors:

- Equity
- Interest rate (duration)
- Credit

The following types of mandates may be used in the MTP:

Equities

- Canadian equities
- Global equities

Fixed Income

- Short-term bonds
- Core fixed income
- Corporate bonds
- High-yield bonds
- Commercial mortgages

The allocation to each individual mandate is limited to 30% of the MTP market value. This constraint is in addition to the ~~asset mix~~**rebalancing** policy in Section 4.4.

The table below shows the risk factors that each strategic asset class is exposed to:

Risk Factor Exposure

Strategic Asset Class	Risk Factors
Equities (Growth)	

Canadian Equities Global Equities	Equity Size (Small cap) Value Growth Momentum Quality
Fixed Income (Interest Sensitive)	
Core Fixed Income Corporate Bonds Commercial Mortgages	Interest rate Credit Deflation Inflation **Liquidity**

4.4 Rebalancing Policy

Administration is permitted to deviate from the approved asset mix policy as follows:

Strategic Asset Class	Target Mix	Allowable Drift	Range
Equities			
Canadian Equities	10%	-5%, +5%	5% to 15%
Global Equities	20%	-5%, +5%	15% to 25%
Total Equities	30%	-5%, +5%	25% to 35%
Fixed Income	70%	-5%, +5%	65% to 75%

Changes to the asset mix policy beyond these ranges ~~would~~ require the approval of ~~P&F~~**the PF Committee** on the recommendation of the **Investment** Committee.

4.5 Exposure to Non-Canadian Currencies

Given the fixed income focus of the MTP, currency exposure should be limited as it would increase the risk of the portfolio. Most non-Canadian currency exposure should be hedged on fixed income mandates. Managers are allowed to retain up to 10% of non-Canadian currency exposure for tactical purposes. The global equity component of the portfolio may remain unhedged, given the relatively small exposure and the diversification benefits it would bring.

4.6 Measurement of Investment Returns

Investment returns are measured quarterly and assessed in relation to the following criteria:

- The overall objective is to achieve a gross rate of return in excess of the FTSE

91-Day T-Bills + 300 basis points over a 3-~~-~~to-~~-~~5 year period, with a level of risk, as measured by the standard deviation of returns, ranging from 3% to 7%.

- The Managers are expected to achieve the performance objectives included in their mandates over the relevant time horizon.

4.7 Liquidity

Liquidity requirements for the MTP are moderate. In a normal environment, assets will not be taken out of the MTP to meet obligations. A significant portion of the portfolio should be convertible into cash in a relatively short timeframe (30 days or less), given the nature of the obligations that the MTP is ~~backing~~**supporting**.

~~Section 5~~5.0 Investment Objectives and Policies – ~~Operating & Endowment~~The Fund

5.1 Fund Objectives

The objectives of the Fund are:

i) to maintain the purchasing power of the Fund after payout over the long-term. The required return, at a minimum, should meet (after fees) **Policy 2.11**~~.~~**;**

ii) to earn the return produced by the asset mix policy (Section 5.3), based on the return of the market indices, plus a premium to reflect active portfolio management. The premium should at least cover the cost of active portfolio management; and

iii) to meet the following payout requirements:

For the Endowed Portfolio

a) Pay the total return generated by the endowment portfolio's share of the Fund to the capital of the endowment funds.

For the Operating Portfolio

~~b)~~**a)** Pay the 30-day Treasury bill rate less an established administrative fee to a portion of the non-endowed funds, as outlined in **Policy 2.11**. Such portion of the Operating Portfolio includes the ~~C~~**c**apital ~~F~~**f**und, ~~A~~**a**ncillaries, and ~~T~~**t**rust ~~F~~**f**unds but do not include ~~R~~**r**esearch ~~F~~**f**unds.

~~c)~~**b)** Pay the amounts required for the ~~S~~**s**upplemental ~~P~~**p**ension ~~P~~**p**lan and for ~~T~~**t**erm ~~E~~**e**ndowments as outlined in **Policy 2.11**.

~~d)~~**c)** Pay an allocation to the University, subject to availability and restricted to one-time allocations. Allocations will not be made to fund general operations of the University.

~~e)~~**d)** Fund the initial and future allocations to the ~~M~~**m**ajor ~~S~~**s**trategic ~~O~~**o**pportunities ~~F~~**f**und ~~("MSOF")~~, subject to the Major Strategic Opportunities Fund (Policy 2.31).

~~f)~~**e)** When investment returns exceed the above obligations and are in excess of the reserve requirements (as defined later in this document), the Board may make additional allocations in relation to University priorities and needs.

5.2 Risk Tolerance

The required real rate of return over time can only be achieved by accepting a level of volatility in returns from quarter to quarter and from year to year. The current expected asset mix policy return on the Fund is ~~6.5~~**7.2**% and the expected standard deviation of returns is ~~10.8~~**11**%[1]. As a result, ~~we expect~~**the expectation is** that annual policy returns will fall within a range of minus ~~4.3~~**3.8**% to plus ~~17.3~~**18.2**% about 67% of the time and that annual returns will fall outside of this range about 33% of the time.

5.3 Asset Mix Policy

The **Investment** Committee **shall** review~~s~~ the asset mix policy on an annual basis to maintain, over the long-term, the best balance between investment returns within an acceptable level of risk. Assets will be allocated across four strategic asset classes, based on the role of the underlying assets in the Fund. The four strategic classes are: ~~E~~**e**quities, ~~F~~**f**ixed ~~I~~**i**ncome, ~~R~~**r**eal ~~A~~**a**ssets, and ~~D~~**d**iversifiers ~~(see Section 6.1 for a list of eligible investments for each strategic asset class)~~**as described further in Section 6 of this Policy**. Each strategic asset class is exposed to particular risk factors:

- Equities are expected to generate most of the growth in the Fund**;**
- Fixed Income assets are expected to protect the Fund in times of stress and provide some liquidity**;**
- Real ~~A~~**a**ssets are expected to protect the Fund from high or unexpected inflation**; and**
- Diversifiers provide additional diversification to the Fund due to their low correlation with the other asset classes**.**

[1] Source: Mercer as of December 31, ~~2021~~**2024**

~~The University is committed to invest 10% of the Fund in sustainable investment strategies by 2025, including but not limited to strategies trying to find solutions to the world environmental and climate change issues. Allocations to sustainable opportunities can be made through an allocation within Equities, Fixed Income or Real Assets.~~

The current target asset mix policy is ~~60~~**57.5**% in ~~E~~**e**quities, ~~15~~**17.5**% in ~~F~~**f**ixed ~~I~~**i**ncome, 20% in ~~R~~**r**eal ~~A~~**a**ssets and 5% in ~~D~~**d**iversifiers. The asset mix policy is based on an optimization model that was externally developed and vetted by the **Investment** Committee. This model projects investment return and risk based on historic relationships among the asset classes. To achieve the return objective, the Fund has a substantial weight in growth assets.

The table below shows the risk factors that each strategic asset class is exposed to:

Risk Factor Exposure

Strategic Asset Class	Risk Factors
Equities (Growth)	
Canadian Equities U.S. Equities EAFE Equities Global Equities **Emerging Markets Equities** Long/short Equities Private Equity	Equity Size (Small cap) Liquidity Value Growth Momentum Quality Foreign exchange
Fixed Income (Interest Sensitive)	
Core Fixed Income **Multi-Asset Credit** Commercial Mortgages Private ~~Debt~~**Credit**	Interest rate Credit Deflation Inflation Liquidity Foreign exchange
Real Assets (Inflation Sensitive)	
Real Estate Infrastructure Commodities	Inflation Liquidity Foreign exchange

Diversifiers	
Absolute Return Strategies Market Neutral Strategies Cash	High yield credit spread Liquidity

5.4 Rebalancing Policy

The Investment Committee is permitted to deviate from the approved asset mix policy as follows:

Fund Rebalancing Policy

Strategic Asset Class	Target Mix	Allowable Drift	Range[2]
Equities			
~~*Canadian Equities*~~	~~12.5%~~	~~+/- 5%~~	~~7.5% to 17.5%~~
~~*U.S. Equities*~~	~~7.5%~~	~~+/- 5%~~	~~2.5% to 12.5%~~
~~*EAFE Equities*~~	~~7.5%~~	~~+/- 5%~~	~~2.5% to 12.5%~~
~~*Global Equities*~~	~~20.0%~~	~~+/- 5%~~	~~15.0% to 25.0%~~
Domestic Equities[3]	**7.5%**	**+/- 7.5%**	**0% to 15%**
Foreign Equities[4]	**37.5%**	**+/- 7.5%**	**30% to 45%**
Private Equity	12.5%	+/- 5%	7.5% to 17.5%
Total Equities	~~60~~**57.5**%	+/- 7.5%	~~52.5~~**50**% to ~~67.5~~**65**%
Fixed Income			
Core Fixed Income	5%	+/- 5%	0% to 10%
Commercial Mortgages	~~5~~**0**%	**-0%, +10%**~~+/- 5%~~	0% to 10%
Private ~~*Debt*~~***Credit***	**7.5**~~5~~%	**7.5%, +5%**~~+/- 5%~~	0% to ~~10~~**12**%
Multi-Asset Credit	**5%**	**+/- 5%**	**0% to 10%**
Total Fixed Income	~~15~~**17.5**%	+/- 7.5%	~~7.5~~**10**% to ~~22.5~~**25**%
Real Assets			
Real Estate	10%	+/- 5%	5% to 15%
Infrastructure	10%	+/- 5%	5% to 15%
Total Real Assets	20%	+/- 7.5	12.5% to 27.5%
Diversifiers			
Cash	0%	-0%, +~~10~~**3**%	0% to ~~10~~**3**%
Short-Term Fixed Income	**0%**	**-0%, +7%**	**0% to 7%**
Absolute Return Strategies, Market Neutral Strategies	5%	+/- 5%	0% to 10%
Total Diversifiers	5%	-5%, +7.5%	0% to 12.5%

The Administration may, at all times, rebalance the Fund toward~~s~~ the target weights without prior approval of the Investment Committee~~, provided that the rebalancing is less than 2.5% of the Strategic Asset Class.~~**.**

[2] The Fund may fall outside of these ranges as it transitions towards the target mix established in ~~2022~~**2025**. Temporary deviations are allowed.

[3] Domestic equities is Canadian equities.

[4] Foreign equities include U.S., EAFE, Global and Emerging Markets equities.

Changes to the asset mix policy beyond these ranges would require the approval of **the** ~~P&F~~**PF Committee** on the recommendation of the **Investment** Committee.

5.~~6~~5 Endowed Portfolio Payout Policy

The Board **has** establishe~~s~~**d** ~~policy for University investment payout~~**Investment Payout Policy** (~~see~~ ~~**Policy**~~**MAPP 2.11**). Such polic**y**~~ies are~~ **is** designed to ensure that current and future generations share equally in the benefits of the ~~endowments.~~**Endowment Portfolio.**

5.6~~7~~ Exposure to Non-Canadian Currencies

The Canadian equity market represents approximately 4% of total world equity market in terms of total capitalization. Non-Canadian investments are included in the Fund in order to add diversification and reduce volatility of returns. Non-Canadian investments need not necessarily incur gains or losses from increases or decreases in the value of the Canadian dollar relative to currencies in other countries. This can be accomplished through currency hedging techniques employed by a Manager.

Although an analysis of the University's spending shows that less than 5% of all expenditures are in non-Canadian funds, the value of the Canadian dollar affects the price of imported materials that are resold in Canada. Accordingly, it is appropriate to have some exposure to investments within currencies that are non-Canadian to provide a hedge against a major fall in the value of the Canadian dollar. Given the rapidly evolving nature of currency markets, it is preferable to hire a Manager dedicated to the management of the Fund's currency exposure.

~~The policy range of exposure to non-Canadian currencies has been established to be within the range of 0% to 80% of the total Fund, after currency hedging.~~
Currency hedging strategies should be implemented on a case-by-case basis, according to the Statement of Investment Committee Beliefs.

5.7~~8~~ Measurement of Investment Returns

Investment returns are **to be** measured quarterly and assessed in relation to the following criteria:

- The overall objective is to achieve the required rate of return over the long-term on the Fund, with an acceptable level of risk. The real rate of return is monitored on a 5~~-~~-year annualized basis.

- The Managers are expected to achieve the performance objectives included in their mandates over the relevant time horizon.

5.8~~9~~ Liquidity

The **Investment** Committee ~~will ensure that~~**shall take reasonable steps to ensure that** the Fund has sufficient liquidity to meet its future obligations. To properly assess the liquidity needs of the Fund, Administration will provide the **Investment** Committee with regular updates on risk controls regarding liquidity, such as:

i) the availability of short-term and mid-term assets;
ii) the ratio of assets to obligations for the Operating Portfolio;
iii) upcoming capital calls and distributions;
iv) potential working capital needs and releases on rolling currency hedges in the currency hedging program;
v) any upcoming contributions to the University operating and capital budgets;
vi) internal loans; and
vii) borrowing within the Fund.

5.9~~10~~ Borrowing

~~In order t~~**T**o meet short-term liquidity needs arising from activities such as rebalancing, capital calls or currency hedging, the Fund may ~~consider~~ us**e**~~ing~~ line(s) of credit. Draws on the credit facilities ~~will~~ **shall** have a combined limit of $100 million and ~~should be~~**generally are to be** repaid within 90 days. A repayment plan from within the Fund shall be ~~identified~~ **developed** by Administration prior to any draw(s) on the credit facilities. Short-term borrowing **hereunder** is restricted for use within the Fund and is not available for ~~general University operations~~**other purposes**. Short-term borrowing costs ~~will~~ **shall** be netted against the performance of the Fund.

~~Section 6~~6.0 ~~General Investment Guidelines and Operational Matters~~Permitted Investments

The University shall maintain a list of permitted investments, categorized by strategic~~y~~ asset classes, as part of the Procedures to this Policy.

~~6.1 Eligible Investments~~

~~The following represents descriptions of eligible investments making up the strategic asset classes. The Portfolios may use these eligible investments except where specifically restricted by the individual portfolio guidelines.~~

~~Equities~~

~~Equity investments include common stock and equivalent securities, including, but not limited to, equity warrants, rights, call options, installment receipts, subscription receipts, convertible debentures, limited partnerships, private placements, REITs, preferred shares, stapled units[5], stock index futures, options on futures and other derivative securities to manage risk, such as currency futures. The common stock or equivalent securities may be traded on Canadian, U.S., international or emerging markets stock exchanges, but can also be privately held. Specific equity mandates may be classified as Canadian equity, U.S. equity, international equity, global equity or emerging markets equity. Equity investments may also involve short selling. Private equity investments may include leverage that is appropriate for that asset class.~~

~~Fixed Income~~

~~Fixed income investments may include Canadian Government and Guaranteed Affiliates bonds, real return bonds, provincial and municipal bonds, corporates/credit sensitive securities (includes the debt of corporations, supranational agencies and municipal entities whether domiciled inside or outside Canada, in developed or developing countries), sovereign bonds from developed or developing countries, high yield bonds, mortgages, preferred stock, commercial mortgage-backed securities, commercial mortgages, mortgage- backed securities, asset-backed securities, private placements, convertible securities, cash and equivalent and fixed income futures and options. Fixed income investments may be tradeable or privately held. Private debt investments may include leverage that is appropriate for that asset class.~~

~~Real Assets~~

~~Real Asset investments include real estate, infrastructure and commodities.~~

~~Real estate investments are ownership investments in land and buildings that are used for office, industrial, retail or residential purposes. Returns from real estate are expected to provide an offset for inflation over time.~~

~~[5] A stapled unit is a security that is contractually bound to one or more other securities to form a single salable unit.~~

~~Infrastructure investments are investments in assets that provide essential services with sustainable demand and predicable cash flows[6]. Returns from infrastructure are expected to provide an offset for inflation over time.~~

~~Real estate and infrastructure investments may include leverage that is appropriate for those asset classes.~~

~~Commodities may include direct investments, or investments through derivatives such as futures, in basic goods in the agriculture, livestock, energy and mining sectors.~~

~~Diversifiers~~

~~Diversifiers include cash and cash equivalents, absolute return strategies and market neutral strategies.~~

~~Cash and cash equivalents may include the following securities:~~

- ~~Government of Canada treasury bills, notes, debentures and any obligations unconditionally guaranteed by the Federal Government of Canada;~~
- ~~Treasury bills, notes, debentures and any obligations unconditionally guaranteed by a provincial government of Canada;~~
- ~~Municipal notes, debentures and any obligations unconditionally guaranteed by a municipal government of Canada;~~
- ~~Highly rated foreign government treasury bills, notes, debentures and any obligations unconditionally guaranteed by a foreign government;~~
- ~~Highly rated Banker's Acceptances, Certificates of Deposits and other instruments issued by a Canadian or foreign bank;~~
- ~~Highly rated commercial paper and corporate bonds of Canadian and foreign corporations;~~
- ~~Repurchase agreements backed by a minimum of industry standard collateral;~~
- ~~Floating-rate notes issued by Canadian or foreign issuers; and~~
- ~~High interest savings accounts.~~

~~Absolute return strategies try to achieve positive returns irrespective of the market environment and exhibit low correlations with bonds and stock portfolios. These strategies may include, but are not limited to life settlements, litigation finance, reinsurance and insurance-linked securities.~~

[6] ~~Infrastructure investment projects may include renewable energy, water, utilities, toll roads, bridges, tunnels, communications and airports.~~

~~Market neutral strategies are structured in such a way that they are not exposed significantly to market fluctuations.~~

~~Absolute return and market neutral strategies may include public and private securities as well as leverage that is appropriate for these types of assets.~~

~~6.2~~7.0 Manager Structure

The **Investment** Committee ~~manages the risk profile of the Fund and the MTP by recommending for approval each portfolio's Asset Mix Policy to P&F and then, ultimately, to the Board. The Committee~~ **may** hire~~s~~ Managers with specific asset class investment mandates as opposed to balanced investment mandates ~~and the Committee is thus able~~ to manage the actual asset mix of the Fund and the MTP.

The **Investment** Committee may hire either active or passive Managers. In general, passive management is preferred in markets where Managers have not been able to outperform the market indices~~, such as the current case in Canadian fixed income securities~~. Active Managers are required to earn a prescribed amount over the appropriate index return to cover their fees and to compensate for the greater risk and fee costs of active management.

The Investment Committee may hire Managers where the mandate allows leverage and short selling. Management of publicly traded equities may involve the use of leverage and short selling at a level with which the **Investment** Committee **has** stated at the outset of the Manager's mandate. ~~The Committee may hire Managers where the mandate allows leverage and short selling[7].~~

There is a preference for multiple manager styles for the ~~total fund~~**Fund**. Within equities, a diversified exposure to various factors, such as value, growth, size, momentum and quality is preferred. Within bonds, styles can include interest rate anticipation, sector selection, security selection, yield curve positioning and currency management or passive (index returns).

The University's tax-exempt status makes interest, dividends, capital gains and foreign exchange gains equally ~~desirable~~**preferable**.

~~5.5~~8.0 Target Ratios for the **Non-Endowed Fund** (Operating Portfolio**, STP, MTP**)

The Administration **shall** provide~~s~~ quarterly reports to ~~P&F~~**the PF Committee**, which **reports** ~~monitor~~ the reserve levels for the ~~Operating Portfolio~~**non-endowed funds** by reporting the ratio of the market value of investments to the obligations of the ~~Operating Portfolio~~ **non-endowed funds** at the end of each fiscal quarter over time. The Board's policy requires the ratio of investments to obligations to maintain a target level of at least 1.08, based on a 12~~-~~ quarter moving average. It is

~~[7] When a security is sold short, the security is borrowed from a broker and sold with the intention of making a profit by buying the security back at a lower value.~~

recognized that due to volatility in investment returns this ratio may fall below 1.00 at the end of a given quarter. Any such shortfall will be shown in the annual financial statements but will not be used in calculating the balanced operating budget required by the Board.

The investment earnings objective is expected to exceed the payout requirements over time for the ~~Operating Portfolio~~**non-endowed funds**. ~~Indeed, A~~**A**~~a~~ fundamental premise is that investment returns in excess of the payout requirements will be generated to meet other **one-time strategic** ~~important~~ University needs.

Reserves, being the cumulative difference between investment returns and obligations**,** are maintained for the ~~Operating Portfolio~~**non-endowed funds** to accommodate the short-term variability of investment returns and ~~thus~~ **to** reduce, to an acceptable level, the risk associated with meeting the payout requirements discussed in Section 5.1 (b) and (c) ~~above~~.

The reserve level is equal to the total market value of the ~~Operating Portfolio portion of the~~ **non-endowed** ~~F~~**f**und less the obligations owing to the ~~Operating Portfolio~~**non-endowed funds**. It is recognized that there is potential for the reserve level for non-endowed funds to be in deficit. ~~Nevertheless, t~~**T**he **Investment** Committee is expected to take a long-term view of the management of the Fund and to maintain an asset mix, which is expected to earn the required rate of return over the long ~~run~~ **term.**

~~6.3~~9.0 Cash Flow Management

The objectives of the University's cash flow management process are as follows:

i) to maximize the funds that are available for external management in the Fund, while maintaining sufficient short-term and mid-term investments outside of the Fund to meet the University's working capital requirements;

ii) to generally maintain a positive cash balance throughout each year in order to meet the University's liquidity needs, investing temporary excess cash either in the STP or MTP;

iii) to only borrow funds for short periods of time to support operating purposes of the Fund. A line of credit is maintained for the Fund's operating needs; and

iv) to ensure, as much as reasonably possible, that the funds allocated to Managers are not subject to short-term cyclical variations as a result of the University's cash flow needs.

~~6.4 Conflict of Interest~~

~~If a member of the Committee or any agent of or advisor to the Committee has any material pecuniary interest, direct or indirect, in any matter in which the Portfolios are concerned and becomes aware of such a conflict, that person shall, without delay, disclose this interest in writing and shall not take part in any debate or vote on such a matter. It is noted that agents and advisors are permitted to present items to the Committee, and it is understood that such agents and advisors may benefit in the event that the Committee adopts the items.~~

~~The Committee shall include in the mandate of each Manager the requirement to comply with the Code of Ethics and Standards of Professional Conduct adopted by the CFA Institute.~~

~~Every disclosure of interest under this section shall be recorded in the minutes of the Committee meeting. The failure of a person to comply with the procedures described in this section shall not of itself invalidate any decision, contract or other matter.~~

~~If a conflict of interest is discovered or disclosed after the Committee has made a decision, the Committee will reconsider the decision in light of the new information.~~

~~6.5 Proxy Voting~~

~~The exercise of voting rights acquired through any investment is delegated to the Managers with the instruction to vote in favour of any proposal which, in their opinion, will accrue and enhance the investment value of the relevant security, and against any proposals which will unduly increase the risk level or reduce the investment value of the relevant security to the detriment of the Fund or the MTP. However, when it would be in the University's best interest to do so, the University reserves the right to exercise its voting rights.~~

~~If the Manager firm, or any employee or associate of the Manager firm, has any direct or indirect pecuniary interest in any matter on which the Fund or the MTP has a right to vote, it must be brought to the attention of the Committee, which has discretion to:~~

~~i) instruct the Manager to exercise the voting right in line with the principles described above, on the grounds that the relevant pecuniary interest is not material; or~~

~~ii) instruct the Manager how to cast the Fund's or MTP's vote, having considered the principles described above; or~~

~~iii) authorize the Fund's and MTP's Custodian to exercise the voting right in line with the principles described above.~~

~~6.6~~10.0 Securities Lending

The Portfolio~~s~~ may engage in securities lending activities to generate incremental income, subject to approval ~~from the Committee, P&F~~**of the PF Committee on the recommendation of the Investment Committee** and compliance with ~~appropriate~~ **applicable** laws and regulations.

Such loans must be secured by Canadian government bonds, treasury bills, provincial bonds of any highly rated Canadian province and/or letters of credit,

discount notes, and banker's acceptances of major Canadian chartered banks. The amount of collateral taken for securities lending should reflect best practices in local markets and marked to market on a daily basis.

The terms and conditions of any securities lending program, including the maximum exposure in aggregate and by counterparty, will be set out in a contract with the Custodian. The Custodian shall, at all times, ensure that the Administration has a current list of those institutions that are approved to borrow the Portfolios' investments. If the Portfolio's assets are invested in a pooled fund, security lending will be governed by the terms and conditions set out in the pooled fund contract.

~~6.7~~11.0 Derivatives Usage

Derivatives may be used by the University or the Managers managing the Portfolio~~s~~ for hedging, risk management and portfolio rebalancing purposes**.** ~~, but not for~~ ~~l~~**L**everaging the Portfolio~~s~~ **is prohibited**. Derivative products include options, futures, forwards and swaps.

~~6.8~~12.0 Valuation of Infrequently Traded Instruments

The valuation of infrequently traded investments shall be determined by the trustee or Custodian of the underlying fund. In the case of private investments, including but not limited to real estate, infrastructure, private equity and commercial mortgages, the valuation shall be based on independent opinions of qualified appraisers as required or should follow the best practices used for a particular asset class.

13.0 Responsible Investing

The Investment Committee will be guided by the Responsible Investing Policy (MAPP 2.32) which shall operate alongside this Policy.

14.0 Conflicts of Interest

Conflicts of interest shall be addressed in accordance with the Procedures to this Policy.

15.0 Review

This Policy will be reviewed at least every five years.

~~Section 2 Statement of Investment Committee Beliefs~~

Appendix A: Statement of Investment Beliefs

The Investment Committee ~~(the "Committee")~~ is guided by various investment beliefs, including:

~~•~~**1.** A governance framework is essential to achieve success in managing investments and consists of:

i) a diverse, independent and experienced **Investment** Committee to mentor, monitor and counsel ~~University~~ **the** Administration;

ii) written investment objectives, policies and governance guidelines to facilitate efficient operations;

iii) acknowledgment and delegation of responsibilities amongst four levels of fiduciaries:

- ~~Board of Governors ("Board")~~**The Board** – approves policies and is ultimately responsible for results attained;
- ~~Property and Finance Committee ("P&F")~~ **The PF Committee – reviews and** recommends policies to the Board;
- **Investment** Committee – designs policies and oversees implementation thereon; and
- Administration ~~("Administration")~~ – implements policy directly and through contracted agents.

iv) establishment of risk management policies, commensurate with the ~~Portfolios'~~ **Portfolio's** circumstance**s**, which attempt to address the greatest investment risks within **each part of** the Portfolio~~s~~. However, it must be recognized that in order to attain the stated objectives, some risk is essential within **parts of** the Portfolio~~s~~.

v) Financial risk and return are the foundation of all investment decisions. The Portfolio must be free from influences or agendas that conflict with the Fiduciary Duty of the Investment Committee.

2.~~•~~ A broadly diversified ~~p~~**P**ortfolio, which includes ~~(~~among other vehicles**,** as appropriate**:**~~)~~ cash, bonds, equities and less liquid non-traditional investments such as private equity, private ~~debt~~**credit**, real assets and absolute return strategies are the best way to achieve required nominal and real returns and is a prudent and cost-effective method of reducing risk.

3. ~~•~~ Cash is generally the asset class with the lowest expected long-term returns and

should be minimized, except for the STP.

4. ~~•~~ Bonds provide a steady income stream and often experience lower volatility when equity performance is volatile.

5. ~~•~~ Equities provide dividend income and/or potential capital growth and are expected to outperform bonds by a risk and volatility premium.

6. ~~•~~ Equity premiums are dynamic and unpredictable; hence, diversification by market, investment manager and style is preferred.

~~•~~ **7.** Non-liquid and non-traditional investments, particularly in private equity, private ~~debt~~**credit**, real estate and infrastructure, provide income and potential capital growth, but generally require more specialized knowledge than public equities and have higher management fees.

~~•~~ **8.** Active portfolio managers are expected to add value above their respective benchmark after ~~taking into account~~**accounting for** related fees, particularly in less efficient markets such as Canadian, non-~~–~~North American equities and non-traditional investments, including private markets. Active portfolio management is defined as any strategy where a manager uses proprietary knowledge to outperform a benchmark, as opposed to only replicating the benchmark return.

~~•~~ **9.** Portfolio return objectives and pursuits thereon must be evaluated on a net-of-fees basis.

10. ~~•~~ Portfolio rebalancing according to asset range guidelines is a procedure that maintains ~~equity/bond~~ **asset mix** exposures at risk policy levels.

11. ~~•~~ Due to the size of the Portfolio~~s~~, it is more economical to use ~~external investment m~~**M**anagers ~~(“~~**Managers**~~”)~~. Managers should preferably be researched by ~~the~~ **I**nvestment ~~consulting community~~ **Consultants** in order to be considered for managing a portion of the Portfolio~~s~~.

12. ~~•~~ The **Investment** Committee should remain mindful of the size of the Portfolio**’s** ~~s~~’ holdings with a particular Manager in relation to the size of the Manager’s assets under management.

13. ~~•~~ Liquidity needs will vary between the Fund, STP and the MTP. The Fund has a long duration with low liquidity needs and, as a result, can hold some of its assets in illiquid investments (e.g., non-traditional investments, including~~:~~ real estate, private equity, private ~~debt~~**credit**, infrastructure and hedge funds) with an objective to achieve additional diversification and an additional liquidity risk premium. The STP and the MTP have high and moderate liquidity needs, respectively, and as such, investments in illiquid asset should be minimized.

14. ~~•~~ Attempting to achieve investment return advantages through market timing practices, such as frequent asset allocation changes, poses unacceptable risks to

the Fund and the MTP. It is extremely difficult to repeatedly time the market through ongoing changes to the ~~equity/bond~~**asset** mix and in individual elements of each **part of the** ~~p~~**P**ortfolio. The **Investment** Committee should be mindful of market cycles and while not attempting to engage in market timing practices, should consider modest ~~p~~**P**ortfolio ~~rebalancing~~ **adjustments** with market cycles in mind.

15. ~~•~~ While acknowledging that most University operating costs and obligations are denominated in Canadian dollars, the **Investment** Committee recognizes that foreign currency exposure can potentially mitigate or exacerbate risk depending on the currency pairings and underlying asset classes. Foreign currency should be hedged when it is expected that it will exacerbate risk or where the volatility associated with currency movements will meaningfully alter the overall risk profile of the investment. The cost of hedging should also be considered when implementing currency hedging programs.

16. ~~• A Responsible Investing ("**RI**") approach and consideration of Environmental, Social and Governance ("**ESG**")~~**ESG** issues **as part of risk management considerations** can enhance long-term performance and is aligned with ~~our~~ **the University's** objective of meeting the needs of current and future generations.

~~•~~**17.** Active stewardship is important for long-term value creation and for promoting best practices with **the University's**~~our~~ Managers.

~~•~~**18.** The risks posed by climate change are relevant and material to the Portfolio~~s~~, and ~~we~~ **the Investment Committee** must manage and mitigate both physical and transition climate risks in order to achieve ~~our~~ **the University's investment** objectives.

~~•~~**19.** An understanding of sustainability issues may lead to new investment opportunities that contribute to ~~our Portfolio~~**the University's investment** objectives.

~~•~~**20.** RI is a journey that requires continuous learning, innovation, and a dynamic and adaptive approach. Being transparent with the University community and regularly reporting on ~~our~~ **the University's** RI progress is fundamental to ~~our~~ **the University's** long-term **RI** journey. ~~Western's RI Policy is covered in Section 7.~~

21. ~~•~~ As described in Section ~~6.4~~**E of the Procedures on Conflict of Interest**, members of the **Investment** Committee will advise the **Chair of the Investment** Committee ~~Chair~~ of any conflicts of interest that arise.

22. ~~•~~ These investment beliefs ~~should~~ **will** be reviewed on an annual basis**, with any proposed changes recommended to the PF Committee. The PF Committee shall review such proposed changes and a recommendation to the Board for approval**.~~.~~

Section 7 Responsible Investing

7.1 Introduction and Definition

The Committee recognizes that RI is a rapidly evolving approach to investing that understands sustainability as a fundamental concept in wisely allocating financial capital for the benefit of today and future generations. The Committee has a fiduciary obligation to invest funds for the benefit of the University in the interest of endowment funds/donors and RI is in keeping with that obligation.

The Committee defines RI as an approach which integrates ESG considerations into investment decisions. It is also recognizes that RI approaches and ESG issues will vary in the degree of relevance and materiality by asset class, strategy, and sector, but ultimately will provide a broader lens to understanding emerging and long-term systemic issues.

As such, the Committee has incorporated the following components into our RI framework:

a) it will involve being pro-active by allocating capital to solutions-based investments that are considered progressive (see Section 7. 3 for a definition of the Sustainable Investment Strategy); and
b) it will use ESG factors as an integral part of the investment process, such as investment decision making, Manager monitoring, and active ownership.

The Committee recognizes the importance of being up to date on RI issues and peer institutional best practice, requiring an adaptive approach and ongoing improvement. It endeavors to look forward and be transparent and flexible in carrying out its long-term investment objectives and in meeting RI commitments. Western's existing RI commitments are outlined in Section 7.2. The Committee will consider new commitments over time, as our RI framework evolves and adapts to changing circumstances.

RI activities will be reported to the University community on an annual basis. The report shall highlight our progress and milestones achieved as well as any challenges experienced in our RI journey.

At all times the RI strategies employed will be in keeping with the mission, aim, values and governance culture of the University.

7.2 Commitments and Targets

a) Capital Allocation Commitment

Western has committed to invest 10% of its Fund (by 2025) in accordance with the Sustainable Investment Strategy, as defined in Section 7.3.

b) Climate Change Commitment

Net-zero emissions target:

The University has committed to net-zero absolute carbon emissions by 2050, or sooner, and this commitment extends to the University's investments. This is a decarbonization strategy that encompasses all investment classes and industries. To monitor the performance of its climate change strategy, the Committee is setting the following targets for the MTP and the Fund:

i) Western aims to reduce the carbon intensity by 45% by 2030, using 2020 as a base year, and;
ii) Western aims to achieve net-zero absolute carbon emissions by 2050, or sooner.

These targets are consistent with those adopted by the University and are aligned with science-based targets to meet the goals of the Paris Agreement. As part of this decarbonization strategy, we will be reviewing all investments and how they align to our goal of net-zero by 2050, or sooner, and will take appropriate action where necessary to achieve those goals.

Carbon measurements include Scope 1 & 2 greenhouse gas ("GHG") emissions. The Committee will consider material Scope 3 GHG emissions once accurate measurement and reporting are available.

The Committee will annually assess carbon measurements and publicly report progress towards the net-zero commitment. It is recognized that the global carbon emission measurement frameworks continue to evolve and standardize. The Committee will review measurement frameworks at least tri-annually to determine if existing measurements continue to be industry best-practice and modify as necessary. For example, while we have committed to a reduction in carbon intensity by 2030, as information on absolute carbon emissions for all asset classes becomes available, we expect to converge to this measurement over time.

7.3 Sustainable Investment Strategy

Western recognizes the role of RI in achieving a forward-looking Fund for the benefit of future generations.

To help steer its Sustainable Investment Strategy, the University is guided by the United Nations Sustainable Development Goals ("SDGs"). These 17 goals have been developed to confront major issues.

Western takes a broad and dynamic approach to sustainable investing; however, a few issues have surfaced as being critical to its stakeholders. These include:

- Access to clean water
- Carbon footprint reduction
- Pollution abatement

Solving those issues presents new opportunities for investors and there is a growing number of businesses providing solutions to these problems which can add to the University's long-term investment returns.

The University is committing to invest a portion of its Fund (10% by 2025) in companies providing solutions along the following themes:

- Clean and renewable energy
- Water treatment solutions
- Waste management solutions

These investments will be funded from the Fund's public equity investments.

By focusing on those investment themes, Western will ensure that its investments will contribute to the following SDGs:

SDG #6: Clean water and sanitation
SDG #7: Affordable and clean energy
SDG #13: Climate action

As the University's understanding of sustainable investment practices, opportunities and stakeholders' preference evolve, additional themes and SDGs may be considered.

The University reserves the right to select the appropriate investment vehicle to implement its strategy, in order to take advantage of all the opportunities available. These may include, in addition to publicly traded equities:

- Fixed income (such as green bonds)
- Natural resources (such as farmland and timber)
- Infrastructure assets
- Private equity

7.4 Monitoring Managers

Given the relatively small size of the Portfolios and the fact that most investments are held in pooled vehicles, it is impractical for the University to directly engage with all individual companies on ESG related issues. Instead, the University will monitor the Managers it hires to manage the Portfolios on how they integrate ESG factors into their portfolio building process.

The cornerstone of the process by which the University monitors its Managers is a required ESG due diligence questionnaire. The ESG questionnaire should cover the following areas:

- Commitment of resources both financial and personnel;
- Transparency of process, including individual company;
- Evolution and advancement of manager expertise in ESG consideration;
- Appropriate manager marketing to the public;
- Policies and practices around the managers' shareholder engagement activities, as part of an overall RI strategy. Managers are to assess companies' management practices in contributing to the long-term health of each investee company.

~~7.5 Engaging Companies~~

~~Company engagement activities, such as dialogue with management, proxy voting or shareholder resolution filing are delegated to the Managers. Managers are expected to report to the University on a regular basis on their engagement work and provide a rationale for their decision to alter a portfolio position based on ESG factors.~~

~~The University may also participate in corporate engagement services, where a collective engagement strategy is desirable and may lead to positive change on specific ESG related topics.~~

~~7.6 Divestment~~

~~The University leaves the decision to exclude a security to the Managers hired to manage a portion of the Portfolios, as they possess the necessary expertise and information to make the decision that is in the best interest of the Portfolios.~~

~~The University believes that, in most situations, engagement is a superior approach to divestment in effecting changes on ESG related issues. Engagement allows investors to retain their voice in terms of voting on shareholder resolutions and maintaining or escalating, as needed, a dialogue with portfolio company management.~~

~~Divestment will be considered where engagement has failed or is not feasible.~~

~~7.7 Advocacy and Collaboration~~

~~The University endeavours to remain up to date on sustainability investing issues and the impact of ESG factors on its investments. In order to maintain its knowledge of the field of RI and to contribute to its development, the University will liaise with other institutional investors and industry associations to discuss key issues.~~

~~7.8 Disclosure~~

~~The University will make available to the University community, upon request, the most recent list of publicly traded investments of the Portfolios, subject to blackout periods imposed by the underlying Managers. Publicly traded investments are defined fixed income securities for which there is a reasonably liquid market and equities of companies listed on a stock exchange. Requests need to comply with the Disclosure of Information on Western Investments (**Policy 2.14**).~~

Western UNIVERSITY · CANADA

Manual of Administrative Policies and Procedures

POLICY 2.26 – Investment

Policy Category:	Financial
Subject:	Investment Policies
Sections:	Purpose; Definitions; Policy
Approving Authority:	Board of Governors
Responsible Officer:	Vice-President (Operations & Finance)
Responsible Office:	Financial Services
Related Procedures:	Procedure for Investment Policy
Related University Policies	Policy 2.32 - Responsible Investing Policy 2.11 - Investment Payout Policy 2.12 – Acquisition of Investment Services Policy 2.31 – Major Strategic Opportunities Fund
Effective Date:	April 30, 2026
Supersedes:	April 28, 2022

I. PURPOSE

This purpose of this Policy is to document the investment policies of the University for the Portfolio.

This Policy sets out the considerations and processes for:

(i) The investment objectives for the Portfolio; and
(ii) The prudent and responsible management of the Portfolio.

II. DEFINITIONS

Administration: The administrative staff of the University responsible for day-to-day management of the Portfolio.

Board: The Board of Governors of the University.

Custodian: A specialized financial institution (typically a major bank) responsible for the holding and safekeeping of an asset of the Portfolio.

Endowed Portfolio: Endowed assets invested to generate income to fund endowed chairs, scholarships, bursaries, research, etc.

ESG: **"**Environmental, social, and governance," and refers to a strategy that evaluates companies based on these non-financial criteria to inform investment decisions. The following definitions are based on the Principles for Responsible Investment.

Environmental issues relate to the quality and functioning of the natural environment and natural systems, identified or assessed in responsible investing processes. These include but are not limited to risks related to greenhouse gas emissions, climate change, natural resources, and waste.

Social issues relate to the rights, well-being, and interests of workers, communities, customers / end-users for corporate entities, and citizens/populations for sovereign entities, identified or assessed in responsible investing processes. These include but are not limited to risks related to human rights, labour rights, child and slave labour, diversity, equity and inclusion, and indigenous rights.

Governance issues relate to the rules followed and actions taken by companies and other investee entities, identified or assessed in responsible investing processes. These include but are not limited to board oversight and structure, independence, company disclosures, shareholder rights, accountability, operational strategies, executive pay and performance evaluation.

Fiduciary Duty: The duty of members of the Board and Investment Committee to act honestly, carefully, in good faith, and in the best interests of the University as a whole. In the investment context, this means that members of the Board and Investment Committee must exercise the care, skill, diligence and judgment that a prudent investor would exercise in making investments, with a long-term view to maximize returns at an acceptable level of risk to support the University's mission.

Fund: The combined Operating Portfolio and Endowment Portfolio of the University.

Investment Committee: A sub-committee of the PF Committee with expertise in investments and investment management.

Investment Consultant: Means an external, third-party professional or firm retained by the Investment Committee and/or Administration to provide objective

advice, research, and recommendations regarding the management of an investment or proposed investment for the Portfolio.

Managers: The external investment managers who invest portions of the Portfolio.

MTP: The mid-term investment portfolio of the University.

Operating Portfolio: The long-term portion of non-endowed funds not included in the MTP and STP.

PF Committee: The Property and Finance Committee of the Board.

Performance Measurement Consultant: A specialized third-party service provider retained to independently calculate, verify, and analyze the returns and risks of one or more investments in the Portfolio.

Policy: Means this MAPP Policy 2.26 – Investment Policy

Portfolio: Collectively, the STP, the MTP and the Fund.

RI: "Responsible investing", is an approach which integrates ESG considerations into investment decision making processes.

STP: The short-term investment portfolio of the University.

University: The University of Western Ontario operating as Western University.

III. POLICY

1.0 Roles and Responsibilities

The Board has a Fiduciary Duty with respect to investing the Portfolio. To fulfill its Fiduciary Duty, the Board has assigned responsibilities for the management of the Portfolio among the PF Committee, the Investment Committee, and the Administration. The University may obtain additional expertise from one or more Managers, Custodians, Investment Consultants and Performance Measurement Consultants.

1.1 The PF Committee

As it relates to this Policy, the PF Committee shall:

i) appoint members of the Investment Committee;

ii) report investment activities to the Board; and

iii) regularly review this Policy and recommend any changes to the Board, on the advice of the Investment Committee.

1.2 The Investment Committee

The Investment Committee shall oversee the effective management of the Portfolio consistent with its fiduciary duty and the approved fund objectives indicated in this Policy. Within this general mandate, the Investment Committee shall:

i) establish a Statement of Investment Beliefs based on the considerations within this Policy, which shall be appended as Appendix A to this Policy;

ii) manage the risk profile of the Fund and the MTP by recommending for approval each portfolio's asset mix policy to the PF Committee;

iii) regularly review this Policy and its objectives and make recommendations to the PF Committee on any changes to this Policy;

iv) appoint Managers and retain Performance Measurement Consultants and other Investment Consultants as appropriate;

v) establish strategies, guidance and/or principles for investing to aid Administration;

vi) on recommendation of the Administration, approve investments;

vii) regularly review the Portfolio and the performance of the Managers and act as the Investment Committee may be deemed appropriate in relation thereto;

viii) on recommendation of the Administration, hire or terminate Managers; and

ix) report to the PF Committee as appropriate or at the request of the PF Committee.

1.3 The Administration

The Administration shall:

i) ensure compliance with legal and University requirements;

ii) rebalance the Portfolio by transferring funds among Managers and asset classes appropriately according to guidance and principles established by the Investment Committee and report such activity to the Investment Committee;

iii) manage University cash flows and any short-term borrowing of the Fund in accordance with the objectives and policies outlined in this Policy;

iv) report to the Investment Committee about the University's cash flows and short-term investing activities on a periodic basis;

v) execute investments approved by the Investment Committee;

vi) report to the Investment Committee on the performance of Managers and of the Portfolio and any issues related thereto;

vii) work closely with and direct the Investment Consultants, Performance Measurement Consultants, the Custodians and the Managers as appropriate;

viii) report to the Investment Committee on any other University activities that impact the Portfolio;

ix) periodically meet with each member of the Investment Committee to discuss any concerns or suggestions for improvement;

x) maintain an awareness of progressive investment management policies and practices at other Canadian and US universities;

xi) report to the Investment Committee and to the PF Committee on the ratio of investments to obligations for the non-endowed portion of the Portfolio;

xii) make recommendations to the Investment Committee concerning terminating Managers and hiring new Managers; and

xiii) make recommendations to the Investment Committee and/or PF Committee, as appropriate, on changes to this Policy.

1.4 Managers

The University may hire one or more Managers who shall:

i) manage a specific investment mandate according to a set of investment guidelines established and approved by the Investment Committee and maintain compliance to those guidelines;

ii) aim to achieve a performance objective;

iii) report to the University on performance of the investment by providing attribution analysis;

iv) report to the University on changes at the firm in terms of organizational structure, personnel and investment process; and

v) vote proxies on behalf of the University, where applicable.

1.5 Custodians

The University may hire one or more Custodians who shall:

i) hold assets owned directly by the University and provide monthly valuation of those assets;

ii) execute instructions provided by Administration; and

iii) coordinate securities lending, if any.

1.6 Investment Consultants

The University may hire one or more Investment Consultants who shall:

i) assist the Investment Committee in the development of strategies, guidance and principles related to investments;

ii) assist the Investment Committee in identifying the objectives and risks to be managed and in implementing the appropriate asset mix;

iii) provide research on emerging investment strategies to the Investment Committee;

iv) provide research on the Managers to the Investment Committee;

v) assist Administration with Manager searches by giving the University access to its database of managers, narrowing the universe, providing performance analysis, preparing questionnaires and attending finalist meetings;

vi) provide quarterly opinions on the performance of the Fund and the MTP;

vii) inform the Investment Committee on beneficial investment management technologies where relevant and appropriate; and

viii) attend Investment Committee meetings, at the invitation of the Chair of the Investment Committee.

1.7 Performance Measurement Consultants

The University may hire one or more Performance Measurement Consultants who shall assist Administration by providing:

i) performance measurement services and analytical services through research reports, data and/or database(s);

ii) total fund, individual Manager and asset class return on a monthly basis; and

iii) quarterly performance reports that include capital market commentary, market indexes, asset class summary by class and Manager, returns over selective time periods by class and Manager, returns attribution analysis, and comparative analysis measurement for active Managers.

2.0 General Description of the Portfolio

The University maintains various investment portfolios, grouped according to their intended objectives.

The total investment Portfolio is as follows:

- The Short-Term Portfolio (STP)
- The Mid-Term Portfolio (MTP)
- The Operating Portfolio
- The Endowment Portfolio

The Operating Portfolio and Endowment Portfolio shall be invested according to the same investment policy as described in Section 5. The combined Operating Portfolio and Endowment Portfolio is referred to as the Fund. The ownership share of the Fund between the Endowed Portfolio and the Operating Portfolio shall be tracked on a monthly basis and investment returns are to be allocated based on the pro-rata share each month.

The STP and MTP provide the University with the liquidity necessary for the allocation of spending from endowments. As a result, the University is able to manage the Fund with a very long-term focus, with little need for liquidity. The horizon of the Fund is perpetuity, and it is invested to withstand volatility in returns from quarter-to-quarter and year-to-year.

3.0 Investment Objectives and Policies – STP

3.1 STP Objectives

The objectives of the STP are:

i) to preserve capital and minimize risk in order to meet the University's liquidity needs; and

ii) to obtain a reasonable level of return commensurate with risk, terms and liquidity.

3.2 Risk Tolerance

Given the STP objectives, risk tolerance is low and therefore investments should be limited to bank accounts, high interest savings accounts and high-quality money market securities.

3.3 Liquidity

Liquidity needs are high given that the STP is used to fund day-to-day operations. Only investments that can settle into cash within a short period of time should be used.

4.0 Investment Objectives and Policies – MTP

4.1 MTP Objectives

The objectives of the MTP are:

i) to outperform the FTSE 91-Day T-Bill Index by 300 basis points over a 3-to-5-year period, gross of fees; and

ii) to generate investment returns that can be used to make additional allocations in relation to University priorities and needs.

4.2 Risk Tolerance

The risk tolerance is moderate, and the standard deviation of returns should normally fall between 3% and 7%. Preservation of capital over the investment horizon (3 to 5 years) is preferred. Liquidity and currency risks are to be minimized. As the MTP will be the next source of liquidity should short-term assets be exhausted, the risk tolerance will fluctuate over time based on the position of the Operating Portfolio and its reserve ratio and should be reassessed periodically.

4.3 Asset Mix Policy

The asset mix policy of the MTP will be reviewed on an annual basis. Given the portfolio's objectives, risk tolerance and constraints, assets will be invested mostly in liquid equities and fixed income. The current target asset mix policy is 30% equities and 70% fixed income.

The MTP's objectives can be achieved by gaining exposure to the following risk factors:

- Equity
- Interest rate (duration)
- Credit

The following types of mandates may be used in the MTP:

Equities:
- Canadian equities
- Global equities

Fixed Income:
- Short-term bonds
- Core fixed income
- Corporate bonds
- High-yield bonds
- Commercial mortgages

The allocation to each individual mandate is limited to 30% of the MTP market value. This constraint is in addition to the rebalancing policy in Section 4.4.

The table below shows the risk factors that each strategic asset class is exposed to:

Risk Factor Exposure

Strategic Asset Class	Risk Factors
Equities (Growth)	
Canadian Equities Global Equities	Equity Size (Small cap) Value Growth Momentum Quality
Fixed Income (Interest Sensitive)	
Core Fixed Income Corporate Bonds Commercial Mortgages	Interest rate Credit Deflation Inflation Liquidity

4.4 Rebalancing Policy

Administration is permitted to deviate from the approved asset mix policy as follows:

Strategic Asset Class	Target Mix	Allowable Drift	Range
Equities			
Canadian Equities	10%	-5%, +5%	5% to 15%
Global Equities	20%	-5%, +5%	15% to 25%
Total Equities	30%	-5%, +5%	25% to 35%
Fixed Income	70%	-5%, +5%	65% to 75%

Changes to the asset mix policy beyond these ranges require the approval of the PF Committee on the recommendation of the Investment Committee.

4.5 Exposure to Non-Canadian Currencies

Given the fixed income focus of the MTP, currency exposure should be limited as it would increase the risk of the portfolio. Most non-Canadian currency exposure should be hedged on fixed income mandates. Managers are allowed to retain up to 10% of non-Canadian currency exposure for tactical purposes. The global equity component of the portfolio may remain unhedged, given the relatively small exposure and the diversification benefits it would bring.

4.6 Measurement of Investment Returns

Investment returns are measured quarterly and assessed in relation to the following criteria:

i) The overall objective is to achieve a gross rate of return in excess of the FTSE 91-Day T-Bills + 300 basis points over a 3-to-5-year period, with a level of risk, as measured by the standard deviation of returns, ranging from 3% to 7%.

ii) The Managers are expected to achieve the performance objectives included in their mandates over the relevant time horizon.

4.7 Liquidity

Liquidity requirements for the MTP are moderate. In a normal environment, assets will not be taken out of the MTP to meet obligations. A significant portion of the portfolio should be convertible into cash in a relatively short timeframe (30 days or less), given the nature of the obligations that the MTP is supporting.

5.0 Investment Objectives and Policies – The Fund

5.1 Fund Objectives

The objectives of the Fund are:

i) to maintain the purchasing power of the Fund after payout over the long-term. The required return, at a minimum, should meet (after fees) **Policy 2.11**;

ii) to earn the return produced by the asset mix policy (Section 5.3), based on the return of the market indices, plus a premium to reflect active portfolio management. The premium should at least cover the cost of active portfolio management; and

iii) to meet the following payout requirements:

For the Endowed Portfolio

a) Pay the total return generated by the endowment portfolio's share of the Fund to the capital of the endowment funds.

For the Operating Portfolio

a) Pay the 30-day Treasury bill rate less an established administrative fee to a portion of the non-endowed funds, as outlined in **Policy 2.11**. Such portion of the Operating Portfolio includes the capital fund, ancillaries, and trust funds but do not include research funds.

b) Pay the amounts required for the supplemental pension plan and for term endowments as outlined in **Policy 2.11**.

c) Pay an allocation to the University, subject to availability and restricted to one-time allocations. Allocations will not be made to fund general operations of the University.

d) Fund the initial and future allocations to the major strategic opportunities fund, subject to the Major Strategic Opportunities Fund **Policy 2.31**

e) When investment returns exceed the above obligations and are in excess of the reserve requirements (as defined later in this document), the Board may make additional allocations in relation to University priorities and needs.

5.2 Risk Tolerance

The required real rate of return over time can only be achieved by accepting a level of volatility in returns from quarter to quarter and from year to year. The current expected asset mix policy return on the Fund is 7.2% and the expected standard deviation of returns is 11.0%[1]. As a result, the expectation is that annual policy returns will fall within a range of minus 3.8% to plus 18.2% about 67% of the time and that annual returns will fall outside of this range about 33% of the time.

5.3 Asset Mix Policy

The Investment Committee shall review the asset mix policy on an annual basis to maintain, over the long-term, the best balance between investment returns within an acceptable level of risk. Assets will be allocated across four strategic asset classes, based on the role of the underlying assets in the Fund. The four strategic classes are: equities, fixed income, real assets, and diversifiers as described further in Section 6 of this Policy. Each strategic asset class is exposed to particular risk factors:

- Equities are expected to generate most of the growth in the Fund;
- Fixed income assets are expected to protect the Fund in times of stress and provide some liquidity;
- Real assets are expected to protect the Fund from high or unexpected inflation; and
- Diversifiers provide additional diversification to the Fund due to their low correlation with the other asset classes.

The current target asset mix policy is 57.5% in equities, 17.5% in fixed income, 20% in real assets and 5% in diversifiers. The asset mix policy is based on an optimization model that was externally developed and vetted by the Investment Committee. This model projects investment return and risk based on historic relationships among the asset classes. To achieve the return objective, the Fund has a substantial weight in growth assets.

[1] Source: Mercer as of December 31, 2024

The table below shows the risk factors that each strategic asset class is exposed to:

Risk Factor Exposure

Strategic Asset Class	Risk Factors
Equities (Growth)	
Canadian Equities U.S. Equities EAFE Equities Global Equities Emerging Markets Equities Long/short Equities Private Equity	Equity Size (Small cap) Liquidity Value Growth Momentum Quality Foreign exchange
Fixed Income (Interest Sensitive)	
Core Fixed Income Multi-Asset Credit Commercial Mortgages Private Credit	Interest rate Credit Deflation Inflation Liquidity Foreign exchange
Real Assets (Inflation Sensitive)	
Real Estate Infrastructure Commodities	Inflation Liquidity Foreign exchange
Diversifiers	
Absolute Return Strategies Market Neutral Strategies Cash	High yield credit spread Liquidity

5.4 Rebalancing Policy

The Investment Committee is permitted to deviate from the approved asset mix policy as follows:

Fund Rebalancing Policy

Strategic Asset Class	Target Mix	Allowable Drift	Range[2]
Equities			
Domestic Equities[3]	7.5%	+/- 7.5%	0% to 15%
Foreign Equities[4]	37.5%	+/- 7.5%	30% to 45%
Private Equity	12.5%	+/- 5%	7.5% to 17.5%
Total Equities	57.5%	+/- 7.5%	50% to 65%
Fixed Income			
Core Fixed Income	5%	+/- 5%	0% to 10%
Commercial Mortgages	0%	-0%, +10%	0% to 10%
Private Credit	7.5%	-7.5%, +5%	0% to 12.5%
Multi-Asset Credit	5.0%	+/- 5.0%	0% to 10%
Total Fixed Income	17.5%	+/- 7.5%	10% to 25%
Real Assets			
Real Estate	10%	+/- 5%	5% to 15%
Infrastructure	10%	+/- 5%	5% to 15%
Total Real Assets	20%	+/- 7.5	12.5% to 27.5%
Diversifiers			
Cash	0%	-0%, +3%	0% to 3%
Short-Term Fixed Income	0%	-0%, +7%	0% to 7%
Absolute Return Strategies, Market Neutral Strategies	5%	+/- 5%	0% to 10%
Total Diversifiers	5%	-5%, +7.5%	0% to 12.5%

The Administration may, at all times, rebalance the Fund toward the target weights without prior approval of the Investment Committee.

Changes to the asset mix policy beyond these ranges require the approval of the PF Committee on the recommendation of the Investment Committee.

5.5 Endowed Portfolio Payout Policy

The Board has established Investment Payout Policy (**MAPP 2.11)**. Such policy is designed to ensure that current and future generations share equally in the benefits of the Endowment Portfolio.

[2] The Fund may fall outside of these ranges as it transitions towards the target mix established in 2025. Temporary deviations are allowed.
[3] Domestic equities is Canadian equities.
[4] Foreign equities include U.S., EAFE, Global and Emerging Markets equities.

5.6 Exposure to Non-Canadian Currencies

The Canadian equity market represents approximately 4% of total world equity market in terms of total capitalization. Non-Canadian investments are included in the Fund in order to add diversification and reduce volatility of returns. Non-Canadian investments need not necessarily incur gains or losses from increases or decreases in the value of the Canadian dollar relative to currencies in other countries. This can be accomplished through currency hedging techniques employed by a Manager.

Although an analysis of the University's spending shows that less than 5% of all expenditures are in non-Canadian funds, the value of the Canadian dollar affects the price of imported materials that are resold in Canada. Accordingly, it is appropriate to have some exposure to investments within currencies that are non-Canadian to provide a hedge against a major fall in the value of the Canadian dollar. Given the rapidly evolving nature of currency markets, it is preferable to hire a Manager dedicated to the management of the Fund's currency exposure.

Currency hedging strategies should be implemented on a case-by-case basis, according to the Statement of Investment Committee Beliefs.

5.7 Measurement of Investment Returns

Investment returns are to be measured quarterly and assessed in relation to the following criteria:

- The overall objective is to achieve the required rate of return over the long-term on the Fund, with an acceptable level of risk. The real rate of return is monitored on a 5-year annualized basis.

- Managers are expected to achieve the performance objectives included in their mandates over the relevant time horizon.

5.8 Liquidity

The Investment Committee shall take reasonable steps to ensure that the Fund has sufficient liquidity to meet its future obligations. To properly assess the liquidity needs of the Fund, Administration will provide the Investment Committee with regular updates on risk controls regarding liquidity, such as:

i) the availability of short-term and mid-term assets;
ii) the ratio of assets to obligations for the Operating Portfolio;
iii) upcoming capital calls and distributions;
iv) potential working capital needs and releases on rolling currency hedges in the currency hedging program;
v) any upcoming contributions to the University operating and capital budgets;
vi) internal loans; and
vii) borrowing within the Fund.

5.9 Borrowing

To meet short-term liquidity needs arising from activities such as rebalancing, capital calls or currency hedging, the Fund may use line(s) of credit. Draws on the credit facilities shall have a combined limit of $100 million and generally are to be repaid within 90 days. A repayment plan from within the Fund shall be developed by Administration prior to any draw(s) on the credit facilities. Short-term borrowing hereunder is restricted for use within the Fund and is not available for other purposes. Short-term borrowing costs shall be netted against the performance of the Fund.

6.0 Permitted Investments

The University shall maintain a list of permitted investments, categorized by strategic asset classes, as part of the Procedures to this Policy.

7.0 Manager Structure

The Investment Committee may hire Managers with specific asset class investment mandates as opposed to balanced investment mandates to manage the actual asset mix of the Fund and the MTP.

The Investment Committee may hire either active or passive Managers. In general, passive management is preferred in markets where Managers have not been able to outperform the market indices. Active Managers are required to earn a prescribed amount over the appropriate index return to cover their fees and to compensate for the greater risk and fee costs of active management.

The Investment Committee may hire Managers where the mandate allows leverage and short selling. Management of publicly traded equities may involve the use of leverage and short selling at a level with which the Investment Committee has stated at the outset of the Manager's mandate.

There is a preference for multiple manager styles for the Fund. Within equities, a diversified exposure to various factors, such as value, growth, size, momentum and quality is preferred. Within bonds, styles can include interest rate anticipation, sector selection, security selection, yield curve positioning and currency management or passive (index returns).

The University's tax-exempt status makes interest, dividends, capital gains and foreign exchange gains equally preferable.

8.0 Target Ratios for the Non-Endowed Funds (Operating Portfolio, STP, MTP)

The Administration shall provide quarterly reports to the PF Committee, which reports the reserve levels for the non-endowed funds by reporting the ratio of the market value of investments to the obligations of the non-endowed funds at the end of each fiscal quarter over time. The Board's policy requires the ratio of investments to obligations to maintain a target level of at least 1.08, based on a 12-quarter moving average. It is recognized that due to volatility in investment returns this ratio may fall below 1.00 at

the end of a given quarter. Any such shortfall will be shown in the annual financial statements but will not be used in calculating the balanced operating budget required by the Board.

The investment earnings objective is expected to exceed the payout requirements over time for the non-endowed funds. A fundamental premise is that investment returns in excess of the payout requirements will be generated to meet other one-time strategic University needs.

Reserves, being the cumulative difference between investment returns and obligations, are maintained for the non-endowed funds to accommodate the short-term variability of investment returns and to reduce, to an acceptable level, the risk associated with meeting the payout requirements discussed in Section 5.1 (b) and (c).

The reserve level is equal to the total market value of the non-endowed fund less the obligations owing to the non-endowed funds. It is recognized that there is potential for the reserve level for non-endowed funds to be in deficit. The Investment Committee is expected to take a long-term view of the management of the Fund and to maintain an asset mix, which is expected to earn the required rate of return over the long term.

9.0 Cash Flow Management

The objectives of the University's cash flow management process are as follows:

i) to maximize the funds that are available for external management in the Fund, while maintaining sufficient short-term and mid-term investments outside of the Fund to meet the University's working capital requirements;

ii) to generally maintain a positive cash balance throughout each year in order to meet the University's liquidity needs, investing temporary excess cash either in the STP or MTP;

iii) to only borrow funds for short periods of time to support operating purposes of the Fund. A line of credit is maintained for the Fund's operating needs; and

iv) to ensure, as much as reasonably possible, that the funds allocated to Managers are not subject to short-term cyclical variations as a result of the University's cash flow needs.

10.0 Securities Lending

The Portfolio may engage in securities lending activities to generate incremental income, subject to the approval of the PF Committee on recommendation of the Investment Committee and compliance with applicable laws and regulations.

Such loans must be secured by Canadian government bonds, treasury bills, provincial bonds of any highly rated Canadian province and/or letters of credit, discount notes, and banker's acceptances of major Canadian chartered banks. The amount of collateral

taken for securities lending should reflect best practices in local markets and marked to market on a daily basis.

The terms and conditions of any securities lending program, including the maximum exposure in aggregate and by counterparty, will be set out in a contract with the Custodian. The Custodian shall, at all times, ensure that the Administration has a current list of those institutions that are approved to borrow the Portfolio's investments. If the Portfolio's assets are invested in a pooled fund, security lending will be governed by the terms and conditions set out in the pooled fund contract.

11.0 Derivatives Usage

Derivatives may be used by the University or the Managers managing the Portfolio for hedging, risk management and portfolio rebalancing purposes. Leveraging the Portfolio is prohibited. Derivative products include options, futures, forwards and swaps.

12.0 Valuation of Infrequently Traded Instruments

The valuation of infrequently traded investments shall be determined by the trustee or Custodian of the underlying fund. In the case of private investments, including but not limited to real estate, infrastructure, private equity and commercial mortgages, the valuation shall be based on independent opinions of qualified appraisers as required or should follow the best practices used for a particular asset class.

13.0 Responsible Investing

The Investment Committee will be guided by the Responsible Investing Policy (MAPP 2.32) which shall operate alongside this Policy.

14.0 Conflicts of Interest

Conflicts of interest shall be addressed in accordance with the Procedures to this Policy.

15.0 Review

This Policy will be reviewed at least every five years.

Appendix A: Statement of Investment Beliefs

The Investment Committee is guided by various investment beliefs, including:

1. A governance framework is essential to achieve success in managing investments and consists of:

   i) a diverse, independent and experienced Investment Committee to mentor, monitor and counsel the Administration;

   ii) written investment objectives, policies and governance guidelines to facilitate efficient operations;

   iii) acknowledgment and delegation of responsibilities amongst four levels of fiduciaries:

   - The Board – approves policies and is ultimately responsible for results attained;
   - The PF Committee – reviews and recommends policies to the Board;
   - Investment Committee – designs policies and oversees implementation thereon; and
   - Administration - implements policy directly and through contracted agents.

   iv) establishment of risk management policies, commensurate with the Portfolio's circumstances, which attempt to address the greatest investment risks within each part of the Portfolio. However, it must be recognized that in order to attain the stated objectives, some risk is essential within parts of the Portfolio.

   v) Financial risk and return are the foundation of all investment decisions. The Portfolio must be free from influences or agendas that conflict with the Fiduciary Duty of the Investment Committee.

2. A broadly diversified Portfolio, which includes among other vehicles, as appropriate: cash, bonds, equities and less liquid non-traditional investments such as private equity, private credit, real assets and absolute return strategies are the best way to achieve required nominal and real returns and is a prudent and cost-effective method of reducing risk.

3. Cash is generally the asset class with the lowest expected long-term returns and should be minimized, except for the STP.

4. Bonds provide a steady income stream and often experience lower volatility when equity performance is volatile.

5. Equities provide dividend income and/or potential capital growth and are expected to outperform bonds by a risk and volatility premium.

6. Equity premiums are dynamic and unpredictable; hence, diversification by market, investment manager and style is preferred.

7. Non-liquid and non-traditional investments, particularly in private equity, private credit, real estate and infrastructure, provide income and potential capital growth, but generally require more specialized knowledge than public equities and have higher management fees.

8. Active portfolio managers are expected to add value above their respective benchmark after accounting for related fees, particularly in less efficient markets such as Canadian, non-North American equities and non-traditional investments, including private markets. Active portfolio management is defined as any strategy where a manager uses proprietary knowledge to outperform a benchmark, as opposed to only replicating the benchmark return.

9. Portfolio return objectives and pursuits thereon must be evaluated on a net-of-fees basis.

10. Portfolio rebalancing according to asset range guidelines is a procedure that maintains the asset mix exposures at risk policy levels.

11. Due to the size of the Portfolio, it is more economical to use Managers. Managers should preferably be researched by Investment Consultants in order to be considered for managing a portion of the Portfolio.

12. The Investment Committee should remain mindful of the size of the Portfolio's holdings with a particular Manager in relation to the size of the Manager's assets under management.

13. Liquidity needs will vary between the Fund, STP and the MTP. The Fund has a long duration with low liquidity needs and, as a result, can hold some of its assets in illiquid investments (e.g., non-traditional investments, including real estate, private equity, private credit, infrastructure and hedge funds) with an objective to achieve additional diversification and an additional liquidity risk premium. The STP and the MTP have high and moderate liquidity needs, respectively, and as such, investments in illiquid asset should be minimized.

14. Attempting to achieve investment return advantages through market timing practices, such as frequent asset allocation changes, poses unacceptable risks to the Fund and the MTP. It is extremely difficult to repeatedly time the market through ongoing changes to the asset mix and in individual elements of each part of the Portfolio. The Investment Committee should be mindful of market cycles and while not attempting to engage in market timing practices, should consider modest Portfolio adjustments with market cycles in mind.

15. While acknowledging that most University operating costs and obligations are denominated in Canadian dollars, the Investment Committee recognizes that foreign currency exposure can potentially mitigate or exacerbate risk depending on

the currency pairings and underlying asset classes. Foreign currency should be hedged when it is expected that it will exacerbate risk or where the volatility associated with currency movements will meaningfully alter the overall risk profile of the investment. The cost of hedging should also be considered when implementing currency hedging programs.

16. ESG issues as part of risk management considerations can enhance long-term performance and is aligned with the University's objective of meeting the needs of current and future generations.

17. Active stewardship is important for long-term value creation and for promoting best practices with the University's Managers.

18. The risks posed by climate change are relevant and material to the Portfolio, and the Investment Committee must manage and mitigate both physical and transition climate risks in order to achieve the University's investment objectives.

19. An understanding of sustainability issues may lead to new investment opportunities that contribute to the University's investment objectives.

20. RI is a journey that requires continuous learning, innovation, and a dynamic and adaptive approach. Being transparent with the University community and regularly reporting on the University's RI progress is fundamental to the University's long-term RI journey.

21. As described in Section E of the Procedures on Conflicts of Interest, members of the Investment Committee will advise the Chair of the Investment Committee of any conflicts of interest that arise.

22. These investment beliefs will be reviewed by the Investment Committee on an annual basis, with any proposed changes recommended to the PF Committee. The PF Committee shall review such proposed changes and a recommendation to the Board for approval.

Last Reviewed:

Western UNIVERSITY · CANADA

Procedure for Investment Policy

Governing Policy: Policy 2.26 – Investment

Sections: Overview; Definitions; Scope; Procedure for Permitted Investments; Procedure for Conflicts of Interest

Responsible Officer: Vice-President (Operations & Finance)

Responsible Office: Financial Services

Effective Date: April 30, 2026

Supersedes: *

A. OVERVIEW

The purpose of this Procedure is to provide a process for addressing conflicts of interest and permitted investments.

B. DEFINITIONS

The defined terms in this Procedure have the same meaning as in the MAPP 2.26 – Investment Policy.

C. SCOPE

This procedure applies to proposed investments or investments of the Portfolios.

D. PROCEDURE FOR PERMITTED INVESTMENTS

1.0 The following represents descriptions of permitted investments making up the strategic asset classes outlined in the Policy. The Portfolio may use these permitted investments except where specifically restricted by the policies applicable to the specific Portfolio.

2.0 Equities

Equity investments include common stock and equivalent securities, including, but not limited to, equity warrants, rights, call options, installment receipts, subscription receipts, convertible debentures, limited partnerships, private

placements, REITs, preferred shares, stapled units[1], stock index futures, options on futures and other derivative securities to manage risk, such as currency futures. The common stock or equivalent securities may be traded on Canadian, U.S., international or emerging markets stock exchanges, but can also be privately held. Specific equity mandates may be classified as Domestic Equities (Canadian equity), or Foreign Equities (U.S. equity, international equity, global equity or emerging markets equity). Equity investments may also involve short selling. Private equity investments may include leverage that is appropriate for that asset class.

3.0 Fixed Income

Fixed income investments may include Canadian Government and Guaranteed-Affiliates bonds, real return bonds, provincial and municipal bonds, corporates/credit sensitive securities (includes the debt of corporations, supranational agencies and municipal entities whether domiciled inside or outside Canada, in developed or developing countries), sovereign bonds from developed or developing countries, high-yield bonds, mortgages, preferred stock, commercial mortgage-backed securities, commercial mortgages, mortgage- backed securities, asset-backed securities, private placements, convertible securities, cash and equivalent and fixed income futures and options. Fixed income investments may be tradeable or privately held. Private debt investments may include leverage that is appropriate for that asset class.

4.0 Real Assets

Real Asset investments include real estate, infrastructure and commodities.

Real estate investments are ownership investments in land and buildings that are used for office, industrial, retail or residential purposes. Returns from real estate are expected to provide an offset for inflation over time.

Infrastructure investments are investments in assets that provide essential services with sustainable demand and predicable cash flows.[2] Returns from infrastructure are expected to provide an offset for inflation over time.

Real estate and infrastructure investments may include leverage that is appropriate for those asset classes.

Commodities may include direct investments, or investments through derivatives such as futures, in basic goods in the agriculture, livestock, energy and mining sectors.

[1] A stapled unit is a security that is contractually bound to one or more other securities to form a single salable unit.

[2] Infrastructure investment projects may include renewable energy, water, utilities, toll roads, bridges, tunnels, communications and airports.

5.0 Diversifiers

Diversifiers include cash and cash equivalents, absolute return strategies and market neutral strategies.

Cash and cash equivalents may include the following securities:

- Government of Canada treasury bills, notes, debentures and any obligations unconditionally guaranteed by the Federal Government of Canada;
- Treasury bills, notes, debentures and any obligations unconditionally guaranteed by a provincial government of Canada;
- Municipal notes, debentures and any obligations unconditionally guaranteed by a municipal government of Canada;
- Highly rated foreign government treasury bills, notes, debentures and any obligations unconditionally guaranteed by a foreign government;
- Highly rated Banker's Acceptances, Certificates of Deposits and other instruments issued by a Canadian or foreign bank;
- Highly rated commercial paper and corporate bonds of Canadian and foreign corporations;
- Repurchase agreements backed by a minimum of industry standard collateral;
- Floating-rate notes issued by Canadian or foreign issuers; and
- High interest savings accounts.

Absolute return strategies try to achieve positive returns irrespective of the market environment and exhibit low correlations with bonds and stock portfolios. These strategies may include, but are not limited to royalties, life settlements, litigation finance, reinsurance and insurance-linked securities.

Market neutral strategies are structured in such a way that they are not exposed significantly to market fluctuations.

Absolute return and market neutral strategies may include public and private securities as well as leverage that is appropriate for these types of assets.

E. PROCEDURE FOR CONFLICTS OF INTEREST

1.0 If a member of the Investment Committee or any agent of or advisor to the Investment Committee has any material pecuniary interest, direct or indirect, in

any matter in which the Portfolios are concerned and becomes aware of such a conflict, that person shall, without delay, disclose this interest in writing and shall not take part in any debate or vote on such a matter. It is noted that agents and advisors are permitted to present items to the Investment Committee, and it is understood that such agents and advisors may benefit in the event that the Investment Committee adopts the items.

2.0 Every disclosure of interest under section 1. above shall be recorded in the minutes of the Investment Committee meeting. The failure of a person to comply with the procedures described in this section shall not of itself invalidate any decision, contract or other matter.

3.0 If a conflict of interest is discovered or disclosed after the Investment Committee has made a decision, the Investment Committee will reconsider the decision in light of the new information.

4.0 If the Manager, or any employee or associate of the Manager, has any direct or indirect pecuniary interest in any matter on which the Fund or the MTP has a right to vote, it must be brought to the attention of the Investment Committee, which has the discretion to:

4.1. instruct the Manager to exercise the voting right in line with the proxy voting positions in the Responsible Investing Policy., on the grounds that the relevant pecuniary interest is not material;

4.2. instruct the Manager how to cast the Fund's or MTP's vote, having considered the proxy voting positions in the Responsible Investing Policy; or

4.3. authorize the Fund's and MTP's Custodian to exercise the voting right in line with proxy voting positions in the Responsible Investing Policy.

Last Reviewed:

University Operating and Capital Budgets for 2026-2027

Action: ☒ Approval ☐ Information ☐ Discussion

University Operating and Capital Budgets and Program Specific Fees and Other Supplemental Fees

Recommended: That the Board of Governors approve the 2026-27 University Operating and Capital Budgets and the proposed Program Specific Fees and Other Supplemental Fees for 2026-27.

Student Fee Funded Units, Ancillaries, Academic Support Units, and Associated Companies

Recommended: That the Board of Governors approve the 2026-27 budgets for Student Fee Funded Units, Ancillaries, and Academic Support Units, and Associated Companies as shown in Item 4.1(c)(iii), Table 1,

And,

That the ancillary fees collected by the University will be as detailed in Item 4.1(c)(iii), Table 2 for full-time students and Table 3 for part-time students as supported by the Student Services Committee.

Executive Summary:

The operating and capital Budgets, budgets for student-fee funded units, ancillaries, academic support units and associated companies, and the setting of tuition fees are under the purview of the Board of Governors and are approved annually.

Senate, at its meeting on April 17, 2026, reviewed the 2026-27 University Operating and Capital Budgets and offered its advice to the Board by recommending approval of those budgets. See Item 5.4(a).

The Annual Report and Recommendations of the Student Services Committee provides an explanation regarding the recommended Full-Time Student Activity Fee Rates shown in tables 2 and 3 of Item 4.1(c)(iii).

Note: Supplemental Fees and Other Charges, shown in the Program Specific Fees and Other Supplemental Fees report are approved by the President throughout the year, as authorized under MAPP Policy 2.4 - Student Fees. These are reported for information.

Documentation Provided:

2026-27 Operating and Capital Budgets

2026-27 Program Specific Fees and Other Supplemental Fees

Student Fee Funded Units, Ancillaries, Academic Support Units and Associated Companies: 2026-27 Budgets

Student Services Committee Report

Western’s 2026-2027 Operating and Capital Budgets (Presentation Slide Deck)



2026-27 Operating and Capital Budgets

March 31, 2026

Western University

2026-27 Budget Highlights

A. Introduction

Western's 2026-27 Operating and Capital Budgets move us forward to a new 2-year plan – spanning the period 2026-27 and 2027-28. This budget builds on recent budgets and has been developed in the context of our Strategic Plan – *Towards Western at 150*. This budget was developed in late-January 2026 in the context of revenue assumptions at that time: frozen core operating grants, frozen domestic tuition for Ontario students, declining international enrolments, targeted program expansion funding, and various time-limited operating grants from the Province.

On February 12, 2026, we received welcome news from the Province with regards to two major components of our operating revenues:

1. The domestic tuition freeze (for Ontario students) has been lifted, and these rates could increase by 2% in each of the next three years.
2. Operating grants to universities will be increased through the following mechanisms:
    a. Full funding for unfunded students up to 2024-25 enrolment levels;
    b. Increases to the per-student funding rates in each of 2026-27 and 2027-28; and
    c. Increases to the funding weights attached to enrolments in programs identified as priority areas by the Province.

The parameters associated with the domestic Ontario tuition rates are clearly known and have been incorporated into the 2026-27 budget – including the additional revenue deriving from the 2% increase and our response, which was immediate base allocations to our Faculties and Support Units.

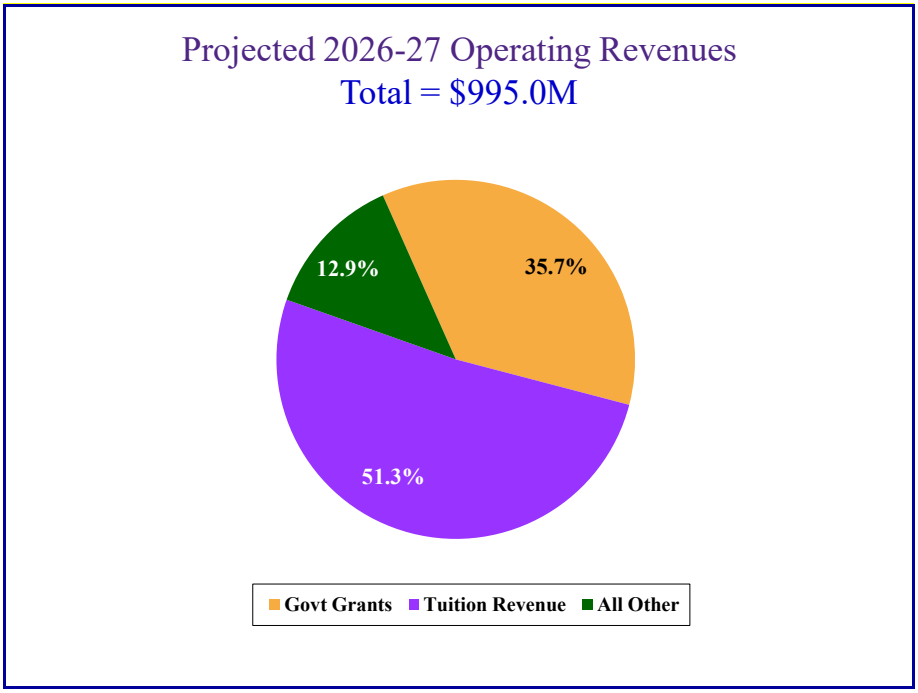
At the time of the writing of this budget, details of the operating grant changes (#2 above) were not available. Therefore, the recommendations in this budget do not include the grant changes/increases. When these details are available, we will report to the Board of Governors – at either the June or September meetings.

This Budget continues with investments in our strategic plan priorities while ensuring prudent fiscal management. A balanced budget is presented for year-end 2026-27, and the Operating Reserve is projected to be $68.9 million.

B. The 2026-27 Operating Budget

Revenues

The 2026-27 Operating Budget projects total revenue of $995.0 million – which is based on the assumptions described above (prior to February 12, 2026), increases in international tuition rates similar to recent years, increases in domestic enrolments, and declining international enrolments. The revenue forecast does include the 2% domestic Ontario tuition allowed by the Province – through the announcement on February 12, 2026.



Expenditures

Total expenditures for 2026-27 are projected to be $985.5 million, and include the following major investments in core activities and new initiatives or strategic priorities:

- Support for the core operations of the University through ***base budget allocations*** to the Faculties totaling $572.9 million and to the Support Units totaling $142.8 million.

- Western continues to give high priority to ***student financial aid*** – through various Scholarships and Bursaries. This budget recommends over $105 million for this purpose.

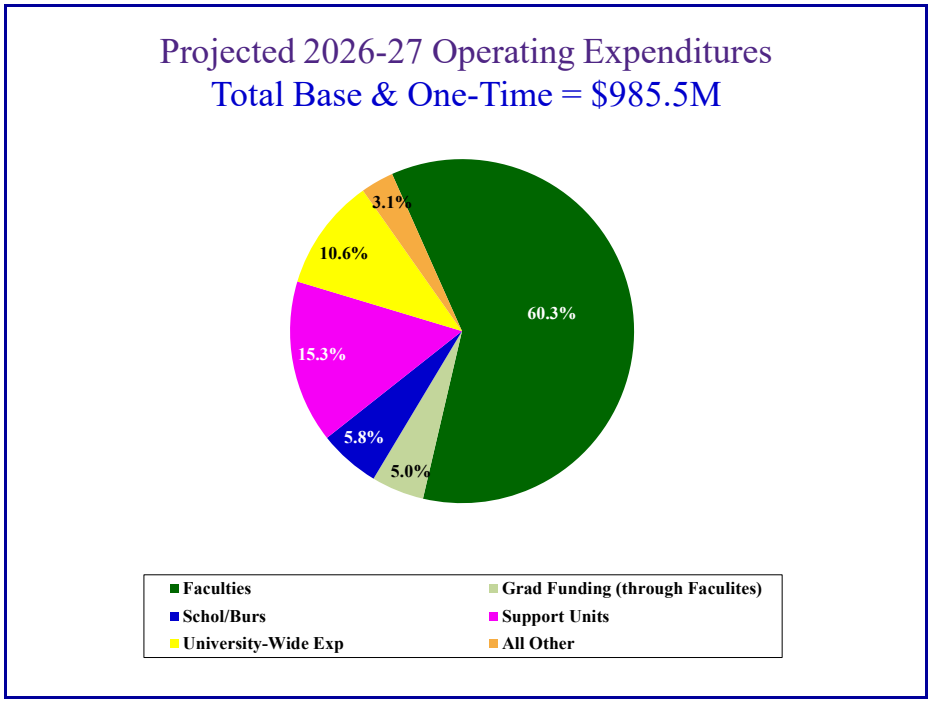
- Growing our endowments is a University priority – and in support of this, a sum of $30 million in one-time funding is being recommended to augment our ***Endowed Chairs Matching Program***.

- ***Enhancing our Scholarship/Research profile*** is a high priority – and this budget recommends $7 million to support the acquisition of a 7T High-Field Magnetic Resonance Imaging Scanner (MRI) and $3.4 million in support of the program aimed at attracting and supporting top-tier Post-Doctoral Fellows.

- In support of strengthening our efforts in ***recruiting international undergraduate students***, a sum of $6.35 million one-time is recommended to fund an array of scholarships.

- The self-funding ***multi-year Engineering Expansion Plan*** that supports expansion of enrolments and faculty/staff complements and the construction of a new building continues in 2026-27. This initiative is supported through the allocation of $1 million in base funding (to Engineering and Science) and $5.8 million in one-time funding to support the new Engineering building.

- ***Information Technology Infrastructure renewal and expansion*** is a requirement that needs investment – and this budget recommends $5 million for this high-priority need.



C. The 2026-27 Capital Budget

The Capital Budget supports our Long-Range Space Plan which involves a number of high priority projects – including the following major academic projects which are underway or in various planning stages:

- A new Engineering building
- An undergraduate student residence
- The Pathogen Research Centre Facility
- The Bioconvergence Centre
- A new facility for the Faculty of Health Sciences

Funding for the Capital Budget in 2026-27 is derived from the following sources: Government Grants ($21.3 million), transfers from the Operating Budget – including unit budgets ($26.1 million), self-funded or ancillary operations ($31.4 million), and borrowing ($139.3 million).

Capital Expenditures are projected to be $329.5 million in 2026-27, with a breakdown as follows:

- $227.2 million in support of ***new construction*** (including planning/design).

- $15.8 million in support of ***major renovation projects***.

- $29.6 million for ***utilities and infrastructure projects***.

- $9.2 million associated with the ***modernization/adaptation of instructional and research facilities*** across campus.

- $21.8 million for ***general campus maintenance projects***.

- $17.8 million in support of ***renewal in our residences***.

- $8.1 million for all ***other capital expenditures*** – which includes carrying costs and debt repayment.

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ACRONYMS used in University Budget Document

	Acronym	Description
2	APF	Academic Priorities Fund
3	APPF	Academic Planning, Policy, & Faculty
4	AQ	Additional Qualification Courses in the Faculty of Education
5	B.Ed.	Bachelor of Education Program/Degree
6	B.L.U.E.	Black Student Leadership University Experience
7	BRIF	Biosciences Research Infrastructure Fund
8	CFI	Canada Foundation for Innovation
9	CRCs	Canada Research Chairs
10	CRV	Current Replacement Value (of Buildings)
11	CSD	Communication Sciences and Disorders Program
12	DM	Deferred Maintenance
13	Ed.D.	Doctor of Education Degree
14	EDI	Equity, Diversity, and Inclusion
15	EDID	Equity, Diversity, Inclusion, and Decolonization
16	EFB	Employee Future Benefits
17	EMBA	Executive Master of Business Administration Degree/Program
18	FIMS	Faculty of Information & Media Studies
19	FRSF	Federal Research Support Fund
20	FTE	Full-Time Equivalent
21	HBA	Honours Business Administration Degree/Program
22	HR	Human Resources
23	IBA	Inflationary Budget Adjustment
24	ITIF	Information Technology Infrastructure Fund
25	LRSP	Long-Range Space Plan
26	M.Cl.Sc.	Masters in Clinical Sciences Degree
27	MA	Master of Arts Degree
28	MBA	Master of Business Administration Degree/Program
29	MD	Doctor of Medicine Degree/Program
30	MEng	Master of Engineering Degree/Program
31	MESc	Master of Engineering Science Degree
32	MMI	Maintenance, Modernization, and Infrastructure
33	MN	Master of Nursing Degree
34	MOS	Management & Organizational Studies Program
35	MPT	Masters in Physical Therapy Degree
36	MSc	Master of Science Degree
37	MSOF	Major Strategic Opportunities Fund
38	OT	Occupational Therapy (School/Program)
39	PAL	Provincial Attestation Letter (in support of international student study permits)
40	Ph.D.	Doctor of Philosophy Degree
41	PT	Physical Therapy (School/Program)
42	QA	Quality Assurance
43	RISF	Research Infrastructure Support Fund
44	SDRI	Siebens-Drake Research Institute
45	SSHRC	Social Science and Humanities Research Council
46	STEM	Science, Technology, Engineering, and Mathematics
47	SUPF	Support Unit Priorities Fund
48	U.C.	University College
49	UCC	University Community Centre
50	USC	University Students' Council
51	USRI	Undergraduate Summer Research Internship Program
52	WAFAR	The Western Academy for Advanced Research
53	WIC	Western International College

2026-27 Operating Budget

Western continues to be guided by the priorities outlined in our **Strategic Plan** – ***Towards Western at 150*** – and is focused on its commitment to an outstanding educational experience, scholarship, research, and creativity. The dedicated efforts made by all members of our university community have enabled the university to maintain those commitments as we look ahead to building a stronger university. Recent changes in the external environment should give us optimism in achieving this objective.

The last four university budgets started the process of investing in our strategic plan priorities, and this budget continues those investments.

The current budget makes additional significant investments in the 2026-27 budget in support of our strategic plan priorities:

- Enrolment growth in areas of demand and capacity – including $834,000 to Engineering and $208,000 to Science in base funding to support the strategic expansion of Engineering, $2.7 million for Nursing expansion, $2.3 million for expansion in Medicine, and $1.4 million in general revenue sharing across most Faculties.
- Scholarship/research/creativity – including $7 million to acquire a 7T MRI and $3.4 million to support a Post-Doctoral funding program.
- Student financial support – including nearly $48 million in centrally-funded student support, over $50 million in graduate student supports through Faculty budgets, and $500,000 in needs-based bursaries for graduate students.
- International student recruitment – including $6.4 million for international student scholarships.
- Fundraising – including $30 million to support the Endowed Chairs Matching program.
- Infrastructure to accommodate growth – including a new Engineering Building and a new Health Sciences building.

These investments will allow us to pursue the various components of our mission as a leading research university.

A. Planning and Budgetary Context

The recently-completed planning process leads us into a new two-year planning cycle – spanning the period 2026-27 and 2027-28. In the summer of 2022, our Faculties and Support Units submitted Academic and Operational Plans in alignment with our strategic plan – and the priorities in those plans have formed the basis for the 2-year university plan.

At this point in time, as we reach the end of the current fiscal year, we are on target to exceed the net position initially projected for 2025-26. The Operating Reserve at the end of the current year is projected to be $59.4 million – compared to the budgeted figure of $44.0 million, largely due to the STEM funding ($18 million) provided by the Province after approval of our 2025-26 Budget by the Board of Governors.

Our planning and budgeting process for the next two-year cycle was completed by late-January 2026 and budget recommendations were developed in the context of what we knew at that point in time – which included the following assumptions regarding revenues:

- Under the Provincial Government's corridor-based block-grant funding system, our overall core on-going provincial grants will remain frozen at the 2016-17 level.
- The Province's tuition framework rolled back domestic tuition rates by 10% in 2019-20 and the rates were kept constant (at the reduced levels) in 2020-21 through 2025-26. At that point in time (late January 2026), Government has confirmed that domestic tuition rates for Ontario students will remain frozen in 2026-27 – making it a total of 8 years of no change to domestic tuition rates.
- Two years ago, the Federal Government introduced a policy/approach to limit study permits for undergraduate international students who would come to Canada from outside the country. One year later, that policy was updated to include all undergraduate students (both coming from outside the country and from within Canada) as well as all international graduate students. In the most recent year (and as of now), that policy reverted to applying only to undergraduate students. Our enrolment planning includes our best assessment of the impact of the Federal Government's policy. We are projecting reductions in undergraduate and graduate international enrolments – which will impact our tuition revenue in each of the two years of our upcoming planning cycle.
- The first year of the Western International College (WIC) will start in 2026-27 – and we expect royalty revenues associated with registrations at College. In year 1, these are expected to be modest – and will ramp up in the coming years. Starting in 2027-28, we will have students transferring into Western's Faculties from WIC.
- Enrolments are the primary driver of operating revenues. For budgetary purposes, our first-year class for 2026-27 is expected to be about 6,600 students (which includes about 465 international students). The graduate enrolment plan is the aggregate of the plans developed by the Faculties – which is a modest increase of about 115 students. Total full-time enrolment (undergraduate and graduate) is projected to increase by about 300 – which includes a reduction of 275 in the international component. Recently, the province has indicated that it will support expansion in the Post-Secondary sector by another 40,000 spaces – in priority areas – over the next three years. Western will pursue this opportunity by developing proposals for expansion in areas of demand and capacity, and in alignment with government priorities.
- In late February 2024, the Provincial Government announced time-limited "sustainability funding" for Ontario's Universities – spanning the period 2023-24 through 2026-27. Western's estimated allocation for 2026-27 of $20.1 million (an increase of $5.8 million over 2025-26) has been incorporated into our operating revenue projections. This funding will end after 2026-27.

In summary, over 85% of our Operating Revenues derive from enrolment-related revenues. As a result, based on the information we had about our revenue parameters at that time (end of January 2026) – i.e. frozen base operating grants, frozen domestic tuition, and international enrolment declines – we were projecting our operating revenue to be flat in 2026-27 and decline slightly in 2027-28.

Based on the above revenue estimates, we have developed our budget recommendations and informed the Faculties and Support Units.

On February 12, 2026, we received welcome news from the Province with regards to two major components of our operating revenues:

1. The domestic tuition freeze (for Ontario students) has been lifted, and these rates could increase by 2% in each of the next three years.
2. Operating grants to universities will be increased through the following mechanisms:

a. Full funding for unfunded students up to 2024-25 enrolment levels;
b. Increases to the per-student funding rates in each of 2026-27 and 2027-28; and
c. Increases to the funding weights attached to enrolments in programs identified as priority areas by the Province.

The parameters associated with the domestic Ontario tuition rates are clearly known and have been incorporated into this budget – including the additional revenue deriving from the 2% increase and our response, which was immediate base allocations to our Faculties and Support Units.

At the time of the writing of this budget, details of the operating grant changes (#2 above) were not available. Therefore, the recommendations in this budget do not include the grant changes/increases. When these details are available, we will report to the Board of Governors – at either the June or September meetings.

At Western, our integrated approach to planning serves us well. We continue to focus our budget planning on our strategic priorities. Our approach to enrolment planning allows us to make significant enhancements to the quality of education and the educational experience we offer our students:

- Recruitment of outstanding undergraduate students is a high priority. The average entering grade of our incoming class in the fall of 2025 was 91.5%, well above the Ontario average.
- Over 94% of our first-year students continue into their second year. Our retention rates are amongst the highest in Canada.
- Graduation rates of our undergraduate students have been steadily increasing, and they are currently much higher than the average of peer universities in Canada and the United States. About 86% of Western's 2019-20 entering cohort graduated within 6 years – again, well above our peer institutions across Canada.
- We are continuing to invest in our recruitment efforts to grow international undergraduate enrolments while also diversifying home country and program destination. At present, about 6.7% of our undergraduate enrolment is international. Our Strategic Plan aspires to reach 20% international undergraduate students. One strategy to achieve this goal is the establishment of the Western International College (WIC) which will provide a pathway for international students to complete their first year at WIC and then transfer to Western for their second year of study. WIC will also support recruitment for some of our graduate programs. In addition, we are strengthening our efforts in direct recruitment – including increased direct in-country recruitment activities, expansion of agents, and on-line recruitment initiatives.
- Expansion of graduate enrolments in areas of demand and capacity continues to be a strategic priority at Western. In the current year, full-time graduate students comprise nearly 19% of total full-time enrolment.

We remain committed to building on the substantive gains we have made in the areas of student quality, educational quality, and student experience. Going forward, we will continue to manage our resources and target them towards the priorities identified in our Strategic Plan.

Figure A

Total FTE Enrolment at Western

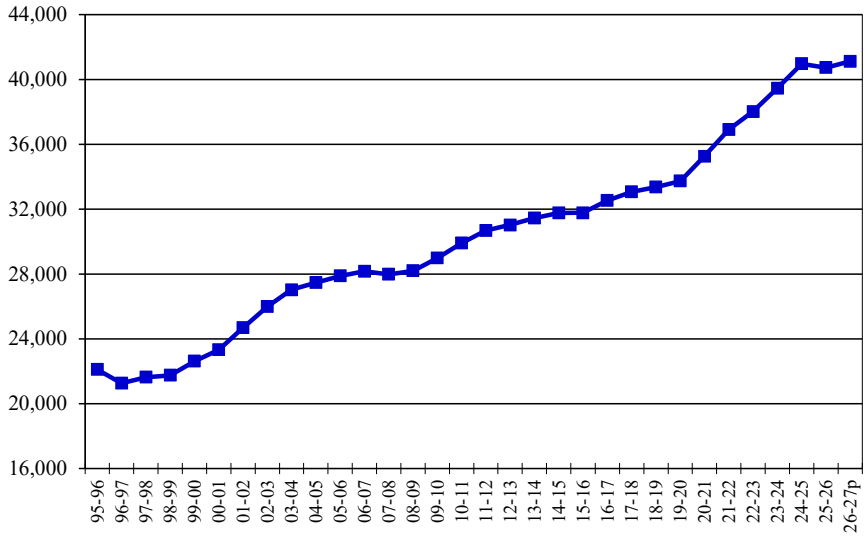
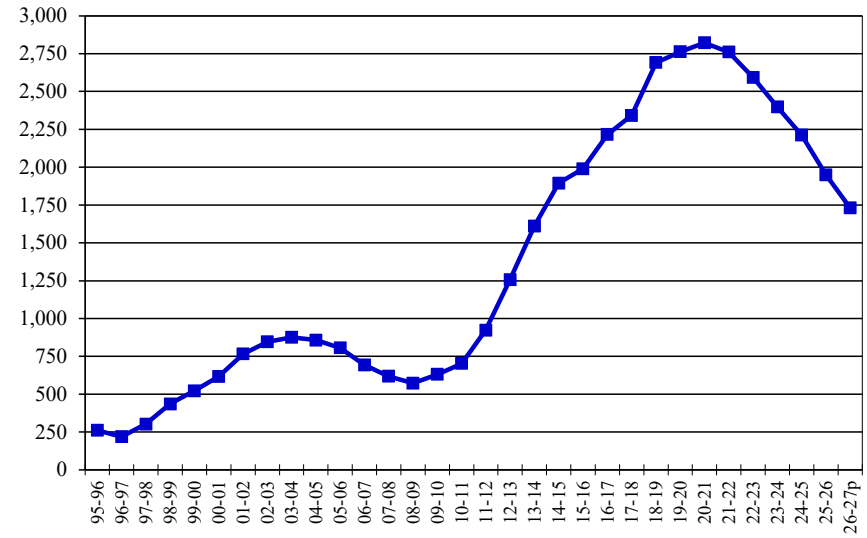


Figure B

Full-Time Undergraduate International Enrolment at Western



B. Updates on Priorities and Initiatives from Last Year's Budget

The following initiatives were included in the 2025-26 Budget and involved substantial investments in alignment with the themes in our Strategic Plan.

Theme 1: Greater Impact

Growth: Enrolments

- The multi-year Engineering expansion involving a new 5-year undergraduate program that combines the core elements of Artificial Intelligence (AI) and Information & Communications Technology with any of the core disciplines in Engineering continued in 2025-26 – and included expansion of enrolments, faculty and staff complements, planning for space/facilities, and allocations to the Faculty of Science which contributes in a significant manner to the teaching of Engineering students.

  Engineering: $611,000 base funding to support faculty and staff positions, $575,000 one-time for faculty start-up funding, and $3.4 million to support the construction of a new building.

  Science: $50,000 base funding and $75,000 one-time for faculty start-up funding.

- In support of the recruitment of international undergraduate students – in the context of student permit caps and increased global competition – a sum of $6.2 million was committed to international student recruitment awards.

Growth: Faculty and Staff Renewal/Expansion

- Last year's budget included various initiatives aimed at faculty and staff renewal and expansion:
  - The allocation of $30 million one-time to the Endowed Chairs Matching Program.
  - Various base and one-time allocations to the Faculties and Support Units – to support faculty and staff positions.

  Since 2019-20, our full-time faculty complement has increased by 161 – from 1,240 to 1,401 (as of February 28, 2026). Similarly, our full-time staff complement has increased by 202 – from 2,492 to 2,694.

Space, Facilities, and Infrastructure to Support Growth

To ensure that we offer the best educational environment for our students and to support our faculty and staff with adequate state-of-the-art facilities, the 2025-26 Budget included the following one-time allocations:

- $3.4 million from the multi-year Engineering expansion revenues to support the new Engineering Building, currently under construction; and
- $2.2 million for technology-related modernization of general university instructional spaces.

Construction of the Engineering Building is well underway and the renewal of technology infrastructure in instructional spaces is an annual/ongoing process.

In addition, last year's budget (Table 13) also included the following projects – the Bioconvergence Centre, the Pathogen Research Facility, and a new Undergraduate Residence – aimed at supporting our Strategic Plan priorities. Planning and/or construction are well underway for all projects.

Enhancing our Research Profile and Impact

Last year's budget recommended various scholarship/research related initiatives, including:

- $1.6 million one-time to support the continuation of the Post-Doctoral Fellowship Program;
- $500,000 one-time funding to support our Research Institutes; and
- $3.4 million one-time to the Vice-President (Research) to support university-wide research initiatives.

For information, the previous three budgets also invested significantly in support of our research aspirations, including:

- $12.5 million in 2024-25 to create an endowment to support our research institutes;
- $10.0 million in 2024-25 for the university's matching requirement for successful CFI projects; and
- $11.0 million in 2023-24 to support major research initiatives – including pathogen and vaccine development research, wind research initiatives, and imaging.

Enhancing the Learning Experience

The 2025-26 budget allocated a sum of $2 million one-time to support the continuation of the Undergraduate Summer Research Internship Program (USRI). The program has supported 314 student internships working under the supervision of 264 faculty members across campus – and included an education and training component as part of the overall experiential research opportunity for our students.

Build Institutional Capacity through Expanded Fundraising

In support of our fundraising campaign through marketing initiatives and staffing for the campaign, a sum of $5 million in one-time funding to the fundraising campaign and $1.26 million one-time for Campaign-related marketing initiatives was allocated.

Theme 2: People, Community, and Culture

Last year's budget included funding allocations in direct support of our goals in the areas of Equity, Diversity, & Inclusion (EDI) and Indigenization.

- One-time funding ($200,000) to the Office of Indigenous Initiatives in support of additional staffing and programming initiatives; and
- Funding to support the Black Student Leadership University Experience Program (B.L.U.E.) and programming initiatives through the Office of Equity, Diversity, and Inclusion ($115,000 one-time funding).

The Graduate Student Needs-based and Emergency Fund continued in 2025-26 – with a $500,000 one-time allocation.

Theme 3: Western's Place in the World

The commitments under this theme were directly supported in the 2025-26 Budget through the following initiatives:

- Western's Long-Range Space Plan which included a new Engineering Building, the Bioconvergence Centre, a new undergraduate residence, the Pathogen Research Centre Facility, and renewal of facilities at the West Campus (formerly Brescia). Construction of the Engineering Building, the Pathogen Research Facility, and the undergraduate residence are well underway, and detailed design for the Bioconvergence Centre is nearing completion.
- Various university-wide campus sustainability, energy conservation, and infrastructure projects (supported through an allocation of $29.6 million in our capital budget) are continuing – and include improvements to central power plan infrastructure, electrical distribution systems, sewer and water systems.
- As committed in our Strategic Plan, the University secured a lease arrangement for space in downtown Toronto. Planned use of the facilities include professional continuing education offerings, other academic programming needs, and space to support recruitment and advancement/fundraising events.

C. Priorities for the 2026-27 Budget and New Initiatives

The recently completed planning process identified the following high priority initiatives that are directly aligned with the three themes in our new Strategic Plan.

Theme 1: Greater Impact

Growth: Enrolments

1. A central element of "Greater Impact" is to grow strategically in areas of demand and societal need. In support of this imperative, the following initiatives are recommended in the 2026-27 Budget.
    - As indicated in section B, a strategic Engineering expansion is underway with a fully developed multi-year plan involving expansion of enrolments, faculty/staff complements, space/facilities, and investments in other Faculties that contribute in a significant manner to the teaching of Engineering students. The investments include: Engineering – $834,000 in base funding (Table 4, line 4, column d), 450,000 in one-time funding (Table 8, line 16), and $5.8 million one-time for a new building (Table 8, line 4); and Science – $208,000 in base funding (included in Table 4. Line 10, column d) and $100,000 in one-time funding (Table 8, line 22).
    - The Provincial Government is supporting the expansion of Nursing enrolments through the allocation of recurring one-time funding – and a sum of $2.7 million in one-time funding flows to the Faculty of Health Sciences (Table 8, line 17).

2. Recruitment of undergraduate international students continues to be a high priority for the University. In support of this – and in the context of the current external environment, which includes global competition for these students and the Federal Government's limits on study permits – we are recommending $6.4 million in one-time funding for international student recruitment awards (Table 8, line 3). In addition, as noted in section A, we are strengthening our efforts in direct international student recruitment – including increased direct in-country recruitment activities, expansion of agents, and on-line recruitment initiatives.

Growth: Faculty and Staff Renewal/Expansion

Faculty and staff renewal and expansion, commensurate with enrolment growth, is a key priority in our Strategic Plan. In support of this, the following budget allocations are recommended:

3. The Endowed Chairs Matching Program, whereby private donations to support faculty positions through the creation of endowed chairs are matched by the University, was introduced in 2010-11. To date, a total of $143.5 million has been allocated for matching purposes. Of this, $108.4 million has already been spent as matching funds for a total of 61 chairs, leaving $35.1 million unspent. Donor agreements are in progress for 2 more chairs which will require $8 million in matching funds in the current year, and the Vice-President (Advancement) is currently in discussions regarding 5 additional chairs which will require up $15 million in matching funds. The plan is to secure 5 to 10 chairs annually. This matching program is a central component of our fundraising campaign, and further incremental matching funds will be required. Therefore, it is recommended that $30 million in one-time funding (Table 8, line 1) be allocated to support the Endowed Chairs Matching Program.

4. The plans for all eleven Faculties (in total) have proposed increases of 23 faculty positions and 46 staff positions in 2026-27. The Support Units have submitted their plans – and are currently under review.

Space, Facilities, and Infrastructure to Support Growth

5. To ensure that we offer the best educational environment for our students and to support our faculty and staff with adequate state-of-the-art facilities, the Strategic Plan calls for investment in facilities and infrastructure. In support of this priority, the following one-time allocations are recommended in this budget:
    - $5.8 million from the multi-year Engineering enrolment expansion revenues to support the new Engineering Building (Table 8, line 4); and
    - $2.5 million to support modernization of general university instructional spaces (Table 8, line 7).

Enhancing our Research Profile and Impact

6. In support of the research aspirations in our Strategic Plan, under the Greater Impact Theme, the following budget allocations are recommended in this budget:
    - $7.0 million to acquire a new 7T high-field magnetic resonance imaging scanner (MRI) – which will be supplemented with additional funding from the Vice-President Research and the Schulich School of Medicine & Dentistry (Table 8, line 2);
    - $3.4 million one-time to support the continuation of the Post-Doctoral Fellowship Program (Table 8, line 6); and
    - $4.5 million one-time support for several university-wide research initiatives – under the direction of the Vice-President Research (Table 8, line 38).

Enhancing the Learning Experience

7. A sum of $2 million one-time is recommended to support the continuation of the Undergraduate Summer Research Internship Program (USRI) (Table 8, line 8). In 2026-27, the program is expected to support 295 student internships – and will include an education and training component as part of the overall experiential research opportunity for our students.

Build Institutional Capacity through Expanded Fundraising

8. In support of our fundraising campaign, this budget recommends the allocation of $700,000 one-time for Campaign-related marketing initiatives (Table 8, line 9). In addition, unit-specific allocations to the Vice-President (Advancement Portfolio) and Western Communications also support the fundraising priorities (see Table 6, lines 30 and 34 and Table 8, lines 39).

State-of-the-Art Information Technology Infrastructure

9. The commitment in the Strategic Plan to invest in state-of-the-art I.T. infrastructure is being supported through the recommendation of $5 million in one-time funding to support renewal of I.T. equipment across campus (Table 8, line 5). This allocation augments the on-going base budget ($8.3 million) line for I.T. Infrastructure shown in Table 7, line 7.

Theme 2: People, Community, and Culture

10. In support of the priorities under this theme, and in direct support of our goals in the areas of Equity, Diversity, & Inclusion (EDI) and Indigenization, the following budget allocations are recommended for 2026-27:
    - One-time funding to the Office of Equity, Diversity, and Inclusion to support programming initiatives (Table 8, line 37); and
    - Base funding to the Office of Indigenous Initiatives and the Office of Equity, Diversity, and Inclusion to support programming initiatives (Table 6, lines 7 and 36).

11. The Graduate Student Needs-based and Emergency Fund will continue in 2026-27 – and a one-time allocation of $500,000 is recommended (Table 8, line 10). This allocation augments the general bursary funds already available to graduate students and undergraduate students (Table 5, lines 2 and 3).

Theme 3: Western's Place in the World

12. The priorities under this theme are directly supported in this budget through the following commitments:
    - Enhancing Western's campus is a central priority in our Long-Range Space Plan (Table 13), and includes the following projects that are underway or in planning stages: a new Engineering Building, an undergraduate student residence, renovations to create the Donald K. Johnson Leadership Centre (for the Ivey School) in Toronto, the Pathogen Research Centre Facility, the Bioconvergence Centre, new facilities to support enrolment growth in the Faculty of Health Sciences, renewal of facilities at the West Campus (formerly Brescia), and modernization of Alumni Hall.

      Table 13 (Long Range Space Plan) summarizes Western's current capital priorities – in support of growth as well as our research aspirations. The list of projects is reviewed annually to confirm that the projects align with current needs and are updated to reflect the evolving external environment and its impact on our needs. Therefore, projects may move between the three categories presented in the Table.

    - The on-going range of university-wide Campus Sustainability, Energy Conservation, and Infrastructure Projects support our aspiration to reduce carbon emissions for campus operations, and we are projecting expenditures of $29.6 million in 2026-27 (Table 14, line 3).

D. Two-Year Operating Budget Forecast

We seek approval of the 2026-27 Budget as outlined in this document. The recommendations in this document have been guided by projections of operating revenues and expenditures for the upcoming 2-year planning period.

Table 1 summarizes our current forecast for the 2-year planning period, and the major underlying assumptions are as follows:

Revenues

- Provincial government on-going/base grant funding (sum of lines 3 and 4 in Table 1) remains constant during the 2-year planning period. As outlined in section A, on February 12, 2026 – after the development of our budget – we received welcome news from the Province that we will receive additional operating grant funding. At this point in time, we do not know the details of the allocations and requirements – and therefore, the incremental grant revenues and the incremental investments are not part of this budget. When we know the details and requirements regarding the additional grant funding, we will report to either the June or September meetings of the Board of Governors.

- As noted earlier, the Province announced a time-limited sustainability funding which will flow $20.1 million in 2026-27 to Western. This amount is included in the $38.1 million in line 6 of Table 1. As noted earlier, this $20.1 million will come to an end after 2026-27 – and this reduction is also reflected in the same line in 2027-28.

- The federal government's Research Support Fund, which is in recognition of the indirect costs of granting-council-supported research covered by the University's operating budget, is expected to be stable.

- As noted earlier, the Province has ended the domestic tuition freeze effective 2026-27 – and has allowed for a 2% annual increase in each of the next 3 years. This budget formally recommends the 2% increase in 2026-27, and we have also included the 2% increase for 2027-28 in our revenue forecasts shown in Table 1.

  Starting in 2022-23, the Province allowed for a 5% increase in tuition rates for domestic students from other provinces. For 2026-27, the Province has allowed for a further 5% in domestic out-of-province undergraduate tuition rates – and this budget recommends the implementation of this 5%.

  Three years ago, the Province approved increases to undergraduate Management & Organizational Studies (MOS) and Computer Science domestic tuition rates by 7.5% per year until the tuition levels reach the average of similar programs at other Ontario universities. The proposed budget includes these increases.

  International tuition rates are de-regulated and we propose increases in the range of 3% for most undergraduate and graduate programs.

  Our proposed rates for 2026-27 are shown in Tables 10, 10a, and 11.

- The Senate-approved enrolment projections and plans, which drive our tuition revenue projections, are shown in Table 12. As indicated earlier, our first-year class (for budgetary purposes) is assumed to be an intake of about 6,600 students – including 465 international students.

  Our Strategic Plan calls for enrolment growth – at all levels of study and in areas of demand and capacity. Since 2020-21, our full-time enrolment has grown by over 5,600 students (about 17.5%). The projections for the next 5 years (starting in 2026-27) show continued modest growth. As we know more about the Province's enrolment strategy for the near future and as we work on increasing international enrolments, we will likely exceed the growth trajectory in Table 12.

Expenditures

- Faculty and Support Unit base budgets have been adjusted to reflect the 3% Inflationary Budget Adjustment (IBA) and augmented by allocations from the Academic Priorities Fund (APF), the Support Units Priorities Fund (SUPF), enrolment expansion funding, and Canada Research Chairs (CRCs). The net impact is that, at year-end, Faculty and Support Unit budgets are expected to increase in 2026-27 (over 2025-26) compared to the budgeted amounts shown in Table 1, lines 22 and 24. This is illustrated later in Figure C.

- Enrolment-related revenue sharing with the Faculties, which transfers about 40% of incremental enrolment-related revenue to the Faculty budgets, continues in 2026-27. The reduction in 2026-27 is due to projected declines in undergraduate international enrolments and associated tuition revenue.

- Non-salary costs associated with major University-wide budget items (e.g. utilities, insurance, and I.T. infrastructure) are based on the current estimates from the units that manage these expenditures.

- Central funding to cover the costs of negotiated employee compensation increases has been set aside and these funds will be transferred to Faculty and Support Unit budgets throughout the year, as the various compensation provisions are implemented.

Net Position and the Operating Reserve

- As can be seen in line 33 of Table 1, the Operating Reserve is projected to be $59.4 million at the end of the current year (i.e. 2025-26). The reserve is projected to be 42.6 million at the end of the upcoming 2-year planning period (2027-28).

  As noted earlier, we anticipate incremental grant funding in each of the next 2 years. Once we know more about the allocations and requirements, we will bring forward additional recommendations – which will impact the reserve levels shown in line 33 of Table 1.

- At present, the Board of Governors requires the University to maintain a minimum Operating Reserve Level of $10 million. Given the size and complexity of our budget (with operating revenues projected to exceed $1 billion) and the many external factors impacting our revenues, it is recommended that the minimum operating reserve requirement be increased to $25 million – starting in 2026-27.

Table 1
BUDGET PLAN FOR 2-YEAR PLAN
2026-27 and 2027-28

		2023-24a	2024-25a	2025-26e	2026-27p	2027-28p
1	**REVENUES**					
2	**Government Grants**					
3	Provincial: Core Operating Grant **<a>**	113.7	97.5	97.5	97.5	97.5
4	Provincial: Performance-based Grant **<a>**	157.6	182.0	182.3	182.3	182.3
5	Provincial: Special Purpose Grants	21.8	24.2	25.6	25.8	25.5
6	Provincial: Time-Limited Grants	9.9	8.4	32.2	38.1	18.0
7	Federal: Research Support Fund (FRSF)	11.7	11.4	11.9	11.9	11.9
8	**Total**	**314.7**	**323.5**	**349.4**	**355.6**	**335.3**
9	**Tuition Revenue**	**482.2**	**502.6**	**497.9**	**510.6**	**524.1**
10	**All Other Revenues**					
11	Canada Research Chairs (CRCs)	8.7	8.5	7.9	7.4	7.4
12	Recoverable Salaries	24.3	24.1	24.5	24.5	24.5
13	All Other	88.4	92.0	93.8	96.9	99.7
14	**Total**	**121.4**	**124.6**	**126.2**	**128.8**	**131.6**
15	**Total Revenues**	**918.3**	**950.7**	**973.5**	**995.0**	**991.0**
16	**EXPENDITURES**					
17	**Faculties**					
18	Base Budgets	483.6	504.4	515.6	514.7	509.6
19	Revenue Sharing Allocations	1.6	2.6	5.3	1.4	2.6
20	Canada Research Chairs (CRCs)	7.6	7.4	6.9	6.5	6.5
21	All Other	50.8	50.8	52.3	50.3	49.2
22	**Total**	**543.6**	**565.2**	**580.1**	**572.9**	**567.9**
23	**Scholarships and Bursaries**	**40.7**	**43.0**	**45.8**	**47.7**	**49.1**
24	**Support Areas**	**130.6**	**140.9**	**145.8**	**142.8**	**139.5**
25	**University-wide Expenditures**	**81.4**	**88.4**	**91.9**	**96.3**	**101.0**
26	**Provision for Cost Fluctuations**	**-**	**-**	**1.2**	**30.6**	**60.5**
27	**One-Time Allocations**	**112.0**	**109.8**	**104.3**	**95.2**	**99.2**
28	**Total Expenditures**	**908.3**	**947.3**	**969.1**	**985.5**	**1,017.2**
29	**REVENUES minus EXPENDITURES**	**10.0**	**3.4**	**4.4**	**9.5**	**-26.3**
30	**OPERATING RESERVE**					
31	Beginning Operating Reserve	41.6	51.5	55.0	59.4	68.9
32	Surplus / (Deficit) -- from Line 29 above	10.0	3.4	4.4	9.5	-26.3
33	**Ending Operating Reserve** ***	**51.5**	**55.0**	**59.4**	**68.9**	**42.6**

<a> The February 12, 2026 Provincial Announcement will lead to increases in the Core Operating Grant and Performance-based Grant. Details of the increases are not yet available. When details are available, we will bring forward further budget recommendations.

*** Recommended Operating Reserve Target of $25M.

E. Summary of the 2026-27 Operating Budget

Table 2 summarizes the 2026-27 Operating Budget, including total revenues, expenditures by area, net position for the year, and the projected operating reserve.

Line 5: Total operating revenue is projected to be $995.0 million in 2026-27. Details of the operating revenues are shown in Table 3.

Line 13: Total expenditures are projected to be $985.5 million in 2026-27. Details of the expenditures (by area) are shown in Tables 4 through 8.

Line 14: The in-year net position is projected to be a $4.4 million surplus in 2025-26 and a planned surplus of $9.5 million in 2026-27.

Line 17: The Operating Reserve is forecast to be $59.4 million at the end of 2025-26 and $68.9 million at the end of 2026-27 – above the recommended Board-mandated minimum level of $25 million. For information, our current forecast is that (as shown in Table 1) the reserve will be $42.6 million at the end of the 2-year planning period (i.e. at the end of 2027-28).

Table 2

SUMMARY OF OPERATING BUDGET: 2026-27

		<a> 2025-26 Budget (@Feb 28, 2026)	<b> 2026-27 Budget	<c> $ Change from 2025-26
1	**Operating Revenues (Table 3)**			
2	Government Grants **<d>**	349,426,673	355,601,714	6,175,041
3	Tuition Revenue	497,949,355	510,594,214	12,644,859
4	All Other	126,102,181	128,791,179	2,688,998
5	**Total Revenues**	**973,478,209**	**994,987,107**	**21,508,898**
6	**Expenditure Budgets**			
7	Faculties (Table 4)	580,078,191	572,933,161	-7,145,030
8	Scholarships and Bursaries (Table 5)	45,825,644	47,678,473	1,852,829
9	Support Areas (Table 6)	145,794,085	142,846,269	-2,947,816
10	University-wide Expenditures (Table 7)	91,883,195	96,310,702	4,427,507
11	Provision for Cost Fluctuations	1,224,652	30,631,352	29,406,700
12	One-Time Allocations	104,293,216	95,055,958	-9,237,258
13	**Total Expenditures**	**969,098,983**	**985,455,915**	**16,356,932**
14	**Surplus / (Deficit) - Line 5 minus Line 13**	**4,379,226**	**9,531,192**	

15	**Beginning Operating Reserve Balance**	**55,034,884**	**59,414,110**	
16	Surplus / (Deficit) -- Line 14 above	4,379,226	9,531,192	
17	**Closing Operating Reserve Balance**	**59,414,110**	**68,945,302**	
18	**Board-mandated Minimum Level Reserve Target**	**10,000,000**	**25,000,000**	

<d> The February 12, 2026 Provincial Annoucement will lead to increases in the Core Operating Grant and the Performance-based Grant. Details are not known at this time. When details are available, we will bring forward further budget recommendations.

F. Details of the 2026-27 Operating Revenue Forecasts (Table 3)

Government Grants

In 2017-18, the Provincial Government introduced an enrolment corridor-based funding system whereby the major portion of on-going/base provincial grants would flow as a block grant, provided the institution maintains an overall level of domestic enrolments. The government is moving towards an approach of linking a portion of the base grant to performance metrics. The sum of lines 2 and 3 is our core operating grants – with line 3 showing the performance-based component.

As noted earlier, the Province committed to two time-limited grants. The sustainability grant (which will be $20.1 million in 2026-27) and STEM funding (which will be $18 million in 2026-27) – the total of these ($38.1 million) is shown in line 5 of Table 3.

Tuition Fees

The recommended tuition fee rates for 2026-27 are summarized in Tables 10, 10a, and 11. Tuition revenue projections are a function of tuition rates and the enrolment forecasts shown in Table 12.

Domestic Students from Ontario

As noted earlier (in section A), tuition rates for domestic students from Ontario are being increased by 2% in in 2026-27. Tuition anomaly adjustments to undergraduate MOS and Computer Science reflect a 7.5% increase – as approved by the Province.

Domestic Students from Other Provinces

As described earlier, tuition rates for undergraduate domestic students from other provinces are recommended to increase by 5% in 2026-27.

International Students

Recent University budgets highlighted the fact that Western's international undergraduate student tuition rates were below the average of our peer research-intensive institutions in Ontario, and it was noted that, looking forward, our recommendations for these tuition fees will seek to move Western's tuition rates to the level of our peers. The recommendations for international undergraduate tuition fees continue on the path to narrowing the gap with our peer institutions.

Starting in the fall term of 2018, tuition rates for international Ph.D. students have been set at the same rate as domestic students.

All Other Revenues

Several other sources contribute to the University's Operating Budget. Major items to note are the Canada Research Chairs (CRCs), the Fee-for-Services Transfer from the Affiliated University Colleges, Fundraising associated with Student Financial Aid, Royalties and Licenses, and the Fee-for-Services Transfer from Ancillaries and Other Self-funded Operations.

- Table 9 summarizes the distribution of currently occupied CRCs at Western. Our current allocation is a total of 78 CRCs. The occupancy of the Chairs turns over dynamically as terms end and begin – including COVID related extensions. There are 57 occupied and funded Chairs in the current year, and we are projecting 55 occupied and funded chairs in 2026-27, with $7.4 million in associated revenue. Some chairs are currently in an unfunded Covid extension year. All remaining available chairs are in the recruitment/nomination process, and we are waiting to hear the results of the CRC reallocation process which may impact the number of CRCs allocated to Western.

- The Fee-for Services Transfer from the Affiliated University Colleges represents payments for services and teaching provided to their students. The standard transfer rate is 12% of the Colleges' grant and tuition revenue. The projected $10.3 million for 2026-27 is a function of the Colleges' enrolment forecasts and associated tuition revenues. In recognition of the financial pressures faced by Huron University College and King's University College (due to reductions in international enrolments), we have agreed to temporary reductions to the transfer rate – from the standard 12% to 11% in 2025-26 and 11.5% in 2026-27. Starting from 2027-28, the transfer rate will return to 12%.

- Fundraising for needs-based Student Awards continues to be of high priority for the University. In 2026-27, we project a sum of nearly $12.8 million from this source.

- Research contracts (through partnerships with the private sector) attracts overhead revenue to cover the indirect costs of the research – and this revenue is shared between the Faculties, the Research Promotion Fund (managed by the Vice-President Research), and the central university budget to cover costs such as space/facilities and I.T. infrastructure.

- The revenue from Royalties and Licenses includes patents/licenses associated with the Robarts Research Institute which flows to the Schulich School. We are projecting a sum of $4.9 million in 2026-27.

- Western's self-funded operations and ancillary units transfer substantial funds to the University Operating Budget by way of payments associated with facilities/land costs and services provided by the University. This category also includes the payment from the Ivey Business School to the University for services provided by the University at-large to Ivey, a component within the funding model for the Ivey School that was introduced in 2004-05.

G. Details of the 2026-27 Expenditure Recommendations

1. Faculty Budget Recommendations

Table 4 shows the 2026-27 **base budget recommendations** for Western's Faculties. Final 2026-27 base budgets are the net result of the following:

- Starting base budgets;
- The Inflationary Budget Adjustments (IBA);
- Academic Priorities Fund (APF) allocations;
- Program expansion funding and/or targeted government allocations; and
- Funds associated with CRC positions (detailed in Table 9).

The **Inflationary Budget Adjustment (IBA)**, which reduces base budgets by 3%, is applied annually. This adjustment is required to help fund inflationary costs, which are primarily the annual employee salary increases as negotiated through collective bargaining agreements.

Figure C illustrates the impact of the in-year addition of funding to cover the costs of negotiated compensation increases – using the Faculties' budgets as presented in last year's budget. Columns <a>, <b>, and <c> are replicated from last year's budget – and show that Faculty budgets in total decrease by $7.8 million in 2025-26 over 2024-25 (column <c>, line 12). This year's budget shows the final 2025-26 Faculty budgets (Table 4, column <a>, line 12) which total $412.6 million (also shown in Figure C, column <d>, line 12) – an increase of $16.3 million compared to what was shown in last year's budget. Of this $16.3 million, $13.1 million was base funding added in-year to cover the costs of negotiated compensation increases.

Figure C

Faculty Budgets: Illustration of Impact of In-Year Compensation Increase Funding and Other Base Allocations Using 2025-26 as an Example

		<a>	<b>	<c>	<d>	<e>
		From Last Year's Budget			From this Budget	
		2024-25 Base Budget	Planned 2025-26 Base Budget	Change over 2024-25 <b> - <a>	Final 2025-26 Base Budget	Change 2025-26 Final vs. Planned <d> - <b>
1	***Faculties***					
2	Arts & Humanities	35,891,174	34,911,940	-979,234	37,464,690	2,552,750
3	Education	20,281,050	19,785,026	-496,024	20,949,460	1,164,434
4	Engineering	42,979,453	42,358,214	-621,239	43,944,207	1,585,993
5	Health Sciences	41,793,975	40,978,356	-815,619	46,418,228	5,439,872
6	Information & Media Studies	12,607,851	12,356,512	-251,339	13,354,591	998,079
7	Law	10,254,258	9,974,728	-279,530	10,930,349	955,621
8	Medicine & Dentistry	81,860,460	80,435,335	-1,425,125	82,781,343	2,346,008
9	Music	11,906,414	11,633,774	-272,640	12,183,225	549,451
10	Science	71,732,719	70,215,111	-1,517,608	73,490,689	3,275,578
11	Social Science	74,821,506	73,691,653	-1,129,853	71,087,515	-2,604,138
12	***Sub-Total Faculties***	***404,128,860***	***396,340,649***	***-7,788,211***	***412,604,297***	***16,263,648***

The **Academic Priorities Fund (APF)** shown in line 19 of Table 4 was established in 2011-12. The Provost's APF recommendations are in direct response to requests from the Faculties and are made in the context of the following considerations:

- The Faculty's overall resource situation relative to enrolments/teaching
- Plans for program expansion and/or development of new graduate and undergraduate programs
- Projected revenue sharing allocations
- Resources relative to similar programs/Faculties
- Cost structure variations among disciplines/Faculties
- Relationship between resources, enrolments, and faculty/staff complements
- Scholarship/research activities and new initiatives, including interdisciplinary or cross-Faculty initiatives
- Investments made in recent years

For 2026-27, in light of our initial revenue assumptions, we had indicated to the Faculties that we would not be able to provide base APF allocations. However, as noted earlier, immediately after the Province's announcement that domestic tuition can increase by 2%, we committed to a total of $2.4 million in base APF allocations – as shows in Table 4, column <c>, line 12).

The **Other Base Changes** for the Faculties (shown in column <d> of Table 4) consist of:

- $834,000 to Engineering as a direct result of enrolment expansion – and this funding is expected to support additional faculty and staff positions; and
- $208,000 to Science in support of the incremental teaching associated with the Engineering expansion plan.

The **funding model for the Ivey Business School**, introduced in 2004-05, flows all tuition fees and government grants deriving from enrolments directly to Ivey. Under this funding model, the Ivey School does not participate in the University's other funding programs such as the APF, the Research Infrastructure Support Fund (RISF), and other targeted special funding programs – and the Faculty is responsible for all its costs, including annual employee compensation increases. Ivey also transfers an annual amount to the central budget, reflecting the cost of general services provided to the Faculty by the University.

Over and above the base budget allocations, the Faculties receive additional funds through the **enrolment-related revenue sharing mechanism** that was implemented in 2011-12 (Table 4, line 15). A proportion of tuition revenue deriving from incremental enrolments flows to the Faculties, as follows:

- for the undergraduate direct-entry component, the equivalent of 40% of incremental domestic tuition revenue provided at the rate of $436 per incremental full-course-equivalent course registration taught
- 40% on second-entry (or professional) undergraduate enrolments
- 40% on graduate enrolments

The Faculties also receive additional budgetary support through:

- **One-time operating budget allocations** (totaling $24.1 million) which are detailed in Table 8 (lines 13 to 24);
- The new **PhD enrolment growth funding support program**, estimated at $544,000 (Table 4, line 16);

- **The Research Infrastructure Support Fund (RISF)** totaling $750,000 (Table 4, line 17); and
- Support for **Faculty-specific capital projects** totaling $1.3 million – through the University's Capital Budget.

A consolidated summary of the Provost's allocation recommendations for the Faculties (direct to the Faculties, from the various sources described above) is presented in Figure D. These recommendations are for the 2026-27 Budget.

Figure D

SUMMARY OF 2026-27 ALLOCATION RECOMMENDATIONS FOR THE FACULTIES

(direct allocations to the Faculties through the planning process)

		Base Allocations	One-Time Allocations	Capital Support
1	Arts & Humanities	222,000	877,300	73,850
2	Education	128,000	578,550	
3	Engineering	1,092,468	2,439,653	237,600
4	Health Sciences	274,000	6,768,067	600,000
5	Information & Media Studies	80,000	133,425	38,000
6	Law	66,000	140,000	
7	Medicine & Dentistry	486,000	8,694,409	300,000
8	Music	73,000	437,350	
9	Science	640,761	2,935,153	
10	Social Science	419,000	1,054,179	
11	**Total**	**3,481,229**	**24,058,086**	**1,249,450**

2. Scholarships and Bursaries

Base budget allocations for centrally-funded student support programs are shown in Table 5 – with a total of $47.7 million estimated for 2026-27.

- Undergraduate scholarships are projected to increase by $500,000 due to increases in the number of scholarship-eligible students.
- Funding to support students in financial need is a priority for the University, and we project a sum of $21.8 million in bursary funds.
- Fundraising for undergraduate and graduate student needs-based awards continues to be a high priority for the University. In 2026-27, we project a sum of $12.8 million from this source.
- As part of the integration of Brescia University College into Western, the University committed to a student financial support program – the Brescia Legacy Fund. The fund was created through a $25 million endowment established on May 1, 2024 – and is expected to provide $1.07 million for spending in 2026-27. The fund will support scholarships, bursaries, and programming for underrepresented groups or historically disadvantaged groups.
- As the footnote in Table 5 indicates, graduate student funding is addressed through the Faculty budgets, and the Faculty plans estimate a total of $50.5 million in 2026-27 for this priority item. Graduate students also receive additional funding through faculty members' research grants,

external student award programs (e.g. tri-agencies), and other sources. In recent years, these sources have added about $45 million annually to overall graduate student financial support.

In addition to the base budget allocations shown in Table 5, two special one-time student financial support funding allocations are also recommended in this budget:

- In recognition of the financial needs of our graduate students, a sum of $500,000 one-time in support of the Graduate Student Needs-based and Emergency Fund continues in 2026-27 – as shown in Table 8, line 10. This fund augments the regular annual general bursary funding available to all students (shown in Table 5, lines 2 and 3).
- As described earlier, international undergraduate student recruitment is a high priority for the University – and is of even greater importance in the current environment which includes the Federal Government's plan to limit the number of study permits for international students. In support of this, $6.35 million in one-time funding for international undergraduate student recruitment awards (shown in Table 8, line 3).

3. Support Unit Budget Recommendations

Table 6 shows the 2026-27 base budget recommendations for Support Units. Final 2026-27 base budgets are the net result of the following:

- Starting base budgets;
- The Inflationary Budget Adjustments (IBA);
- Support Units Priorities Fund (SUPF) allocations; and
- Other strategic and operational base allocations.

For 2026-27, as with the Faculties, we had indicated that we would not be able to provide base SUPF allocations. However, as noted earlier, immediately after the Province's announcement that domestic tuition can increase by 2%, we committed to a total of nearly $1 million in base SUPF allocations – as shown in Table 6, column <c>, line 38).

The Support Units also receive additional budgetary support through:

- **One-time operating budget allocations** ($7.3 million) which are detailed in Table 8 (lines 25 through 40); and
- Support for **Unit-specific capital projects** totaling $2.1 million – through the University's Capital Budget.

4. University-wide Expenditures

Table 7 summarizes University-wide Expenditures. These are expenses that extend across all areas of the University.

- The increase in the University's physical plant **Utilities** is the net result of projected utilities rate increases, utilization patterns, anticipated savings resulting from the implementation of energy efficiency initiatives, and the opening of new buildings.

- The **Library Acquisitions Budget** continues to be a high priority and a sum of $15.7 million is recommended for 2026-27.

- The **Maintenance, Modernization, and Infrastructure (MMI)** transfer to the Capital Budget is maintained at $16 million – and the funds are used to support general maintenance of our facilities. This MMI transfer has remained roughly constant since 2017-18. In next year's budget, we will bring forward recommendations to increase this transfer.

- The **Federal Research Support Fund (FRSF) Transfer to Capital** continues at the $3 million level and these funds are used to support projects in our Long-range Space Plan that involve research facilities. The FRSF provides partial funding to cover the indirect costs associated with federally funded research activities.

- The **Information Technology Infrastructure Fund (ITIF)** supports rapidly expanding University-wide central IT infrastructure including our networks, wireless technologies, internet bandwidth, IT security infrastructure, general university computer labs, instructional support and eLearning software applications, central university databases, the hardware necessary to run the applications and databases, and maintenance costs associated with all the hardware and software.

- **Contingency** is set at $2.5 million or about 0.25% of Operating Revenues, as in previous years.

5. One-Time Recommendations

As noted above, the Faculties and Support Units will receive substantial one-time funding in 2026-27. The specific one-time recommendations are summarized in Table 8 and include unit-specific items as well as allocations for University-wide initiatives.

As described earlier in Section C of this document, the following high priority university-wide initiatives are recommended for support in the 2026-27 budget – with one-time allocations totaling $95.1 million. Major one-time items include:

- **The Endowed Chairs Matching Program**: $30 million
- **Acquisition of a 7T MRI**: $7 million
- **International Undergraduate Recruitment Awards**: 6.35 million
- Multi-year plan to fund a **new Engineering Building** to accommodate the enrolment expansion: $5.8 million
- **Information Technology Infrastructure Renewal and Expansion**: $5 million
- Continuation of the **Postdoctoral Fellowships Program**: $3.4 million
- **Modernization of General University Instructional Facilities**: $2.5 million
- Continuation of the **Undergraduate Summer Research Internship Program**: $2 million
- The **National Campaign and Campaign-related Marketing**: $700,000
- Resources to support **Graduate Student Needs-based Bursaries and Emergency Funding**: $500,000

Table 3

2026-27 OPERATING REVENUES

		2025-26 Budget Forecast (@Feb 28, 2026) (1)	2026-27 Budget (2)	Increase / (Decrease) Amount (3)	% Change (2) to (1)
1	**Government Grants**				
2	Provincial: Core Operating Grant **<a>**	97,517,161	97,517,161	0	0.0%
3	Provincial: Performance-based Grant **<a>**	182,263,965	182,263,965	0	0.0%
4	Provincial: Special Purpose Grants	25,556,747	25,838,358	281,611	1.1%
5	Provincial: Time-Limited Grants	32,203,469	38,082,230	5,878,761	18.3%
6	Federal Research Support Fund (FRSF)	11,885,331	11,900,000	14,669	0.1%
7	**Sub-Total Government Grants**	**349,426,673**	**355,601,714**	**6,175,041**	**1.8%**
8	**Tuition Revenue**				
9	Undergraduate	311,932,861	314,866,666	2,933,805	0.9%
10	Graduate	71,587,204	75,182,296	3,595,092	5.0%
11	*Sub-Total General Programs*	*383,520,065*	*390,048,962*	*6,528,897*	1.7%
12	Ivey Programs (Undergraduate and Graduate)	95,626,290	103,242,252	7,615,962	8.0%
13	International Medical and Dental Students	16,916,000	15,416,000	-1,500,000	-8.9%
14	*Sub-Total Other Programs*	*112,542,290*	*118,658,252*	*6,115,962*	5.4%
15	Miscellaneous Fees	1,887,000	1,887,000	0	0.0%
16	**Sub-Total Tuition Revenue**	**497,949,355**	**510,594,214**	**12,644,859**	**2.5%**
17	**Other Revenues**				
18	Canada Research Chairs (CRCs)	7,900,000	7,400,000	-500,000	-6.3%
19	Fee for Services Transfer from Affiliated University Colleges	9,725,012	10,314,873	589,861	6.1%
20	Recoverable Salaries	24,496,000	24,496,000	0	0.0%
21	Fundraising -- Need-based Student Awards and Bursaries	12,422,999	12,822,999	400,000	3.2%
22	Application Fees	3,000,000	3,000,000	0	0.0%
23	Research Overhead Revenues	5,960,000	6,140,000	180,000	3.0%
24	Royalties and Licences	4,800,000	4,875,000	75,000	1.6%
25	Scholarship/Research Initiatives in the SSHRC Disciplines	535,416	552,152	16,736	3.1%
26	Fee for Services Transfer from Self-Funded & Ancillary Operation	54,883,424	56,015,100	1,131,676	2.1%
27	Miscellaneous Revenues	2,379,330	3,175,055	795,725	33.4%
28	**Sub-Total Other Revenues**	**126,102,181**	**128,791,179**	**2,688,998**	**2.1%**
29	**Total Revenues**	**973,478,209**	**994,987,107**	**21,508,898**	**2.2%**

<a> The February 12, 2026 Provincial Annoucement will lead to increases in the Core Operating Grant and the Performance-based Grant. Details are not known at this time. When details are available, we will bring forward further budget recommendations.

Table 4
FACULTIES

		<a> 2025-26 Base Budget (@Feb 28, 2026)	<b> IBA	<c> APF	<d> Other Base Changes	<e> Canada Research Chairs	<f> Resulting 2026-27 Base Budget **
1	***Faculties***						
2	Arts & Humanities	37,464,690	-1,111,041	222,000			36,575,649
3	Education	20,949,460	-640,814	128,000			20,436,646
4	Engineering	43,944,207	-1,291,926	258,000	834,468	90,000	43,834,749
5	Health Sciences	46,418,228	-1,369,147	274,000		-170,000	45,153,081
6	Information & Media Studies	13,354,591	-397,938	80,000		-90,000	12,946,653
7	Law	10,930,349	-327,910	66,000			10,668,439
8	Medicine & Dentistry	82,781,343	-2,431,241	486,000		180,000	81,016,102
9	Music	12,183,225	-362,797	73,000			11,893,428
10	Science	73,490,689	-2,165,421	433,000	207,761	-170,000	71,796,029
11	Social Science	71,087,515	-2,103,825	419,000		-170,000	69,232,690
12	***Sub-Total Faculties (excluding Business)***	***412,604,297***	***-12,202,060***	***2,439,000***	***1,042,229***	***-330,000***	***403,553,466***
13	Business	108,952,561			7,918,826	-90,000	116,781,387
14	***Sub-Total Faculties***	***521,556,858***	***-12,202,060***	***2,439,000***	***8,961,055***	***-420,000***	***520,334,853***
15	Enrolment-related Revenue Sharing Allocation	5,309,300			-3,913,235		1,396,065
16	PhD Enrolment Growth Support	1,160,000			-616,000		544,000
17	Research Infrastructure Support Fund (RISF)	750,000					750,000
18	Faculty Recruitment Initiatives	164,278					164,278
19	Academic Priorities Fund (APF)	3,840,160					3,840,160
20	***Total -- with Revenue Sharing Allocation***	***532,780,596***	***-12,202,060***	***2,439,000***	***4,431,820***	***-420,000***	***527,029,356***
21	***All Other***						
22	Western Strategic Success Programs	1,500,000					1,500,000
23	Education: Continuing Education for Teachers	1,170,790			36,210		1,207,000
24	Medicine & Dentistry: International Tuition and Primary Care	17,265,805			-1,500,000		15,765,805
25	Faculties' Share of Research Overheads	2,220,000			70,000		2,290,000
26	Faculty Scholars & Distinguished University Professors	505,000					505,000
27	Graduate and Undergraduate Program Reviews	140,000					140,000
28	Recoverable Salaries	24,496,000					24,496,000
29	***Sub-Total***	***47,297,595***	***0***	***0***	***-1,393,790***	***0***	***45,903,805***
30	**Total Academic Units**	**580,078,191**	**-12,202,060**	**2,439,000**	**3,038,030**	**-420,000**	**572,933,161**

*** Note: Funding to cover the costs of negotiated employee salary and benefits increases will be incrementally added to Faculty base budgets (in year, to column f), as the information is available.*

Table 5

SCHOLARSHIPS and BURSARIES

		<a> 2025-26 Base Budget (@Feb 28, 2026)	<b> Changes	<c> Resulting 2026-27 Base Budget
1	Undergraduate Scholarships	10,470,297	500,000	10,970,297
2	Tuition Re-investment and Western Bursaries	20,902,766	907,675	21,810,441
3	Privately-Funded Need-based Awards & Bursaries	12,422,999	400,000	12,822,999
4	Brescia Legacy Fund	1,063,733	2,601	1,066,334
5	Targeted MCU Bursaries	765,849	42,553	808,402
6	Global Opportunities Awards	200,000		200,000
7	**Total Scholarships and Bursaries**	**45,825,644**	**1,852,829**	**47,678,473**

Graduate student funding is addressed through the Faculty budgets. In 2025-26, this funding is estimated to be $50.7 million and the plan for 2026-27 is $50.5 million.
Graduate students also receive additional funding through faculty members' research grants, external student award programs (e.g. tri-agencies), and other sources. It is estimated that these sources will add about $45 million annually to overall graduate student financial support.

Table 6
SUPPORT AREAS

		<a> 2025-26 Base Budget (@Feb 28, 2026)	<b> IBA	<c> SUPF	<d> Other Base Changes	<e> ** Resulting 2026-27 Base Budget
1	***Reporting to the Provost***					
2	Academic Programs Portfolio	2,405,816	-72,174	18,000		2,351,642
3	Western Technology Services	13,851,038	-415,531	104,000		13,539,507
4	Western Libraries	16,114,236	-483,427	121,000		15,751,809
5	Registrar's Office	9,440,330	-283,210	71,000		9,228,120
6	Student Experience Portfolio <f>	3,420,297	-89,462	22,000		3,352,835
7	Office of Indigenous Initiatives	1,411,657	-42,350	11,000		1,380,307
8	Vice-Provost (APPF) Portfolio	1,878,813	-56,364	14,000		1,836,449
9	Graduate & Postdoctoral Studies	2,265,432	-67,963	17,000		2,214,469
10	Institutional Planning and Budgeting	3,830,650	-114,920	29,000		3,744,730
11	Western International	2,791,129	-83,734			2,707,395
12	McIntosh Gallery - Operating Budget Supplement	428,392				428,392
13	Teaching Fellows Program	475,312				475,312
14	***Sub-Total***	***58,313,102***	***-1,709,135***	***407,000***	***0***	***57,010,967***
15	***Reporting to the Vice-President Operations & Finance***					
16	Financial Services	6,479,054	-194,372	49,000		6,333,682
17	Facilities Management	23,628,486	-591,055	148,000	53,582	23,239,013
18	Campus Safety & Emergency Services	5,487,042	-164,611	41,000		5,363,431
19	Internal Audit	753,846	-22,615	6,000		737,231
20	Legal Services	1,105,519	-33,166	8,000		1,080,353
21	***Sub-Total***	***37,453,947***	***-1,005,819***	***252,000***	***53,582***	***36,753,710***
22	***Reporting to the Vice-President Research***					
23	Animal Care/Veterinary Services - Operating Budget Supplement	3,712,300				3,712,300
24	Research Western	8,580,037	-257,401	64,000		8,386,636
25	Research Promotion Fund	1,750,000				1,750,000
26	Special Grants Support for Arts/Humanities/Social Sciences	250,000				250,000
27	Scholarship/Research Initiatives in the SSHRC Disciplines	535,416			16,736	552,152
28	Western Innovation Fund	400,000				400,000
29	***Sub-Total***	***15,227,753***	***-257,401***	***64,000***	***16,736***	***15,051,088***
30	***Vice-President University Advancement Portfolio***	***10,984,422***	***-329,533***	***83,000***	***0***	***10,737,889***
31	***General Administration***					
32	Human Resources (Including Workplace Health Services)	9,349,843	-263,296	66,000		9,152,547
33	Offices of the President and All Vice-Presidents	5,322,681	-159,680	40,000		5,203,001
34	Western Communications	6,602,437	-198,073	50,000		6,454,364
35	University Secretariat	1,577,753	-47,333	12,000		1,542,420
36	Office of Equity, Diversity, and Inclusion	962,147	-28,864	7,000		940,283
37	***Sub-Total***	***23,814,861***	***-697,246***	***175,000***	***0***	***23,292,615***
38	**Total Support Areas**	**145,794,085**	**-3,999,134**	**981,000**	**70,318**	**142,846,269**

Note: Funding to cover the costs of negotiated employee salary and benefits increases will be incrementally added to Unit base budgets (in year, to column e), as the information is available.

<f> In addition to this line, Student Services at Western are funded through Student Ancillary Fees. In 2026-27 the Student Service Unit Budgets are estimated to be $35.9 million.

Table 7
UNIVERSITY-WIDE EXPENDITURES and EMPLOYEE BENEFIT COSTS

		<a>	<b>	<c>	<d>
		2025-26 Base Budget (@Feb 28, 2026)	New Investment	Other Changes	Resulting 2026-27 Base Budget
1	Utilities	27,447,201		3,087,628	30,534,829
2	Library Acquisitions	15,740,896			15,740,896
3	Transfer to MMI: Operating	16,000,000			16,000,000
4	Transfer to MMI: Ancillaries	600,000			600,000
5	FRSF Transfer to Capital	3,000,000			3,000,000
6	CRC Transfer to Capital	808,000		-64,000	744,000
7	Information Technology Infrastructure Fund	8,276,722			8,276,722
8	Property Taxes	2,840,625		-11,925	2,828,700
9	Insurance	3,724,000		300,000	4,024,000
10	Contingency	2,338,384		149,084	2,487,468
11	Accessible Education Services	1,473,454			1,473,454
12	Professional Fees	6,150,000			6,150,000
13	Institutional Memberships	1,800,000			1,800,000
14	Sports and Recreation Services - Operating Budget Supplement	879,226			879,226
15	The Western Entrepreneurship Ecosystem - Operating Budget Supplement	674,207			674,207
16	Costs Associated with Employee Contracts	875,000			875,000
17	Convocation and Diplomas	1,000,000			1,000,000
18	Governance-Related Costs	205,800			205,800
19	Office of the Ombudsperson	129,400			129,400
20	**Total University-wide Expenditures**	**93,962,915**	**0**	**3,460,787**	**97,423,702**
21	Employee Benefit Plan Costs	159,006,300		8,152,700	167,159,000
22	Employee Benefit Recoveries	-161,086,020		-7,185,980	-168,272,000
23	**Net Employee Benefits**	**-2,079,720**	**0**	**966,720**	**-1,113,000**
24	**Net University-wide Expenditures**	**91,883,195**	**0**	**4,427,507**	**96,310,702**

Table 8
2026-27 ONE-TIME ALLOCATIONS

1	Endowed Chairs Matching Program	30,000,000
2	Acquisition of a 7T High-Field Magnetic Resonance Imaging Scanner (MRI)	7,000,000
3	International Scholarship Programs	6,350,000
4	Engineering Expansion -- Support for New Building (multi-year plan) -- Funding from Expansion Revenues	5,758,136
5	IT Infrastructure Renewal / Expansion	5,000,000
6	Post Doctoral Fellowships Program	3,400,000
7	Modernization of General University Instructional Facilities	2,500,000
8	Undergraduate Summer Research Internship Program (USRI)	2,000,000
9	Fundraising Campaign Communications	700,000
10	Graduate Student Needs-based Bursaries	500,000
11	Doctoral Excellence Awards	280,000
12	Climate Sustainability and Campus Development Strategies	250,000
13	**Faculties**	
14	Arts & Humanities: STEM Education Funding ($792K), Curatorial Residency in Social and Environmental Justice ($65K), and Seed Funding for Inter-Faculty Research Projects ($20K)	877,300
15	Education: Teacher Education Expansion ($500K), Transnational Mobility Initiatives ($15K), STEM Education Funding ($9K), and Centre for Research & Education on Violence Against Women & Children (CREVAWC) Supplement ($55K)	578,550
16	Engineering: STEM Education Funding ($1.8M), Artificial Intelligence Systems Engineering Lab ($212K), and Undergraduate Enrolment Expansion -- Start-up and Faculty Recruitment Funding ($450K)	2,439,653
17	Health Sciences: Anatomy Instructional Materials ($100K), Inter-professional Development ($50K), Targetted Government Funding for Clinical Education ($1.9M), Nursing Expansion Funding ($2.7M), Nurse Practitioner Program ($1.24M), Collaborative Nursing Growth ($730K), and STEM Education Funding ($67K)	6,768,067
18	FIMS: Annual Summer Institute and Conference on Technology Innovation for LIS Professionals ($55K), Seed Funding for FAM Initiatives ($20K), and STEM Education Funding ($58K)	133,425
19	Law: Wellness Counsellor ($140K)	140,000
20	Medicine & Dentistry: Targetted Government Funding for Medical Education ($2.3M), Targetted Government Funding for Dental Clinical Education ($1.1M), Dental Patient Simulator Stations ($455K), Robarts Royalties & Licences Flowthrough ($4.0M), and STEM Education Funding ($801K)	8,694,409
21	Music: Limited-Term Renewal ($150K), Grand Piano Renewal ($136K), Staff and Faculty Workstations ($80K), Modernization of Classroom Technology ($48K), and STEM Education Funding ($24K)	437,350
22	Science: STEM Education Funding ($2.8M), and Engineering Expansion Teaching Support ($100K)	2,935,153
23	Social Science : STEM Education Funding ($854K), and Museum of Ontario Archaeology Supplement ($50K)	1,054,179
24	**Sub-Total Faculties**	**24,058,086**
25	**Support Units**	
26	Western Technology Services: AI Pilot -- including Technology Licensing Costs ($390K)	390,000
27	Libraries: GIS/CAD Technician and Work Study Student	30,000
28	Registrar's Office: Additional Technical Resources ($85K)	85,000
29	Student Experience: Accommodated Exams ($650K), Family Practice Clinic Support ($400K), Homecoming/ Orientation ($310K), and Funding for Artificial Turf Fields ($230K)	1,590,000
30	Vice-Provost (APPF): Records Management ($72K) and Website Refresh ($28K)	100,000
31	Graduate & Postdoctoral Studies: Renewal of iThenticate ($22K), Mobile App Development ($10K), and Own Your Future Asynchronous Module Development ($15K)	46,720
32	Financial Services: Digital Assistant -- Co-Pilot Software	100,000
33	Facilities Management: Electrical Vehicle Fleet Expansion ($38K), and Technology Support ($100K)	138,064
34	Campus Safety & Emergency Services: AED Programming ($79K)	79,252
35	Internal Audit: Support for Operational Needs($6K)	6,000
36	Human Resources: Workplace Culture & Engagement Survey Software ($82K)	82,000
37	Equity, Diversity & Inclusion: Campus EDI Initiatives ($50K)	50,000
38	Vice-President (Research): Support for University-wide Research/Scholarship Initiatives	4,462,700
39	Vice-President (University Advancement): Annual Giving Consultant ($100K)	100,000
40	**Sub-Total Support Units**	**7,259,736**
41	**Total One-Time Allocations**	**95,055,958**

Table 9

CANADA RESEARCH CHAIRS -- by FACULTY (Cumulative)

		2025-26 Final						2026-27 Preliminary					
		Tier 1		Tier 2		Total		Tier 1		Tier 2		Total	
		N	$	N	$	N	$	N	$	N	$	N	$
1	Arts & Humanities	**2**	340,000	**1**	90,000	3	430,000	**2**	340,000	**1**	90,000	3	430,000
2	Business	**1**	170,000	**1**	90,000	2	260,000	**1**	170,000	**0**	0	1	170,000
3	Education	**1**	170,000	**2**	180,000	3	350,000	**1**	170,000	**2**	180,000	3	350,000
4	Engineering	**2**	340,000	**6**	540,000	8	880,000	**2**	340,000	**7**	630,000	9	970,000
5	Health Sciences	**3**	510,000	**3**	270,000	6	780,000	**2**	340,000	**3**	270,000	5	610,000
6	Info & Media Studies			**1**	90,000	1	90,000			**0**	0	0	0
7	Law						0						0
8	Medicine & Dentistry	**6**	1,020,000	**8**	720,000	14	1,740,000	**6**	1,020,000	**10**	900,000	16	1,920,000
9	Music			**1**	90,000	1	90,000			**1**	90,000	1	90,000
10	Science	**4**	680,000	**7**	630,000	11	1,310,000	**3**	510,000	**7**	630,000	10	1,140,000
11	Social Science	**3**	510,000	**5**	450,000	8	960,000	**2**	340,000	**5**	450,000	7	790,000
12	Total to Faculties	**22**	3,740,000	**35**	3,150,000	57	6,890,000	**19**	3,230,000	**36**	3,240,000	55	6,470,000
13	**Total CRC Funding**		**4,400,000**		**3,500,000**		**7,900,000**		**3,800,000**		**3,600,000**		**7,400,000**

Table 10
2026-27 TUITION FEE PROPOSALS FOR UNDERGRADUATE PROGRAMS

		Domestic Ontario Students			International Students		
		Actual	2026-27		Actual	2026-27	
		2025-26	Proposed	<a>	2025-26	Proposed	<b>
		Tuition	Tuition	% Increase	Tuition	Tuition	% Increase
1	**First-Entry Programs <c>**						
2	Year 1	6,050	6,171	2.0%	46,110	47,493	3.0%
3	Year 2	6,050	6,171	2.0%	46,110	47,493	3.0%
4	Year 3	6,050	6,171	2.0%	45,240	47,493	3.0%
5	Year 4	6,050	6,171	2.0%	43,565	46,597	3.0%
6	Computer Science						
7	Year 1	7,514	8,077	7.5%	53,560	55,167	3.0%
8	Year 2	7,514	8,077	7.5%	53,560	55,167	3.0%
9	Year 3	7,514	8,077	7.5%	45,240	55,167	3.0%
10	Year 4	6,050	8,077	7.5%	43,565	46,597	3.0%
11	Engineering						
12	Year 1	12,294	12,539	2.0%	62,437	64,310	3.0%
13	Year 2	12,294	12,539	2.0%	62,437	64,310	3.0%
14	Year 3	12,294	12,539	2.0%	62,437	64,310	3.0%
15	Year 4	12,294	12,539	2.0%	60,124	64,310	3.0%
16	M.O.S.						
17	Year 1	7,514	8,077	7.5%	58,354	60,105	3.0%
18	Year 2	7,514	8,077	7.5%	58,354	60,105	3.0%
19	Year 3	7,514	8,077	7.5%	58,354	60,105	3.0%
20	Year 4	6,050	8,077	7.5%	56,193	60,105	3.0%
21	Nursing						
22	Year 1	6,050	6,171	2.0%	58,056	59,798	3.0%
23	Year 2	6,050	6,171	2.0%	58,056	59,798	3.0%
24	Year 3	6,050	6,171	2.0%	58,056	59,798	3.0%
25	Year 4	6,050	6,171	2.0%	55,905	59,798	3.0%
26	**Second-Entry Programs**						
27	Business (HBA)						
28	Year 1	25,200	25,704	2.0%	64,850	70,040	8.0%
29	Year 2	25,200	25,704	2.0%	64,850	70,040	8.0%
30	Dentistry						
31	Year 1	35,341	36,047	2.0%	129,202	133,078	3.0%
32	Year 2	35,341	36,047	2.0%	129,202	133,078	3.0%
33	Year 3	35,341	36,047	2.0%	129,202	133,078	3.0%
34	Year 4	35,341	36,047	2.0%	124,417	133,078	3.0%
35	Education (B.Ed.)	7,271	7,416	2.0%	42,926	44,214	3.0%
36	Law						
37	Year 1	20,151	20,554	2.0%	50,731	52,253	3.0%
38	Year 2	20,151	20,554	2.0%	50,731	52,253	3.0%
39	Year 3	20,151	20,554	2.0%	49,774	52,253	3.0%
40	Medicine (M.D.)						
41	Year 1	23,986	24,465	2.0%	94,858	97,704	3.0%
42	Year 2	23,986	24,465	2.0%	94,858	97,704	3.0%
43	Year 3	23,986	24,465	2.0%	93,068	97,704	3.0%
44	Year 4	23,986	24,465	2.0%	n.a.	95,860	3.0%

<a> The proposed 2026-27 domestic rates would be effective September 1, 2026 -- exept for Computer Science and MOS, which will be effective May 1, 2026.
The % increase figures are calculated on the previous year of study in the previous academic year; for example, the % increase for year 2 is the increase over the year 1 tuition in the previous academic year.

<b> The proposed 2026-27 international rates would be effective May 1, 2026.
The % increase figures are calculated on the previous year of study in the previous academic year; for example, the % increase for year 2 is the increase over the year 1 tuition in the previous academic year.

<c> Includes Arts & Humanities, BMedSci program, Health Sciences, Kinesiology, Music, Science (excl. Computer Science), and Social Science (excl. M.O.S.).

Table 10a
2026-27 TUITION FEE PROPOSALS FOR UNDERGRADUATE OUT-OF-PROVINCE DOMESTIC STUDENTS

		Actual 2025-26 Tuition	2026-27 Proposed Tuition	2026-27 <a> % Increase
1	**First-Entry Programs <b>**			
2	Year 1	7,352	7,719	5.0%
3	Year 2	7,352	7,719	5.0%
4	Year 3	7,352	7,719	5.0%
5	Year 4	7,352	7,719	5.0%
6	Computer Science			
7	Year 1	7,514	8,077	7.5%
8	Year 2	7,514	8,077	7.5%
9	Year 3	7,514	8,077	7.5%
10	Year 4	7,352	8,077	7.5%
11	Engineering			
12	Year 1	14,941	15,688	5.0%
13	Year 2	14,941	15,688	5.0%
14	Year 3	14,941	15,688	5.0%
15	Year 4	14,941	15,688	5.0%
16	M.O.S.			
17	Year 1	7,514	8,077	7.5%
18	Year 2	7,514	8,077	7.5%
19	Year 3	7,514	8,077	7.5%
20	Year 4	7,352	8,077	7.5%
21	Nursing			
22	Year 1	7,352	7,719	5.0%
23	Year 2	7,352	7,719	5.0%
24	Year 3	7,352	7,719	5.0%
25	Year 4	7,352	7,719	5.0%
26	**Second-Entry Programs**			
27	Business (HBA)			
28	Year 1	30,628	32,159	5.0%
29	Year 2	30,628	32,159	5.0%
30	Dentistry			
31	Year 1	42,956	45,103	5.0%
32	Year 2	42,956	45,103	5.0%
33	Year 3	42,956	45,103	5.0%
34	Year 4	42,956	45,103	5.0%
35	Education (B.Ed.)	8,835	9,276	5.0%
36	Law			
37	Year 1	24,491	25,715	5.0%
38	Year 2	24,491	25,715	5.0%
39	Year 3	24,491	25,715	5.0%
40	Medicine (M.D.)			
41	Year 1	29,154	30,611	5.0%
42	Year 2	29,154	30,611	5.0%
43	Year 3	29,154	30,611	5.0%
44	Year 4	29,154	30,611	5.0%

<a> The 2026-27 rates abide by the Provincial Government's framework for domestic out-of province students -- and would be effective May 1, 2026.

<b> Includes Arts & Humanities, BMedSci program, Health Sciences, Kinesiology, Music, Science (excl. Computer Science, and Social Science (excl. M.O.S.).

Table 11
2026-27 TUITION FEE PROPOSALS FOR GRADUATE PROGRAMS

		Domestic Students			International Students		
		Actual 2025-26 Tuition	2026-27 Proposed Tuition	2026-27 <a> % Increase	Actual 2025-26 Tuition	2026-27 Proposed Tuition	2026-27 <a> % Increase
1	**Masters Category 1**						
2	Arts & Humanities	6,360	6,487	2.0%	20,549	20,960	2.0%
3	Engineering (M.E.Sc.)	6,360	6,487	2.0%	20,549	20,960	2.0%
4	Health & Rehabilitation Sciences	6,360	6,487	2.0%	20,549	20,960	2.0%
5	Health Information Sciences	8,664	8,837	2.0%	28,999	29,579	2.0%
6	Interdisciplinary Programs <b>	6,360	6,487	2.0%	20,549	20,960	2.0%
7	Kinesiology M.A. & MSc	6,360	6,487	2.0%	21,157	21,792	3.0%
8	Law/Studies in Law	10,368	10,575	2.0%	28,955	29,534	2.0%
9	Media Studies	6,360	6,487	2.0%	20,549	20,960	2.0%
10	Medicine (Basic Medical Sciences)	6,360	6,487	2.0%	20,549	20,960	2.0%
11	Music	6,360	6,487	2.0%	20,549	20,960	2.0%
12	Nursing (M.Sc.)	7,639	7,791	2.0%	28,999	29,579	2.0%
13	Science	6,360	6,487	2.0%	20,549	20,960	2.0%
14	Social Science	6,360	6,487	2.0%	20,549	20,960	2.0%
15	**Masters Category 2**						
16	Master in Management Analytics	50,700	53,200	4.9%	50,700	53,200	4.9%
17	C.S.D./O.T./P.T. (MPT)	11,294	11,519	2.0%	40,075	41,277	3.0%
18	Foods and Nutrition (MScFN)	10,877	11,094	2.0%	40,075	41,277	3.0%
19	Dentistry (Orthodontics)	27,373	27,920	2.0%	97,456	100,380	3.0%
20	Education (MA)	10,877	11,094	2.0%	40,075	41,277	3.0%
21	Engineering (M.Eng.)	10,877	11,094	2.0%	45,779	47,152	3.0%
22	Environment & Sustainability	12,179	12,422	2.0%	40,075	41,277	3.0%
23	Financial Economics	30,549	31,159	2.0%	62,771	64,654	3.0%
24	Library & Information Science	10,877	11,094	2.0%	40,075	41,277	3.0%
25	M.M. in Journalism & Communication	13,543	13,813	2.0%	40,075	41,277	3.0%
26	Master of Nursing	10,877	11,094	2.0%	40,075	41,277	3.0%
27	MA in Research for Policy & Evaluation	18,720	19,094	2.0%	36,149	37,233	3.0%
28	Master of Data Analytics	23,308	23,774	2.0%	59,245	61,022	3.0%
29	Master of Mgmt. of Applied Science	19,690	20,083	2.0%	59,245	61,022	3.0%
30	Medicine (Family Medicine)	14,322	14,608	2.0%	40,075	41,277	3.0%
31	Medicine (Pathology Assistant)	11,295	11,520	2.0%	40,075	41,277	3.0%
32	Medicine (Public Health)	35,076	36,128	3.0%	59,098	60,871	3.0%
33	Interdisciplinary Medical Sciences (MSc)	11,295	11,520	2.0%	40,551	41,768	3.0%
34	Advanced Health Care Practice (M.Cl.Sc.)	10,877	11,094	2.0%	40,075	41,277	3.0%
35	**Doctoral**						
36	Doctor of Musical Arts	6,360	6,487	2.0%	6,360	6,487	2.0%
37	Doctor of Education (EdD)	10,097	10,298	2.0%	40,075	41,277	3.0%
38	PhD Programs	6,360	6,487	2.0%	6,360	6,487	2.0%

<a> The proposed 2026-27 rates would be effective September 1, 2026.

<b> Includes Biomedical Engineering, Neuroscience, and Theory & Criticism

Table 12
ENROLMENT PROJECTIONS: 2026-27 to 2030-31

		Actuals					Projections/Plans				
		2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
1	**Constituent University**										
2	**Full-Time Undergraduates**										
3	Arts & Humanities	853	864	923	1,030	990	987	975	971	977	980
4	Business (HBA)	1,072	1,210	1,336	1,376	1,368	1,356	1,356	1,356	1,356	1,356
5	Dentistry	264	281	281	283	284	284	284	284	284	284
6	Education	697	703	783	887	866	864	762	668	668	668
7	Engineering	2,293	2,497	2,590	2,919	3,109	3,095	3,112	3,055	2,970	2,986
8	Health Sciences										
9	Foods & Nutrition				237	229	173	171	188	190	189
10	Family Studies				140	168	169	165	166	164	163
11	BHSc Program	1,424	1,437	1,546	1,603	1,755	1,854	1,897	1,919	1,827	1,825
12	Kinesiology	1,283	1,311	1,293	1,337	1,350	1,379	1,397	1,374	1,333	1,331
13	Nursing	1,028	1,180	1,326	1,325	1,417	1,556	1,653	1,510	1,330	1,333
14	Law	482	496	503	510	509	530	530	530	530	530
15	MACS (Media and Communication Studies)	899	880	909	994	961	976	992	982	993	997
16	Medicine										
17	MD Program	688	689	698	716	742	749	748	748	748	748
18	B.Med.Sci. Program	1,252	1,305	1,199	1,117	1,151	1,217	1,345	1,459	1,462	1,468
19	Music	434	410	375	414	425	460	487	470	491	490
20	Science - B.Med.Sci.	1,905	1,546	1,500	1,529	1,609	1,725	1,730	1,743	1,740	1,739
21	Science - Computer Science				481	1,317	1,538	1,360	1,263	1,309	1,352
22	Science - All Other	3,904	4,416	4,763	4,377	3,388	2,951	3,111	3,242	3,331	3,339
23	Social Science - MOS	3,315	3,397	3,457	3,433	3,315	3,350	3,287	3,294	3,415	3,461
24	Social Science - All Other	4,033	4,280	4,469	4,510	4,282	4,189	4,194	4,282	4,377	4,381
25	**Total Full-Time Undergraduates**	**25,826**	**26,902**	**27,951**	**29,218**	**29,235**	**29,402**	**29,556**	**29,504**	**29,495**	**29,620**
26	Concurrent Programs	380	370	384	381	370	370	370	370	370	370
27	ISSAP				7	15	15	15	15	15	15
28	Medical Residents	968	999	1,023	1,048	1,084	1,100	1,100	1,100	1,100	1,100
29	**Full-Time Graduates**										
30	Masters	4,360	4,231	4,370	4,664	4,410	4,582	4,714	4,758	4,797	4,825
31	Doctoral	2,345	2,415	2,477	2,557	2,602	2,546	2,504	2,504	2,495	2,493
32	**Total Full-Time Graduates**	**6,705**	**6,646**	**6,847**	**7,221**	**7,012**	**7,128**	**7,218**	**7,262**	**7,292**	**7,318**
33	**Total Full-Time Enrolment**	**33,879**	**34,917**	**36,205**	**37,875**	**37,716**	**38,015**	**38,259**	**38,251**	**38,272**	**38,423**
34	**Part-Time FTEs**										
35	Undergraduate	2,408	2,537	2,671	2,614	2,625	2,600	2,600	2,600	2,600	2,600
36	Education (AQs)	460	416	452	361	348	375	375	375	375	375
37	Masters	128	111	96	89	90	90	90	90	90	90
38	Doctoral	29	32	30	29	30	30	30	30	30	30
39	**Total Part-Time FTEs**	**3,025**	**3,096**	**3,249**	**3,093**	**3,093**	**3,095**	**3,095**	**3,095**	**3,095**	**3,095**
40	**Total Constituent FTEs**	**36,904**	**38,013**	**39,454**	**40,968**	**40,809**	**41,110**	**41,354**	**41,346**	**41,367**	**41,518**
41	**Affiliated University Colleges**										
42	**Full-Time Undergraduates**										
43	Brescia	1,171	1,099	1,125							
44	Huron	1,525	1,560	1,729	1,981	2,285	2,512	2,629	2,686	2,682	2,682
45	King's	3,253	3,150	2,986	3,053	3,258	3,491	3,527	3,717	3,905	4,066
46	**Total Full-Time Undergraduates**	**5,949**	**5,809**	**5,840**	**5,034**	**5,543**	**6,003**	**6,156**	**6,403**	**6,587**	**6,748**
47	**Part-Time Undergraduate FTEs**										
48	Brescia	72	65	65							
49	Huron	58	50	51	52	54	55	55	55	55	55
50	King's	266	272	257	251	229	250	250	250	250	250
51	**Total Part-Time FTEs**	**396**	**387**	**373**	**303**	**283**	**305**	**305**	**305**	**305**	**305**
52	**Graduate FTEs**										
53	Brescia	31	31	32							
54	Huron	10	7	8	7	4	3	1	0	0	0
55	King's	62	65	64	64	68	100	100	100	100	100
56	**Total Graduate FTEs**	**103**	**103**	**104**	**71**	**72**	**103**	**101**	**100**	**100**	**100**
57	**Total Affiliate FTEs**	**6,448**	**6,299**	**6,317**	**5,408**	**5,898**	**6,411**	**6,562**	**6,808**	**6,992**	**7,153**
58	**Total FTEs - Western Complex**	**43,352**	**44,312**	**45,771**	**46,376**	**46,707**	**47,521**	**47,916**	**48,154**	**48,359**	**48,671**

Table 12
ENROLMENT PROJECTIONS: 2026-27 to 2030-31

		Actuals					Projections/Plans				
		2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
	Rows 59 to 98 Included above										
59	**International Students**										
60	Constituent Full-Time										
61	Undergraduates	2,761	2,593	2,398	2,212	1,949	1,731	1,687	1,712	1,875	1,993
62	Medical Residents	173	189	207	225	235	225	225	225	225	225
63	Masters (excluding Ivey)	826	818	905	1,016	655	698	729	759	792	816
64	MBA (Regular), Ivey MSc	199	222	239	254	281	245	254	233	233	233
65	Executive MBA	2	1	0	0	2	0	0	0	0	0
66	Doctoral	798	875	941	954	954	901	885	875	868	863
67	Affiliates										
68	Undergraduates	1,233	1,144	1,027	784	658	567	538	592	666	712
69	Masters	4	3	3	0	1	1	1	1	1	1
70	**Year 1 Only**										
71	**Constituent**										
72	Arts & Humanities	248	202	257	281	259	265	265	265	265	265
73	Engineering	774	893	848	948	985	850	860	865	870	870
74	Health Sciences										
75	Foods & Nutrition				39	58	60	60	60	60	60
76	Family Studies				17	52	50	50	50	50	50
77	BHSc Program	421	387	477	466	528	455	450	450	450	450
78	Kinesiology	351	351	344	369	373	340	340	340	340	340
79	Nursing	142	142	176	187	208	205	205	205	205	205
80	MACS (Media and Communication Studies)	270	212	244	324	287	290	290	295	295	295
82	Music	94	88	98	144	114	135	135	135	135	135
83	Science - B.Med.Sci.	1,049	1,000	981	920	1,028	1,020	1,030	1,035	1,030	1,030
85	Science - Computer Science				481	332	330	355	365	380	380
84	Science - All Other	967	1,033	1,084	518	564	600	610	615	630	630
81	Social Science - MOS	1,052	1,151	1,200	1,054	909	1,000	1,020	1,040	1,060	1,060
86	Social Science - All Other	1,054	1,009	990	900	905	1,000	1,000	1,000	1,000	1,000
87	**Total Year 1 - Constituent**	**6,422**	**6,468**	**6,699**	**6,648**	**6,602**	**6,600**	**6,670**	**6,720**	**6,770**	**6,770**
88	**Affiliated University Colleges**										
89	Brescia	258	244	304							
90	Huron	448	417	575	685	791	800	800	800	800	800
91	King's	840	721	650	774	944	1,139	1,215	1,274	1,355	1,389
92	**Total Year 1 - Affiliates**	**1,546**	**1,382**	**1,529**	**1,459**	**1,735**	**1,939**	**2,015**	**2,074**	**2,155**	**2,189**
93	**Total Year 1 - Western Complex**	**7,968**	**7,850**	**8,228**	**8,107**	**8,337**	**8,539**	**8,685**	**8,794**	**8,925**	**8,959**
94	**Masters**										
95	All Programs (excluding MBAs)	3,545	3,429	3,512	3,803	3,550	3,664	3,738	3,768	3,807	3,835
96	Ivey (excl EMBA)	665	631	653	654	687	738	789	799	799	799
97	Executive MBA	150	171	205	207	173	180	187	191	191	191
For Information											
98	Year 1 Constituent International Students	610	684	622	523	427	465	510	560	610	610

Table 13
WESTERN'S LONG-RANGE SPACE PLAN
Note: within each category, the projects are not prioritized

	Major Capital Projects	Status
	Category 1 -- Projects Underway or in Advanced Planning	
1	**New Engineering Building**	Underway
2	**Undergraduate Residence -- University Drive Location**	Underway
3	**Renovations to Create the Donald K. Johnson Leadership Centre in Toronto (Ivey)**	Underway
4	**Pathogen Research Centre Facility**	Underway
5	**The Bioconvergence Centre -- Interdisciplinary Research & Experiential Learning Facility**	In Advanced Planning
6	**New Facilities for Health Sciences -- to support Enrolment Expansion**	In Advanced Planning
7	**Renewal of Facilities at the West Campus (formerly Brescia) -- including space for Brescia Museum/Archives and McIntosh Gallery**	In Advanced Planning
8	**Replacement of University Drive Bridge**	In Advanced Planning
9	**Modernization of Alumni Hall**	In Advanced Planning
10	**University-wide Campus Sustainability/Energy Conservation/Infrastructure Projects (multiple stages)**	Ongoing
11	**Residence Renovation Projects**	Ongoing
12	**Pedestrian-friendly Campus Initiatives -- *Open Space Strategy***	Ongoing
13	**Category 2 -- Projects in Various Planning Stages**	
14	**Social Sciences Centre Realignment/Expansion**	Early Planning Stages
15	**Multi-Sport Field House -- with Parking Garage**	Early Planning Stages
16	**Category 3 -- For Future Consideration**	
17	**Ivey Facilities Expansion**	
18	**Western Commons -- Gathering/Collision Spaces**	
19	**Graduate and Upper-Year Housing -- Platt's Lane East**	
20	**Western in Downtown London**	
21	**Spencer Hotel and Conference Centre Renewal**	
22	**New Research Initiatives/Partnerships at the Research Parks**	
23	**Multi-Level Parking Structures**	
24	**Renewal: University Community Centre, Spencer Engineering Building, Elborn College, Law Building**	
25	**Asset Acquisitions**	

2026-27 Capital Budget

A. The Nature of University Capital Expenditures

The Capital Budget for 2026-27 sets out Western's planned capital spending in the context of the proposed Long-Range Space Plan, as outlined in Table 13 of the Operating Budget. The various elements of capital spending are grouped into nine categories as shown in Table 14.

Category 1 shows all new construction, while categories 2 to 7 show renovations to existing space. Category 1 expenditures are usually funded from general University funds, the major exceptions being projects funded all or in part from external research grants, private funds, government, student contributions, and Housing construction – the latter being funded from the Housing budget. Categories 2 to 5 are funded primarily from general University funds and government, while category 6 is funded from Housing operations, and category 7 is funded by the Ancillary Unit undertaking the work. Categories 8 and 9 involve carrying costs and loan repayments, other expenditures such as purchases of land and buildings, and transfers from the Capital Budget for other purposes. Planned capital expenditures for 2026-27 total $329.5 million.

Categories 2 to 5 involve **Maintenance, Modernization, and Infrastructure (MMI)** and are eligible to receive funds from the annual MMI transfer from the Operating Budget to the Capital Budget. These types of expenditures are directed at the modification of existing space and the renewal and expansion of the utilities and infrastructure of the University.

In planning future expenditures on MMI, it is useful to consider the Current Replacement Value (CRV) of our campus capital assets, which generally have increased because of rising construction and renovation costs over the last decade. As shown in *Figure E*, our buildings and infrastructure have a CRV of approximately $5,202 million (as at February 20, 2026).

Figure E
CURRENT REPLACEMENT VALUE (BUILDINGS AND INFRASTRUCTURE)

	Western University	CRV ($M)	Square Metres	Major Buildings
1	Major Non-Residential Buildings	3,222	599,081	80
2	Utilities and Infrastructure	253		
3	Subtotal, Eligible for MMI	3,475	599,081	80
4	Housing	1,310	278,522	15
5	Other Ancillary Buildings	417	71,983	11
6	Total	5,202	949,586	106

The University has approximately 599,000 gross square metres spread amongst eighty major non-residential buildings. The non-residential buildings, including utilities and infrastructure, are the physical assets generally eligible for MMI expenditures.

The University also has approximately 279,000 square metres of Housing space in twelve major undergraduate residences, three major apartment buildings, and numerous smaller buildings for graduate students in Platt's Lane Estates. Other than Housing, there are many buildings which are operated largely or entirely as ancillaries: Western Student Recreation Centre, Thompson Recreation and Athletic Centre, Alumni Stadium, Boundary Layer Wind Tunnel, Western Day Care, the Spencer Hotel & Conference Centre, and facilities at the Research Parks.

With this background in mind, we describe the nine categories of University capital expenditures:

1. **New Construction**. This category includes projects which create new buildings, including housing, additions to existing buildings, and other new facilities such as parking structures or lots, power plants and athletic fields.

2. **Major Building Renovations**. This category involves major maintenance and renovation expenditures on non-residential building projects, with project timelines of more than one year.

3. **Utilities and Infrastructure Projects**. This category involves projects with values greater than $10,000 directed at the upgrading and new installation of utilities and other infrastructure, including boilers and chillers, electrical, transportation, water and sewer distribution systems, and sustainability and energy conservation initiatives like deep energy retrofits.

4. **Modernization of Instructional and Research Facilities.** This category includes the renewal and modernization of classrooms, laboratories, libraries, and other space used for instruction and research, as well as upgrades to information technology. These expenditures are critical to maintaining Western's reputation as a leader in the quality of teaching and research. These projects are sometimes funded by the units themselves with operating or research funds.

5. **General Maintenance and Modernization Projects.** This category consists of a wide variety of maintenance and modernization projects which are not included in categories 2 to 4. Such projects include roof replacement, interior and exterior painting, road, bridge, sidewalk repair, walkway and pedestrian improvements, and general maintenance of structures and systems.

6. **Housing Renovations**. This category includes all maintenance and modernization expenditures on University residences and apartment buildings but excludes new construction (category 1). Maintenance and modernization expenditures, projected to be $17.8 million in 2026-27, are funded from Housing revenues, which has always set aside adequate funds to manage long-term maintenance.

7. **Ancillary Projects**. This category includes capital expenditure on Ancillaries other than Housing, including Hospitality Services, the Book Store, Parking Services, student fee-funded units, self-funded support units, and self-funded research units. These units pay a charge to the University for the space they occupy.

8. **Carrying Costs and Debt Repayments**. This category consists of principal repayments and interest on debt for capital projects.

9. **Other Capital Expenditures**. This category includes asset acquisitions and other miscellaneous expenditures. It has been an established principle in Western's Campus Development Strategy that the University pursue, as appropriate, the purchase of land contiguous to University property as land becomes available. Western will continue to seek to protect the Regional Facilities zoning around the main campus and to buy land near our campus when it comes up for sale. The University will also look to acquire strategic physical assets.

Table 14 includes Line A through M, additional information that is relevant to understanding the capital budget funding and financing, and maintenance expense metrics. Line A shows total sources of funding for the Capital Budget, including use of debt; line B, sources of funds less expenditure; line C, the accumulated capital reserve at year-end; and line D, capital debt outstanding at year-end. Details of these items are shown in Tables 16 and 18. Changes in the capital reserve (line C) result from funding less expenditure (line B). Thus for 2024-25, line B shows a net source of $10.8 million, the difference between funding of $180.8 million and expenditure of $169.9 million. In years where the expenditure exceeds sources of funding, the reserve is drawn upon as planned, as is forecasted in the 2025-26 budget for ($49.5 million).

Line E shows the replacement value of non-residential buildings and utilities and infrastructure, the assets eligible for MMI spending, while line F shows the ratio of the annual MMI expenditure to the replacement value. For example, in 2024-25, MMI expenditures were $43.9 million, while the estimated replacement value of non-residential buildings, utilities, and infrastructure was $3,649 million. The ratio of the two is 1.2% (line F), representing the contribution of maintenance, modernization and infrastructure expenditure to the replacement value of the buildings and infrastructure. Modernization and infrastructure expenditure is included as these projects often result in major renovation and infrastructure upgrades that relieve deferred maintenance expense.

Line G of Table 14 shows the annual transfer from the Operating Budget to the Capital Budget for Maintenance, Modernization, and Infrastructure (the MMI transfer). The annual transfer is $16.0 million in 2024-25; a funding commitment that has established Western as a leader among Canadian universities in maintaining its facilities and dealing with deferred maintenance.

Line H of Table 14 shows the ratio of the annual MMI transfer to total MMI expenditures; for example, in 2024-25, the transfer was $16.0 million, and expenditures were $43.9 million, so the ratio is 36.5%. This ratio represents how much of the annual MMI expenditure is funded by annual transfers from the Operating Budget. This ratio will fluctuate with the level of MMI expenditure each year. Other sources of funding for MMI expenditures can include the annual capital Facilities Renewal Program grant from the Province, special Provincial grants, additional one-time allocations from the University's Operating Budget, one-time allocations from the Province, fundraising, and borrowing.

Line J contains an estimate of maintenance spending, defined narrowly as spending required to restore aging facilities up to their condition when originally built. Whenever Western undertakes a major maintenance project, there is also modernization of the facility, and whenever we carry out a major modernization project, there is generally some maintenance expenditure; it is thus difficult to separate the two. Line J is calculated on the assumption that 2/3 of the expenditures in categories 2, 3, and 5 involve maintenance (the remaining 1/3 is modernization), while 1/3 of the expenditures in category 4

involve maintenance (the remaining 2/3 is modernization). While the ratio of maintenance to modernization varies by project and year, these rates are reasonable long-term averages.

The value of estimated maintenance expenditure (line J) in 2024-25 is $26.8 million, or 0.7% (line K) of the replacement value in that year. An industry target for this ratio is 2.0%; if buildings last an average of 50 years, then average maintenance spending should be 2.0% of replacement value. When the actual ratio is consistently lower than 2.0%, deferred maintenance accumulates, which is the case at Western and most Canadian universities. In years with significant renovations, accumulated deferred maintenance declines.

Major capital projects are outlined in Table 15. The projects reflect the Long-Range Space Plan and are assigned to one of the nine capital expenditure categories. Where possible, the year and month of the start and end of the project(s) are shown.

The list in Table 15 presents a variety of capital projects supporting academic, student and research spaces, utilities and infrastructure improvements. With new construction projects, Western continues to utilize its limited developable land in the core campus, often by using existing parking lots. This increases the pressure on available parking, and we continue to plan for construction of additional parking structures at the periphery of campus. The Campus Development Strategy, scheduled for consultation with the campus community this spring, will help guide the future planning for development of campus, including the necessary infrastructure and transportation gateways to support a growing campus footprint.

B. Sources of Funding and Capital Expenditures in 2026-27

Table 16 displays sources of funding for budgeted capital expenditures with estimates of comparative data for 2025-26. There are six major sources of funding: 1) Government grants; 2) Western's Operating Budget; 3) One-time funds from Internally Restricted Net Assets; 4) Fundraising; 5) Borrowing; and 6) Other sources.

The University must carefully balance its available resources for use in capital expenditure. For example, projects financed by debt require an ultimate funding source, and one-time funding from Internally Restricted Net Assets, such as allocations from the Major Strategic Opportunities Fund, must be used strategically since they can be exhausted.

Table 17 shows expenditures in categories 1 and 2 for 2025-26 (estimates as of March 6, 2026) and 2026-27 (current proposals).

In alignment with the priorities of Western's Strategic Plan, the University is continuing our capital plan in support of "growth and impact". We closely monitor construction market conditions and have been adjusting our capital plan and related timing of projects accordingly.

Table 14
CAPITAL BUDGET SUMMARY, 2022-23 TO 2026-27
($000)

Category	Purpose	Actual 2022-23	Actual 2023-24	Actual 2024-25	Projected 2025-26	Budget 2026-27
	New Construction					
1	New Construction (Table 17, line 15)	35,439	34,712	51,059	136,071	227,174
	Maintenance, Modernization, and Infrastructure (MMI)					
2	Major Building Renovations (Table 17, line 24)	11,321	5,608	12,079	21,249	15,800
3	Utilities and Infrastructure Projects	6,673	10,178	11,444	24,764	29,571
4	Modernization of Instructional and Research Facilities	10,682	12,053	7,308	10,272	9,236
5	General Maintenance and Modernization Projects	14,076	11,736	13,019	11,798	21,839
	Sub-Total MMI	42,751	39,576	43,851	68,083	76,446
	Other					
6	Housing Renovations	6,514	3,972	7,024	13,775	17,760
7	Ancillary Projects	2,261	1,637	2,543	2,949	7,171
8	Carrying Costs and Debt Repayments	904	839	821	800	700
9	Other Capital Expenditures	6,072	4,965	64,652	18,469	222
	Sub-Total Other	15,751	11,413	75,040	35,993	25,853
	Total Expenditures	**93,941**	**85,701**	**169,950**	**240,147**	**329,473**

Line		Actual 2022-23	Actual 2023-24	Actual 2024-25	Projected 2025-26	Budget 2026-27
	Sources of Funding, Reserves, and Debt					
A	Total Sources of Funding, Including Debt (Table 16)	117,561	150,839	180,795	190,692	228,200
B	Sources of Funding less Expenditures	23,620	65,139	10,845	-49,455	-101,273
C	Capital Reserve, Year End (Table 18)	207,687	272,825	283,670	234,215	132,942
D	Capital Debt Outstanding, Year End (Table 18)	320,623	312,246	303,581	294,560	290,000
E	Replacement Value of Non-Residential Buildings, Utilities & Infrastructure, $M	2,414	3,024	3,649	3,475	3,642
F	MMI Expenditures/Replacement Value	1.8%	1.3%	1.2%	2.0%	2.1%
G	Annual MMI transfer from Operating to Capital Budget	15,500	15,500	16,000	16,000	16,000
H	MMI transfer/MMI Expenditures	36.3%	39.2%	36.5%	23.5%	20.9%
J	Estimate of Maintenance Expenditure	24,940	22,366	26,798	41,965	47,885
K	Maintenance Expenditure/Replacement Value	1.0%	0.7%	0.7%	1.2%	1.3%
L	Number of Major Buildings	99	99	106	106	106
M	Total Gross Square Meters (000's)	905	905	950	950	978

Category 8 does not include carrying costs and loan repayments for Residences and Apartments, Research Park and the Ivey Business School Foundation.

Line B is equal to Line A Total Sources of Funding less Total Expenses.

The change in line C from one year to the next is equal to Line B.

Line J consists of 2/3 of Category 2, 3 and 5 and 1/3 of Category 4.

Table 15
MAJOR CAPITAL PROJECTS

		Category	Start	End
1	***Projects Underway, or in Advanced Planning***			
2	New Engineering Building	**1**	Q1 2025	Q3 2027
3	Undergraduate Residence -- University Drive Location	**1**	Q1 2025	Q3 2027
4	Renovations to Create the Donald K. Johnson Leadership Centre in Toronto (Ivey)	**2**	Q1 2025	Q2 2026
5	Pathogen Research Centre Facility	**1**	Q3 2025	Q2 2027
6	The Bioconvergence Centre -- Interdisciplinary Research & Experiential Learning Facility	**1**	tbd	tbd
7	New Facilities for Health Sciences -- to support Enrolment Expansion	**1**	tbd	tbd
8	Renewal of Facilities at the West Campus (formerly Brescia) -- including space for Brescia Museum/Archives and McIntosh Gallery	**2**	tbd	tbd
9	Replacement of University Drive Bridge	**1**	tbd	tbd
10	Modernization of Alumni Hall	**2**	tbd	tbd
11	University-wide Campus Sustainability/Energy Conservation/Infrastructure Projects (multiple stages)	**1,3&5**	Ongoing	
12	Residence Renovation Projects	**6**	Ongoing	
13	Pedestrian-friendly Campus Initiatives -- *Open Space Strategy*	**1&5**	Ongoing	
14	***Projects in Various Planning Stages***			
15	Social Sciences Centre Realignment/Expansion	**2**	tbd	tbd
16	Multi-Sport Field House -- with Parking Garage	**1**	tbd	tbd
17	***Projects for Future Consideration (requires funding plan)***			
18	Ivey Facilities Expansion	**1**	tbd	tbd
19	Western Commons -- Gathering/Collision Spaces	**1**	tbd	tbd
20	Graduate and Upper-Year Housing -- Platt's Lane East	**1**	tbd	tbd
21	Western in Downtown London	**1&2**	tbd	tbd
22	Spencer Hotel and Conference Centre Renewal	**2**	tbd	tbd
23	New Research Initiatives/Partnerships at the Research Parks	**1**	tbd	tbd
24	Multi-Level Parking Structures	**1**	tbd	tbd
25	Renewal: University Community Centre, Law Building, Spencer Engineering Building, Elborn College	**2**	tbd	tbd
26	Asset Acquisitions	**9**	tbd	tbd

Dates may use calendar quarters as an estimate of the anticipated construction start and end periods. Projects completed in multiple phases may reference multiple end dates.

Table 16
CAPITAL BUDGET: SOURCES OF FUNDING
($000)

		Projected 2025-26	Budget 2026-27
1	***Government Grants***		
2	MCU Annual Capital Grant (Facilities Renewal Program)	7,814	7,800
3	CFI BRIF - Pathogen Research Centre Facility	0	11,010
4	Ministry of Environment and Climate Change Canada (Decarbonization Incentive Program)	2,885	2,109
5	MCU Capital Grant (Training Equipment and Renewal Fund)	376	376
6	CFI SDRI Biotherapeutics Centre Renovation	950	0
7	Department of Natural Resources Canada (Zero Emission Vehicle Infrastructure Program)	45	0
8	***Sub-Total***	***12,070***	***21,295***
9	***Operating Budget***		
10	Operating Budget MMI Transfer - Base	16,000	16,000
11	Operating Budget MMI Transfer - Base (Ancillaries)	600	600
12	Operating Budget - FRSF Transfer	3,000	3,000
13	Operating Budget - CRC Transfer	808	744
14	Operating Budget - New Engineering Building	3,418	5,758
15	Operating Budget - Pathogen Research Centre Facility	6,700	0
16	***Sub-Total***	***30,526***	***26,102***
17	***Major Strategic Opportunities Funding (MSOF) and Undistributed Investment Returns***	***21,576***	***10,075***
18	***Fundraising***		
19	New Engineering Building	900	0
20	***Sub-Total***	***900***	***0***
21	***Borrowing***		
22	Undergraduate Residence -- University Drive Location	78,406	100,500
23	New Engineering Building	8,700	29,500
24	Modernization of Alumni Hall	0	9,300
25	***Sub-Total***	***87,106***	***139,300***
26	***Other***		
27	Student Contribution - Western Student Recreation Centre	1,600	1,700
28	Sports & Recreation Services - Student Contribution for Artificial Turf Playing Fields	235	240
29	Student Contribution - New Engineering Building	236	236
30	Energy Conservation Incentives (Rebates)	300	300
31	EC Damage Insurance Recovery	493	0
32	Unit Contributions	18,926	4,021
33	Projects Funded by Housing	13,775	17,760
34	Projects Funded by Ancillaries	2,949	7,171
35	***Sub-Total***	***38,514***	***31,428***
36	**Total Sources of Funding (In-Year)**	**190,692**	**228,200**

Table 17

CAPITAL EXPENDITURES FOR NEW CONSTRUCTION AND MAJOR BUILDING RENOVATIONS

2025-26 and 2026-27

($000)

		Projected 2025-26	**Budget** 2026-27
1	***Category 1: New Construction***		
2	Undergraduate Residence -- University Drive Location	66,178	100,500
3	The Bioconvergence Centre -- Interdisciplinary Research & Experiential Learning Facility	18,846	40,000
4	New Engineering Building	34,343	35,460
5	Pathogen Research Centre Facility	6,679	25,938
6	New Facilities for Health Sciences -- to support Enrolment Expansion	1,675	20,000
7	Replacement of University Drive Bridge	502	3,000
8	Multi-Sport Field House -- with Parking Garage	318	2,276
9	Health Sciences 4th Floor Addition	3,730	0
10	Western Commons -- Gathering/Collision Spaces	1,790	0
11	Ronald D. Schmeichel Building for Entrepreneurship and Innovation	1,175	0
12	Biomedical Research Facility - Phase 1 of Medical School Project	669	0
13	Building Addition to consolidate Faculty of Education Clinics	76	0
14	Graduate and Upper-Year Housing -- Platt's Lane East	90	0
15	***Total, Category 1***	***136,071***	***227,174***
16	***Category 2: Major Building Renovations***		
17	Modernization of Alumni Hall	1,500	9,200
18	Renovations to Create the Donald K. Johnson Leadership Centre in Toronto (Ivey)	19,371	5,100
19	Renewal of Facilities at the West Campus (formerly Brescia) -- including space for Brescia Museum/Archives and McIntosh Gallery	0	1,500
20	Weldon Library Modernization	154	0
21	Fanshawe Boathouse/Rowing Centre Renewal	103	0
22	Social Sciences Centre Realignment/Expansion	90	0
23	Elborn College, Faculty of Health Sciences Expansion of Physical & Occupational Therapy	31	0
24	***Total, Category 2***	***21,249***	***15,800***

Table 18
CAPITAL RESERVES AND DEBT AT FISCAL YEAR END
($000)

		Actual 2022-23	Actual 2023-24	Actual 2024-25	Projected 2025-26	Budget 2026-27
1	**A. Capital Reserves**					
2	General Capital Fund	56,427	50,586	47,082	40,180	18,562
3	Designated Capital Fund	151,260	222,239	236,588	194,035	114,380
4	**Total Capital Reserves**	**207,687**	**272,825**	**283,670**	**234,215**	**132,942**

		Actual 2022-23	Actual 2023-24	Actual 2024-25	Projected 2025-26	Budget 2026-27
5	**B. Capital Debt**					
6	New Construction, Major Renovations & Other	0	0	0	8,700	47,500
7	Housing	41,061	31,257	21,155	89,160	178,900
8	Research Park	11,662	10,994	10,292	9,600	8,700
9	Unused and Invested Debenture Proceeds	267,900	269,995	272,134	187,100	54,900
10	**Total Capital Debt**	**320,623**	**312,246**	**303,581**	**294,560**	**290,000**

Line 2 includes the required $6 million general capital reserve fund.
Line 3 includes fund balances for large capital projects.

Long-Term Financial Trends

The Operating and Capital Budgets represent Western's proposed spending in the near future; however, the University continues to operate within a long-term planning horizon. As such, there are important long-term financial trends which must be understood when evaluating these budgets. Three such financial trends are: capital reserves and debt, employee future benefits, and deferred maintenance.

A. Capital Reserves and Debt

Table 18 displays Capital Reserves and Debt for fiscal years ending April 30.

Capital Reserves are divided into two categories:

- the **General Capital Fund**, which includes funds not yet designated for specific purposes and funds designated for future projects.
- the **Designated Capital Fund**, which has been assigned to specific capital projects.

Capital Debt is divided into the following categories:

- **New Construction, Major Renovations, Infrastructure, and Other** – represents debt on projects that are largely new construction, additions to existing buildings, other new facilities, non-residential projects that involve major maintenance, and renovations to existing space. It also includes debt on purchases of property.
- **Housing –** debt required for new construction, maintenance, and modernization projects for University residences and apartment buildings.
- **Research Park –** debt incurred by the Research Park.
- **Unused and Invested Debenture Proceeds** – unused proceeds from Western's debenture issuances that have been committed and invested until specific capital projects require the funding.

Capital Debt is a resource that can help Western advance its Long-Range Space Plan and Campus Development Strategy. However, while debt is an important component in our planning, financing requires an ultimate funding source. As a result, careful consideration must be taken to balance the levels of debt and ensure repayment and service costs remain financially sustainable for Western.

Western's Capital Debt consists of $190 million and $100 million debentures issued in 2007 and 2017, respectively. In 2013, the University also obtained a $100 million amortizing facility, to finance a residence capital project, which will be fully repaid in October 2026. The University's debentures necessitate an annual credit rating. Standard & Poor's completed its review in February 2026, and the credit rating was re-affirmed at AA+, with a stable outlook.

The Board of Governors has approved a Capital Debt Policy that outlines the principles used in guiding the University's overall capitalization and debt management strategy. The policy requires compliance with two ratios and also utilizes monitoring ratios as part of its debt management strategy. The capital debt, as well as the policy ratios are shown in *Figure F* for the years ending April 30.

Figure F
CAPITAL DEBT and POLICY RATIOS

		Compliance Ratios		Monitoring Ratios	
	Debt ($M)	Net Assets-to-Debt Ratio (greater than 0.5x)	Debt Burden (less than 5%)	Debt per FTE ($)	Debt/ Revenues Available for repayment (%)
2022	328.7	4.2	2.8%	8,907	30%
2023	320.6	4.6	1.8%	8,434	27%
2024	312.2	5.4	1.7%	7,920	23%
2025	303.6	6.0	1.6%	7,412	22%
2026p	294.6	6.2	1.4%	7,256	21%

The projected debt is based on Board-approved projects with allowance for other projects, which may be presented to the Board during the period under consideration.

B. Employee Future Benefits

Subject to eligibility rules set within various collective agreements, the University provides medical, dental, and life insurance benefits to eligible employees after their employment with Western ends.

The obligation for these employee future benefits is projected by actuarial valuation every three years. In the years between valuations, an extrapolation of the actuarial valuation is used to determine the projected benefit obligations. At April 30, 2025, the University's accrued benefit liability relating to the employee future benefit plans was $452.9 million (2024 - $408.7 million). The annual expense for non-pension employee future benefits in 2025 was $27.5 million (2024 - $22.8 million).

Amongst major research universities, Western historically has one of the largest employee future benefits liabilities. *Figure G* outlines the University employee future benefits, the obligation and expense for years ending April 30.

Figure G
EMPLOYEE FUTURE BENEFITS (EFB) AS A % OF TOTAL EXPENSES

	EFB Obligation ($M)	EFB Expense ($M)	Total University Expenses ($M)	EFB Expense as % of Total
2021	565.3	30.1	1,137	2.6%
2022	478.6	27.6	1,212	2.3%
2023	420.7	23.3	1,323	1.8%
2024	408.7	22.8	1,399	1.6%
2025	452.9	27.5	1,470	1.9%

C. Deferred Maintenance

Deferred Maintenance is defined as work on the maintenance of physical facilities that has been deferred on a planned or unplanned basis to a future budget cycle or postponed until funds become available. To avoid increasing the size of the deferred maintenance backlog, it is necessary to carry out replacement of facility components on an annual basis.

The estimates of deferred maintenance are different from estimates of debt or employee future benefits. There are actual contracts in place for the first two categories that allow us to make reasonable estimates. For deferred maintenance, this is not the case; therefore, we must find other ways to quantify this liability. The University uses a capital-asset management system common to the sector to assess, track, and report on the condition of facilities. The system requires that each major component of a building – roof sections, classrooms, heating, ventilation, air-conditioning systems and so on – be inspected, either entirely or on a sample basis. Data on the findings of these inspections are entered into a central database. The system uses industry-standard cost and lifecycle data to forecast the timing and costs of capital renewal projects. Cost forecasts also include soft costs and automatic renewal requirements to maintain assets.

The University, in coordination with all other Ontario universities, has completed a campus-wide facilities data review, conducted by a common vendor for the sector. This common approach has the benefit of improving consistency in estimates and in comparability across institutions. Western will continue to assess about 20% of its facilities data each year. The deferred maintenance values may fluctuate annually, driven by expected replacement timelines for key building components based on their age. Once assessments or maintenance occur, the deferred maintenance expected for replacement is reset, which can lead to volatility in deferred maintenance forecasts. In general, deferred maintenance has increased over the last decade, commensurate with Western's growth, and rising maintenance and renovations costs.

As of February 20, 2026, the Facilities Management division estimates that deferred maintenance at Western is $502 million for non-residential buildings and $248 million for residences. Approximately 45% of the deferred maintenance for non-residential buildings relates to mechanical and electrical requirements. Other major components include maintenance driven by code requirements and maintenance for roofs and windows.

A common measure for determining the overall condition of facilities is the ratio of deferred maintenance over Current Replacement Value (DM/CRV) of the facilities. The calculation as at February 20, 2026, is outlined in *Figure H* as follows:

Figure H
DEFERRED MAINTENANCE TO CURRENT REPLACEMENT VALUE

		Non-Residential Buildings	Combined Residences
1	Current Replacement Value (CRV)	$3,475 million	$1,310 million
2	Deferred Maintenance (DM)	$502 million	$248 million
3	DM/CRV	14.4%	18.9%

The average age of Western's buildings is 40 years and 69% of our buildings were built before 1995. A ratio of 14.4% (Deferred Maintenance/Current Replacement Value) for non-residential buildings indicates a significant need for maintenance funding.

Western residences are funded through rents which cover maintenance; the University manages its residence deferred maintenance over the long-term. As new residences are constructed, the ratio will decline, and new spaces provide opportunities for major renovations to proceed. In 2026, a significant number of residence building components have had lifecycles triggers (such as carpets, flooring, etc.), which has led to a sharp increase in expected deferred maintenance. Housing has always been good stewards of the residences, and typically these deferred maintenance spikes are representative of the time between the lifecycle trigger and physical inspection/assessment as opposed to a growing deferred maintenance challenge. Over the long-term, deferred maintenance in the residence system has averaged around 8.5% indicating the assets are well-maintained.

If the average component of a large building lasts 50 years, then on average, maintenance spending should be 2.0% of replacement value. This level of spending is a standard target in the industry. When the actual ratio is consistently less than 2.0%, as has been the case at most Canadian universities, the volume of deferred maintenance will grow. Failure to adequately address deferred maintenance results in substandard facilities and could result in the failure of critical systems. Based on the Current Replacement Value of our facilities at $3,475 million, spending on major maintenance for campus buildings at 2.0% should be in the range of $70 million annually.

As explained at the start of the Capital Budget, the annual maintenance transfer is used for Maintenance, Modernization, and Infrastructure (MMI). The Administration is sometimes asked by faculty and staff if the MMI transfer is too large. As lines G and E in Table 14 show, the ratio of the MMI transfer to the Current Replacement Value of our non-residential buildings, utilities, and infrastructure has been below 1% in recent years (*Figure I*).

Figure I
MMI TRANSFER TO CRV RATIO 2022-23 to 2026-27

		Actual 2022-23	Actual 2023-24	Actual 2024-25	Projected 2025-26	Budget 2026-27
1	MMI ($M)	15.5	15.5	16.0	16.0	16.0
2	CRV ($M)	2,414	3,024	3,649	3,475	3,642
3	Ratio	0.64%	0.51%	0.44%	0.46%	0.44%

Thus, the MMI transfer from the Operating to the Capital Budget is less than a quarter of the 2.0% required to keep deferred maintenance from growing. Over the long term, if Western does not sustain funding for deferred maintenance, the backlog of deferred maintenance will affect campus. Growth in the MMI transfer is essential to maintaining a safe and reliable campus infrastructure, which supports modern research and teaching, and sustains faculty, staff, and student morale well into the future.

Line J of Table 14 presents an estimate of maintenance spending from all sources, with maintenance defined as spending required to bring aging facilities up to their condition when originally built. The last time the ratio of this estimate to Current Replacement Value was above 2.0% was 2010-11. A projected ratio of 1.3% for 2026-27 will be higher than in recent years, but below the 2.0% target.

Additional funding, from provincial and federal sources, continues to be required to catch up and maintain the 2.0% target over the long term. Achieving the 2.0% target over time is required to sustain the condition of Western's facilities.

Annex 2



2026-27 Program Specific Fees and Other Supplemental Fees

March 31, 2026

Western University

Notes regarding 2026-27 Program-specific Tuition and Fees and Other Supplemental Fees

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Table 1: Program-Specific Tuition

This table includes tuition fees that do not align with the standard structure of tuition fees outlined in Tables 10, 10a, and 11 of the Operating Budget document – and include concurrent programs, new programs, and graduate diploma programs.

Table 2: Program-Related Fees

This table includes program-related fees – including internship/placement fees, course materials fees, tuition deposits, and the health insurance plan for International Students.

Table 3: Application Fees

This table includes application fees for graduate programs, professional programs, and undergraduate exchange programs.

Table 4: Supplemental Fees and Other Charges

This table includes a variety of other fees including late registration fees, course cancellation/change fees, and charges for official documentation, supplemental exams, and photo identification.

Table 5: Business School Course Material Fees

Reports the costs of custom course material fees (course packs and related) for all pre-HBA courses.

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26 Amount	Proposed 2026-27 Amount	Proposed 2026-27 % change
1	**Concurrent Programs**				
2	**HBA/BESc Program**				
3	Entering After 2 Years of Engineering	*Domestic*	22,138.00	22,581.00	2.0%
4	Entering After 3 Years of Engineering	*Domestic*	32,095.00	32,737.00	2.0%
5	Entering After 2 Years of Engineering	*Domestic Out-of-Province*	26,908.00	28,253.00	5.0%
6	Entering After 3 Years of Engineering	*Domestic Out-of-Province*	39,012.00	40,963.00	5.0%
7	Entering After 2 Years of Engineering	*International*	94,862.00	99,330.00	4.7%
8	Entering After 3 Years of Engineering	*International*	127,287.00	134,350.00	5.5%
9	**HBA/JD Program**				
10	All Years	*Domestic*	29,505.00	30,095.00	2.0%
11	All Years	*Domestic Out-of-Province*	35,862.00	37,655.00	5.0%
12	All Years	*International*	83,156.00	87,273.00	5.0%
13	**HBA/BA-BSc Program**				
14	Entering After 2 Undergraduate Years	*Domestic*	17,361.00	17,708.00	2.0%
15	Entering After 3 Undergraduate Years	*Domestic*	27,902.00	28,460.00	2.0%
16	Entering After 2 Undergraduate Years	*Domestic Out-of-Province*	21,102.00	22,157.00	5.0%
17	Entering After 3 Undergraduate Years	*Domestic Out-of-Province*	33,915.00	35,611.00	5.0%
18	Entering After 2 Undergraduate Years	*International*	78,535.00	82,513.00	5.1%
19	Entering After 3 Undergraduate Years	*International*	111,020.00	117,533.00	5.9%
20	**JD/BA-BSc Program**				
21	Entering After 2 Undergraduate Years	*Domestic*	15,600.00	15,912.00	2.0%
22	Entering After 3 Undergraduate Years	*Domestic*	19,955.00	20,353.00	2.0%
23	Entering After 2 Undergraduate Years	*Domestic Out-of-Province*	18,962.00	19,910.00	5.0%
24	Entering After 3 Undergraduate Years	*Domestic Out-of-Province*	24,255.00	25,468.00	5.0%
25	Entering After 2 Undergraduate Years	*International*	64,561.00	66,497.00	3.0%
26	Entering After 3 Undergraduate Years	*International*	73,786.00	76,000.00	3.0%
27	**JD/BESc Program**				
28	Entering After 2 Years of Engineering	*Domestic*	18,891.00	19,269.00	2.0%
29	Entering After 3 Years of Engineering	*Domestic*	22,192.00	22,636.00	2.0%
30	Entering After 2 Years of Engineering	*Domestic Out-of-Province*	22,962.00	24,110.00	5.0%
31	Entering After 3 Years of Engineering	*Domestic Out-of-Province*	26,975.00	28,323.00	5.0%
32	Entering After 2 Years of Engineering	*International*	75,445.00	77,709.00	3.0%
33	Entering After 3 Years of Engineering	*International*	81,950.00	84,408.00	3.0%
34	**MBA/JD Program**				

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26	Proposed 2026-27	
			Amount	Amount	% change
35	Note: 2025-26 = March 2026; 2026-27 = March 2027				
36	Year 1	*Domestic*	63,982.00	65,262.00	2.0%
37	Years 2 and 3	*Domestic*	42,380.00	43,228.00	2.0%
38	Year 1	*Domestic Out-of-Province*	68,238.00	70,558.00	3.4%
39	Year 2	*Domestic Out-of-Province*	44,752.00	46,274.00	3.4%
40	Year 3	*Domestic Out-of-Province*	44,752.00	46,274.00	3.4%
41	Year 1	*International*	119,443.00	122,787.00	2.8%
42	Years 2 and 3	*International*	83,279.00	85,611.00	2.8%
43	**JD/MA-MSc Program**				
44	Entering Before Year 1 Law	*Domestic*	22,229.00	22,674.00	2.0%
45	Entering After Year 1 Law	*Domestic*	23,507.00	23,977.00	2.0%
46	Entering Before Year 1 Law	*Domestic Out-of-Province*	26,717.00	28,052.00	5.0%
47	Entering After Year 1 Law	*Domestic Out-of-Province*	27,830.00	29,221.00	5.0%
48	Entering Before Year 1 Law	*International*	57,581.00	59,240.00	2.9%
49	Entering After Year 1 Law	*International*	61,006.00	62,733.00	2.8%
50	**MBA/MEng Program**				
51	Note: 2025-26 = March 2026; 2026-27 = March 2027				
52	Years 1 - 2	*Domestic*	48,154.00	49,117.00	2.0%
53	After 2 years	*Domestic; per term*	16,050.00	16,371.00	2.0%
54	Years 1 - 2	*Domestic Out-of-Province*	48,154.00	49,117.00	2.0%
55	After 2 years	*Domestic Out-of-Province: per term*	16,050.00	16,371.00	2.0%
56	Years 1 - 2	*International*	86,543.00	88,793.00	2.6%
57	After 2 years	*International; per term*	28,848.00	29,598.00	2.6%
58	**MBA Direct /JD Program**				
59	Note: 2025-26 = July 2025; 2026-27 = July 2026				
60	Year 1	*Domestic*	41,688.00	42,522.00	2.0%
61	Year 2	*Domestic*	34,425.00	35,114.00	2.0%
62	Year 3	*Domestic*	34,425.00	35,114.00	2.0%
63	Year 1	*Domestic Out-of-Province*	46,326.00	48,028.00	3.7%
64	Year 2	*Domestic Out-of-Province*	38,635.00	40,103.00	3.8%
65	Year 3	*Domestic Out-of-Province*	38,635.00	40,103.00	3.8%
66	Year 1	*International*	84,352.00	86,949.00	3.1%
67	Year 2	*International*	72,772.00	74,810.00	2.8%
68	Year 3	*International*	72,772.00	74,810.00	2.8%

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26 Amount	Proposed 2026-27 Amount	Proposed 2026-27 % change
69	**Ivey Business School**				
70	The rates shown below are program fees				
71	Business (MBA)	*Domestic*	83,250.00	84,915.00	2.0%
72	Business (MBA)	*International*	132,990.00	136,310.00	2.5%
73	Business (MSc) -- all streams	*Domestic*	38,250.00	39,015.00	2.0%
74	Business (MSc) -- all streams	*International*	89,300.00	93,770.00	5.0%
75	Business (MGMT/CEMS)	*Domestic*	43,200.00	44,064.00	2.0%
76	Business (MGMT/CEMS)	*International*	96,120.00	100,930.00	5.0%
77	Business (MSc) Double Degree Track Program -- Business Analytics Stream for Ivey Students Attending 2 terms at Norwegian School of Economics	*Domestic (total for 5 terms) - effective with the September 2026 intake*	47,800.00	38,250.00	-20.0%
78	Business (MSc) Double Degree Track Program -- Business Analytics Stream for Ivey Students Attending 2 terms at Norwegian School of Economics	*International (total for 5 terms) - effective with the September 2026 intake*	93,800.00	93,770.00	0.0%
79	Tuition, Executive MBA Program- Canada -- September & February Intake	*Domestic: total for 3 terms*	126,000.00	129,200.00	2.5%
80	Tuition, Executive MBA Program- Canada -- September & February Intake	*International: total for 3 terms*	126,000.00	129,200.00	2.5%
81	Tuition, MBA Direct (Domestic) -- July Intake		50,085.00	51,087.00	2.0%
82	Tuition, MBA Direct (International) -- July Intake		77,860.00	79,810.00	2.5%
83	Tuition, Accelerated MBA (Domestic) -- November Intake		89,100.00	92,310.00	3.6%
84	Graduate Diploma in Management				
85	Summer program	*New: Domestic, 1 term*		20,000.00	
86	Summer program	*New: International, 1 term*		20,000.00	
89	Graduate Diploma in Accounting				
90	Summer program	*Domestic, 1 term*	9,400.00	9,400.00	0.0%
91	Summer program	*International, 1 term*	18,000.00	18,000.00	0.0%
92	Graduate Diploma in Business and Sustainability (MSc)	*Domestic*	5,000.00	5,000.00	0.0%
93	Graduate Diploma in Business and Sustainability (MSc)	*International*	5,000.00	5,000.00	0.0%
94	Graduate Diploma in Climate Risk Assessment and Opportunity (Business and Climate Impact)	*Domestic (per-course)*	5,000.00	5,000.00	0.0%
95	Graduate Diploma in Climate Risk Assessment and Opportunity (Business and Climate Impact)	*International (per-course)*	7,500.00	7,500.00	0.0%
96	Leadership Under Fire	*Domestic (per-course)*	500.00	500.00	0.0%
97	**Faculty of Education**				
98	Tuition - Post Graduate Certificate in Education	*per course*	250.00	250.00	0.0%
99	3-Part Additional Qualification	*per course*	685.00	685.00	0.0%
100	3-Part Additional Qualification	*International, per course*	1,370.00	1,370.00	0.0%
101	Additional Basic Qualification	*Domestic, per course*	735.00	735.00	0.0%
102	Additional Basic Qualification	*International, per course*	1,470.00	1,470.00	0.0%
103	Honor Specialist Additional Qualification	*per course*	735.00	735.00	0.0%

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26	Proposed 2026-27	
			Amount	Amount	% change
104	Honor Specialist Additional Qualification	*International, per course*	1,470.00	1,470.00	0.0%
105	Technology Studies: Additional Qualification	*per course*	735.00	735.00	0.0%
106	Certificate of Unified English Braille Competence (non-credit)	*per level*	325.00	325.00	0.0%
107	**Master of Professional Education (MPEd)**				
108	Domestic Students				
109	All Fields	*per course*	2,719.00	2,773.00	2.0%
110	International Students				
111	Onsite	*per course*	4,771.00	4,914.00	3.0%
112	Online	*per course*	3,641.00	3,750.00	3.0%
113	**Faculty of Engineering**				
114	University Network of Excellence in Nuclear Engineering Program	*10 courses or 8 courses and project*	22,500.00	22,950.00	2.0%
115	Graduate Diploma in Engineering Leadership and Innovation	*Domestic: per term tuition fee*	3,625.00	3,697.00	2.0%
116	Graduate Diploma in Engineering Leadership and Innovation	*International: per term tuition fee*	15,259.00	15,717.00	3.0%
117	**Faculty of Information and Media Studies**				
118	MLIS Part-Time	*Domestic; per-course tuition fee*	725.13	739.00	1.9%
119	MLIS Part-Time	*International; per-course tuition fee*	2,671.00	2,751.00	3.0%
120	**Faculty of Health Science**				
121	Professional Doctorate in Interdisciplinary Health Science	*New: Domestic; per term fee*		5,000.00	
122	Professional Doctorate in Interdisciplinary Health Science	*New: Internation; per term fee*		15,000.00	
123	**Compressed Nursing Program**				
124	Years 3 and 4, Fall/Winter	*Domestic*	6,050.00	6,171.00	2.0%
125	Years 3 and 4, Fall/Winter	*Domestic Out-of-Province*	7,352.00	7,719.00	5.0%
126	Year 3, Fall/Winter	*International*	58,055.00	59,797.00	3.0%
127	Year 4, Fall/Winter	*International*	58,055.00	59,797.00	3.0%
128	Summer Term between Years 3 and 4	*Domestic*	3,025.00	3,085.00	2.0%
129	Summer Term between Years 3 and 4	*Domestic Out-of-Province*	3,676.00	3,859.00	5.0%
130	Summer Term between Years 3 and 4	*International*	27,952.00	28,791.00	3.0%
131	G.Dip. in Professional Practice, Clinical Leadership, and Education	*New: Domestic; per-course tuition fee*		2,000.00	
132	G.Dip. in Professional Practice, Clinical Leadership, and Education	*New: International; per-course tuition fee*		4,000.00	
133	**Combined Health Professional Masters and PhD**				
134	All Years	*Domestic*	11,294.00	11,519.00	2.0%
135	All Years	*International*	40,075.00	41,277.00	3.0%
136	Graduate Diploma in Applied Health Sciences	*Domestic; per-course tuition fee*	1,418.00	1,446.00	2.0%
137	Graduate Diploma in Applied Health Sciences	*International; per-course tuition fee*	3,880.00	3,996.00	3.0%

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26	Proposed 2026-27	
			Amount	Amount	% change
138	Graduate Diploma in Primary Health Care Nurse Practitioner	*Domestic; per term*	2,666.00	2,719.00	2.0%
139	Masters of Kinesiology (MKIN)	*Domestic; per term*	2,120.00	2,162.00	2.0%
140	Masters of Kinesiology (MKIN)	*Internation; per term*	9,761.00	10,054.00	3.0%
141	**Schulich School of Medicine and Dentistry**				
142	Medicine (M. D.) -- Year 5	*due to unmatched residency*	11,993.00	12,232.00	2.0%
143	Medicine (M. D.) -- Year 6	*due to unmatched residency*	5,996.00	6,115.00	2.0%
144	Medicine (M. D.) -- Year 7	*due to unmatched residency*	5,996.00	6,115.00	2.0%
145	Medicine (M.D.) -- Repeat of partial or full academic year	*Domestic*	14,392.00	14,679.00	2.0%
146	Medicine (M.D.) -- Repeat of partial or full academic year	*Out of Province*	17,492.00	18,366.00	5.0%
147	Medicine (M.D.) -- Repeat of partial or full academic year	*International*	56,915.00	56,915.00	0.0%
148	MSc in Clinical Medical Biophysics	*Domestic; per-course tuition fee*	1,411.75	1,440.00	2.0%
149	MSc in Clinical Medical Biophysics	*International; per-course tuition fee*	4,679.00	4,819.00	3.0%
150	Advanced Standing Dentistry Program for International Dental Graduates	*Year 2 (plus full-time ancillary and supplementary fees)*	56,000.00	57,680.00	3.0%
151	Advanced Standing Dentistry Program for International Dental Graduates	*Year 3 (plus full-time ancillary and supplementary fees)*	56,000.00	57,680.00	3.0%
152	Advanced Standing Dentistry Program for International Dental Graduates	*Year 4 (plus full-time ancillary and supplementary fees)*	56,000.00	57,680.00	3.0%
153	International Medical Trainees	*includes Saudi Trainees*	100,000.00	100,000.00	0.0%
154	Dentistry, Advanced Standing Program Bench Test	*reflects changes in exam structure*	4,500.00	4,500.00	0.0%
155	Grad Diploma: Pathology and Laboratory Medicine	*Domestic per Term*	2,595.00	2,673.00	3.0%
156	Grad Diploma: Pathology and Laboratory Medicine	*International per Term*	3,476.00	3,580.00	3.0%
157	Master of Health Sciences (MHSc) -- Global Health Systems	*Domestic*	22,000.00	22,440.00	2.0%
158	Master of Health Sciences (MHSc) -- Global Health Systems	*International*	59,245.00	60,015.00	1.3%
159	Master of Science in Drug Safety and Pharmacovigilance	*Domestic*	22,002.00	22,442.00	2.0%
160	Master of Science in Drug Safety and Pharmacovigilance	*International*	38,563.00	39,720.00	3.0%
161	**Faculty of Music**				
162	Music Recording Arts, All Years - Domestic tuition	*Domestic: compressed prgm with Fanshawe*	6,914.00	7,052.00	2.0%
163	Music Recording Arts, All Years - Domestic tuition	*Domestic Out-of-Province: compressed prgm with Fanshawe*	8,404.00	8,824.00	5.0%
164	Music Recording Arts - Year 1 - International tuition	*compressed prgm with Fanshawe*	39,418.00	40,601.00	3.0%
165	Music Recording Arts - Year 2 - International tuition	*compressed prgm with Fanshawe*	39,418.00	40,601.00	3.0%
166	Music Recording Arts - Year 3 - International tuition	*compressed prgm with Fanshawe*	39,418.00	40,601.00	3.0%
167	**Faculty of Science**				
168	Graduate Diploma in Climate Risk Assessment and Opportunity (Natural Hazards and Risks)	*Domestic (per-course)*	5,000.00	5,000.00	0.0%
169	Graduate Diploma in Climate Risk Assessment and Opportunity (Natural Hazards and Risks)	*International (per-course)*	7,500.00	7,500.00	0.0%
170	**Faculty of Social Science**				
171	Graduate Diploma in Public Administration				

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Table 1

2025-2026 and Proposed 2026-2027 PROGRAM-SPECIFIC TUITION FEES

			2025-26	Proposed 2026-27	
			Amount	Amount	% change
172	per-course tuition	*Domestic*	920.00	938.00	2.0%
173	per-course tuition	*International*	5,120.00	5,274.00	3.0%
174	Graduate Diploma in Climate Risk Assessment and Opportunity (Climate Change Governance)	*Domestic (per-course)*	5,000.00	5,000.00	0.0%
175	Graduate Diploma in Climate Risk Assessment and Opportunity (Climate Change Governance)	*International (per-course)*	7,500.00	7,500.00	0.0%
176	UG Diploma in Management Studies	*Domestic*	6,050.00	6,171.00	2.0%
177	UG Diploma in Management Studies	*International*	21,630.00	22,279.00	3.0%
178	Graduate Diploma in Accounting				
179	Summer program	*Domestic, 1 term*	9,400.00	9,400.00	0.0%
180	Summer program	*International, 1 term*	18,000.00	18,000.00	0.0%
181	**Indigenous Student STEM Access Program (ISSAP)**	*Domestic*	6,050.00	6,171.00	2.0%
182	**Per-Course Tuition Fees**				
	First Entry Programs: • Tuition per full course is one-fifth (20%) of full program tuition for the respective program. • Tuition per full audited course is one-tenth (10%) of full program tuition for the respective program.				
183	*HBA Year 2:* Tuition per full course is one-sixth of full program tuition.				
184	*Law:* Tuition per full course is one-seventh of full program tuition.				
185	*Medicine/Dentistry:* Tuition will be set by special arrangement.				
186	*Graduate Programs:* Tuition per term is one-half (50%) of full-time tuition for the respective program.				

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Table 2

Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
1	**Faculty of Arts and Humanities**			
2	Student Donation	*opt out option: to support Faculty priorities*	50.00	50.00
3	Visual Arts Field Trip Fee	*Applicable to several VA courses*	60.00	60.00
4	1020 Safety Kit & Materials Fee	*SA 1601*	40.00	40.00
5	236 Printmaking Materials Fee	*SA 2630 A/B*	120.00	120.00
6	330 Printmaking Materials Fee	*SA 3633*	190.00	190.00
7	SA 2690Y-Studio Art Ceramics Materials Fee	*SA 2690*	190.00	190.00
8	Printmaking Silk Screen Fee	*SA 4605 / 9500*	60.00	60.00
9	Workshop Fees	*Applicable to several VA courses*	25.00	25.00
10	Sculpture 1 Workshop Materials Fee (half course)	*Applicable to several VA courses*	95.00	95.00
11	Sculpture 2 Workshop Materials Fee (full course)	*SA 2643 / 3643*	190.00	190.00
12	Toronto: Culture and Performance field trip fee	*Theatre Studies 3581F/English 3581F/ArtHum 3393F*	175.00	200-300
13	Internship Fee - 4 month academic internship (0.5 credit), Western-sourced position	*one instalment*	150.00	150.00
14	Internship Fee - (Professional Internship) - 4 month work term	*one instalment*	150.00	150.00
15	Internship Fee - (unpaid internships) - administrative fee	*one instalment*	100.00	100.00
16	Internship Fee - Non-credit (paid or unpaid)	*one instalment*	75.00	75.00
17	Studio Art Materials Fee	*Studio Art 3678*	50.00	50.00
18	Destination Theatre Trip (accommodation, live theatre, seminars/workshops)	*Theatre Studies 3900G*	3,000.00	3,000.00
19	Havana Course	*Spanish 2104F/G*	1,800-2,000	1,800-2,000
20	Rondine Course	*Italian 3040A/B*	4,500-5,000	5,000-5,500
21	San Luis Potosi Mexico	*Spanish 2908H/3908B*	2,500-3,000	2,500-3,000
22	Sevilla Course	*SP 3910B and SP 2956G*	3,000-3,500	3,000-3,500
23	Study Trip to Oaxaca, Mexico	*AH2680G/SA2690B*	4,500-5,000	4,500-5,000
24	Study Tour to Greece	*Classical Studies 3010G*	3,500.00	3,500-4,000
25	Vindolanda Field School Fees	*Classical Studies 4580G*	3,500-4,000	3,500-4,000
26	Study Tour to Italy	*Classical Studies 3050G*	3,500-4,000	3,500-4,000
27	CEL Cuba – Field Trip to University of Holguin Oscar Lucerno Moya in Cuba	*Spanish 1030, 2200 or 3300*	750.00	750.00
28	Study Abroad in Cuba	*Spanish 2200 or 3300*	2,400.00	2,400.00
29	Media Art in the Age of Intelligent Mechines	*New: SA 2664A/B*		130.00
30	**Continuing Studies**			

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Table 2

Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
31	Tuition Deposit for Diploma Programs in: Not for Profit Management, Clinical Trials Management, Occupational Health & Safety Management, Public Relations, Pedorthics, Marketing, Human Resources, and Safety Management & Human Resources	*non-refundable*	500.00	500.00
32	**Faculty of Education**			
33	Tuition Deposit - B.Ed./Dip.Ed.	*non-refundable*	500.00	500.00
34	Tuition Deposit - Add'l Qualifications (per full course)	*non-refundable*	100.00	100.00
35	Tuition Deposit - All Graduate programs	*non-refundable*	500.00	500.00
36	Deferral Fee - All Graduate programs	*admission deferral, non-refundable*	500.00	500.00
37	Practicum Supports B.Ed./Dip. Ed.	*Year 1*	550.00	550.00
38	Practicum Supports B.Ed./Dip. Ed.	*Year 2-Fall Term*	550.00	275.00
39	Practicum Supports B.Ed./Dip. Ed.	*New: Year 2-Summer Term*		275.00
40	Practicum Supports B.Ed./Dip. Ed.	*New: Additional Terms*		275.00
41	Student Donation	*opt out option: to support Faculty priorities*	30.00	30.00
42	Technology AQ Facility Fee	*to rent space & equipment needed for course EDTECH 5677*	75.00	75.00
43	School & Applied Child Psychology -- Access to Psychological Test Material		40.00	40.00
44	**Faculty of Engineering**			
45	M.Eng Tuition Deposit	*non-refundable*	500.00	500.00
46	Endowed Student Donation	*opt out option: to support UG Student Initiatives (i.e., project teams, events, clubs) and Faculty Laboratories*	150.00	150.00
47	Co-op Program Application	*non-refundable*	125.00	125.00
48	Co-op Program	*Fee Per Term*	550.00	550.00
49	Undergraduate Student Co-curricular Learning Space	*non-refundable*	75.00	75.00
50	MME 4490 - Engineering in a Global Context: Advanced Manufacturing	*International Component Course Fee*	2,300.00	2,500.00
	Exchange Programs For information on fees for the International Study Centre, please contact Western International at exchange@uwo.ca or call (519) 661-2111 ext. 89309 Incoming Exchange, Fees Payable to Western: • *Full or half year:* bus pass, Western One card, and UHIP for International Students Outgoing Exchange, Fees Payable to Western: • *Full Year:* full program tuition fees, USC health and dental plans • *Half Year at Western:* full program tuition fees, USC health plan and dental plans, bus pass, half of full-time ancillary fees *Half Year not at Western:* half of full-time tuition fees, USC health and dental plans			
51	**Faculty of Health Science (CSD, Nursing, OT, PT, Health Studies, Kinesiology, HRS)**			

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Table 2

Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
52	Graduate Programs Tuition Deposit fee	*Domestic (Masters and PhD)*	500.00	500.00
53	Graduate Programs Tuition Deposit fee	*International (Masters and PhD)*	2,000.00	2,000.00
54	**School of Health Studies**			
55	Course fee: Aging Globally, Lessons from Scandinavia		4,000.00	4,500.00
56	Student Donation *(Student Opportunity Fund)*	*opt out option: to support Faculty priorities*	100.00	100.00
57	**School of Kinesiology**			
58	Holster Kit Fee	*Applicable to specific courses*	120.00	120.00
59	Student Donation *(Student Opportunity Fund)*		100.00	100.00
60	Kinesiology - Taping supplies		100.00	100.00
61	Kinesiology - First responder certification training	*for students in Kinesiology 4585*	425.00	425.00
62	Kinesiology - Course Reader Fee	*Opt out option: for students in Kinesiology 3362*	45.00	45.00
63	**School of Kinesiology AND School of Health Studies AND Brescia School of Food and Nutritional Sciences**			
64	Internship fee: 4 month work term	*paid in one installment*	450.00	450.00
65	Internship fee: 8 month work term	*paid in two installments*	700.00	700.00
66	Internship fee: 9-12 month work term	*paid in three installments*	950.00	950.00
67	Internship fee: 13-16 month work term	*paid in three installments*	1,200.00	1,200.00
68	Health Record Verification. Preplacement Clearance	*for students in: Kinesiology 4995 A/B, 4996A/B and 4590and Health Science 4995A/B, 4996A/B, Rehab Science 4970E, Family Studies 4406A/B/Y, 4407A/B/Y*	50.00	55.00
69	**School of Nursing**			
70	Student Donation *(Student Opportunity Fund)*	*opt out option: to support Faculty priorities*	100.00	100.00
71	Placement Kit	*for students in Nursing 1201 and Nursing 1080*	20.00	20.00
72	Clinical Fieldwork Placement Fee - Crisis Intervention Training	*for students in Nursing 1080A/B, Nursing 3900 - and Nursing 2271*	70.00	70.00
73	NurseAchieve eLearning Tool - CTF Program	*for students in Nursing 3630A/B*	450.00	450.00
74	NurseAchieve eLearning Tool - Collaborative Program	*for students in Nursing 3630A/B*	550.00	550.00
75	**School of Occupational Therapy**			
76	Clinical Fieldwork Placement Fee - Crisis Intervention Training	*for students in Occupational Therapy 9580*	70.00	70.00
77	Laboratory and Clinic Kit Fee	*for all students in Occupatonal Therapy*	150.00	150.00
78	**School of Physical Therapy**			
79	Clinical Fieldwork Placement Fee - Crisis Intervention Training	*for students in Physical Therapy 9181*	70.00	70.00
80	**School of Communication Sciences and Disorders**			
81	Laboratory and Clinic Kit fee - Speech Language Pathology Program	*for all students in Speech Language Pathology*	300.00	300.00
82	Laboratory and Clinic Kit fee - Audiology Program	*for all students in Audiology*	300.00	450.00

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Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
83	Clinical Fieldwork Placement Fee - Crisis Intervention Training	*for all students in Commsci 9511 and 9626*	70.00	70.00
84	Cadaveric Laboratory Fee	*New: for all students in CSD9620*		48.00
85	**Applied Health Care Practice**			
86	AHCP Wound Healing Supplies	*for students taking AHCP9660, 9670*	550.00	550.00
87	AHCP Sport & Exercise Medicine Taping Supplies and Certificate Costs	*for students taking AHCP9691*	550.00	650.00
88	AHCP MCISc Mentorship	*for all students in the Advanced Health Care Practice Program*	2,100.00	2,100.00
89	**Brescia School of Foods & Nutrition**			
90	Student Donation *(Student Opportunity Fund)*	*opt out option -- to support Faculty priorities. All undergraduate students in Foods & Nutrition & Family Studies*	100.00	100.00
91	Course fee: Canadian & Japanese FN Diet Professions	*for students in FN 4488*	4,000.00	4,000.00
92	Lab Fee: Foods & Nutrition Labs	*for all students in FN 2140A/B, FN 2142A/B, FN 3310A/B, FN 3340A/B, FN 3342A/B, FN 3348A/B FN 3400A/B, FN 4420A/B, FN 4435A/B, FN 9342A/B, FN 9420A/B, FN 9430A/B*	50.00	50.00
93	Masters of FN (MScFN) Clinical Preceptorship Fees	*for students in MScFN applies to courses FN 9001, FN 9002, FN 9003, FN 9004*	4,000.00	4,000.00
94	Crisis Intervention Training	*All Master Program. Training in May.*	70.00	70.00
95	**Faculty of Information and Media Studies**			
96	MLIS Co-op Placement	*Applicable to specific courses*	800.00	825.00
97	Ph DLIS Co-op Placement	*Applicable to specific courses*	800.00	825.00
98	Internship Fee, FIMS, Academic Internship		150.00	150.00
99	Internship Fee, MMJC, non-academic, Third-Term Internship		125.00	128.75
100	Tuition Deposit, MMJC	*non-refundable*	450.00	475.00
101	Tuition Deposit, Library and Info. Science (Graduate)	*non-refundable*	450.00	475.00
102	Student Donation	*opt out option: to support Faculty priorities*	50.00	50.00
103	Health Information Sciences Placement	*Applicable to specific courses*	800.00	825.00
104	**Faculty of Law**			
105	Tuition Deposit, JD program, Year 1 only	*non-refundable*	500.00	500.00
106	Tuition Deposit, LLM and MSL programs, new students only	*non-refundable*	500.00	500.00
107	International Law Capstone Course field trip fee; Ottawa/NY	*optional*	800-2,200	800-2,200
108	Career Management Platforms		45.00	45.00
109	**Schulich School of Medicine and Dentistry**			
110	Dental Kits	*Year 1*	17,000.00	17,000.00
111	Dental Kits	*Year 2*	18,000.00	18,000.00
112	Dental Kits	*Year 3*	4,500.00	4,500.00

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Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
113	Dental Kits	*Year 4*	1,000.00	1,000.00
114	Advanced Standing Dentistry Program for International Dental Graduates-Dental Kits	*Year 2*	35,000.00	35,000.00
115	Advanced Standing Dentistry Program for International Dental Graduates-Dental Kits	*Year 3*	4,500.00	4,500.00
116	Advanced Standing Dentistry Program for International Dental Graduates-Dental Kits	*Year 4*	1,000.00	1,000.00
117	Tuition Deposit, Dentistry, Year 1 only	*$500 non-refundable*	1,000.00	1,000.00
118	Tuition Deposit, Dentistry, Year 2, Advanced Standing Dentistry Program For International Dental Graduates	*$500 non-refundable*	4,950.00	4,950.00
119	Instrument Deposit, Dentistry, Year 2, Advanced Standing Dentistry Program for International Dental Graduates	*non-refundable*	5,000.00	5,000.00
120	International Medical Elective Insurance Fee (Specific Partnerships)	*per elective*	445.00	446.00
121	Tuition Deposit, Medicine, Year 1 only	*$500 non-refundable*	1,000.00	1,000.00
122	Tuition Deposit, Masters of Public Health	*$500 non-refundable*	500.00	500.00
123	Visiting Medical Elective, Canadian Universities	*per elective*	150.00	100.00
124	Visiting Medical Elective, International Universities	*per elective*	945.00	946.00
125	Student Donation, Undergraduate BMSc	*opt out option: to support Faculty priorities*	75.00	75.00
126	Interdisciplinary Medical Sciences MSc: Fee for Material and External Assessment Tool		150.00	150.00
127	Summer Experiential Learning Fee -- MHSc (Global Health Systems)		5,000.00	6,000.00
128	Graduate Orthodontics - Scrub Fee (Year I only)	*New*		75.00
129	Graduate Orthodontics - Print Use and Consummables Fee (Years 1, 2, & 3)	*New*		150.00
130	Graduate Orthodontics - Dental Clinic Management Software (Years 1, 2, & 3)	*New*		740.00
131	Graduate Orthodontics - Personal Protective Equipment & Reprocessing Fee (Years 1, 2, & 3)	*New*		1,400.00
132	Dentistry - Dental Management Software (All Years)	*New*		249.00
133	Advanced Standing Dentistry Program for International Dental Graduates - Dental Management Software (All Years)	*New*		249.00
134	Anatomy Lab Materials Fee - ANATCELL 2200	*New*		176.00
135	Anatomy Lab Materials Fee - ANATCELL 3200	*New*		110.00
136	Anatomy Lab Materials Fee - ANATCELL 4200A	*New*		132.00
137	Anatomy Lab Materials Fee - ANATCELL 4201	*New*		132.00
138	Anatomy Lab Materials Fee - ANATCELL 9501	*New*		36.00
139	Anatomy Lab Materials Fee - ANATCELL 9560	*New*		360.00
140	Anatomy Lab Materials Fee - ANATCELL 9569	*New*		36.00
141	Anatomy Lab Materials Fee - ANATCELL 9636	*New*		96.00
142	Anatomy Lab Materials Fee - DENTS 5160/5185/5186	*New*		60.00
143	Anatomy Lab Materials Fee - CSD 9620	*New*		48.00

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Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
144	Anatomy Lab Materials Fee - Biophysics 9706Y	*New*		32.00
145	Capstone Lab Materials Fee - ANATCELL 4985E	*New*		250.00
146	Capstone Lab Materials Fee - BIOCHEM 4484E	*New*		250.00
147	Capstone Lab Materials Fee - BIOCHEM 4985E	*New*		250.00
148	Capstone Lab Materials Fee - BIOCHEM 4999E	*New*		250.00
149	Capstone Lab Materials Fee - MBI -4985E	*New*		250.00
150	Capstone Lab Materials Fee - MEDBIO 4985E	*New*		250.00
151	Capstone Lab Materials Fee - MEDSCIEN 4990E	*New*		250.00
152	Capstone Lab Materials Fee - MEDSCIEN 4991F/G	*New*		250.00
153	Capstone Lab Materials Fee - MICROIMM 4985E	*New*		250.00
154	Capstone Lab Materials Fee - NEURO 4985E	*New*		250.00
155	Capstone Lab Materials Fee - ONEHEALT 4985E	*New*		250.00
156	Capstone Lab Materials Fee - PATHOL 4985E	*New*		250.00
157	Capstone Lab Materials Fee - PHYSPHRM 4985E	*New*		250.00
158	Lab Materials Fee - BIOCHEM 3380G	*New*		50.00
159	Lab Materials Fee - BIOCHEM 3383F/G	*New*		50.00
160	Lab Materials Fee - MEDBIO 3980E	*New*		50.00
161	Lab Materials Fee - MEDSCIEN 3990E	*New*		50.00
162	Lab Materials Fee - MEDSCIEN 3991F	*New*		50.00
163	Lab Materials Fee - MEDSCIEN 3383F/G/Z	*New*		50.00
164	Lab Materials Fee - MICROIMM 3610F	*New*		50.00
165	Lab Materials Fee - MICROIMM 3620G	*New*		50.00
166	Lab Materials Fee - NEURO 3996F	*New*		50.00
167	Lab Materials Fee - NEURO 3997G	*New*		50.00
168	Lab Materials Fee - PHYSPHRM 3000E	*New*		50.00
169	**Faculty of Music**			
170	Music Lesson (2 term total)	*Applicable to specific courses*	2,781.00	3,000.00
171	Music - Audition Fee		88.00	91.00
172	Music - Opera Workshop Fee		88.00	91.00
173	Music - Music Education Instrument Fee		62.00	64.00
174	Music Performance String Instrument Bank Fee		134.00	138.00

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Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
175	Internship Fee - 4 month academic internship (0.5 credit), Western-sourced position	*one instalment*	129.00	133.00
176	Student Donation (Gift Fund)	*opt out option: to support Faculty priorities*	100.00	100.00
177	**Ivey Business School**			
178	Tuition Deposit, MBA	*$500 non-refundable*	5,000.00	5,000.00
179	Tuition Deposit, Executive MBA Program (Canada)	*non-refundable*	5,000.00	5,000.00
180	Tuition Deposit, Accelerated MBA	*$500 non-refundable*	5,000.00	5,000.00
181	Tuition Deposit, Master of Management-Analytics (MMA)	*non-refundable*	2,000.00	2,000.00
182	Tuition Deposit, HBA	*$500 non-refundable*	2,000.00	2,000.00
183	Tuition Deposit, MSc program	*$500 non-refundable*	2,000.00	2,000.00
184	Tuition Deposit, PhD	*non-refundable*	300.00	300.00
185	Course Material Fees, MBA		2,639.00	2,639.00
186	Course Material Fees, MBA (exchange students)		420.00	420.00
187	Course Material Fees, JD/MBA		2,325.00	2,325.00
188	Course Material Fees, Direct MBA		1,490.00	1,490.00
189	Course Material Fee, Graduate Diploma in Accounting		1,000.00	1,000.00
190	Pre Business Custom Course Material Fees	*See Ivey Custom Course Material Fees 2026-2027*		
191	HBA 1 Custom Course Material Fees		1,750.00	1,500.00
192	HBA 2 Custom Course Material Fees		700.00	750.00
193	HBA Dual Degree Course Material Fees		350.00	375.00
194	MSc Business Analytics Course Material Fees (Fall 2026 Intake)	*Fall 2026 & Winter 2027 terms*	650.00	650.00
195	MSc International Business Course Material Fees (Winter 2026 & Winter 2027 Intakes)	*Fall 2026 & Winter 2027 terms*	625.00	625.00
196	MSc Digital Management Course Material Fees (Fall 2026 Intake)	*Fall 2026 & Winter 2027 terms*	875.00	875.00
197	**Faculty of Science**			
198	Telescope Access Fee	*Astronomy 2801*	35.00	35.00
199	Science Co-op program	*$500 per 4-month term*	500.00	500.00
200	Student Donation	*opt out option: to support Faculty priorities*	75.00	75.00
201	Accelerated Masters in Geology	*field school course; refundable upon successful completion of course*	1,600.00	1,600.00
202	Accelerated Masters in Geophysics		1,600.00	1,600.00
203	Master of Environment and Sustainability (MES)	*Co-op Program Fee*	3,000.00	3,200.00
204	Master of Data Analytics	*Co-op Program Fee*	3,000.00	3,200.00
205	Master in Statistics	*Co-op Program Fee*	3,000.00	750.00

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Table 2

Proposed 2026-2027 PROGRAM-RELATED FEES

			2025-26 Amount	Proposed 2026-27 Amount
206	Earth Sciences Field Course 2250Y	*New: Field course*		550 - 1,600
207	Earth Sciences Field Course 3350Y	*New: Field course*		1,050 - 1,500
208	Earth Sciences Field Course 4450Y	*New: Field course*		2,000 - 2,600
209	Earth Sciences Field Course 4452Y	*New: Field course*		3,000 - 4,000
210	Earth Sciences Field Course 4001Y	*New: Field course*		3,000 - 4,000
211	Earth Sciences Field Course 4451	*New: Field course*		500 - 1,000
212	Environmental Sciences Field Course 2400	*New: Field course*		500 - 1,000
213	Biology Laboratory Material Fee	*NEW: Biology 1001A, 1002B, 2290 F/G*		50.00
214	Chemistry Laboratory Material Fee	*NEW: Chemisty 1301 A/B, 1302 A/B, 2213 A/B, 2223 B*		50.00
215	Physics Laboratory Material Fee	*NEW: Physics 1201 A/B, 1202 A/B*		50.00
216	**Faculty of Social Science**			
217	Internship Fee (replace varied work term rates)	*per 4-month term*	500.00	500.00
218	Student Donation	*opt out option; to support Faculty priorities*	50.00	75.00
219	Course Material Fees, Graduate Diploma in Accounting		1,000.00	1,000.00
220	Master of Management of Applied Science Internship Fee	*placement costs*	3,500.00	3,500.00
221	**General**			
222	Admission Deferral Deposit	*non-refundable*	500.00	500.00
223	Tuition Deposit, Full-time Undergraduates	*non-refundable*	500.00	500.00
224	Tuition Deposit, Part-time Undergraduates	*non-refundable*	250.00	250.00
225	Tuition Deposit, Full-time International Undergraduates	*non-refundable*	2,500.00	2,500.00
226	Tuition Deposit, Full-time International Masters	*non-refundable*	2,000.00	2,000.00
227	University Health Insurance Plan for International Students			
228	Undergraduates, Full-time and Part-time	*12 month term*	792.00	TBD
229	Graduates, excluding MBA	*per term*	264.00	TBD
230	Graduates, MBA	*12 month term*	792.00	TBD
231	Exchange students	*per term*	264.00	TBD

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Table 3

Proposed 2026-2027 APPLICATION FEES

			2025-26 Amount	Proposed 2026-27 Amount
1	**Undergraduate Programs**			
2	Arts and Humanities - Application fee for Student Service Learning Option in Cuba	*Spanish 2200 or 3300*	75.00	75.00
3	Arts and Humanities - Application fee for summer study at University of Holguin Oscar Lucero Moya in Cuba	*academic credit via Letter of Permission (Spanish 1030, 2200 or 3300)*	75.00	75.00
4	Arts and Humanities - Visual Arts Portfolio Application Fee	*BFA Studio Arts; USD*	15.00	15.00
5	Dentistry		375.00	375.00
6	Dentistry: Advanced Standing Program - International Dental Graduates - Application		375.00	375.00
7	Education, B.Ed./Dip.Ed.		80.00	80.00
8	Engineering, Leadership and Innovation Certificate		125.00	125.00
9	Exchange programs: Western International Exchange, Study Abroad, Internship, Research & Summer programs		65.00	65.00
10	Exchange programs, Faculty of Law		60.00	65.00
11	Part-time Application Fee		100.00	100.00
12	Law		150.00	150.00
13	Medicine		135.00	135.00
14	**Ivey Business School**			
15	HBA		200.00	200.00
16	HBA Advanced Entry Opportunity Program		200.00	200.00
17	**Continuing Studies**			
18	Application Fee due at time of submission for Diploma Program in: Not for Profit Management, Clinical Trials Management, Occupational Health & Safety Management, Public Relations, Pedorthics, Marketing, Human Resources, and Safety Management & Human Resources	*non-refundable*	100.00	100.00
19	**Graduate Programs**			
20	Communication Sciences and Disorders (M.CL.Sc.)		275.00	290.00
21	Occupational Therapy M.Sc. (OT)		275.00	290.00
22	Physical Therapy (MPT)		275.00	290.00
23	Ivey MBA		150.00	150.00
24	Ivey MSc		150.00	150.00
25	Orthodontics		350.00	350.00
26	All other graduate programs		170.00	185.00

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Table 4

Proposed 2026-2027 SUPPLEMENTAL FEES AND OTHER CHARGES

			2025-26 Amount	Proposed 2026-27 Amount
1	**Course Cancellation/Change Fees**			
2	Full-time Undergraduates - excl. Yr 1 Dentistry, Yr 1 Medicine and HBA		400.00	450.00
3	Part-time Undergraduates	*per full course*	120.00	140.00
4	Part-time Undergraduates	*per half course*	60.00	70.00
5	Education - B.Ed./Dip.Ed.		350.00	350.00
6	Education - Additional Qualifications		100.00	100.00
7	Law - JD, First year only		500.00	500.00
8	Law - LLM and MSL programs		500.00	500.00
9	Executive MBA Cancellation Fee	*if withdrawing up to 30 days from start of session*	5,000.00	5,000.00
10	MM-A Cancellation Fee	*if withdrawing up to 30 days from start of session*	2,000.00	2,000.00
11	Accelerated MBA Cancellation Fee	*NEW: if withdrawing up to 30 days from start of session*	2,000.00	5,000.00
12	HBA Deferral Fee		1,000.00	1,000.00
13	**Identification Cards**			
14	Photo Identification Card (Western ONEcard)		50.00	50.00
15	Photo Identification Replacement		50.00	50.00
16	**Late Payment Charges: based on overdue balance on new consolidated account including tuition and residence charges (Fall 2026)**			
17	Late payment charges will be charged monthly at an interest rate of 1.5% on overdue balances, which is equivalent to an annual interest rate of 19.56%			
18	**Late Registration Fees**			
19	Full-time Undergraduates		230.00	240.00
20	Part-time Undergraduates		115.00	120.00
21	Accommodated Exam, Unauthorized Exam Absence Fee		35.00	35.00
22	Deferred Exam Fee	*New*		60.00
23	Courier	*Within Ontario*	50.00	55.00

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Table 4

Proposed 2026-2027 SUPPLEMENTAL FEES AND OTHER CHARGES

			2025-26 Amount	Proposed 2026-27 Amount
24	Courier	*Canada (Outside of Ontario)*	55.00	60.00
25	Courier	*U.S.*	60.00	65.00
26	Courier	*International*	120.00	130.00
27	Course Description/Course Syllabus	*1 course*	5.00	5.00
28	Deregistration Fee		375.00	400.00
29	Diploma Authentication		20.00	25.00
30	Amended Tax Receipts (T2202/T4A)	*includes electronic filing of amendments*	35.00	40.00
31	Early Release of Diploma		145.00	150.00
32	Education - French as a Second Language Testing		100.00	100.00
33	Braille Drills Supplement Book	*one time charge for levels 2-4; included if entering in level 1*	40.00	40.00
34	PLA Testing Braille Certificate	*if studied at other Braille provider*	100.00	100.00
35	Education - Kodaly certification		320.00	320.00
36	Engineering - Supplemental Examination	*non-refundable*	125.00	125.00
37	Exchange Placement fee, Faculty of Law		165.00	175.00
38	Exchange , Western International & Western Heads East Placement Fee		170.00	170.00
39	Facsimile (Fax)/PDF charge		35.00	40.00
40	Electronic Degree Parchment		60.00	60.00
41	Late Application to Graduate		140.00	150.00
42	Letter of Permission - Outgoing Students		100.00	110.00
43	Letter of Permission - Incoming Students		100.00	110.00
44	Mailing of Diplomas	*Outside of Canada*	100.00	100.00
45	Mailing of Diplomas	*Within Canada*	60.00	60.00
46	Mailing of Miscellaneous Items	*for mailing items through Canada Post (excludes mailing of transcripts, official letters, forms)*	25.00	30.00

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Table 4

Proposed 2026-2027 SUPPLEMENTAL FEES AND OTHER CHARGES

			2025-26 Amount	Proposed 2026-27 Amount
47	Dentistry - Supplemental Examination	*London*	75.00	75.00
48	Medicine - Postgraduate Fellowship Administrative Fee		150.00	175.00
49	Medicine - Masters of Public Health - Learning Materials	*charged 1/3 in each of 3 terms*	1,000.00	1,000.00
50	Medicine - Masters of Public Health - Practicum Fee	*charged 1/3 in each of 3 terms*	650.00	1,000.00
51	Medicine - Postgraduate Verification-Dates only	*Regular & Rush*	50.00	75.00
52	Medicine - Postgraduate Verification-Dates & Performance		75.00	75.00
53	Medicine - Postgraduate Certificate of Completion of Training - duplicate/replacement		25.00	25.00
54	Medicine - Postgraduate Registration - Residents/Fellows	*set by provincial COFM*	980.00	1,015.00
55	Medicine - Undergraduate Non-credit Summer Elective	*per elective*	60.00	60.00
56	Medicine - Undergraduate Verification-Dates only		50.00	75.00
57	Medicine - Undergraduate Verification-Dates & Performance		75.00	75.00
58	International Health and Equity Learning (IHEL) - International Placement Fee	*per placement*	60.00	60.00
59	Dentistry - Program Transfer Fee	*New*		3,750.00
60	Dentistry - Physiology Challenge Exam	*New*		300.00
61	Graduate Orthodontics - Clinical Placement Fee (Internal Clinic) (All Years)	*New*		1,700.00
62	Dentistry - Clinical Placement Fee (Internal Clinic) (Years 3 & 4)	*New*		1,200.00
63	Advanced Standing Dentistry Program for International Dental Graduates - Clinical Placement Fee (Internal Clinic) (Years 3 & 4)	*New*		1,200.00
64	Community Engaged Learning Placement Fee - BIOCHEM 4955E	*New*		50.00
65	Community Engaged Learning Placement Fee - MEDSCIEN 4995E	*New*		50.00
66	Community Engaged Learning Placement Fee - MEDSCIEN 4000E	*New*		50.00
67	Music - Recital Cancellation Fee		216.00	222.00
68	Nursing - Foreign Licensure Documentation		300.00	350.00
69	Nursing - Professional Practice Remedial Fee		300.00	450.00

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Table 4

Proposed 2026-2027 SUPPLEMENTAL FEES AND OTHER CHARGES

			2025-26 Amount	Proposed 2026-27 Amount
70	Official Western Letter	*Per Electronic Letter*	30.00	33.00
71	Official Western Letter, on demand	*Per Paper Letter*	40.00	43.00
72	Physical Therapy - Foreign Licensure Documentation		300.00	350.00
73	Physical Therapy - Clinical Fieldwork Placement Remedial Fee		450.00	450.00
74	Occupational Therapy - Clinical Fieldwork Placement Remedial Fee		450.00	450.00
75	Occupational Therapy - Foreign Licensure Documentation		300.00	300.00
76	Communication Sciences & Disorders - Clinical Fieldwork Placement Remedial Fee		450.00	450.00
77	Communication Sciences & Disorders - Foreign Licensure Documentation		300.00	300.00
78	Physical Therapy - Supplemental Examination		250.00	250.00
79	Occupational Therapy - Supplemental Examination		250.00	250.00
80	AHCP - MClSc Supplemental Practical Examination		500.00	500.00
81	Physical Therapy - Out of Catchment Placement	*New*		250.00
82	Re-admission Fee (Undergraduates deleted for non-payment of fees)		110.00	120.00
83	Removal of Academic Sanctions (Sealing charge)		90.00	100.00
84	Replacement Cheque Fee		40.00	40.00
85	Replacement/Duplication of Graduation Diplomas		85.00	85.00
86	Reprinting of non-current fee bills		25.00	25.00
87	Returned Cheque Charge		90.00	100.00
88	Self-service Letters	*Per Letter*	20.00	25.00
89	Supplemental Examination	*London; for Faculties not listed above*	60.00	30.00
90	Third Party Forms	*per form; standard processing time*	30.00	35.00
91	Third Party Forms on demand		40.00	45.00
92	Transcripts, electronic (MyCreds)	*per copy; electronic (MyCreds)*	30.00	33.00

Western University

Table 4

Proposed 2026-2027 SUPPLEMENTAL FEES AND OTHER CHARGES

			2025-26 Amount	Proposed 2026-27 Amount
93	Transcripts, paper	*per copy; paper*	30.00	33.00
94	Transcript Special Handling	*to include with a transcript an external student-provided form that does not require completion*	10.00	12.00
95	Transcript Evaluation Fee		120.00	125.00
96	Visiting Research Only Processing Fee	*Graduate*	300.00	300.00
97	Visiting Research Only Processing Fee	*Undergraduate*	300.00	300.00
98	Writing Proficiency Examination		100.00	100.00
99	Payment Plan Charge		110.00	120.00
100	Student Experience: Student-Athlete Fee -- Varsity Athletes		350.00	350.00
100	Student Experience: Student-Athlete Fee -- Varsity Club Athletes		290.00	290.00
101	Specialized Post-Degree Official Enrolment and Completion Letters	*New*		25.00

Western University

Table 5

PROPOSED 2026-27 BUSINESS SCHOOL COURSE MATERIAL FEES

				2025-26 Amount	2026-27 Amount	% change
	BUSINESS FOUNDATIONS CUSTOM COURSE MATERIAL FEES					
	Course		***Fees include program activity fees if applicable***			
1	1220E	Bus 1220E Introduction to Business	*Making Business Decisions Text and Cases 16th Edition*	230.00	230.00	0.0%
2	2257	Bus 2257 Accounting and Business Analysis	*Bus2257 Accounting and Business Analysis Casebook*	300.00	300.00	0.0%
3	2295F/G	Bus 2295 F/G Business Basics for the Sciences	*Bus2295F/G Bus Basic for Science Casebook*	90.00	90.00	0.0%
4	1299E	Bus 1299E Business for Engineers	*Bus1299E Business for Engineers Casebook*	245.00	245.00	0.0%
5	**Notes**					
6	•	*Business Foundations course material fees include a custom coursepack, plus all course materials not bound in the custom coursepack including in-class readings, handouts, additional cases and items ordered from outside suppliers like software, workbooks, or other materials.*				
7	•	*The custom course pack and hardcopy handouts are comprised of purchased material, copyright material reported through copyright holders directly, copyright material reported through Access Copyright, and materials that fall in the fair dealing copyright exception.*				

Annex 3

Student Fee-Funded Units, Ancillaries, Academic Support Units, and Associated Companies

2026-27 Budgets and Ancillary Fees

March 31, 2026

Student Fee-funded Units, Ancillary Units, Academic Support Units, and Associated Companies

2026-27 Budgets and Ancillary Fees

A. Introduction

The following provides a financial overview and description of funding sources for Student Fee-Funded Units, Ancillary Units, Academic Support Units, and Associated Companies

Table 1 includes a summary of the 2025-26 projected year-end results and 2026-27 budgets for each of the units. Tables 2 and 3 provide a listing of the 2025-26 Ancillary fees and the proposed Ancillary fee rates for 2026-27.

B. Student-Fee-Funded Units

Student Fee-Funded Units are supported, in whole or in part, by non-tuition-related compulsory ancillary fees. The proposed 2026-27 Student Organization and University Ancillary Fees are presented on Tables 2 and 3. Student involvement in establishing fee levels for University fee-funded units is facilitated through the Student Services Committee (SSC) – a student-run group comprised of voting representatives from the University Students' Council (USC), the Society of Graduate Students (SOGS), and the Master of Business Administration Association (MBAA).

Historically, annual inflationary increases have regularly been supported by the SSC and recommended to Western's Board of Governors. The 3-year period of the global pandemic (2020-21 to 2022-23) was an exception when the University did not propose fee increases.

To sustain and enhance the services provided to our students by the fee-funded student service units — and in consideration of the current level of inflation — the University proposed that a basic increase of 2% be applied to all student service ancillary fees in 2026-27. The fee increase was unanimously supported by the SSC.

In general, most units are operating within approved plans – with normal annual fluctuations in revenues and expenses. Units within the Wellness & Well-being and Leadership & Learning pillars under the Student Experience portfolio are using operating reserve funds to hire contract staff in 2026-27 for special one-time initiatives in the areas of student health, engagement and experiential learning.

C. Ancillary Units

Revenues that support the *Ancillary Unit* budgets are derived primarily from the sale of goods and services to the general University community.

Increases in Housing expenses are due to major maintenance and property costs associated with infrastructure renewal projects and the ramp-up of operations in preparation for opening the new residence.

Hospitality Services continues to pursue revenue growth opportunities through innovative concept offerings, resulting in improved fiscal performance in 2026-27 compared to 2025-26. Expenses are being actively reviewed to identify efficiencies in processes, supply chain management and inventory practices to further improve the unit's financial position.

D. Academic Support Units

The budgets for the *Academic Support Units* are funded from various sources, including recoveries from internal research projects, revenues from external industrial contracts, and course fees. In addition, Animal Care & Veterinary Services (ACVS) receives support from the University operating budget to help offset the costs of housing research animals, unrecoverable regulatory requirements, and training for animal users.

University Machine Services (UMS) is projecting lower revenues and expenses in 2026-27 compared to 2025-26 because of a significant decline in external business. The unit's operating reserve was sufficient to fund the one-time restructuring costs.

Western Continuing Studies (WCS) is projecting higher expenses in 2025-26 – and thus projecting a deficit – due to its relocation to the West Campus (formerly Brescia) and the transition to a new learning management system, both of which had one-time costs. WCS will utilize its operating reserve to fund these costs.

E. Associated Companies

The Associated Companies are separate legal business entities that are consolidated into the overall Combined Western University Financial Statements.

Western Research Parks (WRP) is in the process of securing a new anchor tenant to replace a vacancy left in 2024-25. The budget assumes a replacement tenant halfway through 2026-27. WRP will use its operating reserve to cover the deficit over the vacancy period.

The Ivey Business School Foundation is projecting an in-year deficit of $7.9M in 2025-26 due to a one-time allocation of $13M to support the Donald K. Johnson capital project in downtown Toronto.

Table 1

Western University

Student Fee-Funded Units, Ancillary Units, Academic Support Units, and Associated Companies
2026-27 Budgets ($ 000)

		2025-26 Projected			2026-27 Budget			% Change		Budgeted Reserves at April 30, 2027	
		Revenues	Expenses	Rev-Exp	Revenues	Expenses	Rev-Exp	Revenues	Expenses	Operating	Capital
1	**A - Student Fee-Funded Units**										
2	***Student Experience Fee-Funded Ancillary Units***										
3	*Sport & Recreation Pillar*										
4	Recreation	6,500.2	6,489.0	11.2	6,650.6	6,656.4	-5.8	2.31%	2.58%	420.1	840.9
5	Sport	8,525.9	8,477.7	48.2	8,675.0	8,788.8	-113.8	1.75%	3.67%	84.5	250.0
6	Spirit & Connection (Thompson Recreation & Athletic Centre)	1,425.0	1,407.0	18.0	1,495.3	1,475.1	20.2	4.93%	4.84%	137.1	224.4
7	Spirit & Connection (Spirited Activities & Events)	1,732.9	1,753.4	-20.5	1,806.4	1,820.8	-14.4	4.24%	3.84%	68.3	
8	*Wellness & Well-being Pillar*										
9	Health & Wellness	7,601.0	7,502.9	98.1	7,669.1	8,230.9	-561.8	0.90%	9.70%	969.8	700.3
10	Wellness & Equity Education	791.0	800.5	-9.5	799.0	769.4	29.6	1.01%	-3.89%	442.4	200.0
11	Student Support & Case Management	569.9	523.6	46.3	575.9	545.0	30.9	1.05%	4.09%	444.4	82.6
12	*Leadership & Learning Pillar*										
13	Academic Support & Engagement	2,168.2	2,103.9	64.3	2,195.9	2,355.4	-159.5	1.28%	11.95%	402.8	
14	Careers & Experience	1,886.5	1,770.5	116.0	1,909.6	2,079.7	-170.1	1.22%	17.46%	438.6	
15	***All Other Fee-Funded Ancillary Units***										
16	Financial Aid Office	1,575.5	1,578.3	-2.8	1,578.9	1,577.5	1.4	0.22%	-0.05%	409.1	
17	International Student Services	641.8	635.9	5.9	648.1	647.5	0.6	0.98%	1.82%	1.1	
18	Indigenous Student Centre	973.8	973.7	0.1	944.1	938.7	5.4	-3.05%	-3.59%	632.9	
19	Off-Campus Housing & Housing Mediation Services	651.4	598.4	53.0	660.4	613.5	46.9	1.37%	2.51%	909.5	
20	Western Foot Patrol	244.7	244.0	0.7	247.7	246.9	0.8	1.23%	1.19%	65.4	77.3
21	**Sub-Total**	**35,287.9**	**34,858.9**	**429.0**	**35,856.0**	**36,745.6**	**-889.6**	**1.61%**	**5.41%**	**5,426.0**	**2,375.5**
22	**B - Ancillary Units**										
23	Employee & Family Health Clinic	684.4	687.5	-3.1	685.6	678.1	7.5	0.18%	-1.37%	45.7	
24	Housing Services	114,434.3	107,001.5	7,432.8	111,308.9	112,332.3	-1,023.4	-2.73%	4.98%	-3,694.3	
25	Retail and Hospitality Services	27,681.9	30,508.4	-2,826.5	28,126.0	30,245.3	-2,119.3	1.60%	-0.86%	-14,299.4	
26	Spencer Leadership Centre	9,285.6	8,881.1	404.5	9,581.3	9,247.0	334.3	3.18%	4.12%	1,000.1	
27	Parking Services	7,422.7	7,450.7	-28.0	7,570.3	7,903.4	-333.1	1.99%	6.08%	692.5	
28	**Sub-Total**	**159,508.9**	**154,529.2**	**4,979.7**	**157,272.1**	**160,406.1**	**-3,134.0**	**-1.40%**	**3.80%**	**-16,255.4**	**0.0**
29	**C - Academic Support Units**										
30	Animal Care & Veterinary Services	8,307.4	8,499.2	-191.8	8,084.5	8,134.2	-49.7	-2.68%	-4.29%	1,849.3	194.5
31	Boundary Layer Wind Tunnel	2,368.0	2,261.9	106.1	2,418.3	2,392.9	25.4	2.12%	5.79%	756.5	575.0
32	University Machine Services	1,514.2	1,650.8	-136.6	510.2	510.2	0.0	-66.31%	-69.09%	0.0	
33	Fraunhofer Innovation Platform	1,097.0	1,097.0	0.0	1,049.8	1,049.8	0.0	-4.30%	-4.30%	0.0	138.4
34	Surface Science Western	2,336.1	2,335.6	0.5	2,459.2	2,458.5	0.7	5.27%	5.26%	177.0	724.2
35	Western Continuing Studies	5,477.0	6,235.2	-758.2	5,616.9	5,682.4	-65.5	2.55%	-8.87%	2,402.8	
36	**Sub-Total**	**21,099.7**	**22,079.7**	**-980.0**	**20,138.9**	**20,228.0**	**-89.1**	**-4.55%**	**-8.39%**	**5,185.6**	**1,632.1**
37	**D - Associated Companies**										
38	Western Research Parks (incl. ADEISS & AMP)	4,578.9	5,456.6	-877.7	5,046.5	5,526.1	-479.6	10.21%	1.27%	4,844.2	
39	Ivey Business School Foundation and Ivey Asia Limited	41,226.6	49,202.0	-7,975.4	43,195.2	39,793.8	3,401.4	4.78%	-19.12%	19,506.2	
40	**Sub-Total**	**45,805.5**	**54,658.6**	**-8,853.1**	**48,241.7**	**45,319.9**	**2,921.8**	5.32%	-17.09%	**24,350.4**	**0.0**
41	**Grand Total**	**261,702.0**	**266,126.4**	**-4,424.4**	**261,508.7**	**262,699.6**	**-1,190.9**	**-0.07%**	**-1.29%**	**18,706.6**	**4,007.6**

Table 2

Western University

Proposed 2026-2027 *Full-Time* Student Organization and University Ancillary Fee Rates

		Full-Time Undergraduate			Full-Time Graduate - 3 Terms			Full-Time MBA		
		2025-26 Rate	<a,b> Proposed 2026-27 Rate	% change	2025-26 Rate	<a> Proposed 2026-27 Rate	% change	2025-26 Rate	<a> Proposed 2026-27 Rate	% change
1	**Student Organization Fees:**									
2	Organization Fee	-	-	-	104.79	98.52	-6.0%	720.00	740.00	2.8%
3	Student Buildings	146.53	153.85	5.0%	26.85	27.00	0.6%	-	-	-
4	Student Recreation Centre Fund	99.17	102.15	3.0%	99.17	102.15	3.0%	99.17	102.15	3.0%
5	Transit Pass	317.79	323.55	1.8%	311.43	317.04	1.8%	362.00	<c>380.00	5.0%
6	Safe Transit Program	18.02	18.38	2.0%	-	-	-	-	-	-
7	Health and Wellness	14.25	14.54	2.0%	-	-	-	-	-	-
8	Health Plan <Incl. Dental for Graduate Students> <d>	240.43	257.26	7.0%	666.96	730.83	9.6%	1,320.00	<e>1,412.00	7.0%
9	Dental Plan <d>	219.01	223.39	2.0%	-	-	-	-	-	-
10	Virtual Doctor <f>	42.14	45.09	7.0%	-	-	-	-	-	-
11	Academic Support (includes Ombuds Fee)	13.83	14.10	2.0%	3.34	3.33	-0.3%	-	-	-
12	Community Legal Services	6.39	6.52	2.0%	6.39	6.39	0.0%	-	-	-
13	Grad Club Levy	-	-	-	42.54	48.81	14.7%	-	-	-
14	Canadian Federation of Students Fee	-	-	-	20.64	21.09	2.2%	-	-	-
15	Government Advocacy	12.15	12.51	3.0%	-	-	-	-	-	-
16	Student Life	16.39	17.05	4.0%	-	-	-	-	-	-
17	Peer Programs	5.36	5.47	2.1%	-	-	-	-	-	-
18	Clubs Administration	13.30	13.57	2.0%	-	-	-	-	-	-
19	Orientation Week Fee <first year students only>	129.22	133.09	3.0%	-	-	-	-	-	-
20	Student Initiative Grants	6.42	6.55	2.0%	-	-	-	-	-	-
21	Gazette	18.88	19.25	2.0%	-	-	-	-	-	-
22	Radio Western	11.36	11.59	2.0%	-	-	-	-	-	-
23	Student Refugee Program	0.92	0.94	2.2%	-	-	-	-	-	-
24	Marching Band Fee	2.15	2.19	1.9%	-	-	-	-	-	-
25	Faculty and Affiliate Councils	4.73	4.82	1.9%	-	-	-	-	-	-
26	***Sub-Total: Student Organization Fees***	***1,338.44***	***1,385.86***	***3.5%***	***1,282.11***	***1,355.16***	***5.7%***	***2,501.17***	***2,634.15***	***5.3%***
27	**University Ancillary Fees:**									
28	***Student Experience Fees***									
29	*Sport & Recreation Pillar*									
30	Recreation	113.43	115.70	2.0%	143.82	146.70	2.0%	143.82	146.70	2.0%
31	Sport	94.13	96.01	2.0%	94.13	96.01	2.0%	94.13	96.01	2.0%
32	Spirit & Connection (Thompson Recreation & Athletic Centre)	21.94	22.38	2.0%	21.94	22.38	2.0%	21.94	22.38	2.0%
33	Spirit & Connection (Spirited Activities & Events)	6.01	6.13	2.0%	6.01	6.13	2.0%	6.01	6.13	2.0%
34	*Wellness & Well-being Pillar*									
35	Health & Wellness	119.35	121.74	2.0%	119.35	121.74	2.0%	119.35	121.74	2.0%
36	Wellness & Equity Education	13.97	14.25	2.0%	13.97	14.25	2.0%	13.97	14.25	2.0%
37	Student Support & Case Management	10.53	10.74	2.0%	10.53	10.74	2.0%	10.53	10.74	2.0%
38	*Leadership & Learning Pillar*									
39	Academic Support & Engagement	48.27	49.24	2.0%	48.27	49.24	2.0%	48.27	49.24	2.0%
40	Careers & Experience	40.48	41.29	2.0%	40.48	41.29	2.0%	40.48	41.29	2.0%
41	***All Other Unit Fees***									
42	Financial Aid Office	43.31	44.18	2.0%	43.31	44.18	2.0%	43.31	44.18	2.0%
43	International Student Services	15.87	16.19	2.0%	15.87	16.19	2.0%	15.87	16.19	2.0%
44	Indigenous Student Centre	13.61	13.88	2.0%	13.61	13.88	2.0%	13.61	13.88	2.0%
45	Off-Campus Housing & Housing Mediation Services	10.08	10.28	2.0%	10.08	10.28	2.0%	10.08	10.28	2.0%
46	Western Foot Patrol	5.32	5.43	2.1%	5.32	5.43	2.1%	5.32	5.43	2.1%
47	***Sub-Total: University Ancillary Fees***	***556.30***	***567.44***	***2.0%***	***586.69***	***598.44***	***2.0%***	***586.69***	***598.44***	***2.0%***
48	***Grand Total***	***1,894.74***	***1,953.30***	***3.1%***	***1,868.80***	***1,953.60***	***4.5%***	***3,087.86***	***3,232.59***	***4.7%***

<a> The proposed rates are effective September 1, 2026, except for the Student Recreation Centre fee, which is effective May 1, 2026.
<b> In addition to the Full-Time Undergraduate fees, a $400.00 fee will be collected on behalf of the HBA Association from HBA students entering the first year of their program. The $400.00 fee covers both years of the program.
<c> The MBA Transit Pass fee is administered by the USC and is valid for a full year, commencing January 2027.
<d> The Health & Dental plan is eligible for opt-out upon presentation of proof of coverage from another source.
<e> The MBA Health & Dental Plan is administered by the USC and provides coverage for a full year, commencing January 2027.
<f> The Virtual Doctor fee is eligible for opt-out without conditions.

Table 3

Western University

Proposed 2026-2027 *Part-Time* Student Organization and University Ancillary Fee Rates

		Part-Time Undergraduate - per full course			Undergraduate: Summer - per full course			Part-Time Graduate - per term		
		2025-26 Rate	<a> Proposed 2026-27 Rate	% change	2025-26 Rate	<a> Proposed 2026-27 Rate	% change	2025-26 Rate	<a> Proposed 2026-27 Rate	% change
1	**Student Organization Fees:**									
2	Organization Fee	-	-	-	-	-	-	17.47	16.42	-6.0%
3	Student Buildings	29.31	30.77	5.0%	14.66	15.39	5.0%	-	13.50	-
4	Student Recreation Centre Fund	19.84	20.44	3.0%	10.27	10.58	3.0%	16.53	17.03	3.0%
5	Safe Transit Program	3.61	3.68	2.0%	-	-	-	-	-	-
6	Health and Wellness	2.85	2.91	2.0%	1.43	1.46	2.0%	-	-	-
7	Academic Support (includes Ombuds Fee)	2.77	2.82	2.0%	1.38	1.41	2.0%	-	1.68	-
8	Community Legal Services	1.27	1.30	2.0%	0.65	0.66	2.0%	-	3.21	-
9	Grad Club Levy	-	-	-	-	-	-	7.10	8.14	14.6%
10	Canadian Federation of Students Fee	-	-	-	-	-	-	3.44	3.52	2.3%
11	Government Advocacy	2.43	2.50	3.0%	1.22	1.26	3.0%	-	-	-
12	Student Life	3.28	3.41	4.0%	1.65	1.72	4.0%	-	-	-
13	Peer Programs	1.08	1.10	2.1%	0.53	0.54	2.1%	-	-	-
14	Clubs Administration	2.66	2.71	2.0%	1.33	1.36	2.0%	-	-	-
15	Student Initiative Grants	1.28	1.31	2.0%	0.65	0.66	2.0%	-	-	-
16	Gazette	3.78	3.85	2.0%	1.90	1.94	2.0%	-	-	-
17	Radio Western	2.27	2.32	2.0%	1.14	1.16	2.0%	-	-	-
18	Marching Band Fee	0.43	0.44	1.9%	0.22	0.22	1.9%	-	-	-
19	Faculty and Affiliate Councils	0.94	0.96	1.9%	0.48	0.49	1.9%	-	-	-
20	***Sub-Total: Student Organization Fees***	***77.80***	***80.52***	***3.5%***	***37.51***	***38.85***	***3.6%***	***44.54***	***63.50***	***42.6%***
21	**University Ancillary Fees:**									
22	***Student Experience Fees***									
23	*Sport & Recreation Pillar*									
24	Recreation	22.68	23.13	2.0%	11.34	11.57	2.0%	-	-	-
25	Sport	18.82	19.20	2.0%	9.42	9.61	2.0%	-	-	-
26	Spirit & Connection (Thompson Recreation & Athletic	4.39	4.48	2.0%	2.19	2.23	2.0%	-	-	-
27	Spirit & Connection (Spirited Activities & Events)	1.20	1.22	2.0%	0.60	0.61	2.0%	-	-	-
28	*Wellness & Well-being Pillar*									
29	Health & Wellness	23.87	24.35	2.0%	11.93	12.17	2.0%	19.88	20.28	2.0%
30	Wellness & Equity Education	2.79	2.85	2.0%	1.40	1.43	2.0%	2.33	2.37	2.0%
31	Student Support & Case Management	2.11	2.15	2.0%	1.05	1.07	2.0%	1.76	1.79	2.0%
32	*Leadership & Learning Pillar*									
33	Academic Support & Engagement	9.65	9.84	2.0%	4.84	4.94	2.0%	8.04	8.21	2.0%
34	Careers & Experience	8.10	8.26	2.0%	4.05	4.13	2.0%	6.75	6.89	2.0%
35	***All Other Unit Fees***									
36	Financial Aid Office	8.66	8.83	2.0%	4.34	4.43	2.0%	7.22	7.36	2.0%
37	International Student Services	3.17	3.23	2.0%	1.59	1.62	2.0%	2.65	2.70	2.0%
38	Indigenous Student Centre	2.72	2.77	2.0%	1.36	1.39	2.0%	2.27	2.32	2.0%
39	Off-Campus Housing & Housing Mediation Services	2.02	2.06	2.0%	1.01	1.03	2.0%	-	-	-
40	Western Foot Patrol	1.07	1.09	2.1%	0.53	0.54	2.1%	0.89	0.91	2.1%
41	***Sub-Total: University Ancillary Fees***	***111.25***	***113.46***	***2.0%***	***55.65***	***56.77***	***2.0%***	***51.79***	***52.83***	***2.0%***
42	***Grand Total***	***189.05***	***193.98***	***2.6%***	***93.16***	***95.62***	***2.6%***	***96.33***	***116.33***	***20.8%***

<a> The proposed rates are effective September 1, 2026, except for the Student Recreation Centre fee, which is effective May 1, 2026.

Summary of Student Organization Ancillary Fee Increases for 2026-27

(Table 2 of Ancillary Fee Document)

	Undergraduate Students (through USC)	Graduate Students (through SOGS)	MBA Students (through MBAA)
Overall Increase	**3.5% → to $1,385.86**	**5.7% → to $1,355.16**	**5.3% → to $2,634.15**
Major Specific Items			
Student Rec Centre Fund	3.0%	3.0%	3.0%
Student Buildings	5.0%		
Health Plan	7.0%	9.6%	7.0%
Student Life	4.0%		
Virtual Doctor	7.0%		
Student Organization Fee	~ 2.0% average	-6.0%	3.0%
Grad Club Levy		14.7%	

Student Services Committee Report

Item:	Student Services Committee Report for the 2025/2026 Academic Year
Author:	Kathleena Henricus, Student Services Committee Chairperson
Date:	April 1, 2026

Summary

I would like to start by thanking all the administration and members from our student representatives for their participation in this year's Student Services Committee. We greatly appreciated the tours provided from Recreation and Western International, which offered deeper insight into the services they provide on campus. Given the rising costs for service delivery, the committee felt the proposed inflationary increase was appropriate. However, we did not support the Academic Support and Engagement proposal, due to the financial constraints already burdening students. A lack of support from members of the committee in further CliftonStrengths investments was also highlighted as one of the reasons for their decision.

Academic Support & Engagement Fee Request

There was a request for an additional $4 per student in student ancillary fees (approximately $160K) for the Academic Support & Engagement unit, with which they would deliver:

- Enhanced Leadership Programming: Learn to Lead Certificate, Western Peer Leader Program, and Leadership Competitions
- Strengths Programming: Embedding Strengths into 1-1 Career Coaching, an annual Student Strengths Conference, early introduction of strengths programming, and peer-to-peer strengths coaching network
- Networking with Employers: Industry-specific networking events, and career sessions with industry speakers
- Professional Development Recognition: Enhanced Co-Curricular Record

Denial of Academic Support & Engagement Fee Request

When the proposal was delivered at the Student Services Committee, the student representatives spoke directly to the team at Academic Support and Engagement and had a fulsome discussion highlighting their questions and concerns. Following the meeting, each student went back to consult with their constituents on the merit of the increase. After consultations it was decided over an email vote not to approve this fee increase. The financial constraints already burdening students and a lack of support in further CliftonStrengths investments were the reasons for their decision.

Inflationary Increases

The Student Services Committee voted to approve the 2% inflationary increase. Considering the current economic climate and the fact that there has been such a substantial cost increase across all fronts, we deemed this increase reasonable.

Conclusion

This year we were conscious in our efforts and as student representatives put an emphasis on collaboration and coming to decisions that we felt would benefit the entire student body. We carefully analyzed each fee request, considering both the evidence provided and the current economic atmosphere to ground our decisions.

We are grateful to our partners at Western for their continued collaboration.

Signed,



Kathleena Henricus
Student Service Committee Chairperson
University Students' Council, President & CEO

Cherin Chung
Society of Graduate Students, President

Arham Ali
Master of Business Administration Association, President

Western's 2026-27 Operating and Capital Budgets

Board of Governors
April 30, 2026



2026-27 Operating Budget

$985.5 Million Investment in:

- Student Experience
- Academic Excellence
- Research Impact
- Strategic Growth

Major Investments in 2026-27: $985.5M Budget

Student Experience – $111M

- Investing in Students & Student Success
- Strengthening Academic Programs

Academic Excellence – $33M

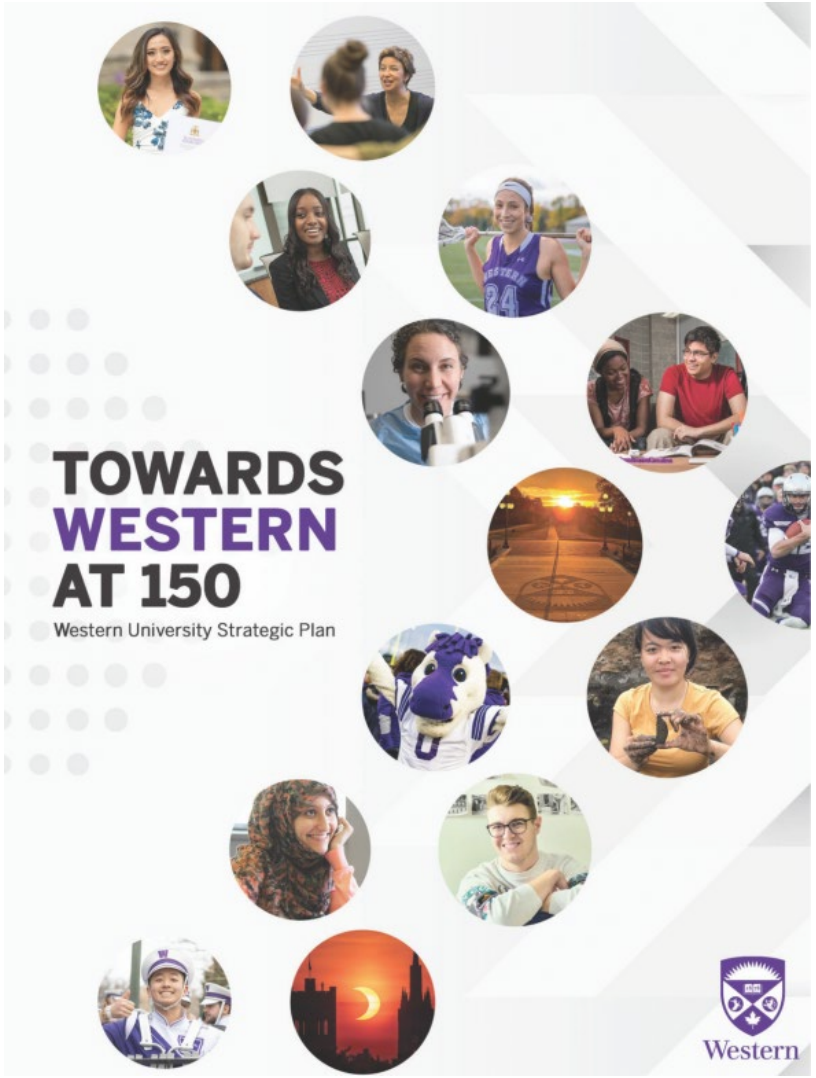
- Attracting Global Talent
- Creating New Streams of Funding

Research Impact – $9M

- Investing in Research Facilities
- Strengthening Research infrastructure

Setting the Conditions for Strategic Growth – $721M

- Advancing Core Academic Operations
- Modernizing Infrastructure and Digital Capacity



Major Investments 2023-27 ($M)

	2023-24 Budget	2024-25 Budget	2025-26 Budget	2026-27 Budget
Student Experience	96.8	109.5	113.8	**111.1**
Academic Excellence	15.0	3.6	31.6	**33.4**
Research Impact	13.0	27.0	2.5	**9.0**
Setting the Condition for Strategic Growth	702.6	710.6	707.2	**720.7**
Total	827.4	850.7	855.1	**874.2**

Budget Context and Response Timeline

Planning Assumptions (Before Feb 12, 2026)

- Declining operating revenue
- No new base allocations
- New two-year planning cycle

Provincial Announcement (February 12, 2026)

- Domestic tuition freeze lifted
- 2% annual increases for three years

Increases to core operating grants:

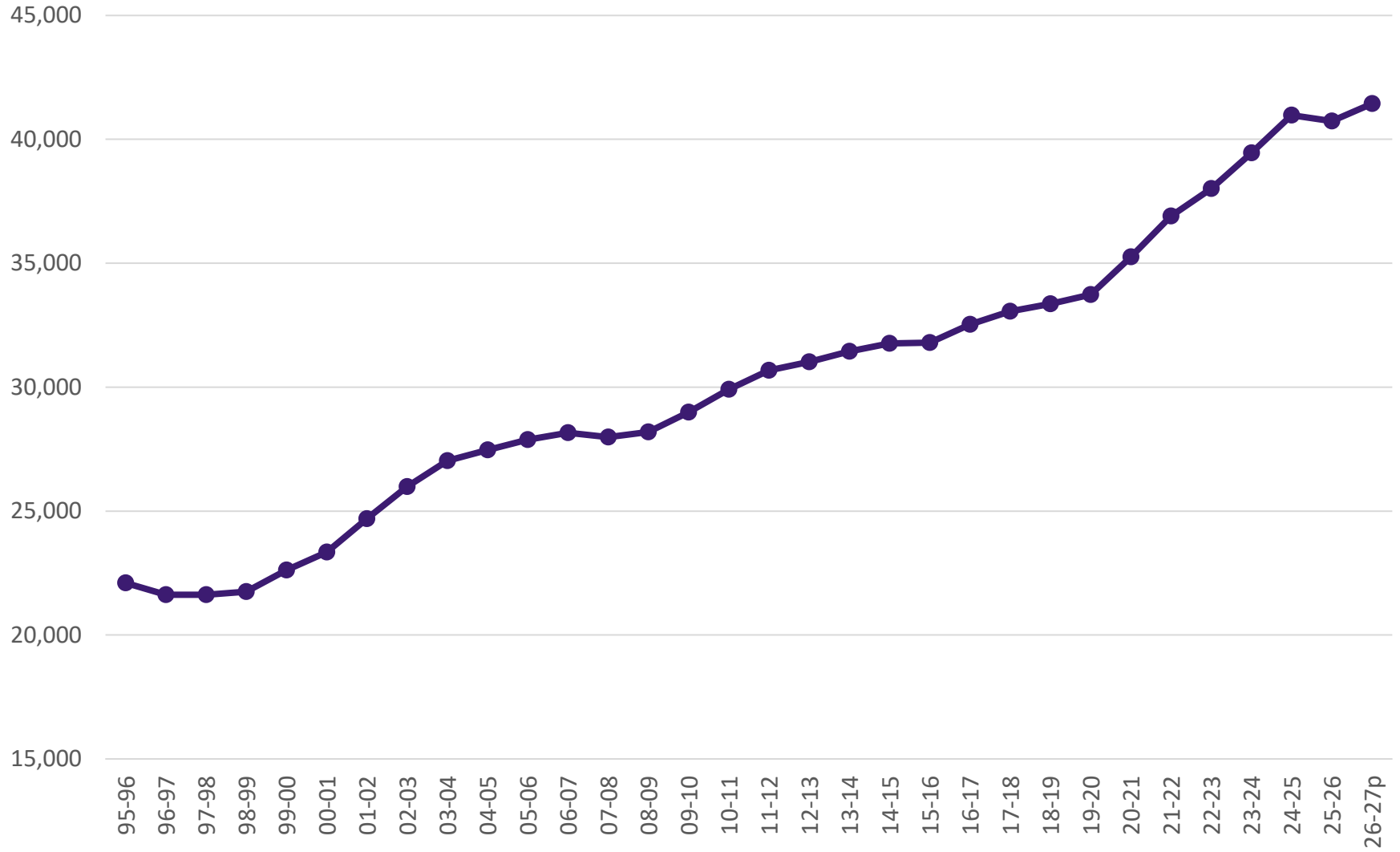
- Funding for previously unfunded students (up to 2024–25 levels)
- Increased per-student funding rates per Weighted Grant Unit (WGU)
- Increased WGUs for priority academic programs
- An additional 40,000 funded seats for Colleges and Universities (competition)

Details and constraints are not yet known

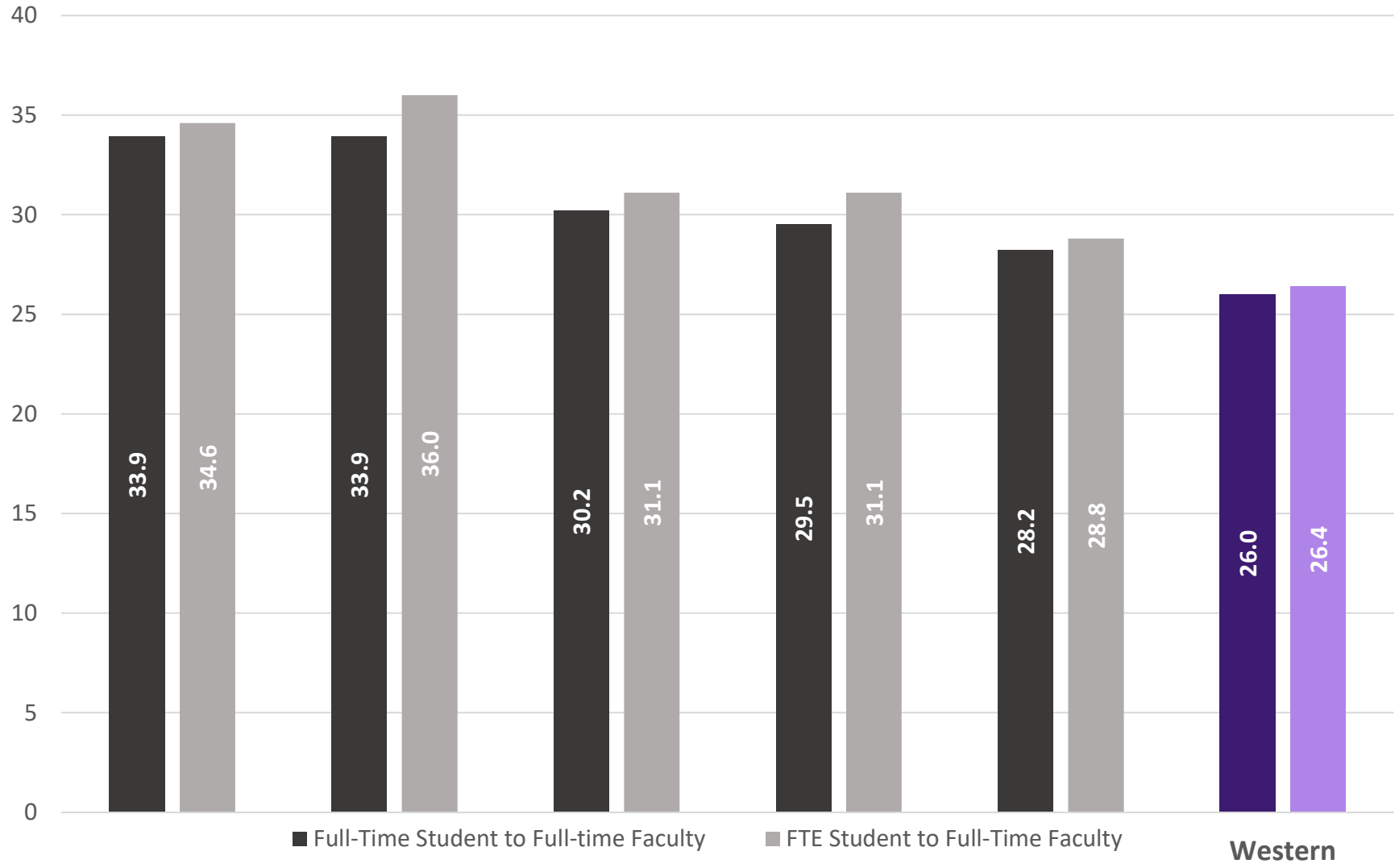
Western's Response

- Incorporated 2% domestic tuition revenue into the 2026–27 budget
  - Allocated $2.4M base funding to Faculties
  - Allocated $1M base funding to Support Units
- Overall continued careful spending
- Awaiting further details on grants before new allocations are made

Our Total FTE Enrolment

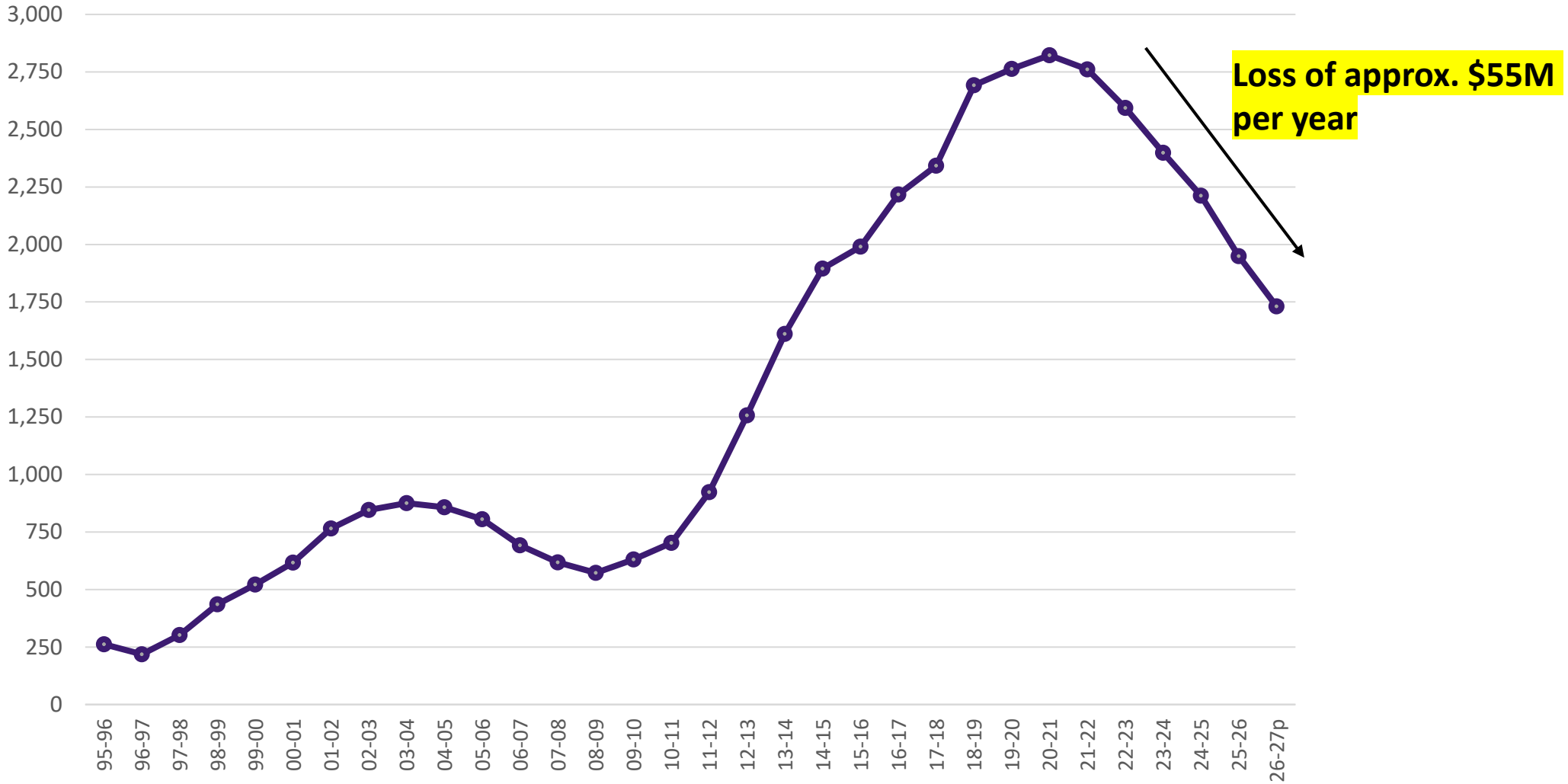


U6 Student to Faculty Ratios (2024-25)



Source: U15 Data Exchange *University of Toronto ratios are 2023-24 data*

Our Full-Time Undergraduate International Enrolment

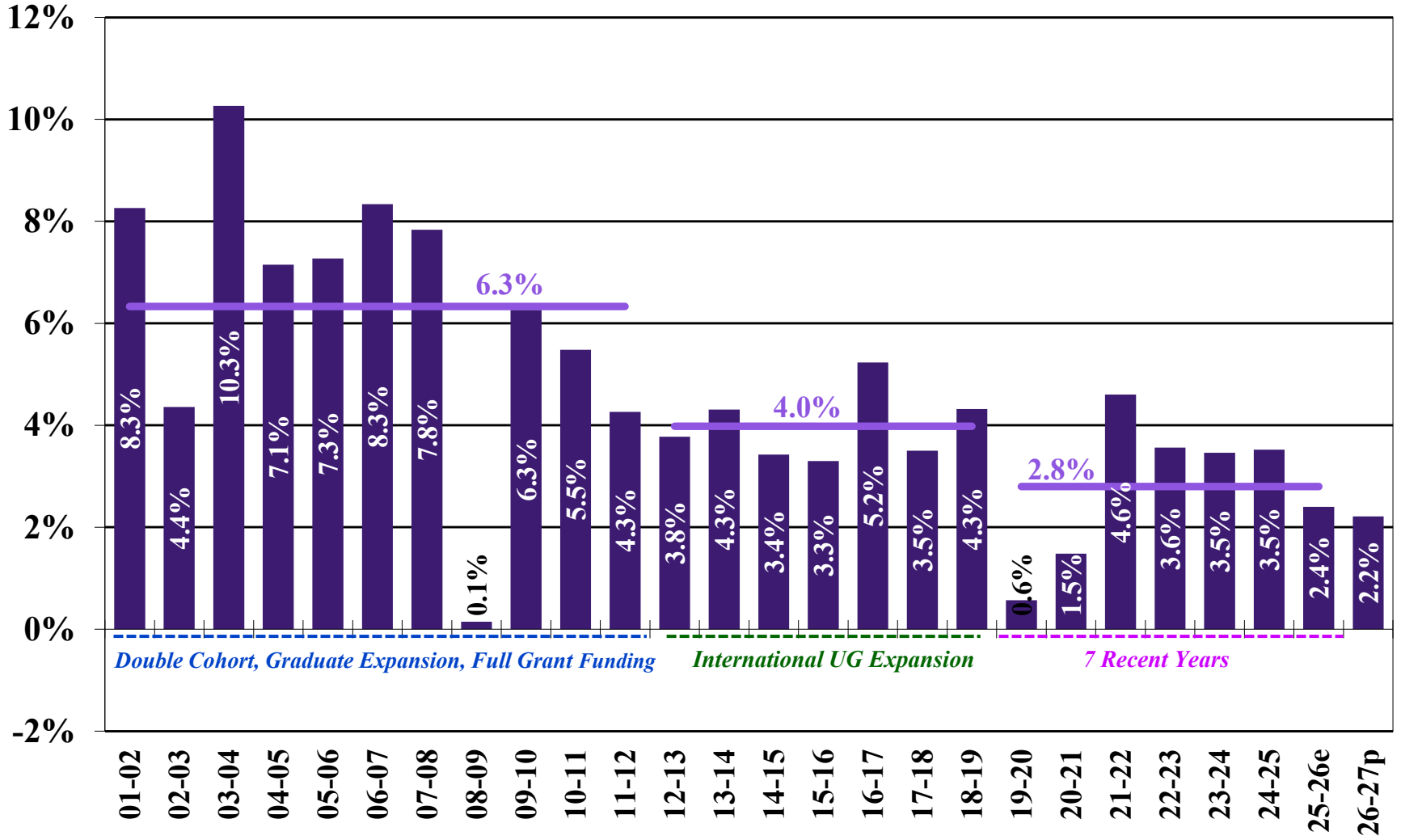


2026-27 Revenue Forecast

Our Operating Revenue Forecast for 2026-27 ($M)

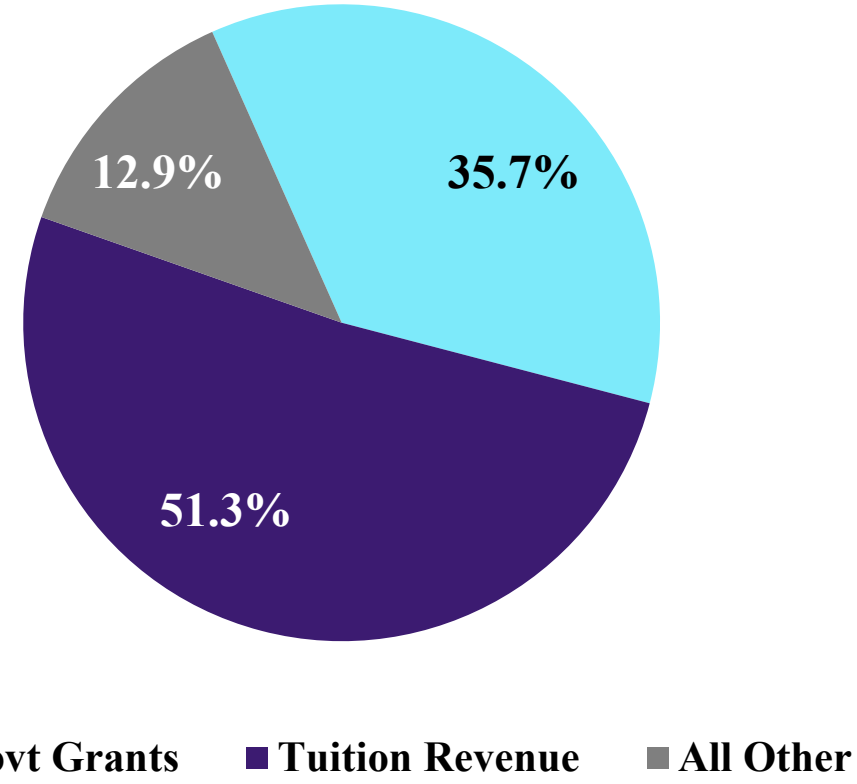
	2025-26 e	2026-27 p	$ Change	% Change
Core Operating Grant	279.8	279.8	0	0.0%
Time-Limited Provincial Grant	**32.2**	**38.1**	**5.9**	**18.3%**
Other (Special Purpose) Grants	37.5	37.7	0.2	0.5%
Sub-Total Government Grants	349.5	355.6	6.1	1.7%
Tuition Revenue: Regular	383.5	390.1	6.6	1.7%
Tuition Revenue: Self-Funded	114.4	120.5	6.1	5.3%
Sub-Total Tuition Revenue	497.9	510.6	12.7	2.6%
All Other Revenue	126.2	128.8	2.6	2.1%
Total Operating Revenue	**973.6**	**995.0**	**21.4**	**2.2%**

Operating Revenues: Annual % change 2001-02 to 2026-27p

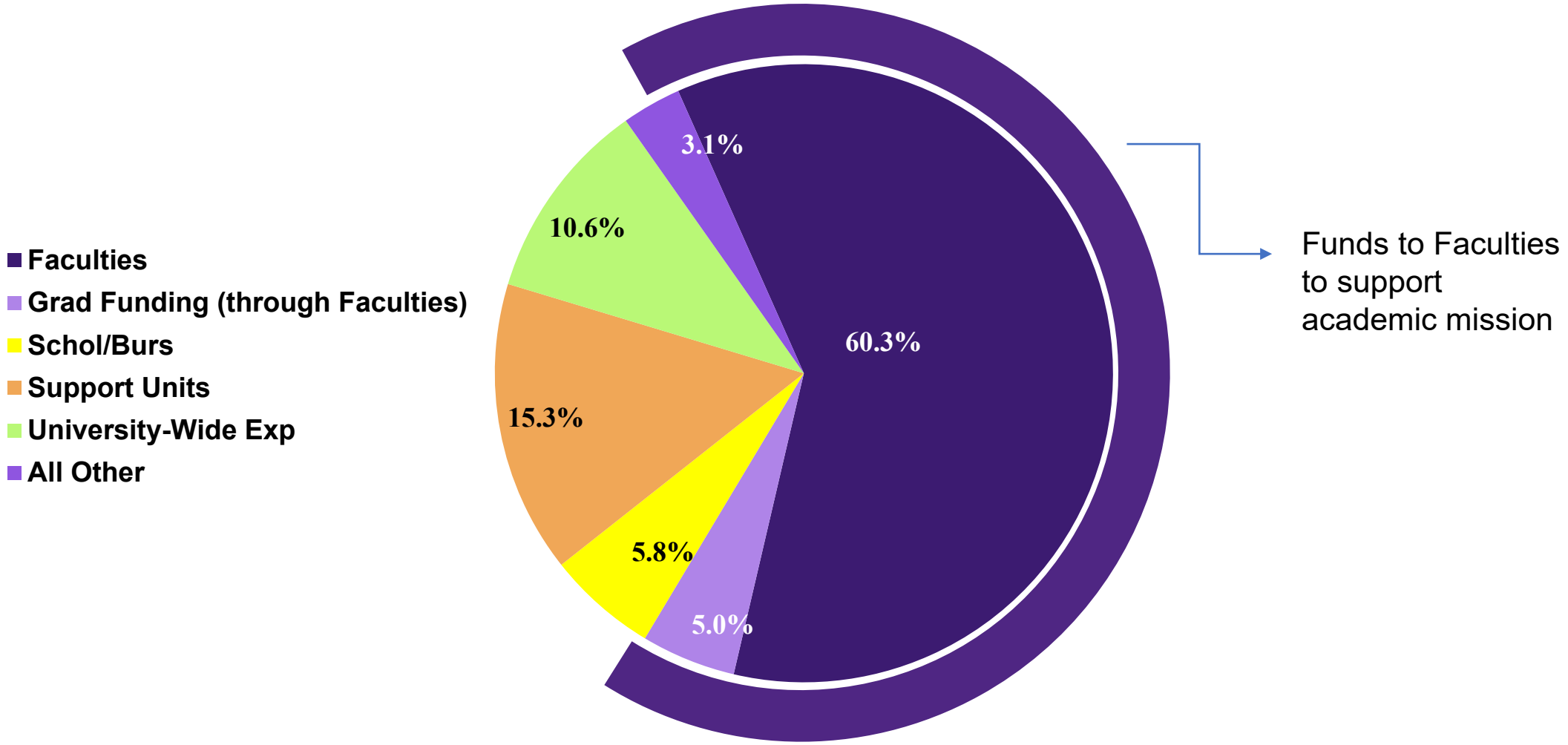


Summary of 2026-27 Operating Budget

Projected 2026-27 Operating Revenue
(Total = $995M)



Projected 2026-27 Operating Expenditures
Total Base & One-Time = $985.5M



Summary of 2026-27 operating budget
(Table 2)

Revenue forecast = $ 995M

Expenditure plan = $ 985.5M

Projected in-year position: $9.5M

Projected operating reserve: $68.9M

Summary of our 2026-27 Capital Budget

Next set of major capital projects

- Supports Long-Range Space Plan (Page 35, Table 13)

Projects underway or in advanced planning (Category 1)

- New Engineering Building
- Undergraduate Residence – University Drive Location
- Donald K. Johnson Leadership Centre in Toronto (Ivey)
- Pathogen Research Centre Facility
- The Bioconvergence Centre
- New Facility for Health Sciences
- Renewal of Facilities at the West Campus
- University Drive Bridge Replacement
- Modernization of Alumni Hall

Overview of 2026-27 Capital Budget

Total spending of $329.5M (Table 14, line 10)

$227.2M for new construction

(Table 17, line 15)

$15.8M for major renovations

(Table 17, line 24)

$86.5M for all other expenditures

- Utilities and infrastructure
- Modernization of academic facilities
- General maintenance and modernization
- Housing and ancillary projects

Discussion


1878
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Revisions to Resolution re: Banking

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of the Property and Finance Committee, the Board of Governors approve the revisions to the Resolution re: Banking.

Executive Summary:

This report seeks approval for amendments to the University's Banking Resolution to ensure it remains accurate and aligned with current operations and internal control requirements.

Section 3 of the Banking Resolution (Signing Officers for Cheques) has been updated to reflect recent role title changes and evolving responsibilities within Financial Services to maintain appropriate segregation of duties.

In addition, the proposed amendments remove the section requiring the maintenance of a separate bank account with unique signing authorities for the Trois-Pistoles French Immersion School at Caisse populaire Desjardins, as the related operations have ceased and there are no plans to re-establish this banking arrangement.

Finally, the amendments reflect the rebranding of Ivey Spencer Leadership Centre to Spencer Hotel and Conference Centre and clarify that the account shall be solely in The University of Western Ontario's name.

Documentation Provided:

Resolution re: Banking (redlined)

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Resolution re: Banking

Effective Date: ~~September 21, 2023~~**April 30, 2026**

Supersedes: **September 21, 2023;** September 22, 2022; November 18, 2021; January 21, 2021; September 22, 2020; November 29, 2018; April 21, 2016

1. **General**

(a) Bank accounts in the name of The University of Western Ontario ("the University") shall be maintained at the Bank of Montreal, Main Branch, 270 Dundas Street, London, Ontario, and elsewhere and in such other financial institutions as determined appropriate to manage University banking business. Collectively these financial institutions are herein referred to as the "Banks".

(b) Any one of Group "A" hereunder, together with any one of Group "B" hereunder, shall have full power for, and in the name of the University, to make and confirm arrangements or agreements with the Banks for advances and loans, including overdrafts, to or for the University and to manage, transact and settle all manner of banking business whatsoever, and to adjust and settle accounts between the University and the Banks.

GROUP "A"

Vice-President (Operations & Finance) _____

Associate Vice-President (Financial Services) _____

GROUP "B"

Controller _____

Director, Treasury Services _____

2. **Number of Signatures Required**

Cheques issued against bank accounts and other withdrawals therefrom shall bear the signatures of two persons as authorized in this resolution whose signing authority shall be subject to the restrictions herein stated.

3. **Signing Officers for Cheques**

(a) Any one of Group "A" hereunder may sign cheques issued against bank accounts or other withdrawals therefrom, in any amount, together with any one of Group "B" hereunder.

(b) In the event the University implements an organized closure as a result of public health guidance from the Middlesex-London Health Unit (for example, due to an infectious disease outbreak or pandemic), any one of Group "A" OR Group "B" hereunder may sign cheques issued against bank accounts or other withdrawals there from, in any amount.

GROUP "A"

Vice-President (Operations & Finance) _____

Associate Vice-President (Financial Services) _____

Controller _____

Director, Treasury Services _____

GROUP "B"

Manager, Commerce and Capital~~Assistant Controller~~ _____

Director, Research Finance _____

Associate Vice-President (Human Resources) _____

~~Financial Officer~~**Manager**, Endow**ment**~~ed~~ & Restricted Funds _____

4. **Facsimile Signatures**

(a) The signature of authorized signing officers may be facsimile signatures given by a cheque-signing machine or by other mechanical means, but no cheque bearing a facsimile signature or signatures shall be issued or presented to the Banks for an amount exceeding the sum of $100,000 for each cheque, but the University shall, however, remain liable and responsible to the Banks for any and all cheques bearing such facsimile signatures and honored or paid by the Banks, whatever the amount thereof.

(b) The Banks are authorized and directed to pay any and all cheques drawn on the aforesaid accounts and purporting to be cheques of the University bearing the signatures authorized by the preceding paragraphs and the Banks shall not be liable for any cheque or cheques which may have been irregularly or improperly drawn through the use of a cheque-signing machine or other mechanical means and paid or cashed by the Banks.

5. **Verbal/Facsimile Messages**

The Banks may act on oral instructions and/or facsimile transmission on University letterhead subject to procedures approved by the Board of Governors and attached hereto as **Annex 1**.

6. Transfer Deposit Accounts

Transfer deposit accounts may be opened in the name of The University of Western Ontario on the joint authority of any one of Group "A" together with any one of Group "B" as listed in section 1(b) for such special purposes as will facilitate the administration of funds of the University. The sole means of removal of funds from transfer deposit accounts shall be by transfer to the general accounts of the University or to trust accounts held by an authorized agency.

7. **Advice to Banks**

A certified copy of this resolution and certified specimens of the signatures and facsimile signature of the officers hereby authorized shall be delivered to, and may be acted upon, by the Banks until notice to the contrary shall have been given to the Banks.

~~8.~~ ~~**Trois-Pistoles French Immersion School**~~

~~An account may be maintained at the Caisse populaire des Jardins, Trois-Pistoles, Quebec, to facilitate payment of expenses at Trois-Pistoles French Immersion School, such account to be subject to the following provisos:~~

~~(a) The title of the account shall be "Trois-Pistoles French Immersion School - The University of Western Ontario", and~~

~~(b) Any one of Group "A" hereunder may sign cheques issued against this bank account or other withdrawals therefrom, in any amount, together with any one of Group "B" hereunder.~~

~~**GROUP "A"**~~

~~Director, Western Continuing Studies~~

~~Director of Trois-Pistoles French Immersion School~~ _____

~~Controller, The University of Western Ontario~~ _____

~~**GROUP "B"**~~

~~Administrative Officer, Western Continuing Studies~~ _____

~~Secretary for Trois-Pistoles French Immersion School~~ _____

~~Bookkeeper for Trois-Pistoles French Immersion School~~ _____

8~~9~~. ~~**Ivey Spencer**~~**Spencer Hotel and Conference** ~~**Leadership**~~ **Centre**

Bank account(s) may be maintained for the operations of the ~~Ivey Spencer Leadership Centre~~**Spencer Hotel and Conference Centre** at selected Banks, subject to the following provisi**o**n**s**:

(a) The title of the account(s) shall be " ~~**Spencer Hotel and Conference Centre** Ivey Spencer Leadership Centre -~~ The University of Western Ontario", and

(b) Any one of Group "A" hereunder may sign cheques issued against the bank account(s) or other withdrawals therefrom, in any amount, together with any one of Group "B" hereunder.

GROUP "A"

General Manager, **Spencer Hotel and Conference Centre**~~Ivey Spencer Leadership Centre~~

Associate Vice-President (Financial Services)

Controller, The University of Western Ontario

GROUP "B"

Director of Finance, **Spencer Hotel and Conference Centre**~~Ivey Spencer Leadership Centre~~

Director of Finance, Housing & Ancillary Services

Human Resources Manager, **Spencer Hotel and Conference Centre**~~Ivey Spencer Leadership Centre~~

ANNEX 1 – BANKING TRANSACTIONS – VERBAL/FACSIMILE MESSAGES

The University of Western Ontario hereby directs the Banks to act on instructions for banking transactions submitted either verbally (orally) or by facsimile transmission on the University's letterhead (the "Messages"), subject to the terms hereof. In consideration of the Banks so doing, the University has:

1. Requested that the Banks institute a Call Back Arrangement ("the Call Back Arrangement") to verify all Messages which purport to transfer funds to third parties. The Call Back Arrangement will involve the Banks calling an authorized signing officer (who did not initiate the payment order) for the account being debited.

   Any one of the following authorized signing officers is permitted to verify the Messages:

   Vice-President (Operations & Finance)
   Associate Vice-President (Financial Services)
   Director, Treasury Services
   Controller
   Manager, Commerce and Capital~~Assistant Controller~~
   Director, Research Finance
   Manager~~Financial Officer~~, Endow**ment**~~ed~~ & Restricted Funds

2. Authorized the Banks to act on all Messages, provided that authentication by the Call Back Arrangement has taken place.

3. Directed the Banks to decline to act if the Call Back Arrangement does not result in authentication, or if the Banks doubt the authenticity of any Messages.

4. Acknowledged that all Messages acted upon by the Banks and confirmed by the Call Back Arrangement will, in the absence of gross negligence or willful misconduct, be deemed conclusively to be valid instruction, whether or not authorized by the University or whether or not accurately transmitted to the Banks.

5. Agreed to indemnify and save the Banks harmless from and against any and all liabilities, costs, charges, losses, damages, demands, complaints, and expenses which the Banks may incur, sustain or suffer, other than pursuant to its own gross negligence or willful misconduct, arising from or by reason of the Banks acting or declining to act upon any Messages given, in accordance with this agreement as the case may be, including without limitation legal fees and disbursements reasonably incurred by the Banks. This indemnity is in addition to any other indemnity provided by the University to the Banks.

Campus Development Plan and Open Space Strategy Update

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

L. Logan, Vice-President (Operations & Finance), will provide an update on the development of the revised Campus Development Plan and the Open Space Strategy.

Documentation Provided:

Campus Development Plan and Open Space Strategy (slide deck presentation)

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Campus Development and Open Space Strategy

Board of Governors

April 30, 2026



Campus Development & Open Space Strategy

Objectives

The Campus Development Strategy will provide a renewed framework for making ongoing development choices and decisions within the context of the long-term vision.

The Open Space Strategy will reaffirm the university's commitment to a pedestrian-first core campus, integrate current and planned capital projects, and develop a campus mobility strategy.



Campus Development & Open Space Strategy

Committee



Lynn Logan, Vice President, Operations & Finance (Chair)
Andrew Konowalchuk, Associate Vice-President, Facilities Management (Vice-Chair)
Chris Alleyne, Associate Vice-President, Housing & Ancillary Services
Julian Birkinshaw, Ivey School of Business
Christy Bressette, Office of Indigenous Initiatives
Bill Chantler, Director, Campus Safety & Emergency Services
Ruban Chelladurai, Associate Vice-President, Institutional Planning & Budgeting
Cherin Chung, Society of Graduate Students President
Jessica Farmer-Bosma, Director, Government Relations
Kathleena Henricus, University Student Council President
Jeff Hutter, Acting Deputy Provost
Heather Hyde, Director, Sustainability
Gregory Kopp, Faculty of Engineering
Mike McLean, Director, Facilities Planning & Design
Bryan Neff, Associate Vice-President, Research
Lesley Oliver, Specialist in Equity, Diversity and Inclusion
Susanne Schmid, Chair, SCUP
Ali Springate, Western Communications
Melissa Steadman, Associate Director, Off-Campus Housing & Apartments
Geoff Wild, Associate Dean, Infrastructure, Faculty of Science

Campus Development & Open Space Strategy

Engagement

- Campus community
  - Town Halls
  - Senior administration (President's Group, Provost Leadership Team, Deans Council, Campus Council)
  - SOGS & USC Executive
  - CSES & Parking Services
  - Office of Indigenous Services & EDI
  - Affiliates
- Neighbourhood Associations
- City of London
- London Transit Commission
- University Hospital

Timeline

- Phase 1: Inventory and Analysis (completed April 2025)
- Phase 2: Draft Plan Development (December 2025)
- Phase 3: Committee Meetings (January - June 2026)
- Phase 4: Engagement (March - May 2026)
- Phase 5: Final Report and Approval (June 2026)



Existing Conditions

New content to reflect the **current campus conditions and ongoing projects**, both on and off campus.

Recently Completed Buildings, Open Spaces, Paths, & Street Projects

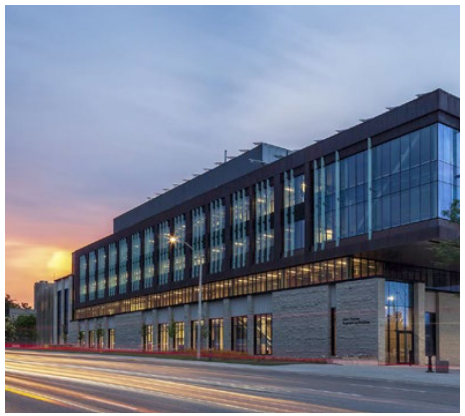
EXAMPLES



WSRC Gym Addition



Schemeichel Entrepreneurship and Innovation Building



Amit Chakma Engineering Building



Kent Walk



University Hill Pathways

Existing Conditions

EXAMPLES

Current Campus Projects



New Engineering Building



Fieldhouse/Parking Structure



Bioconvergence Centre



Faculty of Health Sciences Buildings

Transit Service Direction



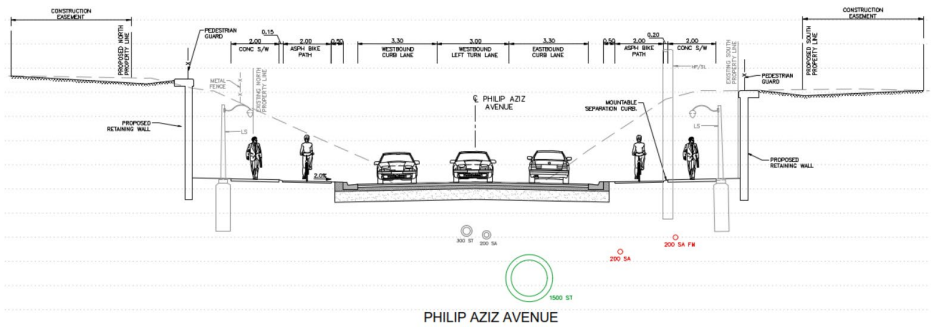
BRT no longer routed through campus and not likely in the near term, but still planned
Local bus service likely to remain as-is for at least 5 years



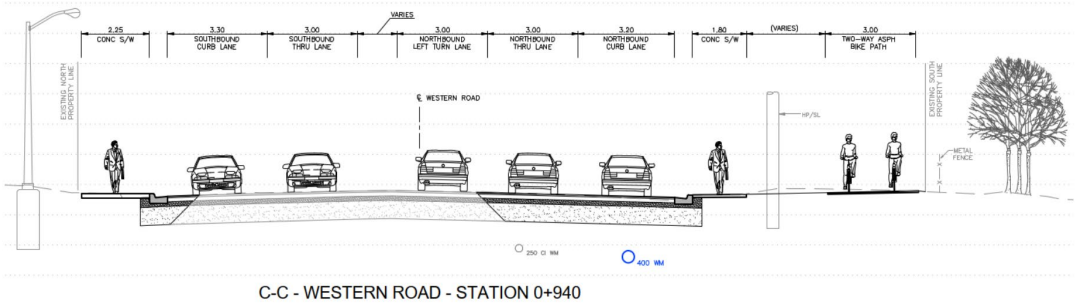
King's Shuttle no longer serves West Campus (formerly Brescia)

Existing Conditions

Mobility – Upcoming City Projects



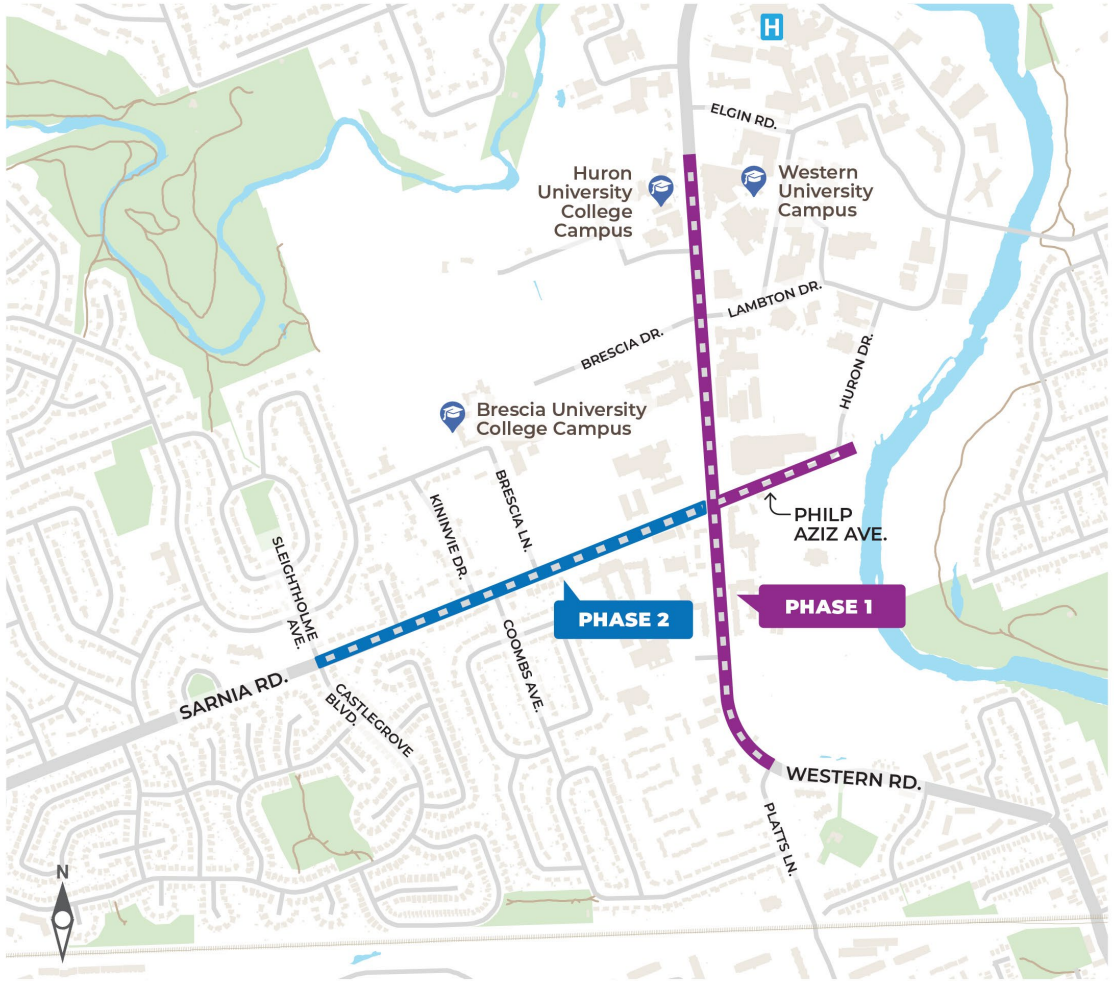
Philip Aziz Avenue (2026) – New sidewalks, bicycle lanes, curb, and gutter, LPIs



Western Road (2026) – Interim design with bicycle lanes on east side, extended SB right turn lane to Sarnia Road (WB)

Sarnia & Western Road Intersection (2026) – Cyclist crossings, wider pedestrian crossings and waiting areas, and leading pedestrian intervals (LPI)

Dedicated bus lanes for Rapid Transit are planned for the future



Existing Conditions

Natural & Open Space Amenities



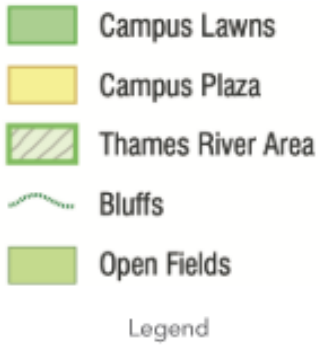
UC Hill



Thames River



Playing Fields



Legend




Campus Development Strategy

Campus Development Strategy

Campus Design Framework

Circulation and Mobility



Open Space and Public Realm



Built Form and Design

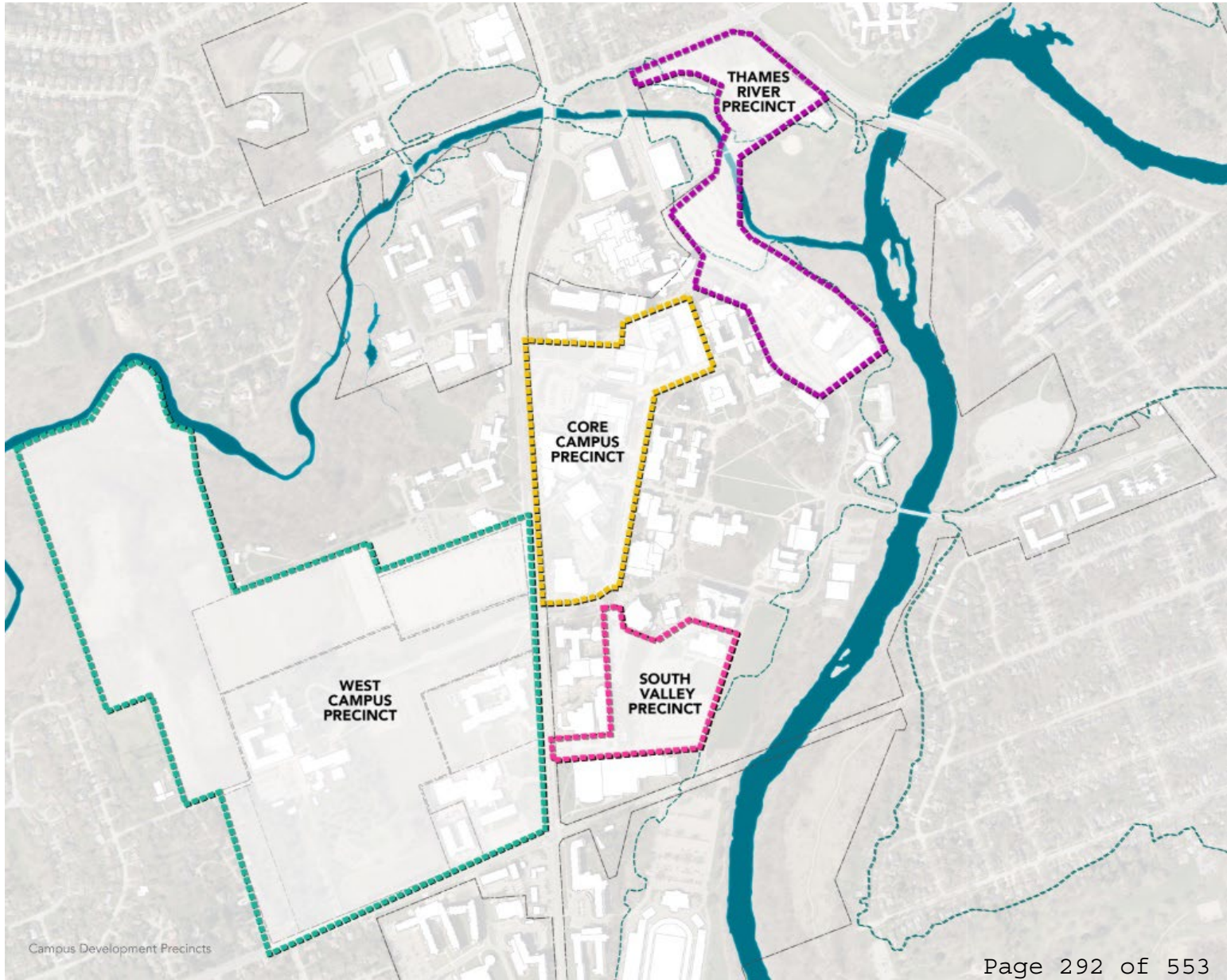


Campus Development Strategy

Campus Intensification Areas

Campus Precincts

- Main Campus presents the most significant opportunity for future academic development or redevelopment.
- Campus precincts - smaller areas that fit within the broader character areas.
- Grouping development sites into precincts recognizes how the longer-term success of an area of campus will be achieved by the careful planning and coordination of all sites in close proximity.

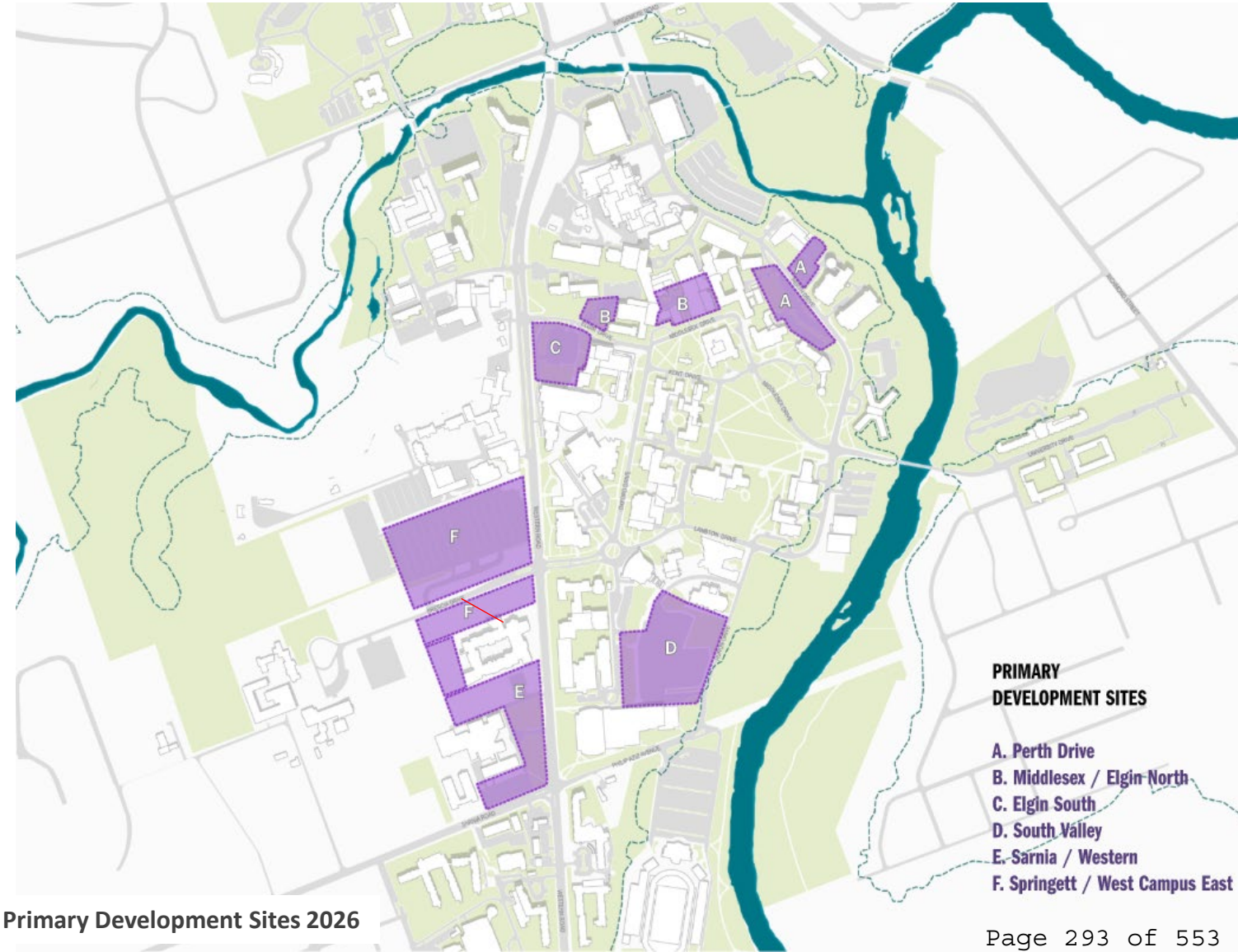


Campus Development Strategy

Primary Development Sites



Primary Development Sites 2015



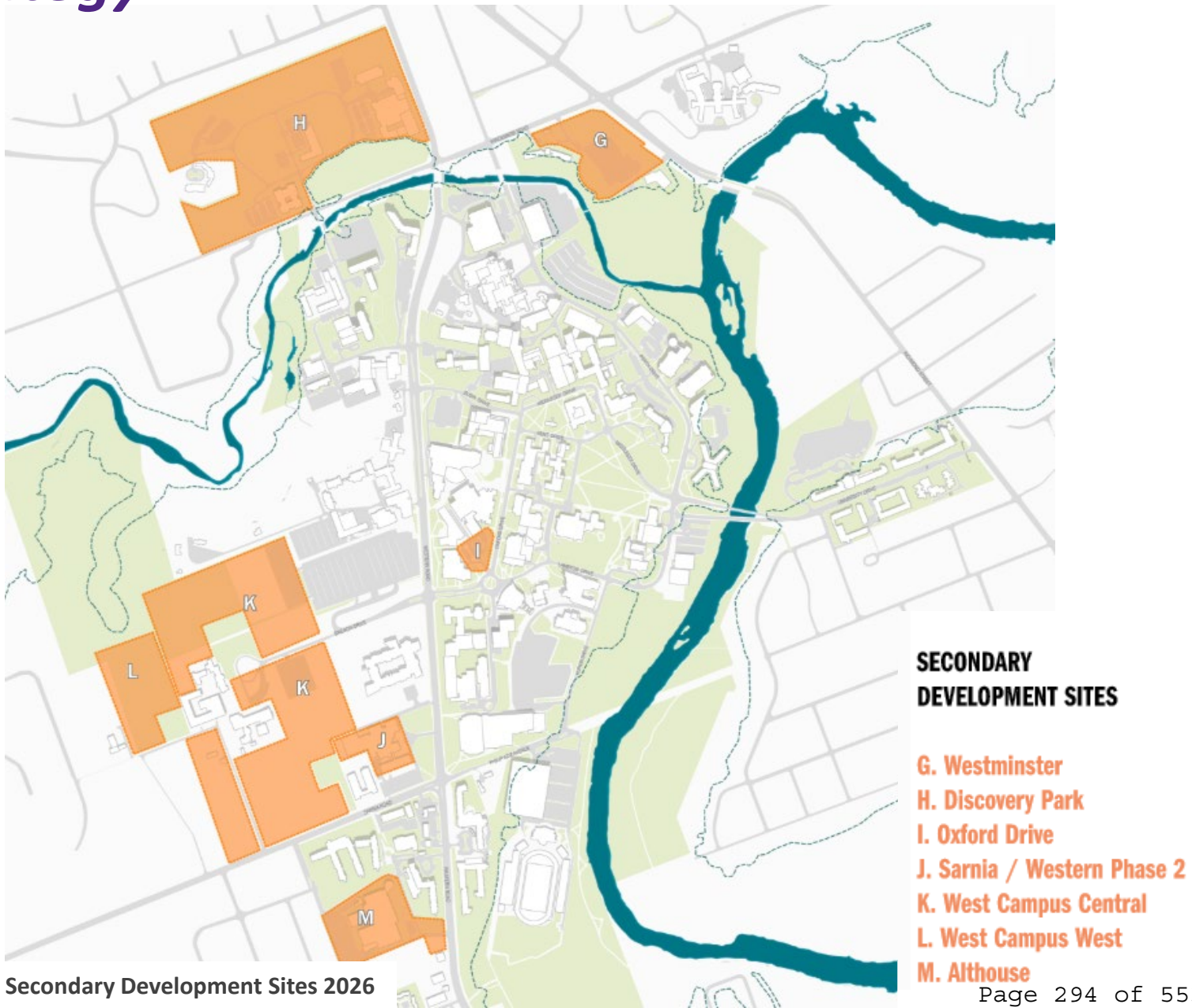
Primary Development Sites 2026

Campus Development Strategy

Secondary Development Sites



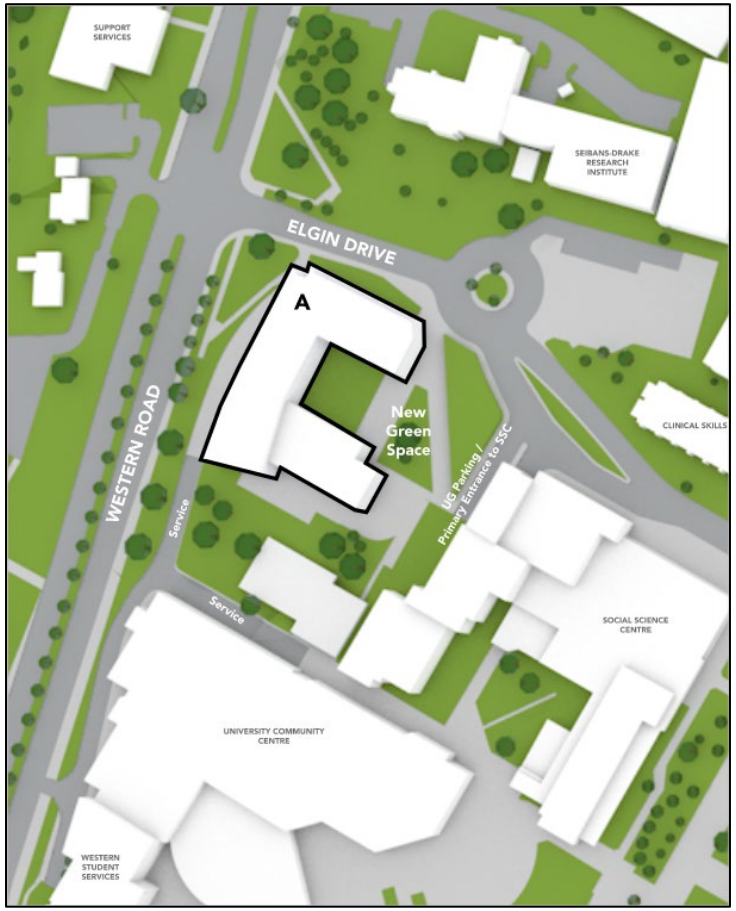
Secondary Development Sites 2015



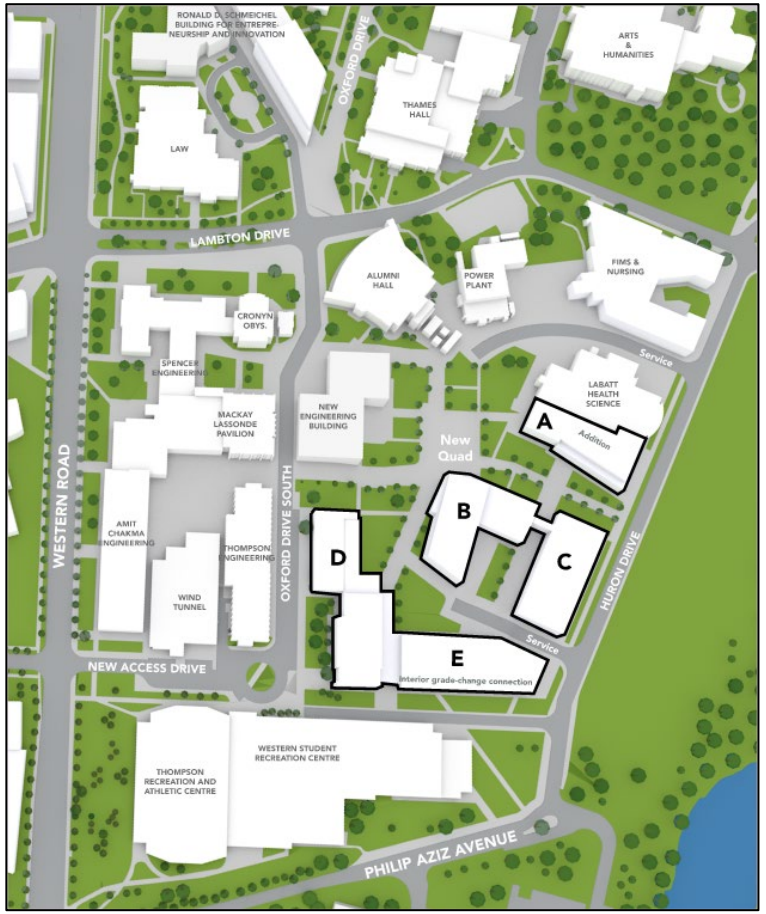
Secondary Development Sites 2026

Campus Development Strategy

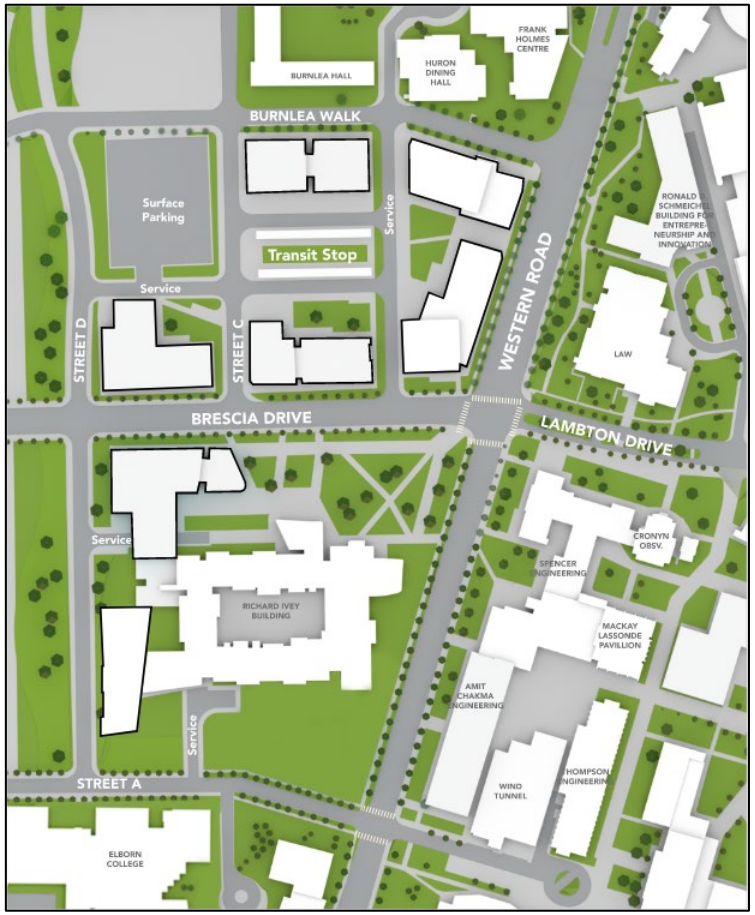
Primary Development Opportunities – Demonstration Plans



Elgin Drive South – North Core Precinct



South Valley – South Valley Precinct



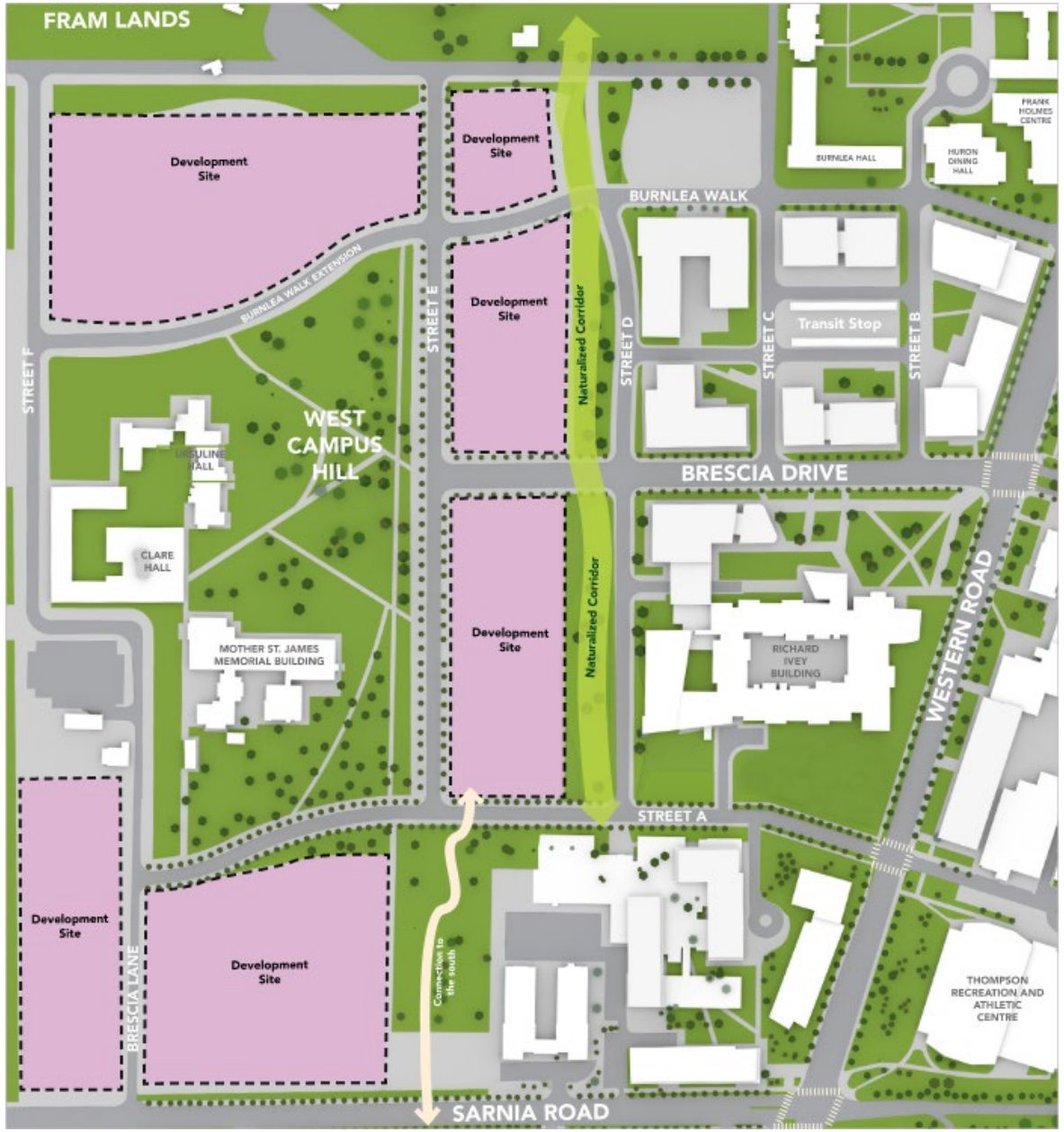
Springett / West Campus East – West Campus Precinct

Campus Development Strategy

Secondary Development Opportunities



Westminster – Thames River Precinct



West Campus Precinct

Campus Development Strategy

Phasing Future Growth & Change



Short-term Development

Short-term Development

- **A** Bioconvergence Centre + Schulich Redevelopment - 300,000 SF
- **B** University Drive Residence - 304,000 SF
- **C** LHS Addition - 75,000 SF
- **D** New Engineering Building - 100,000 SF
- **E** Fieldhouse Parking Structure - 111,000 SF

Short-term Roadways + Public Realm

1. Brescia-Huron West
2. Burnlea Walk Extension
3. Elgin Drive Modification



Short-term Roadways + Public Realm


Open Space Strategy

Open Space Strategy

Vision

"The Western Open Space Strategy will **build on the natural beauty** of Western's campus and legacy of landscape stewardship to deliver a **safe, inclusive, and a sustainable** campus that will foster learning and promote Western as a **destination of choice** for world class education and research."



We are still working toward the **same vision from the 2018 plan**!

Open Space Strategy

Guiding Principles



Human Place

No change to 2018 supporting details



Equity

No change to 2018 supporting details



Mobility

No change to 2018 supporting details



Sustainability & Resilience

***Updated** to align with Climate and Sustainability Strategy*



Access to University

No change to 2018 supporting details



Supporting Pedagogy & Research

No change to 2018 supporting details

- Support Health and Wellness of the university community
- Provide efficient and cost-effective Operations and Maintenance of the open space system
- Create a sustainable environment (economically, socially, physically)
- Ability to recover as a campus from weather events related to climate change

We've **updated the principles** to match the Climate and Sustainability Strategy.

Open Space Strategy

10 Big Moves

Prioritize Pedestrians



Improve Accessibility



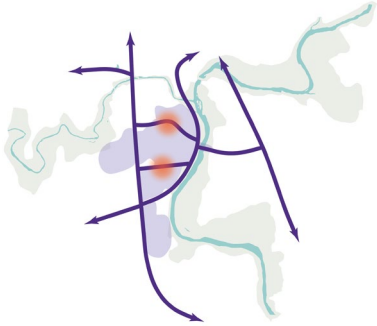
Emphasize Landscape & Connect to the River



Integrate West Campus



Maintain Convenient Access to Transit



Complete the Bicycle Network



Maintain Vehicle Access



Reduce Cut-Through Traffic



Position Parking on the Perimeter



Allow for Service Access



We've **updated the Big Moves** to fit the current context.

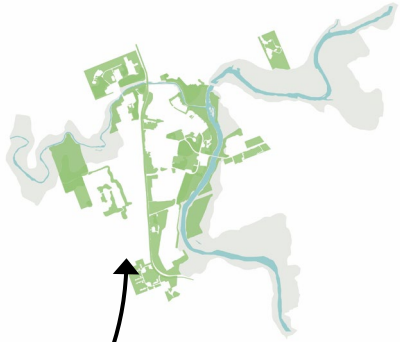
Open Space Strategy

10 Big Moves

Prioritize Pedestrians

Improve Accessibility

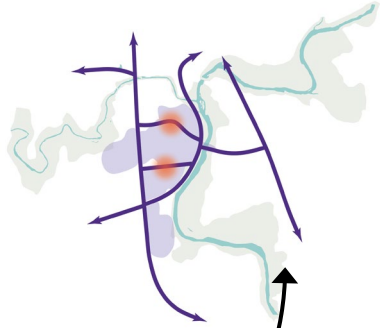
Emphasize Landscape & Connect to the River



Integrate West Campus



Maintain Convenient Access to Transit



Complete the Bicycle Network

Maintain Vehicle Access

Reduce Cut-Through Traffic

Position Parking on the Perimeter

Allow for Service Access

Combined two 2018 moves

Brescia integration

Shift from BRT to local bus

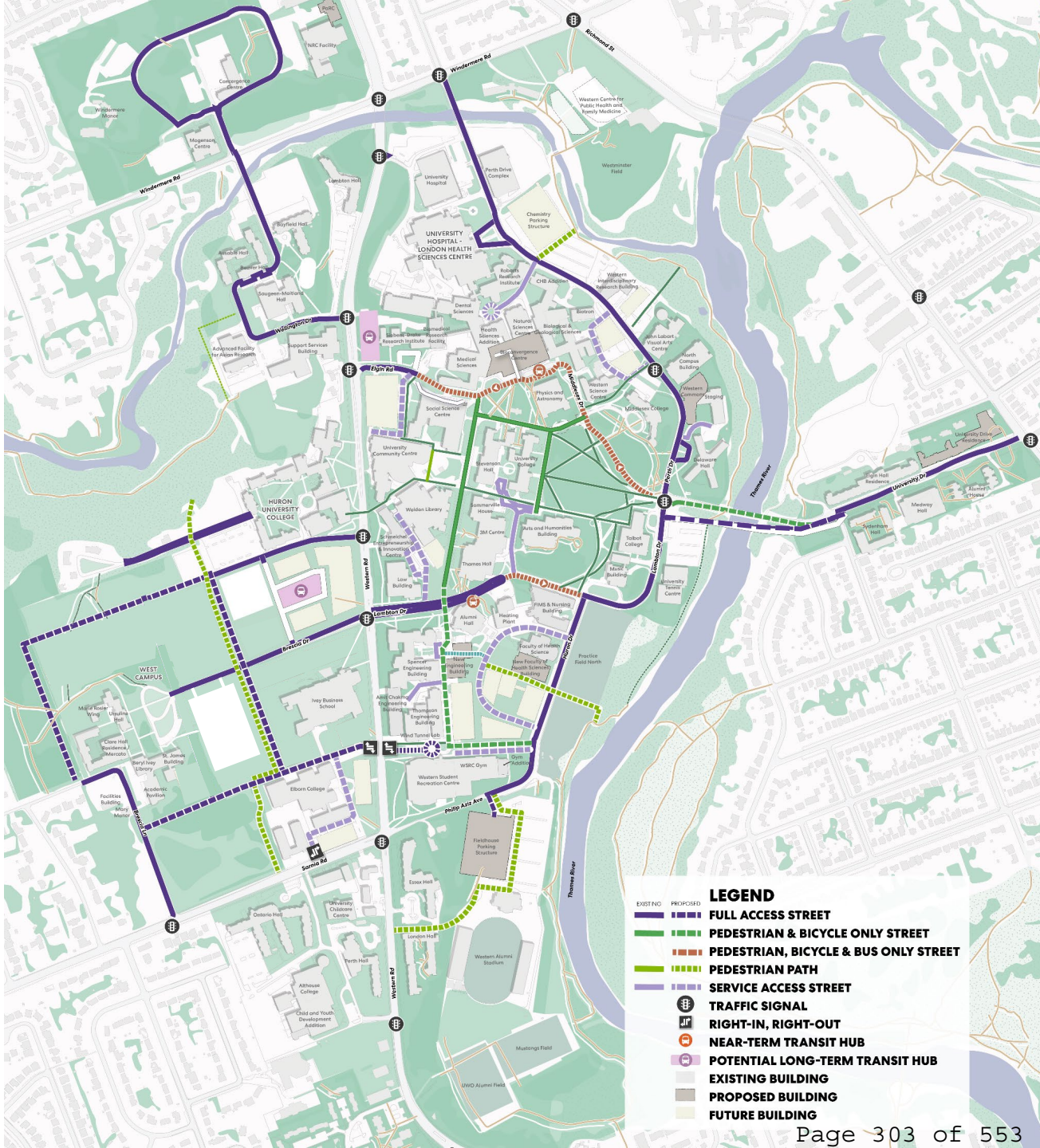
We've **updated the Big Moves** to fit the current context.

Open Space Strategy

Campus Circulation & Landscape Plan

Mobility Overview

- Upgrading and extending Oxford Drive North and South as a primary north-south spine
- Twinning University Drive bridge
- Limiting vehicular through traffic on Lambton Drive and Middlesex Drive
- Redesigning Alumni Circle for safer crossings
- Filling in missing sidewalks and gaps in the bicycle network
- Building structured parking on the periphery

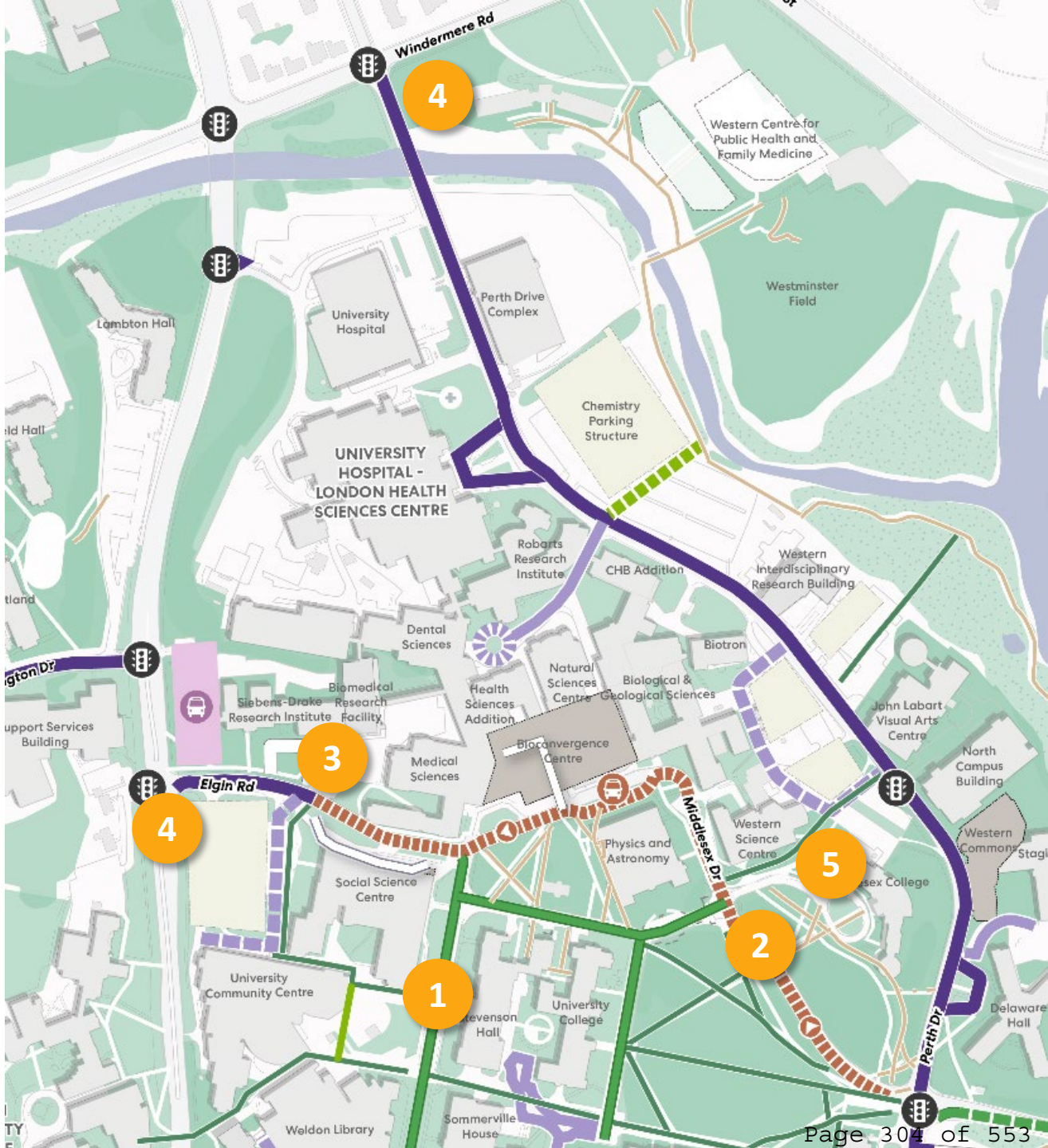


Open Space Strategy

Campus Circulation & Landscape Plan

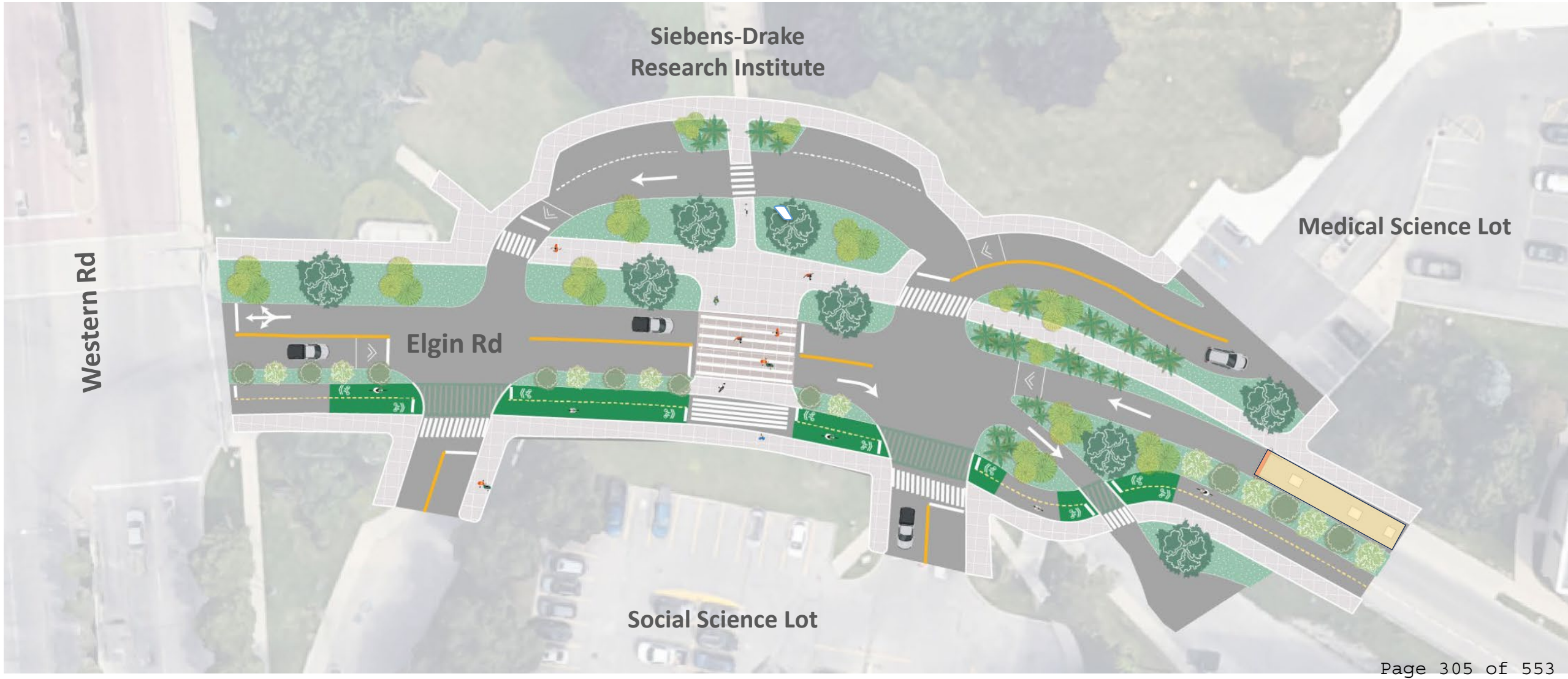
Mobility – Key North End Projects

1. Oxford Drive North renewal, upgrading to a similar condition to Kent Walk
2. Middlesex Drive (Social Science Centre to Perth Drive) becomes one-way WB for buses and service only (no through traffic)
3. Designing a new turnaround and PUDO on Elgin Road at Siebens-Drake to return private vehicles to Western Road
4. Upgraded gateways at Elgin Road and Windermere Road
5. Upgraded walkway through Middlesex Parking Lot



Open Space Strategy

Elgin Road PUDO Draft Concept – Option 1 – Front Loop

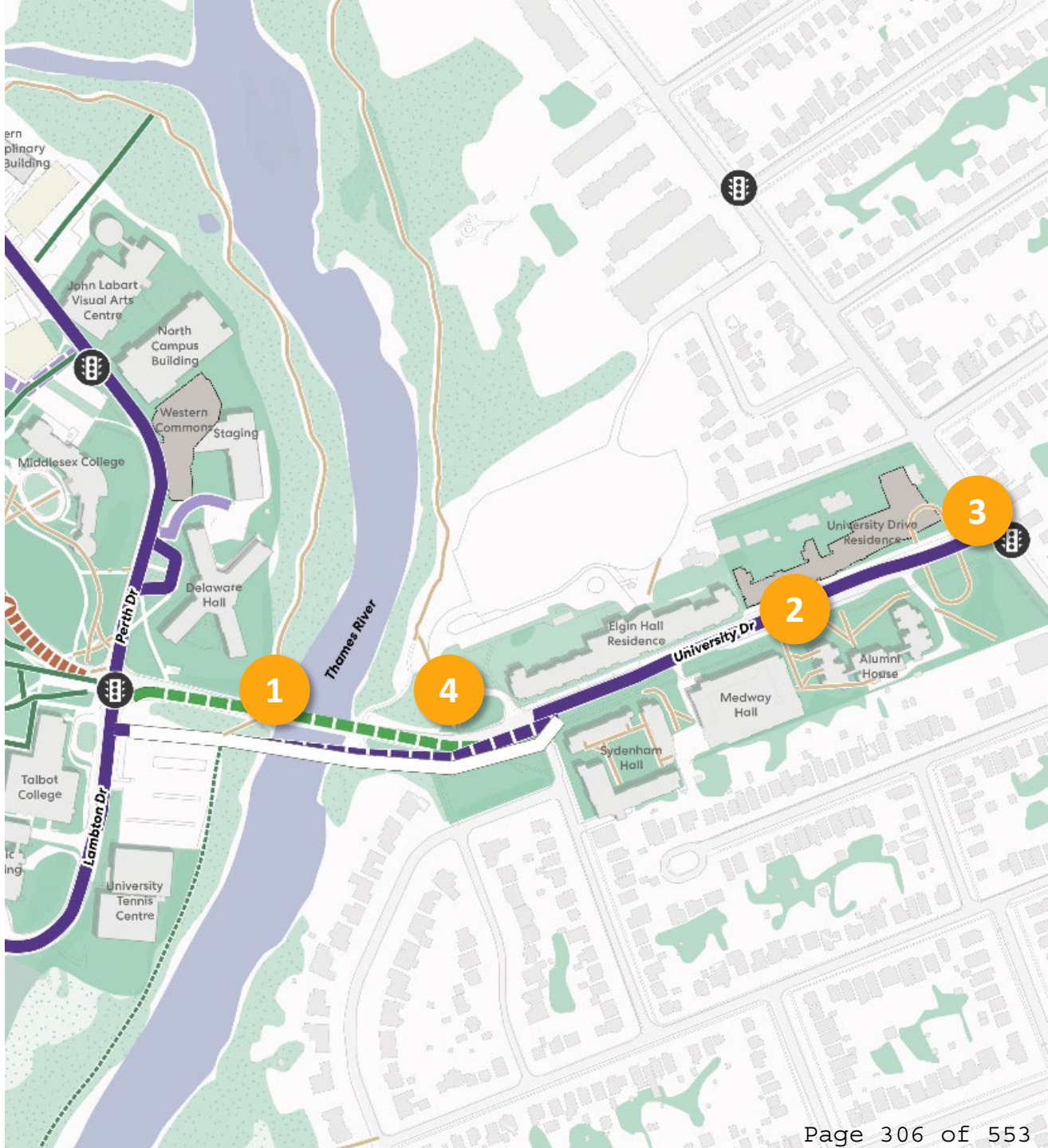


Open Space Strategy

Campus Circulation & Landscape Plan

Mobility – Key East Side Projects

1. Twin University Drive bridge, converting the historic bridge to a pedestrian- and bicycle-only street and adding a new vehicular bridge
2. Minor safety improvements along University Drive (e.g. curb extensions at crossings, fixing curb ramps, green conflict paint at driveways, etc.)
3. Upgrade University Drive gateway
4. Increase visibility of Thames Valley Parkway access points

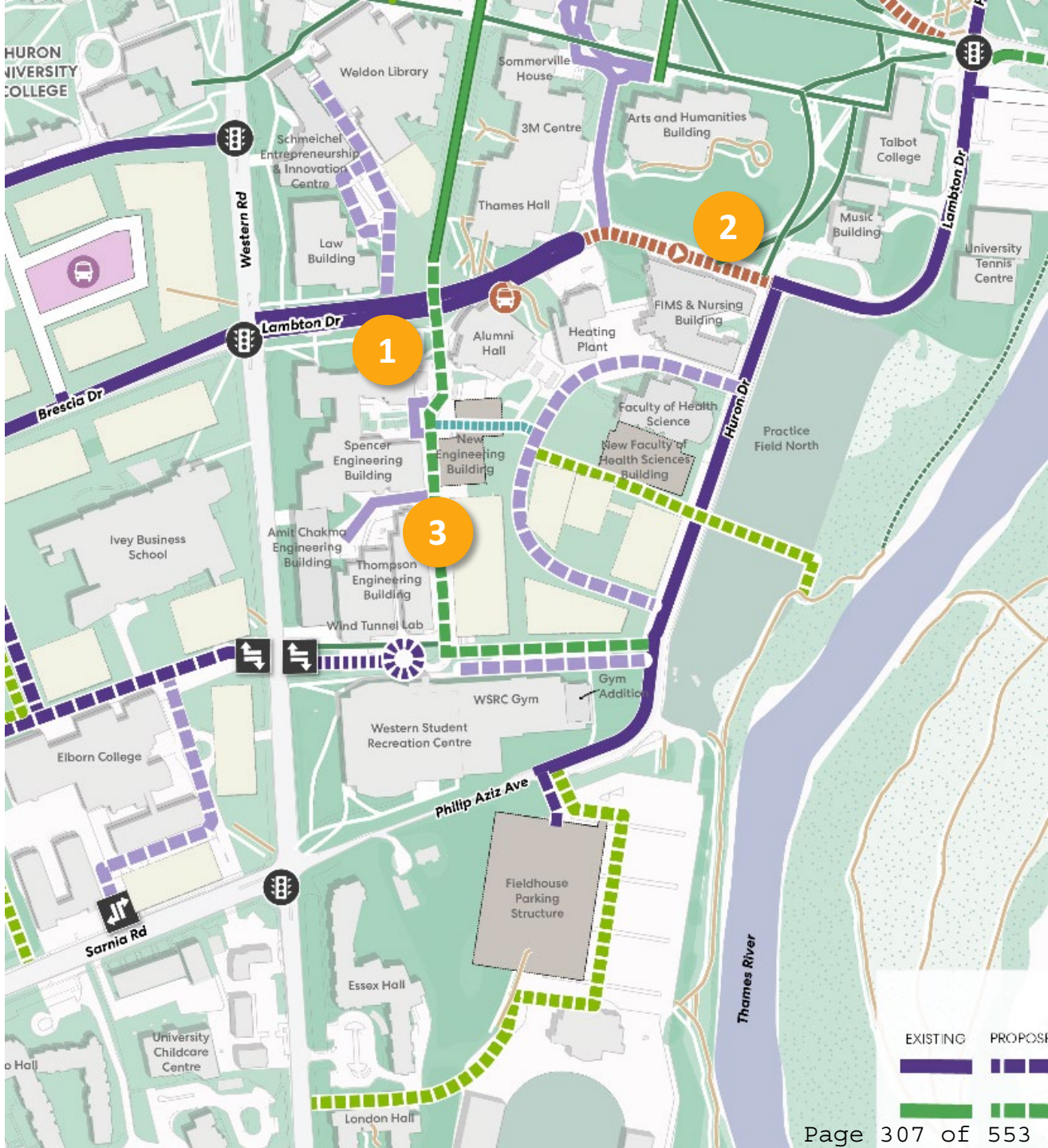


Open Space Strategy

Campus Circulation & Landscape Plan

Mobility – Key South End Projects

1. Redesign Lambton Drive to:
    - Remove the roundabout to shorten pedestrian crossing distances at Oxford Drive and improve visibility and bus staging
    - Add a new turnaround
    - Add a two-way bicycle facility
2. Make Lambton Drive bus- and service-only from Thames Hall to Huron Drive
3. Redesign Oxford Drive South as a pedestrian- and bicycle-only space like Kent Walk



Open Space Strategy

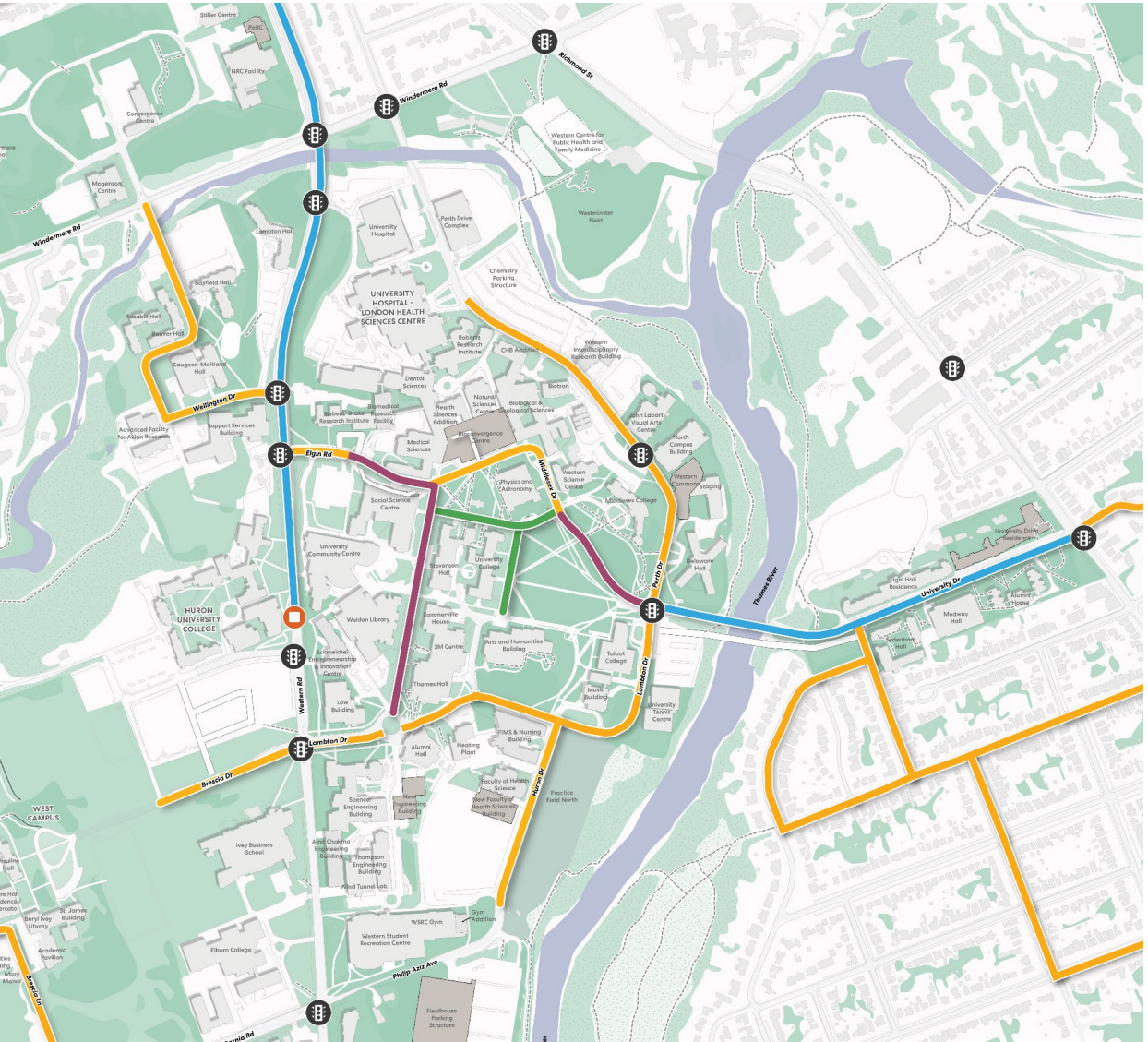
Lambton Drive Draft Concept



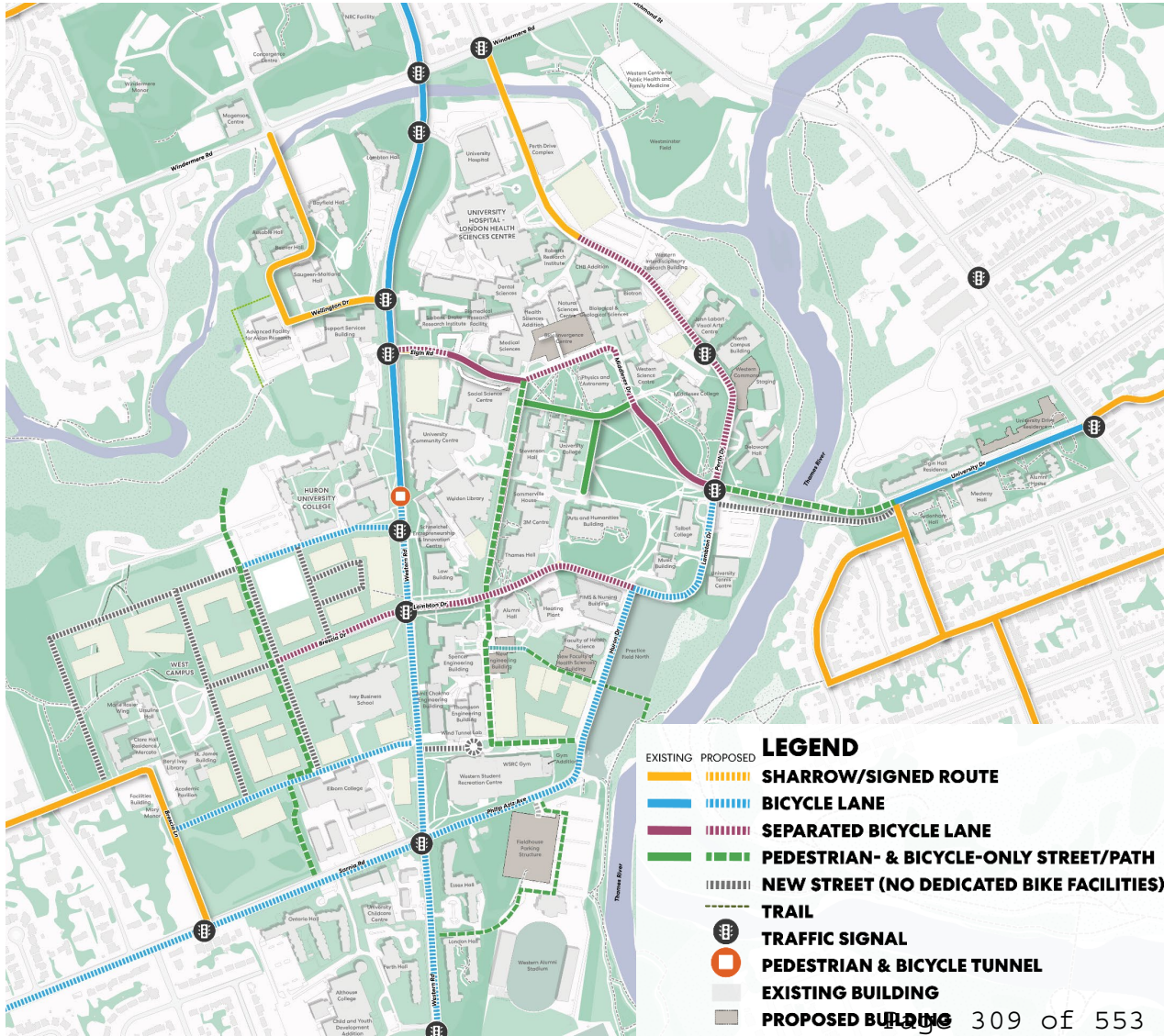
Open Space Strategy

Bicycle Network

Existing



Proposed

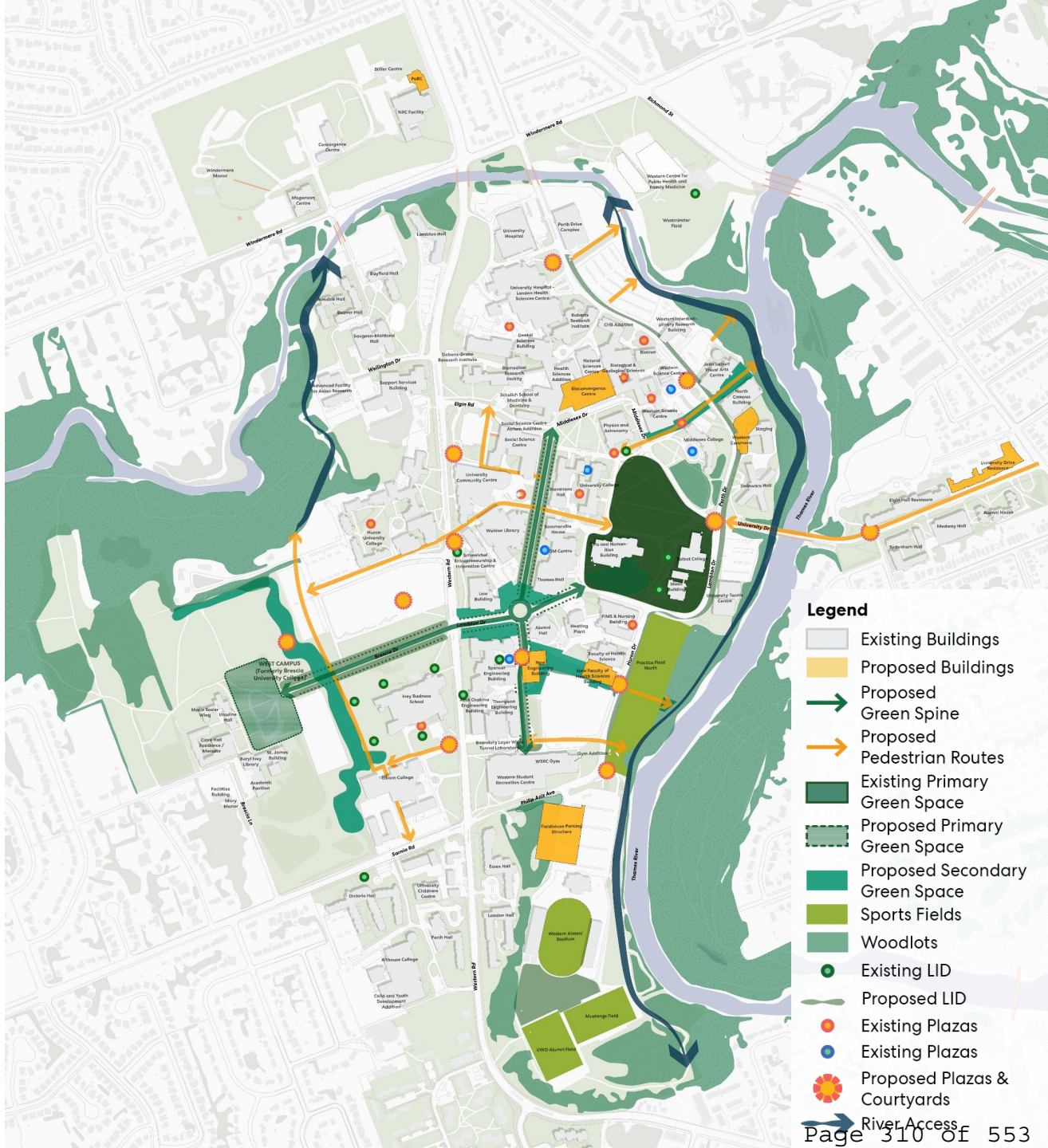


Open Space Strategy

Landscape & Open Space Structure

Overview

- Green Spine
- Pedestrian Routes
- Primary and Secondary Green Space
- Sports Fields
- Low Impact Development Infrastructure
- Courtyards and Plazas
- Woodlots
- River Access



Open Space Strategy

Campus Circulation & Landscape Plan

Sports Fields and LID Infrastructure

LIDs: landscape features that play an essential role in collecting and infiltrating stormwater into the ground.

Priority LID locations:

1. Along both Green Spines
2. Within the South Valley parking lot
3. Along Huron Drive, Lambton Drive, and Perth Drive
4. In proximity to the sports fields south of Philip Aziz Drive
5. Along the West Campus corridor to support infiltration

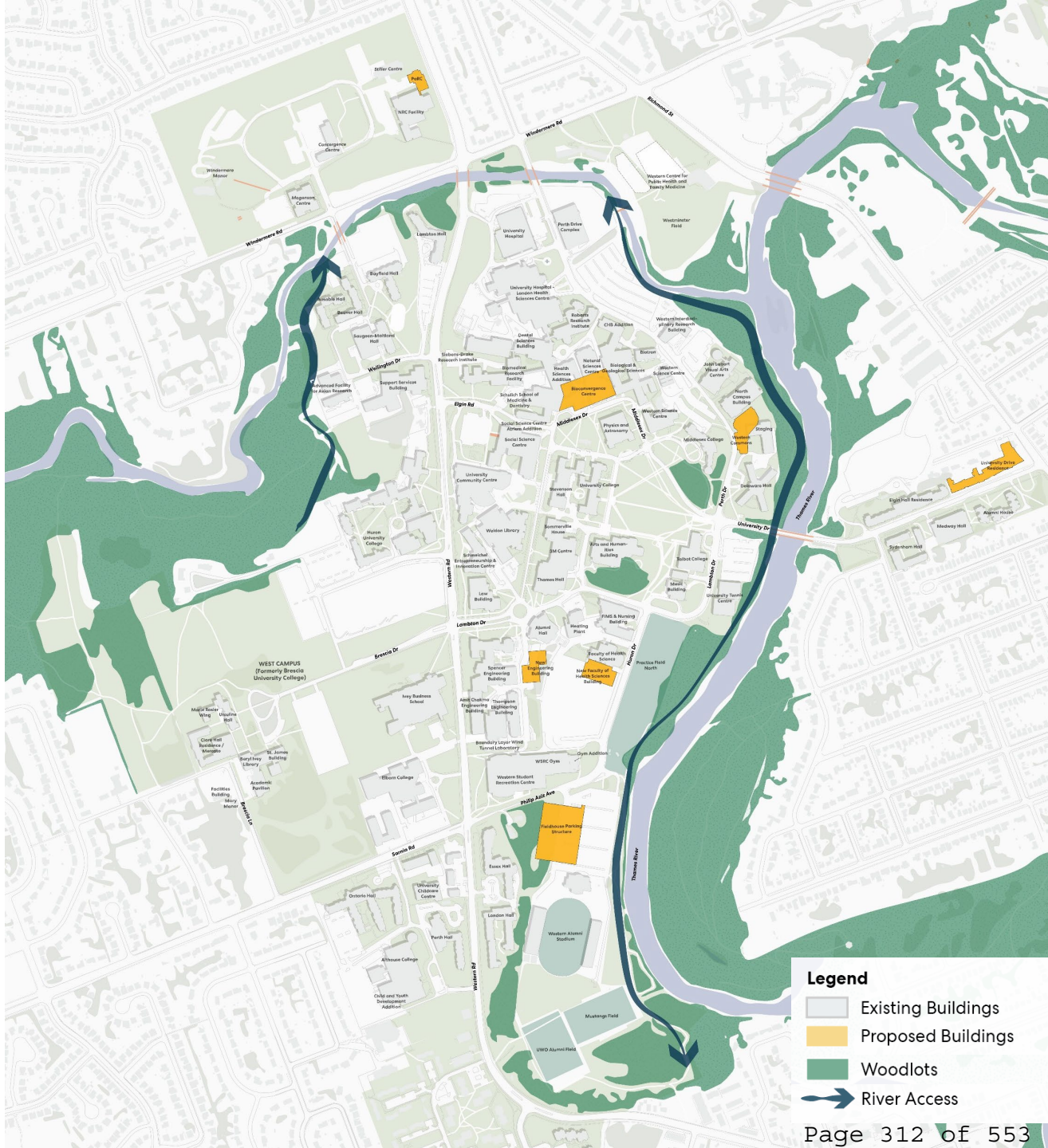


Open Space Strategy

Campus Circulation & Landscape Plan

Woodlots and River Access

1. River's edge: Improved pedestrian and recreational access to the campus's natural features will be achieved through multi-use trails along the Thames River and to the Medway Creek
2. Woodlots: Protect and maintain mature woodlots as much as possible



Open Space Strategy

Implementation

Updated the work program to reflect recent accomplishments and add new project priorities

Retained from 2018 OSS

- Still organized with quick wins, short-term priorities, medium-term priorities, and long-term priorities

Key Changes

- Added an Action Plan table with additional detail on proposed phasing for discrete projects, organized by topic (mobility, open space, parking, policies)

Action plans organized by topic

Table 4. Mobility Projects Action Plan

Project Name	Project Type	Notes	Timeframe
Coordinate with the City of London on the final design for Philip Aziz Avenue, Sarnia Road, and the southern portion of Western Road	Mobility – City Coordination	Ensure the final design reflects campus street design standards, such as decorative streetlights.	Short Term
Collect updated traffic counts	Mobility – Data & Analyses	Collect updated traffic counts—including turn movement volumes and pedestrian and bicycle counts—at key locations across campus to inform design decisions	Short Term
Construct a new Elgin Drive PUDO and upgrade the gateway at Western Road	Mobility – PUDO & Gateway	Select and construct a preferred design for the new PUDO/turnaround. Upgrade the gateway at Elgin Drive/Western Road as part of the project.	Short Term
Conduct a traffic analysis to assess the impact of the desired limited access sections of Middlesex Drive and Lambton Drive	Mobility – Data & Analyses	Evaluate the impacts of proposed closures of Lambton Drive (Thames Hall to Huron Drive) and Middlesex Drive (Elgin Road to Perth Road) to vehicles other than buses	Short Term
Install reduced speed limit signs at all campus entrances	Mobility - Gateways	Ensure all entry points transition to 40 km/h or slower	Short Term
Create branded "Western University" plaques as street sign toppers	Mobility – Branding and Wayfinding		Short Term
Construct a new road connecting the Springett Parking Lot to Brescia Drive	Mobility – Street Design		Short Term
Work with the City of London to install minor pedestrian and bicycle safety improvements on Western Road (Burnlea Walk to Wellington Drive)	Mobility – Street Design	Minor improvements to be implemented prior to the BRT redesign may include refreshing crosswalk markings, upgrading all crosswalks to high-visibility markings, installing missing tactile warning strips, extending center medians for better defined pedestrian refuges, adding green conflict striping where bicycle lanes cross driveways and intersections, adding transitional signage and markings where the bicycle lane ends, and installing LPIs.	Short Term
Minor safety improvements on University Drive	Mobility – Street Design	Install a series of minor safety and comfort upgrades on University Drive from Sunset Street to Richmond Street, including adding green conflict marking where bicycle lanes pass through driveways, installing accessible curb ramps where missing, adding 1-2 new mid-block crossings with curb extensions, and adding shelters at bus stops.	Short Term


University Drive Bridge

University Drive Bridge

Existing Condition



University Drive Bridge

Preferred Conserve & Twin Option



University Drive Bridge

Active Transportation Bridge



University Drive Bridge



Western
UNIVERSITY · CANADA

Campus Development and Open Space Strategy 2026



Campus Safety & Emergency Services Annual Report

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Campus Safety & Emergency Services Annual Report is provided to the Board of Governors annually for information.

Documentation Provided:

Campus Safety & Emergency Services Annual Report

Western

Campus Safety & Emergency Services

Annual Report

2026

William Chantler,
Director – Campus safety & Emergency Services

Western

Campus Safety & Emergency Services

2026 Annual Report

CSES Overview

In support of Western's academic and research mission, Campus Safety & Emergency Services (CSES) are values driven services, focusing on collaborative, community-centric, problem-solving approaches to create, maintain and support an environment of safety, security and well-being for students, faculty, staff and visitors at Western.

CSES consists of the following units Western Special Constable Services (WSCS); Emergency Management & Continuity of Operations (EM); Fire Safety (FS); Foot Patrol (FP); and, Building Access Control (BAC). The CSES organizational chart can be found in **Appendix A** of this report.

Highlights of CSES activities & achievements during 2025 include:

WSCS

- 6,756 calls for service
- 311 investigations
- 656 building / office / interior space insecurities
- 57 CSPTED Assessments
- 181 Community Services events / engagements
- Replacement & update of mission critical communications hardware & software

Emergency Management & Continuity of Operations

- Active assailant response training and tabletop exercises for the University's Emergency Operations Control Group
- Campus Automated External Defibrillator (AED) program
- Management of AlertWesternU emergency notification system

Fire Safety

- Fire safety systems upgrade at Lambton Hall, Bayfield Hall, Supports Services Building and Talbot College
- Multi-year initiative to upgrade in-building fire hoses and associated valves across campus locations
- Key training reviews and hands-on training exercises for the HAZMAT Team
- Renewal of the third-party fire alarm monitoring contract

Western

Campus Safety & Emergency Services **2026 Annual Report**

Western Special Constable Service

The Western Special Constable Service (WSCS) provides safety, security and well-being for our campus community on the property of Western's main campus, Kings University College and Huron University College.

In April 2024, Ontario Regulations under the Community Safety and Policing Act (CSPA), 2019, came into effect. As well as specifying authorities that may granted to WSCS Special Constables by the London Police Service Board (LPSB), the Regulations require that Western University be designated as a Special Constables Employer by the Ministry of the Solicitor General to provide special constable services on the University's property. Western University was granted Special Constable Employer status in June 2025.

The appointment of WSCS Special Constables and the authority for the provision of special constable services on the property of Western University (and affiliate University Colleges) is granted to WSCS Special Constables by the LPSB through a Memorandum of Agreement (MoA) between the London Police Service Board (LPSB) and Western University (2025).

The overall complement of the WSCS is forty (40) members, consisting of 28 appointed Special Constables and 12 non-appointed / administrative staff. The WSCS organizational chart can be found in **Appendix B** of this report.

The WSCS provides safety & security for our campus community 24/7 through Patrol Operations consisting of 1 Staff Sergeant, four (4) Patrol Sections, each with two Sergeants, three Special Constables, and one Communications Operator (dispatcher). Patrol Operations are responsible for responding to calls for service, investigations, community centric problem solving and proactive, high visibility, patrol to provide and maintain an environment of safety, security and well-being for students faculty, staff and visitors at Western.

WSCS provides community-based services through the Community Services Section consisting of 1 Staff Sergeant, 1 Sergeant and 4 Campus Community Resources Officers (CCROs). Community services provided including managing over 1800 security surveillance cameras across campus, Campus Safety Provided Through Environmental Design (CSPTED), personal safety planning, safety presentations, safety programs, represent WSCS on various campus wide safety committees, and enhanced community engagement.

The WSCS operational and community services statistics for 2025 can be found in **Appendix C** of this report.

Western

Campus Safety & Emergency Services **2026 Annual Report**

Proactive Safety & Security Measures on Campus

Campus Safety Provided Through Environmental Design (CSPTED) and recorded security surveillance video cameras are key elements to the safety and security umbrella at Western. On average WSCS conducts approximately 60 CSPTED assessments annually and there are over 1800 security surveillance video cameras deployed throughout campus.

CAMPUS SAFETY PROVIDED THROUGH ENVIRONMENTAL DESIGN (CSPTED)

Campus Safety Provided Through Environmental Design (CSPTED) has been successfully applied on Western's campus since 2006. There is a significant and ongoing demand CSPTED service with the continuing development of new buildings and spaces on campus as well as the need for ongoing safety and security audits and updates of existing buildings and spaces.

CSPTED assessments are conducted by the WSCS Community Services Section. CSPTED assessment consider how the physical environment of a building, office or other space can be altered to improve and promote safety and security.

CSPTED assessments provide strategies to mitigate safety and security risk by identifying vulnerabilities and insecurities related to the physical aspects of a location and making recommendations related to enhancing safety and security.

Typically, CSPTED assessments are conducted for buildings under construction / renovation and other locations throughout campus such as an office, study area or work area that has been identified as high risk, has some safety/security vulnerabilities, has been subjected to unauthorized activity, or where a person may feel unsafe.

CSPTED assessments are also completed for exterior walkways, roadways, parking lots and areas where the community may congregate as well as isolated spaces where an increased safety risks may exist.

CSPTED recommendations may include security of perimeter access points; lighting; target-hardening; improve lock hardware; install access control systems; alarm monitoring and response protocols; improving lines of sight and natural surveillance opportunities; increasing security patrols; and, installation of CCTV video monitoring and recording technology.

When implemented, CSPTED recommendations have been proven to enhance safety and security; mitigate unwanted and illegal behaviour; and provide an enhanced sense of safety and security for our campus community.

VIDEO MONITORING & RECORDING TECHNOLOGY

The WSCS Community Services Section is responsible for the overall management of the Video Monitoring and Recording Technology (VMRT). The security video cameras and VMRT have proven

successful in deterring unauthorized activity, improving safety and security, and supporting investigations.

CCTV cameras and VMRT are utilized on campus in strict accordance with Western's Video Monitoring and Recording Policy. Accessing and viewing video records is strictly controlled and video records are destroyed after a 30-day retention period (unless retention of the video record is required for a specific, authorized, purpose) in accordance with Western's Video Monitoring and Recording Policy and the Freedom of Information and Protection of Privacy Act (FIPPA).

Building Access Control

BUILDING SECURITY

Building Access Control (BAC) is responsible for providing and managing card access for approximately 73 buildings and approximately 392 alarm systems, including high-risk locations, campus wide. BAC also supports and is a resource for other departments that manage their own card access systems, like Research Park, Engineering and Schulich.

BUILDING ACCESS CONTROL SUPPORT

BAC is a resource to support the card access administrators throughout campus (Departments and Faculties) to ensure required user access is provided, buildings lock and unlock on master schedules, as well as provide for unique classroom-booking automated unlocking and locking.

During 2025, BAC responded to over 13,100 emails, sent to the card access email account (Not including emails and phone calls sent directly to the members of BAC).

The requests for support include hardware / system service; user access (often for 100 or more users) additions, deletions, or changes; and, automated unlock / lock schedule additions, deletions or changes.

BAC SERVICE CALLS

In 2025 BAC logged 308 calls for service (card access and alarms) ranging from equipment and hardware failure to battery changes.

BAC also supported several small projects, supporting FM project managers with renovation/construction projects,

NEW AFx ENTERPRISE ICT (card-reader) SYSTEM

During 2025 BAC continued to support Facilities Management with a major conversion project to update and enhance the building card access system.

Card access conversion is complete for Labatt Health Sciences Building, Fims/Nursing, Weldon Library and Althouse College, in progress is Law building, Ivey Business School in Toronto and WIRB.

Emergency Management & Continuity of Operations (EM)

EM is responsible for projects focusing on life safety of Western's students, faculty, staff, monitoring threats to infrastructure and environment, planning, preparing and practicing responses to major or critical events on campus.

ALERT WESTERNU

AlertWesternU is the University's emergency notification system. EM Is responsible for the management of the AlertWesternU with the emergency notification system provided by a third-party vendor.

Emergency notifications are sent out by WSCS. Emergency notifications are received by community members by way of email (autromatically), SMS text message, and through the emergency notification app.

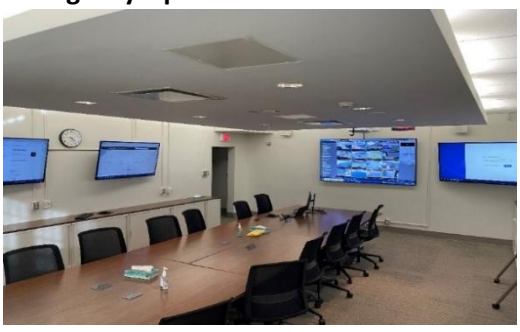
To receive emergency messages by way of SMS text message community members must add their cellphone number to the AlertWesternU system. To receive emergency messages by way of the emergency app community members must download the app.

Instructions for adding contact information into the AlertWesternU system or downloading the app can be found on the AlertWesternU webpage: https://alert.westernu.ca/

EMERGENCY OPERATIONS CENTER

EM is responsible for management of the University's Emergency Operations Center (EOC) located in Lawson Hall in the WSCS offices as well as activation and support of the Emergency Operations Control Group. The EOC is opened and the EOCG is stood up to support and Manage the Univerity's response to major events and critical incidents.

Emergency Operations Center



Mobile Operations Trailer



Western

Campus Safety & Emergency Services **2026 Annual Report**

WESTERN AUTOMATED EXTERNAL DEFIBRILLATORS PROGRAM

With Ontario Bill 141 (Defibrillator Registration & Public Access Act 2020) which imposes certain requirements respecting installation, maintenance, testing, and availability of automated external defibrillators (AED) on premises such as Western in mind, in 2024 and 2025 EM led a group of student volunteers in the mapping and identification of AED locations on campus.

There is now a total of 56 AEDs deployed throughout campus, all of which have check, received maintenance or replacement as required and are “rescue ready”.

The University’s AED deployment and maintenance program is now fully under the purview of CSES. All AED devices on campus have been loaded into the Pulse Point App for quick location in an emergency. AED mapping data was uploaded into the *Ready for Action* tracking tool to assist with monitoring best before dates of devices, batteries, and pads to source replacements before they expire. Cabinet decals have been applied to all AED cabinets across campus to increase awareness of available support.

In addition, Naloxone safety kits have been placed in all AED cabinets throughout campus

AED cabinet in Stephenson Hall





Western

Campus Safety & Emergency Services **2026 Annual Report**

Foot Patrol





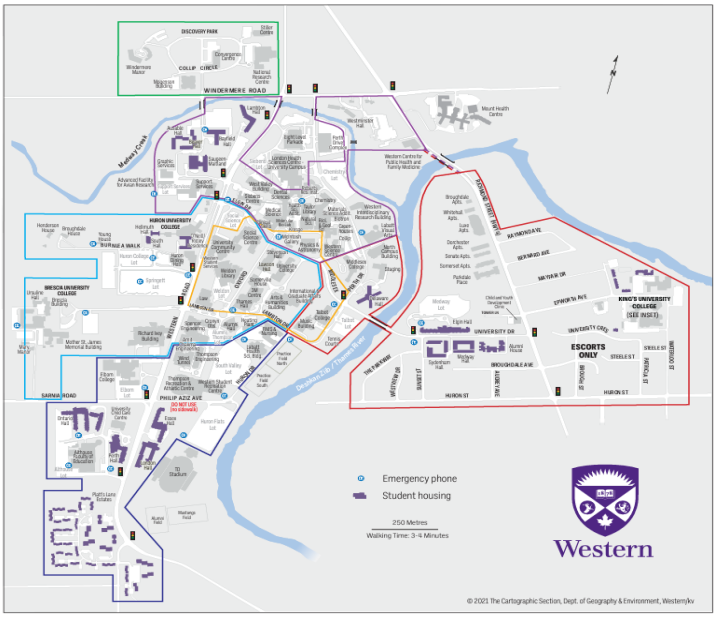
Western Foot Patrol (FP) is a student volunteer-based service, supervised by a full-time manager. This team of volunteers provide uniformed or plain clothes escorts, both on foot and by vehicle, wear high visibility vests to deter crime, and report safety concerns, across the main and affiliate college campuses. These services are delivered by over 150 volunteers each year.

In addition to Foot Patrol escorts, the team also completes weekly emergency blue phone and monthly exterior light audits. These services assist in reducing crime and enhancing campus safety. Foot Patrol also operates Western's main Lost & Found, handling over one thousand inquiries each year.

Program videos, highlighting services and volunteering, can be found at:

https://www.uwo.ca/footpatrol/

Campus Foot Patrol – Patrol Areas



Western

Campus Safety & Emergency Services **2026 Annual Report**

Fire Safety

Fire Safety (FS)
FS provides expertise in fire safety and fire prevention to ensure safety, security, and quality of life for the Western Community. FS members are responsible for the testing, inspection, and maintenance of fire and life safety equipment such as fire alarms, sprinklers, standpipes, kitchen suppression systems and fire extinguishers. Fire Safety is responsible for the testing and inspection of 84 Fire Alarm Systems, 21,383 Fire Alarm Devices, 65 Sprinkler Systems, 10 Pre-acting Suppression Systems, 27 Kitchen Suppression Systems, and 4,299 Fire Extinguishers. FS members also provide education and training to faculty, staff and students. FS Personnel are accredited through the National Fire Protection Association and technicians are certified through the Canadian Fire Alarm Association.

Fire Alarms
In 2025, total fire alarm occurrences increased to 121, above the five-year average of approximately 112 (from 2020–2024 data). Actual fires rose to seven, all extinguished appropriately with no serious injuries reported. Additionally, there were four occurrences related to natural gas odors.

Of the seven actual fires, four were cooking-related, with three occurring in commercial kitchens on campus—this trend highlights the need to prioritize enhanced fire safety training and prevention efforts for staff in these high-risk areas.

The fire at the Social Science Centre was deliberately set (deemed suspicious, with an arrest for arson) and proved more significant than typical minor incidents, involving notable flame and smoke damage (particularly on the 8th floor, affecting air quality) as well as water damage from firefighting efforts using hoses; one individual experienced smoke inhalation and was shaken up but required no serious medical treatment. This event reinforced that prevention efforts must address both accidental and intentional fires. In response, FS collaborated with campus partners to strengthen policies on combustible storage in public corridors, specifically restricting bulk wastepaper bins (used for recycling) to short-duration deployment in public-facing areas, with immediate removal to the loading dock afterward; bins should be used sparingly to minimize risks.

Residence buildings maintained strong results: malicious FA occurrences stayed low at 3 in 2025 (continuing the downward trend from higher levels in prior years). Cooking-related FA occurrences in residences did not emerge as a primary concern this year, attributable to sustained proactive initiatives. FS continues close collaboration with Western colleagues (Housing, FM, FD&E, CSES) and the London Fire Department to advance fire safety and prevention strategies, reducing nuisance alarms and real fire risks across campus.

In the fall of 2025, there was a discharge of the fire suppression systems with the University's main data center which resulted in a significant outage of Western's technology systems. FS led troubleshooting of the unintended discharge in the data centre suppression system to identify the root cause, implemented fire watch protocols during repairs, coordinated testing and safe reinstallation of suppression gas cylinders, and applied integrated system enhancements across multiple platforms based on lessons learned.

Hazardous Materials (HazMat) Team

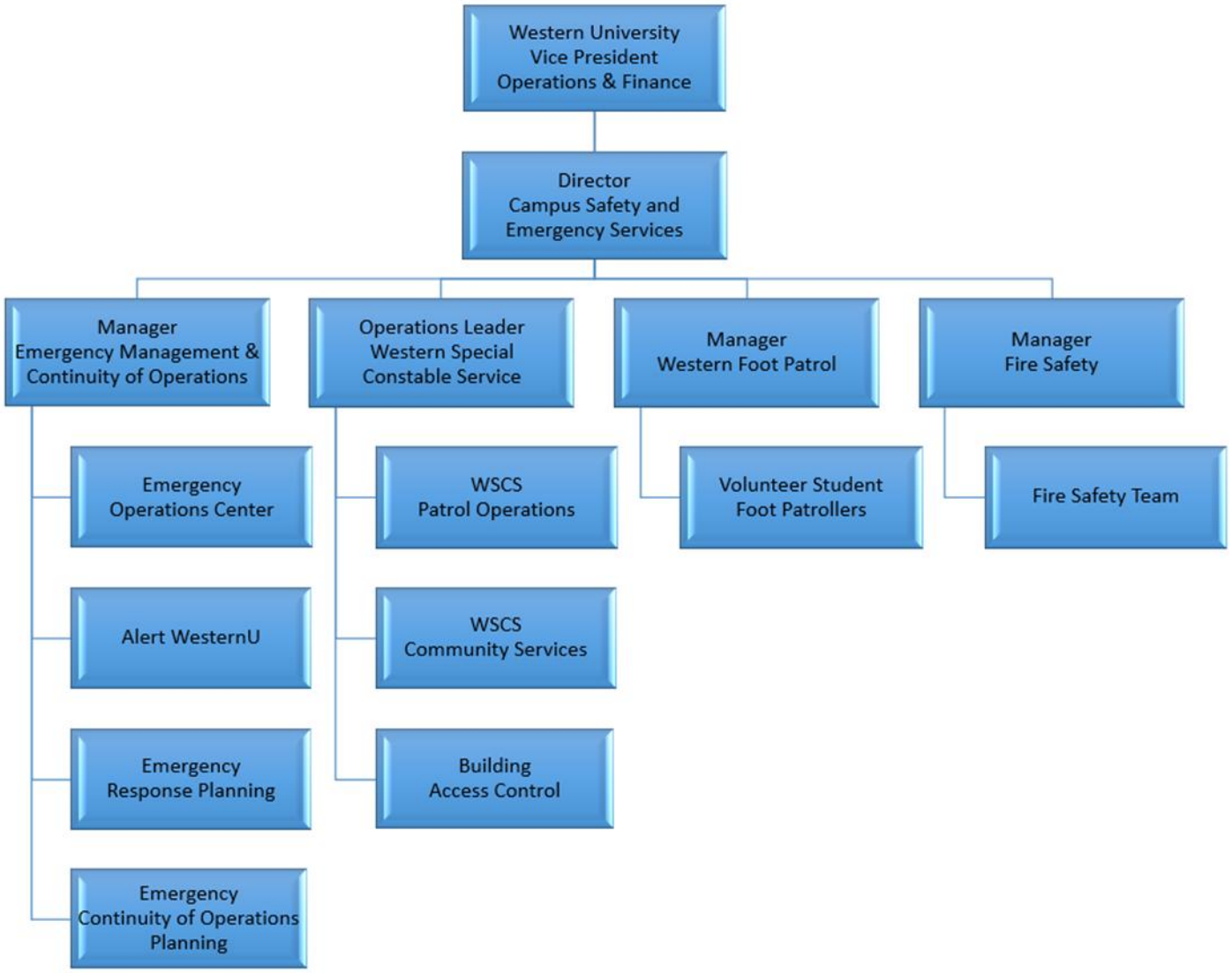
Western's HazMat Team consists of one full-time leader and approximately 16 volunteer members with diverse backgrounds and expertise in chemical, biological, radiological, nuclear, confined space, and mechanical/electrical hazards. The team maintains a comprehensive inventory of specialized equipment and resources to support campus research operations and emergency response.

Services provided by Western's HazMat Team on campus include 24/7/365 hazardous materials emergency response, spill assessment and remediation, air quality and natural gas odor assessment and remediation, and confined space emergency response and support.

Western

Campus Safety & Emergency Services **2026 Annual Report**

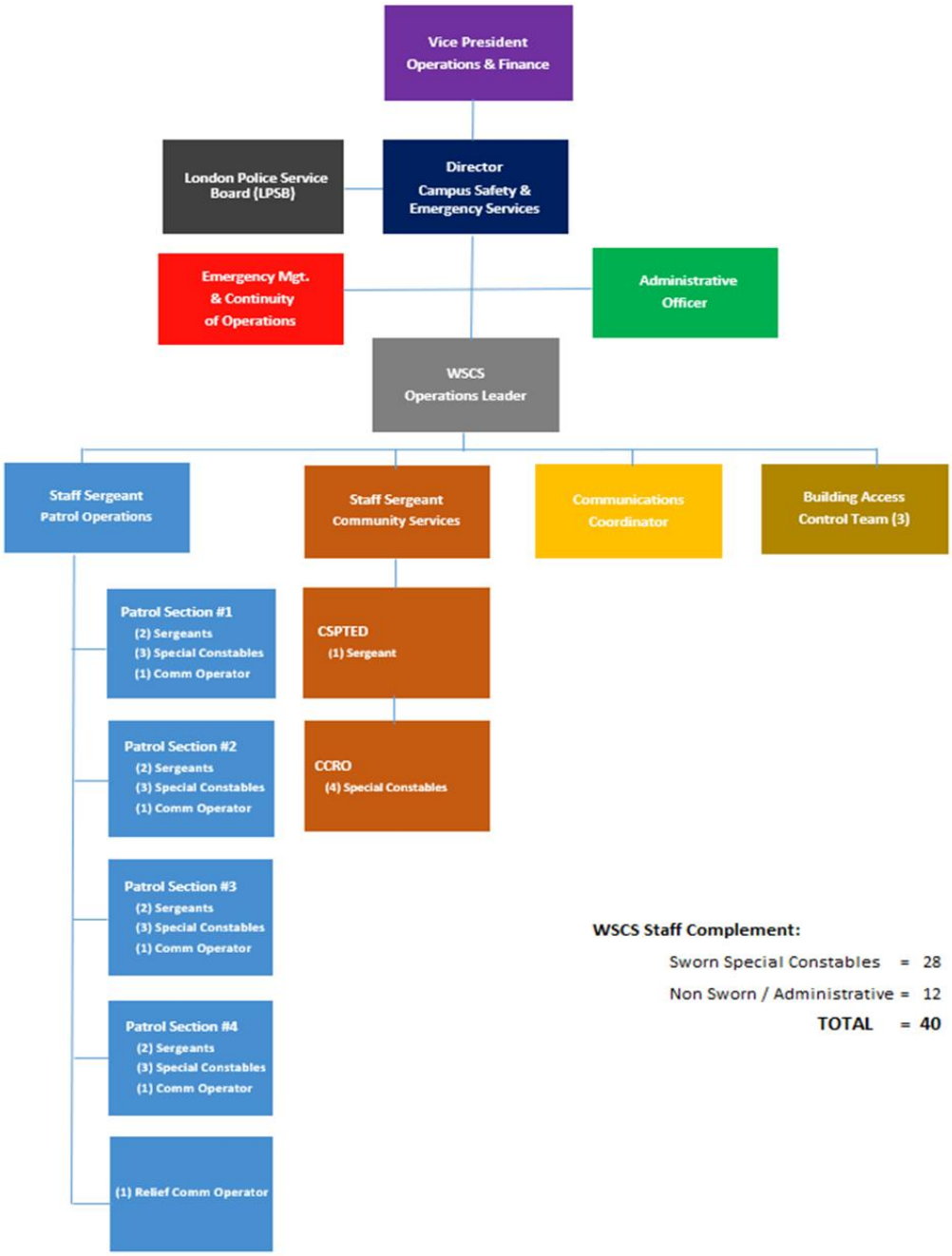
APPENDIX "A"
Campus Safety & Emergency Services
Organizational Chart



Western

Campus Safety & Emergency Services **2026 Annual Report**

APPENDIX "B"
Western Special Constable Service
Organizational Chart



Western

Campus Safety & Emergency Services **2026 Annual Report**

APPENDIX "C"
Western Special Constable Service
Operational Statistics

Table 1 below provides an overview of the calls for service and occurrence reporting of the WSCS In 2025. In 2025 there was a total of 6,756 calls for service to the WSCS which generated 2,300 occurrence reports, including 311 criminal occurrence reports. Protest activity on campus and labour disputes were significantly lower in 2025 (8) compared to 2024 (114).

Table 1

Calls for Service and Occurrence Reporting	2023	2024	2025
Calls for Service (CADs)	6,315	7,425	6,576
Occurrence Reports	1,886	2,658	2,300
Criminal Occurrence Reports	281	345	311
Protests and Pickets	7	114	8

Table 2 below indicates the top 10 types of calls for service responded to by the WSCS in 2025.

Table 2

Top 10 Types of Calls for Service	2024	2025
Assistance	2,000	1,864
Trades Call-Ins	739	773
Suspicious Persons, Vehicles or Activities	488	437
Lost and Found Property	484	353
Intrusion Alarm Responses/Investigations	338	317
Criminal	391	311
Community Services	232	238
Office Insecurity occurrences	259	211
Fire Responses	117	125
Traffic	158	105

Table 3 below reports the nature and number of criminal complaints reported to the WSCS in 2025.

Table 3

Criminal CAD Types	2023	2024	2025
Totals	281	391	311
Theft	167	187	209
Property Damage	63	132	68
Harassment	5	19	12
Assault	9	11	6
Break and Enter	7	4	3
Threats	2	3	3
Fraud	9	19	1
Sexual Assault	2	2	1
Other	17	14	8

Western

Campus Safety & Emergency Services **2026 Annual Report**

Table 4 reports the nature and number of criminal charges laid by WSCS in 2025. All WSCS reports in relation to criminal complaints / investigations are submitted electronically to LPS via the Versaterm Records Management System. WSCS occurrence reports are audited by the LPS Report Auditing Unit. All charges, Criminal or Provincial offences, laid by members of the WSCS are submitted and processed through the LPS Support Services Division.

Table 4

Types of Charges Laid by Special Constables	
Criminal Offences	
Assault	1
Criminal Harassment	1
B&E - Business	3
Theft – Other/Trailer Under $5,000	3
Mischief Under $5,000	4
Bail Violations	2
Mischief – False Name/Report	1
Provincial Offences	
Trespass to Property Act	2
Careless Driving	1

Table 5 below reports the nature and number of Provincial Offence matters responded to by WSCS Special Constables in 2025.

Table 5

Provincial Statutes and Municipal By-law Occurrences	**2023**	**2024**	**2025**
Totals	153	155	79
Trespass to Property Act	87	82	48
Mental Health	41	34	17
Noise By-law	22	29	13
Liquor License Act	2	7	1
Other	1	0	0

Complaints

The WSCS maintains a complaints process for receiving and investigating complaints regarding service or conduct of WSCS members. Complaints relating to the status as a Special Constable or allegations that a Special Constable failed to provide adequate or competent service are investigated by the WSCS and copies of the report are forwarded to the LPSB. Any allegation of criminal conduct involving a WSCS Special Constable is investigated by the LPS.

Table 6 reports complaints made to the WSCS in 2025.

Table 6

	2024	**2025**
Complaints	8	5

Community Services Section

Table 7 reports on the activities of the Campus Community Resource Officers (CCROs) and WSCS Community Services Section.

Table 7

Community Services	**2023**	**2024**	**2025**
Totals	160	232	238
CCRO Event	0	117	153
CSPTED	70	51	57
Golf Cart Training	8	5	15
Women's Self Defence Training	9	3	7
Other	73	56	6

Health, Safety and Employee Well-being Annual Report

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

This report is provided annually to the Audit Committee for information in accordance with the Audit Committee's Terms of Reference.

It is provided to the Board of Governors for information.

Documentation Provided:

Health, Safety and Employee Well-being Annual Report

Western University

Health, Safety and Employee Well-being

2025 ANNUAL REPORT



Western

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Opening Comments and Background

On behalf of Human Resources I am pleased to provide you with the 2025 Health, Safety and Employee Well-being Annual Report for Western University.

Human Resource teams assist the university community in meeting the obligations for a safe workplace for all who work and learn here. The total number of workers on campus can vary during the academic year, but on average is approximately 14,000.

This annual report includes information about the development, implementation and maintenance of programs targeted at supporting the safety system for all stakeholders. The university, supervisors, and workers each have a role to play to mitigate environmental, occupational, and public health safety risks.

A summary of the results of safety inspections on campus is included in this report as well as initiatives and actions our team and our safety partners and committees are taking to ensure clear communication of safe work practices and adherence with applicable university policies.

The report includes incident data and claims frequency (Appendix B) under the Workplace Safety Insurance Board (WSIB) as well as activities and events that have required the attention of the Ministry of Labour, Training and Skills Development, the Canadian Nuclear Safety Commission, the Ministry of the Environment, the Canadian Food Inspection Agency, the Public Health Agency of Canada and other government organizations.

Our team of professionals are focused on assessing potential hazards and putting in place a variety of controls to mitigate the risk to the worker and the university community. Providing an environment in which workers are safe and equipped to perform at their best is a continual process.

Many efforts of the Workplace Health Team help workers get off to a great start by reviewing their job-specific hazards and discussing safe procedures, personal health monitoring plans, role specific training requirements, and appropriate personal protective equipment.

When incidents occur in the workplace, supervisors across campus engage in a variety of responses, including referral of injured and ill workers to our Employee Well-being Team, to mitigate further risk to the worker and others in the area.

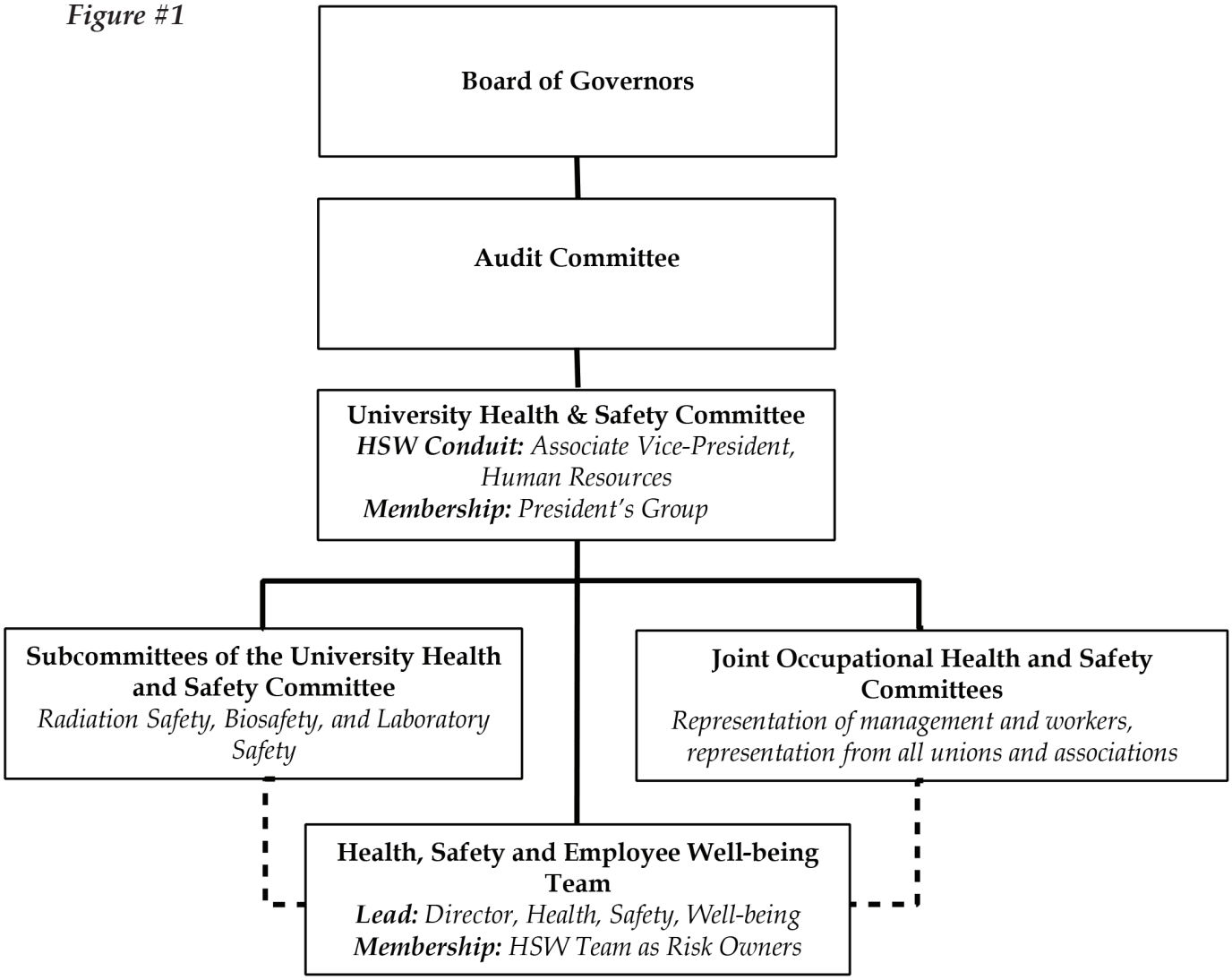
I am very proud to report on the work of our teams for the 2025 calendar year.



Louise Koza
Director, Health, Safety, and Well-being
Western University

1. The Governance Structure for workplace safety is illustrated below:

Figure #1



2. Complexity of Western's Working Environment

A university campus has a wide scope of safety surveillance responsibilities, given the complexity of activities both indoors and outdoors, on campus and around the world, and the diversity of worker relationships. All work activity can align to programs our safety team is responsible for: From student activities like experiential learning placements, charity events like the Fire Engine Pull, to managing hazardous waste disposal, there is a need to ensure that our workers are able to perform in the safest environment possible. With over 100 buildings to inspect annually and over 40,000 people in our community, just figuring out whether regulation applies to a "worker" can be a challenge. Workers include all the visiting researchers, associates from hospitals and clinics, contractors for various facilities maintenance and construction, students in laboratories, and volunteers.

The variety of work is also complex — from working with highly infectious diseases to significantly repetitive work procedures in preparing food. We also have more than average numbers of young

workers with our part-time student workforce. These young workers and their supervisors sometimes need some extra attention to ensure they understand the importance of safety in the workplace.

Western is proud to be home to world-class and expanding research facilities and institutes — and the collaboration and partnerships are ever expanding. This means that some new innovations in research may uncover hazards to workers that were not previously considered.

For example, tackling the waste management aspects of advanced nuclear fuel (SAFE-T project), using custom-designed biomaterials to restore function to spinal discs (Bone and Joint Institute) and building a structure to hold advanced research in human pathogens (the PaRC) requires re-assessment of the potential hazards to researchers and for our teams to recommend controls, while being cognizant of the statutes and regulations that may apply to these activities.

Human Resources has business partners across campus who demonstrate an exceptional commitment to safety and collaborate to build a robust safety system where everyone plays a role in maintaining a safe work and learning environment.

3. Risk Management Framework

Under the guidance, resources, and tools of Western's Enterprise Risk Management Policy and Procedures, Human Resources has developed a framework for looking at hazards in the workplace and evaluating the effectiveness of our existing controls in mitigating the risk of injury to workers.

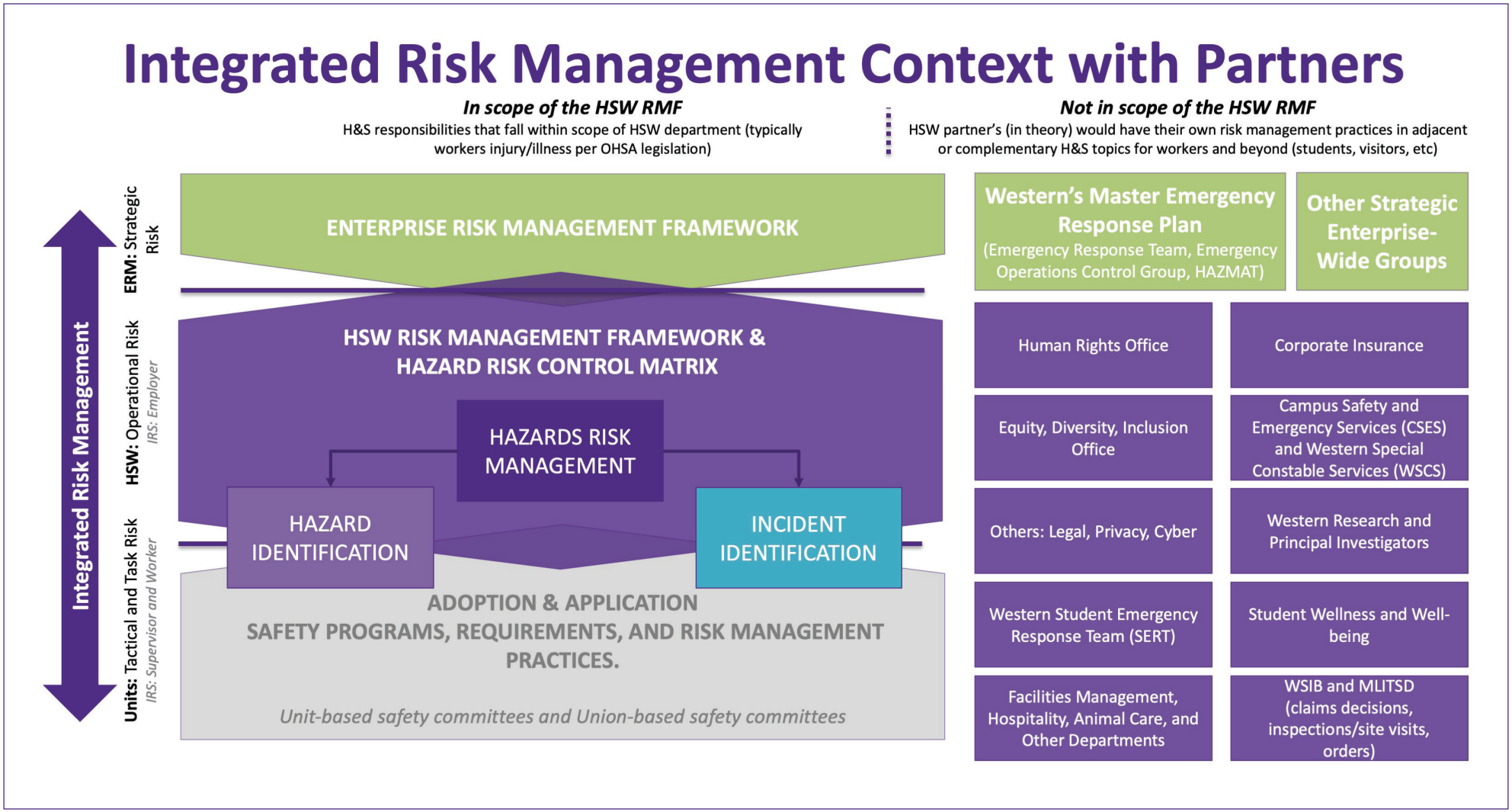
The scope of the framework is limited to the operations and programs supported by the Health, Safety and Well-being team and highlights the integration and collaboration that exists at Western with other groups focused on safety.

The update of the risk management framework is an on-going process which will allow us to deliberately and systematically look at new and evolving risks and existing controls, and identify new controls to be considered.

Following guidelines of the Ministry of Labour, Training and Skills Development, the Occupational Health and Safety Management System accreditation standards and the WSIB, we have inventoried the variety of hazards and grouped them as: Environmental, Biological, Chemical, Other Physical Hazards, Work Design and Psychological. The hazards are part of a registry in which we have documented controls for the hazards and will keep a running assessment of the severity and probability of the hazard to the worker, along with proposed improvements and testing of the controls to be completed.

In 2025, the Internal Audit team at Western reviewed the development of the Risk Management Framework and provided advice on opportunities to improve it based on industry standards. The framework provides a comprehensive view of the existing safety programs, a risk registry and a risk evaluation matrix, supporting informed decision making when considering resource allocation and priorities.

Figure #2


Integrated Risk Management Context with Partners
In scope of the HSW RMF
H&S responsibilities that fall within scope of HSW department (typically workers injury/illness per OHSA legislation)
Not in scope of the HSW RMF
HSW partner's (in theory) would have their own risk management practices in adjacent or complementary H&S topics for workers and beyond (students, visitors, etc)
Integrated Risk Management
ERM: Strategic Risk
HSW: Operational Risk
IRS: Employer
Units: Tactical and Task Risk
IRS: Supervisor and Worker
ENTERPRISE RISK MANAGEMENT FRAMEWORK
HSW RISK MANAGEMENT FRAMEWORK & HAZARD RISK CONTROL MATRIX
HAZARDS RISK MANAGEMENT
HAZARD IDENTIFICATION
INCIDENT IDENTIFICATION
ADOPTION & APPLICATION
SAFETY PROGRAMS, REQUIREMENTS, AND RISK MANAGEMENT PRACTICES.
Unit-based safety committees and Union-based safety committees
Western's Master Emergency Response Plan
(Emergency Response Team, Emergency Operations Control Group, HAZMAT)
Other Strategic Enterprise-Wide Groups
Human Rights Office
Corporate Insurance
Equity, Diversity, Inclusion Office
Campus Safety and Emergency Services (CSES) and Western Special Constable Services (WSCS)
Others: Legal, Privacy, Cyber
Western Research and Principal Investigators
Western Student Emergency Response Team (SERT)
Student Wellness and Well-being
Facilities Management, Hospitality, Animal Care, and Other Departments
WSIB and MLITSD (claims decisions, inspections/site visits, orders)

Our team will be using the reported incidents and other metrics to determine the probability of injury to workers and the severity of that injury should it occur — this evaluation of the hazards helps inform where to focus our resources when we have multiple demands for our attention.

4. Pro-active and Preventative Well-being

Keeping the workforce safe starts with worker participation in identifying hazards, training, and pro-actively engaging workers in wellness activities that make them aware of additional personal health risks they may have in completing work procedures.

Many efforts of the Workplace Health Team help workers get off to a great start by reviewing the hazards associated with their work and discussing safe procedures, personal health monitoring plans, and appropriate personal protective equipment.

Workplace Health had 3,180 visits in 2025 including 378 employees new to their position requiring hazard review and assessment. Six hundred and two employees were under annual surveillance to ensure they continue to be healthy despite their exposure to hazards. In addition, the Occupational Health Physician consulted on 35 cases (ill or injured employees) with the Employee Well-being team.

We are planning to implement new technology to support the Workplace Health team which would include electronic integration with the Human Resources system and the Electronic Medical Records system that is used to monitor worker's health and any relevant hazards that are being observed. The Electronic Medical Records system is currently under review with Western's Technology Risk Assessment Committee and we expect to make progress on this technology improvement in 2026.

We had a very successful vaccination clinic in the fall of 2025, offering workers both COVID 19 and flu vaccines in the same visit. We administered 3,482 vaccinations to employees and students, with about 100 more employees vaccinated over the previous year.



3,482

Flu vaccinations administered to employees and students in 2025

The Flu virus in 2025/2026 was quite severe and employees who missed the clinics were reminded that they can still get the flu vaccine from Workplace Health, a pharmacy or their treating medical practitioner.

Our Living Well @ Western program offers a wide variety of physical and mental activities free to all employees with programming every work day, with an average of 10 classes/events offered each week. With dedicated space in the centre of campus, we have been able to expand our services to support various health and wellness programs including areas for employees to view wellness webinars and presentations.

There were 2,009 participants registered for classes and educational webinars in 2025, an increase of 4.3% over 2024.

The Living Well program collaborates and promotes events delivered by Student Experience, Office of Indigenous Initiatives, Western Sustainability, McIntosh Gallery, Western Libraries, Campus Safety and Emergency Services, the Dellelce Family Bookstore and the Don Wright Faculty of Music. With the support of Western Sport and Recreation Services, the program promotes some physical activities in Thompson Arena.



2,009 (+4.3%)

Participants registered for classes and educational webinars in 2025

Employees can be motivated by earning "wellness rewards" by completing activities, attending events, and engaging in monthly challenges — points accumulate for small rewards and recognition.

In May of 2025, we held a very successful Western Employee Health Fair (to be repeated annually) bringing a wide variety of vendors and organizations to campus to share resources and tools, and connect with Western workers. Nearly 600 employees visited over 40 information booths regarding campus and community resources and supports.

5. Primary Care and Early Intervention

The Workplace Health and Employee Well-being teams address issues swiftly as they arise — providing immediate support to mitigate risks to employees. On any given day the Occupational Health Physician can see employees who may have had an animal bite or needlestick injury — they may assess an over-exertion strain or prescribe antibiotics. Our Well-being team can quickly assess the employee's ability to continue to work or offer alternative work; they are also very supportive as employees experience trauma, where psychological suffering, illness or injury is involved or likely to occur. By being on campus and on site throughout the work week, these teams can respond nimbly — moving quickly between multiple campus locations to intervene early and help prevent complications from workplace injuries.



149

General MD Visits
(Referral from employee well-being, injuries, illness)

941

Cases opened by Employee Well-being in 2025

928

Cases closed by Employee Well-being in 2025

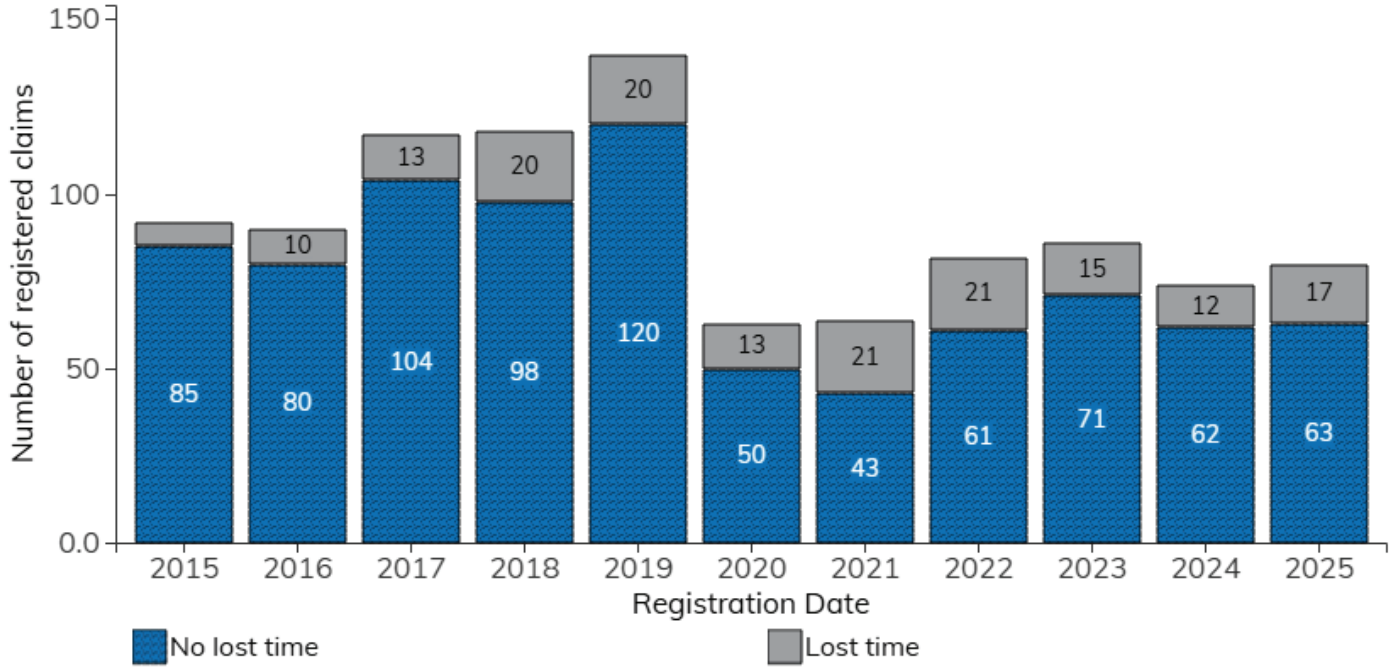
- At any given time, the Employee Well-being team are managing approximately 500 cases.
- Approximately 50 of these cases have proceeded to long-term disability and our team are actively working with the employee and the insurance carrier on planning a return to work.

80

WSIB Claims Approved in 2025

- 17 for lost time and 63 for healthcare

Figure #3



Compass - Generated Report for THE UNIVERSITY OF WESTERN ONTARIO (1643185)
Data Source: Workplace Safety and Insurance Board
Data Maturity: As of January 31, 2026
Data Notation: includes data from 01/01/2015 to 12/01/2025
Data downloaded from WSIB Compass tool.
Report Downloaded On 2026-03-05 14:54:53

The teams continue to recognize and evaluate the risks of psychological hazards in our workplace including working alone, workplace harassment, and workplace violence. A number of employee well-being cases in 2025 (Appendix B) were directly related to the need for staff to return to a fully in-person on-site workplace. The team supported the employees and the university in a number of ways, including evaluating medical accommodations needed and liaising with the employee's leadership team.

New in 2026, the Excellence in Leadership program is delivering a 3-hour professional development session for leaders at the University: "Leading with Psychological Safety " which will focus on creating environments where individuals feel safe to seek clarity, ask for help, and contribute fully.

Many workers fulfill physically demanding responsibilities — managing our beautiful outdoor space, preparing and serving food to our students, and taking care of large colonies of rodents in our research facilities to name a few. When this work is conducted, it is important that procedures are well thought out, tested, and that proper training is delivered to prevent repetitive strain injuries.

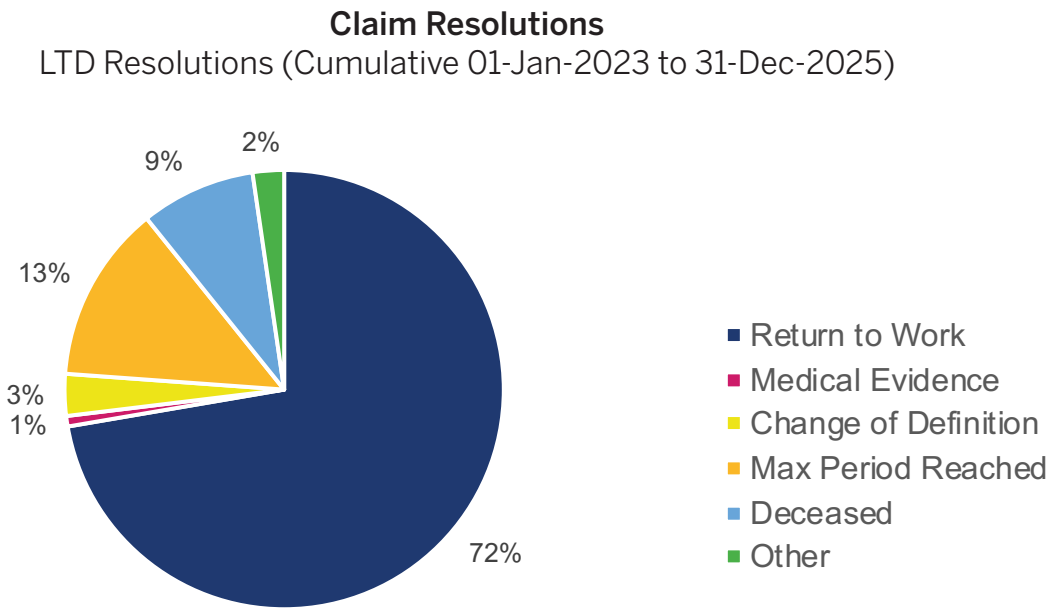
Our team, with the input of supervisors and workers, develops job demands analysis and delivers ergonomic resources and guidance to workers across campus. Facilities Management staff, Hospitality Service workers, Animal Care workers and loading dock stores staff have the most physically demanding roles at Western.

6. Recovery and Return to Optimum Functioning

The university is committed to supporting employees who are experiencing occupational and non-occupational illness, injury, and disabilities. Human Resources supports a collaborative, proactive approach to help employees stay at work or to safely return to work following an illness or injury. We are also focused on fulfilling our legislative obligations with respect to the Workplace Safety and Insurance Act, the Ontario Human Rights Code, and the Employment Equity Act, minimizing the monetary and psychological costs associated with disability at Western. The return to optional functioning is a collaborative process with employee-centric accommodations — engaging the employee, the employee association/union, treating practitioners, and where applicable case managers from external insurance companies.

In 2025 the Long Term Disability (LTD) claims occurrence rate was 9.17 per 1,000 lives insured. This was down by 28.5% relative to 2024 claims occurrences. The top three represented groups making claims are the employees represented by University of Western Ontario Staff Association (UWOSA), the Professional and Managerial Association (PMA) and the CUPE 2361. While 44 LTD claims were approved in 2025, 32 claims (a combination of 2025 and earlier year claims) were resolved by returning to work.

Figure #4



Our performance as a university relative to the educational industry and our insurers' book of business suggests that our teams have been very effective at successful return to work for our employees following an illness or injury. Even when employees have experienced a critical non-occupational illness (e.g., cancer, heart attack, stroke) we can still support them and sometimes find a way for them to develop functionality and engage in our community while they recover — often finding creative and safe ways such as return-to-work trials and graduated work-conditioning supports.

In addition to these physical and procedural supports, we emphasize the importance of social connection as a critical part of recovery and reintegration. We actively work to connect employees with peer support networks and community-based services and have supported the establishment of a Community Treatment Team to assist in complex recovery situations. Referrals to specialized programs and coordination of funding supports are extended not only to employees, but also to affected family members, recognizing the broader impact of serious illness or injury. Throughout this process, supervisors, team members, and representatives from union groups and associations are actively involved in supporting reintegration.

These groups receive ongoing guidance, education, and tools to ensure they can support returning colleagues with empathy, flexibility, and effectiveness during their transition back to work. The collaborative efforts of the workers, supervisors, our well-being consultants and the employee group representatives have significantly paid off — for the employees returning to sustained and fulfilling work, and financially saving the University over $1 million dollars per year (about 16% of LTD insurance premiums) over the last two fiscal years.

7. Safety Programs For Workplaces with Unique Hazards

Some work at Western is highly regulated as it is associated with significant hazards to people, and risks to the environment, which left uncontrolled hold significant reputational, legal, and financial risks to the university.

Biological Safety

Western currently holds three Human Pathogens and Toxins Act (HPTA) licences for work with risk group 2 and 3 biological agents. The Pathogen Research Centre (PaRC) hosts research work involving a large number of workers that interact with viruses and vaccines, and will soon consistent of 3 facilities (currently only one):

1. Imaging Pathogens for Knowledge Translation: ImPaKT (existing)
   - Uses advanced imaging techniques to study how diseases behave inside the body
2. Microbial Transmission: MiTRA (under construction)
   - Unique facility specifically designed to test how viruses and other pathogens spread in real-world settings
3. Good Manufacturing Practices Production: GMPro (under construction)
   - Manufacturing of clinical-grade vaccines and treatments under strict quality control standards

The HPTA license was updated and approved to support new research using risk group 3 human and animal pathogens (ImPaKT facilities). This required considerable effort from our Biosafety Officer to work with the researchers, the facilities operators and the regulators to ensure our administrative documents and security procedures were in accordance with requirements to work with these materials. All workers in these facilities are monitored to ensure exposure to biological hazards are controlled in their workplace.



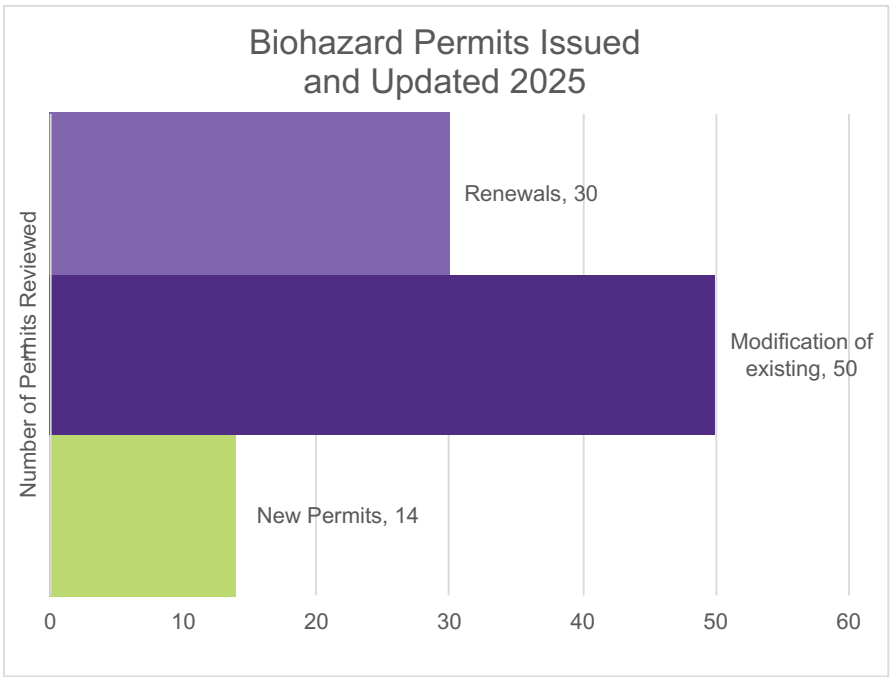
The Pathogen Research Centre (PaRC)

157

Trained and monitored to work in the Containment Level 3 (CL3) and/or CL2+ facilities

With the oversight of a Biosafety Committee, 205 active permits are held by principal investigators or course curriculum Chairs to ensure compliance with the relevant standards and Western's established controls when working with potentially hazardous pathogens and toxins, as well as any work with human source materials.

Figure #5



The current system for Biosafety permit management is antiquated and does not provide a foundation for advanced analysis of risks. Work was initiated on a new Biosafety permit administrative system "WorkSafe at Western" with an anticipated go live date in the Spring of 2026.

With the support of this new system and database, principal investigators, their research teams and the members of the Biohazard Sub-Committee will be able to collaborate to modify and implement new methods more efficiently and timely under this highly regulated research environment.

71

Permit Inspections (multiple rooms) were completed in 2025, with 183 non-compliance items observed but over 96% of the permit and statute requirements met

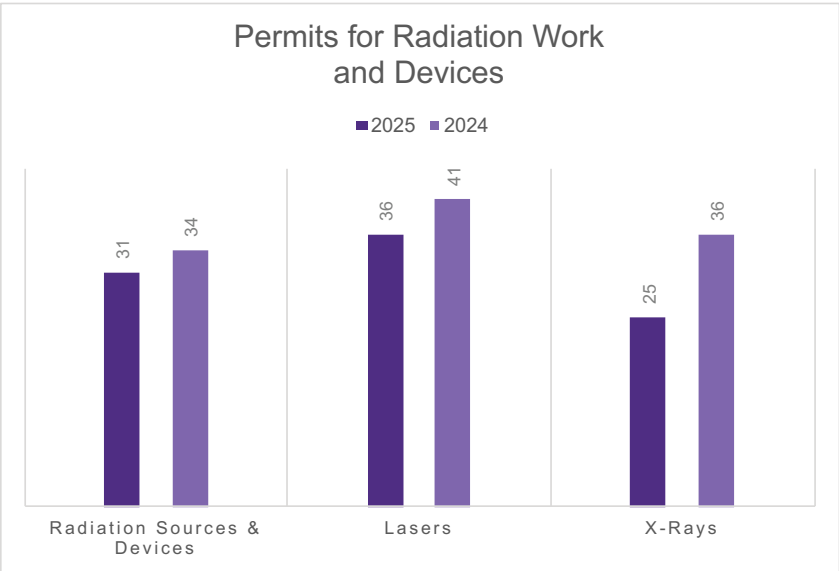
- All corrective actions for non-compliance observations have been implemented.
- In addition to these permit inspections, 31 autoclave devices were inspected.

The Biosafety Officer has also provided considerable advice on the design of the new facilities being built on campus, including the Bioconvergence Centre — participating in the schematic design and development phases to ensure laboratory spaces will meet applicable standards and legislated requirements.

Radiation Safety

The Radiation Safety Program is designed to mitigate risk of working with ionizing radiation including radiation emitting devices such as X-rays and lasers. This work is governed by the Canadian Nuclear Safety Commission (CNSC), the International Atomic Energy Agency (IAEA), and the Ministry of Labour, Training and Skills Development. With oversight of the Radiation Safety Committee, permits are issued to principal investigators and core facilities managers to ensure compliance with all relevant statute and standards when working with radioactive materials and/or radiation emitting equipment.

Figure #6



In 2024 and 2025, the Radiation Safety Officer and the Alternate Radiation Safety Officer spent considerable time reviewing existing work with radiation, lasers, and x-rays and in a number of cases encouraged principal investigators to remove these materials and devices from their labs since they have not used these items in a number of years. In addition, as faculty members retired, there were a few labs completely decommissioned as a radiation space. The number of permits managed has reduced by 19 or 17% since 2024.

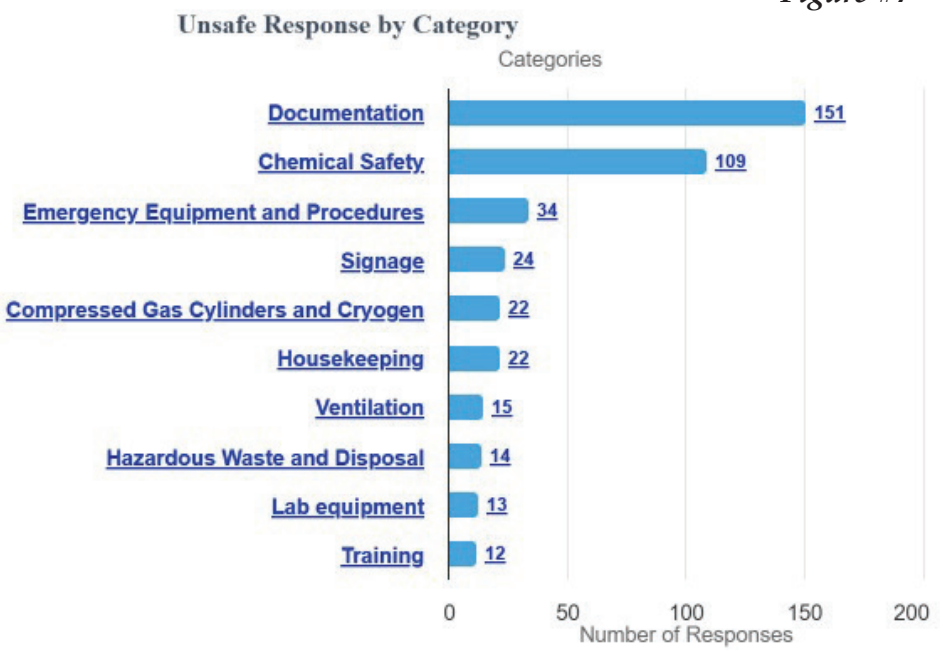
These are complex workplaces with regulated materials and equipment in different spaces. Our safety team has put a number of controls in place, and tested them, to ensure workers are not exposed to unacceptable levels of radiation. Approximately 500 workers, including 120 workers (mostly students) in the Dental Clinics, are classified as nuclear energy workers and are required to wear a personal dosimeter, complete and renew radiation safety training, use detection devices and document readings regarding radiation concentration.

In 2025, the university's security around two GammaCell self-shielded irradiators was audited by the CNSC. Corrective measures included installation of new video surveillance of these work areas.

Laboratory Safety

The Laboratory Safety program is designed to mitigate risks to workers and students in more than 520 labs across campus and in specialized research facilities off campus. The guidelines, procedures, and requirements for work in the labs are governed by the Ontario Occupational Health and Safety Act, the Workplace Hazardous Materials Information Systems (WHMIS), the Electrical Safety Authority of Ontario, the Ontario Fire Code as well as regulation relating to other special hazards (i.e., biological, radiation) that may be in the laboratories.

Figure #7



In 2025, we inspected 176 principal investigator groups, in some cases with multiple lab spaces. A common concern has been the lack of attention to basic housekeeping issues which pose a heightened risk given the hazardous materials present in the labs. Some labs are cluttered with excess supplies,

inactive equipment, old and confusing signage. Documentation (emergency contact numbers, how to manage hazardous waste, records of training on equipment and procedures in the lab) is inconsistent and the labelling and storage of chemicals is also challenging. Some of this is due to a lack of full time staff to organize the space, lack of supervision of students while in the lab, and uncertainty regarding what to do with existing supplies and equipment when a lab is reassigned to a new research group.

The unsafe observations in 2025 are similar in character to those observed in 2024, where emergency equipment and procedures, chemical safety and chemical storage were the top 3 cited corrective measures needed. To help improve the safety culture in labs we will be engaging academic leaders in the Faculties to re-educate and remind principal investigators of the important role they play in ensuring their lab space on campus is effectively and safely managed. There are some best practices found in some departments on how faculty are orientated to their lab space and their accountabilities when they first join Western — we will encourage that these best practices are passed on to others.

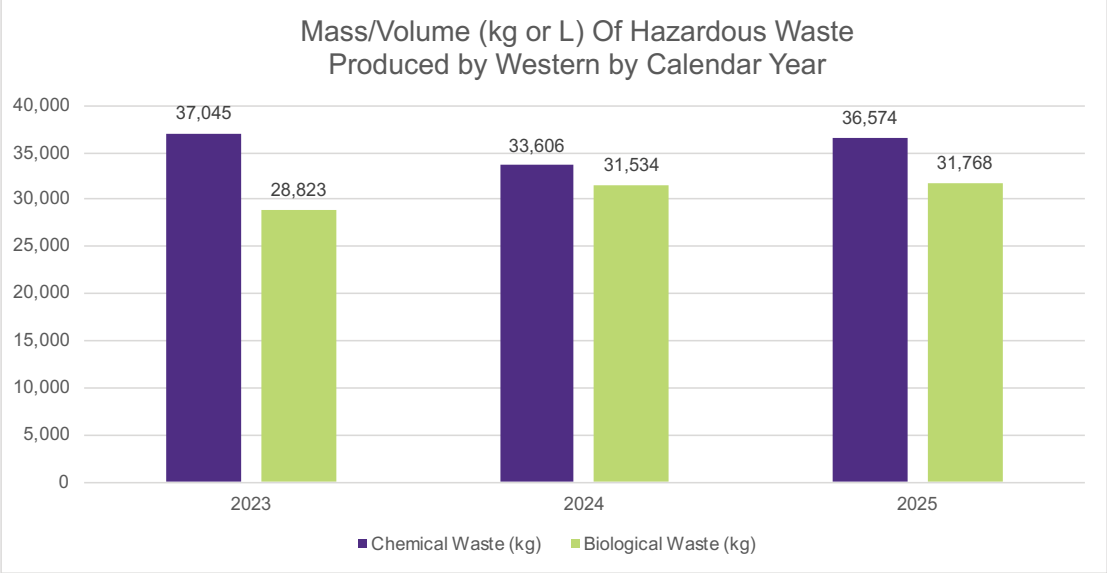
Hazardous Chemicals and Waste

Western received over 6,948 unique chemical agents as new supply in 2025 and disposed of 36,874 kg/l of chemical waste in 2025.

The procurement and transportation of hazardous materials is governed by the Transportation of Dangerous Goods Act, which requires a number of workers in shipping and receiving locations on campus (27 active staff members in Stores, Procurement, Health and Safety) to receive specialized training. The labeling, storage, and use of hazardous materials is governed by WHMIS.

Whether or not an employee works directly with these hazardous products, all workers at Western must complete WHMIS training and refresh the training regularly. The completed training records are provided in detail in Appendix C of this report. The required training in e-learning modules will transition to the new Brightspace learning management tool in the first quarter of 2026. Once the technology is stabilized, we will be launching a communications strategy to ensure all existing employees review their training records and complete any outstanding required training.

Figure #8



8. Outdoor Environment

As the winter weather arrives on campus, despite significant effort to keep pedestrian walkways clear and dry, we receive many safety incidents reported related to slips and falls which occurred outdoors. Incident reports have also included hazardous conditions relating to motor vehicles, attacks from geese, insect bites and stings and gas-leak concerns. In addition to these hazards, the university has a number of large, medium, and small construction sites which carry risks to those traversing the campus.



New Smoke-Free Campus installed across campus.

In 2025, we refreshed our communication efforts regarding Western's smoke free campus, revising and introducing new signage to those on campus and as visitors arrive. At the same time our health and safety team monitored events and some habitual locations used by those not adhering to our smoke/vape free campus policy. This included educating people about where they need to go to be considered off campus when taking a smoking break. With new people arriving on our campus every day it can be challenging to reinforce this messaging — we need leadership from many to reiterate the importance of keeping campus air quality smoke and vape free.

Our safety team works very closely with Facilities Management's services and operations when hazards are identified. In 2025, the Joint Occupational Health and Safety Committee completed 194 inspections, with 372 corrective actions to be implemented and ~20 of those corrective actions were flowed directly to the FM service desk for action. We have found that using technology and working together to resolve hazardous situations has improved our ability to ensure a safe work and learning environment.



15,185 rooms in 96 buildings

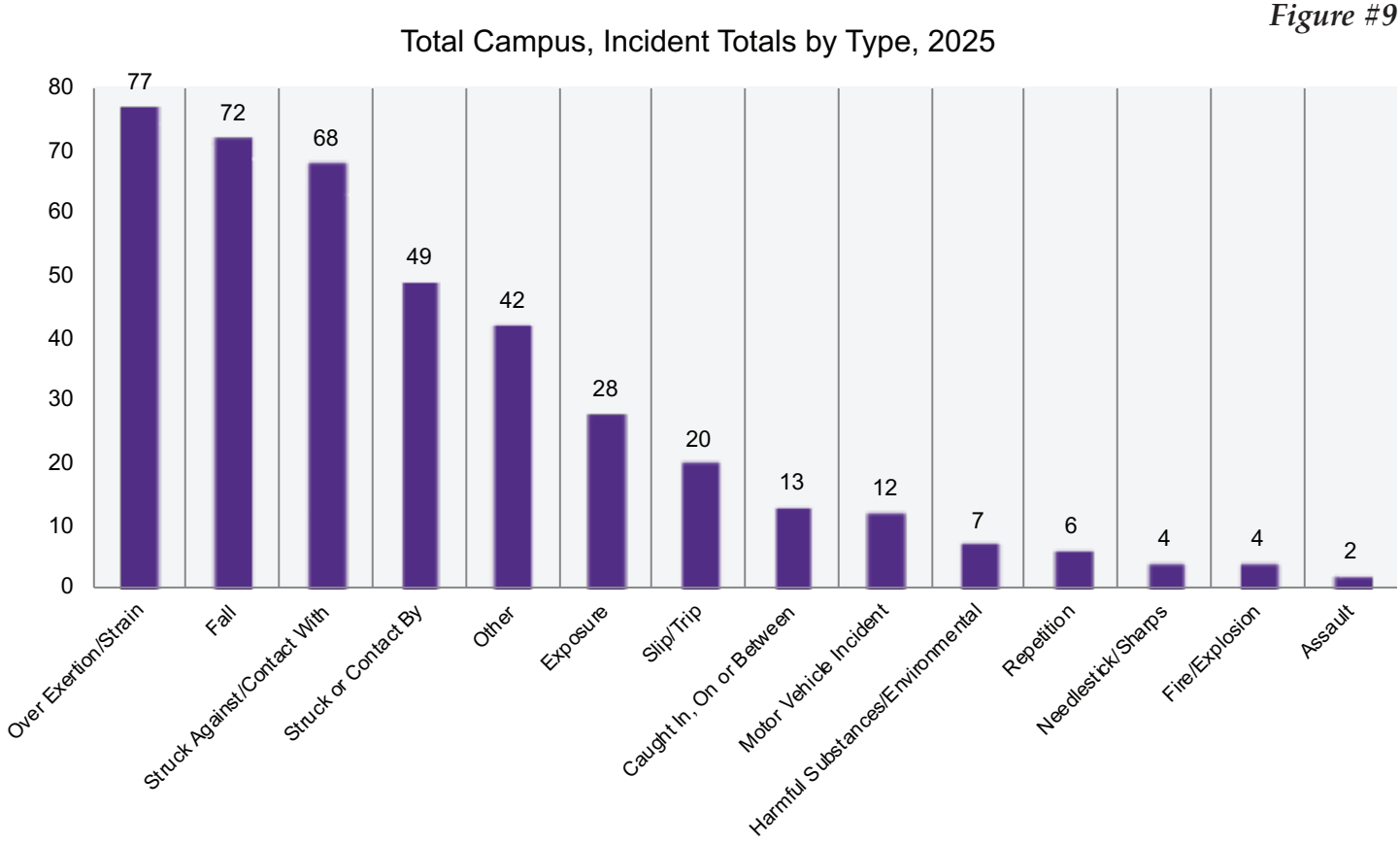
Inspected by the Joint Occupational Health and Safety Committee in 2024

With the support of FM, we completed a preliminary investigation on humane methods to manage the ever expanding population of geese on campus.

9. Workers with Significant Physical Demands and Exposure to Hazards

To support the infrastructure and buildings at Western, there are over 450 workers — many with very physically demanding accountabilities which require in depth training to apply their specialized skills. These workers are exposed to potentially hazardous chemicals, electrical shock, lacerations and other injuries which require heightened vigilance when it comes to proper training on work procedures, engineering controls such as guards and handrails, and properly procured and allocated personal protective equipment. The Facilities Management staff and leaders collaborate with the Health, Safety and Well-being teams to ensure that appropriate controls are in place and workers' health conditions are reviewed regularly. The controls have been very effective at mitigating incidents.

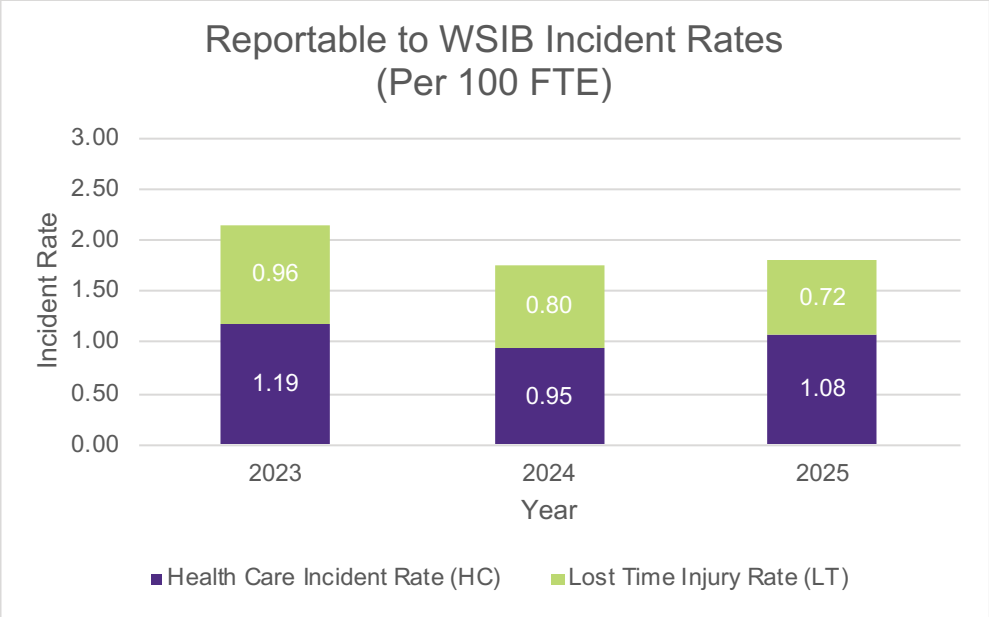
Figure #9



Of the 404 incidents reported in 2025 (details in Appendix A), about 24% involved workers from Facilities Management; 34% involved workers from Hospitality Services; and the remaining 42% involved workers from the rest of the campus. Thirteen per cent of the 2025 incidents (51 in total) resulted in some lost time for the workers. Using similar methodology from WSIB to compare organizations, we have measured the reportable incidents (requiring healthcare support and/or resulting in lost time) per 100 FTE workers. With over 14.8 million hours worked by over 14,000 workers, Western reports 1.8 incidents to WSIB for every 100 FTE workers or 1.8%, with 0.72% of those reports relating to lost time for workers.

With close to 800 hospitality workers exposed to hazards such as burns, lacerations, and tight workspace, training and procedure review for this group of workers are a high priority for the leadership of Hospitality Services in order to mitigate risks of hazards. The rate of incidents for this

Figure #10



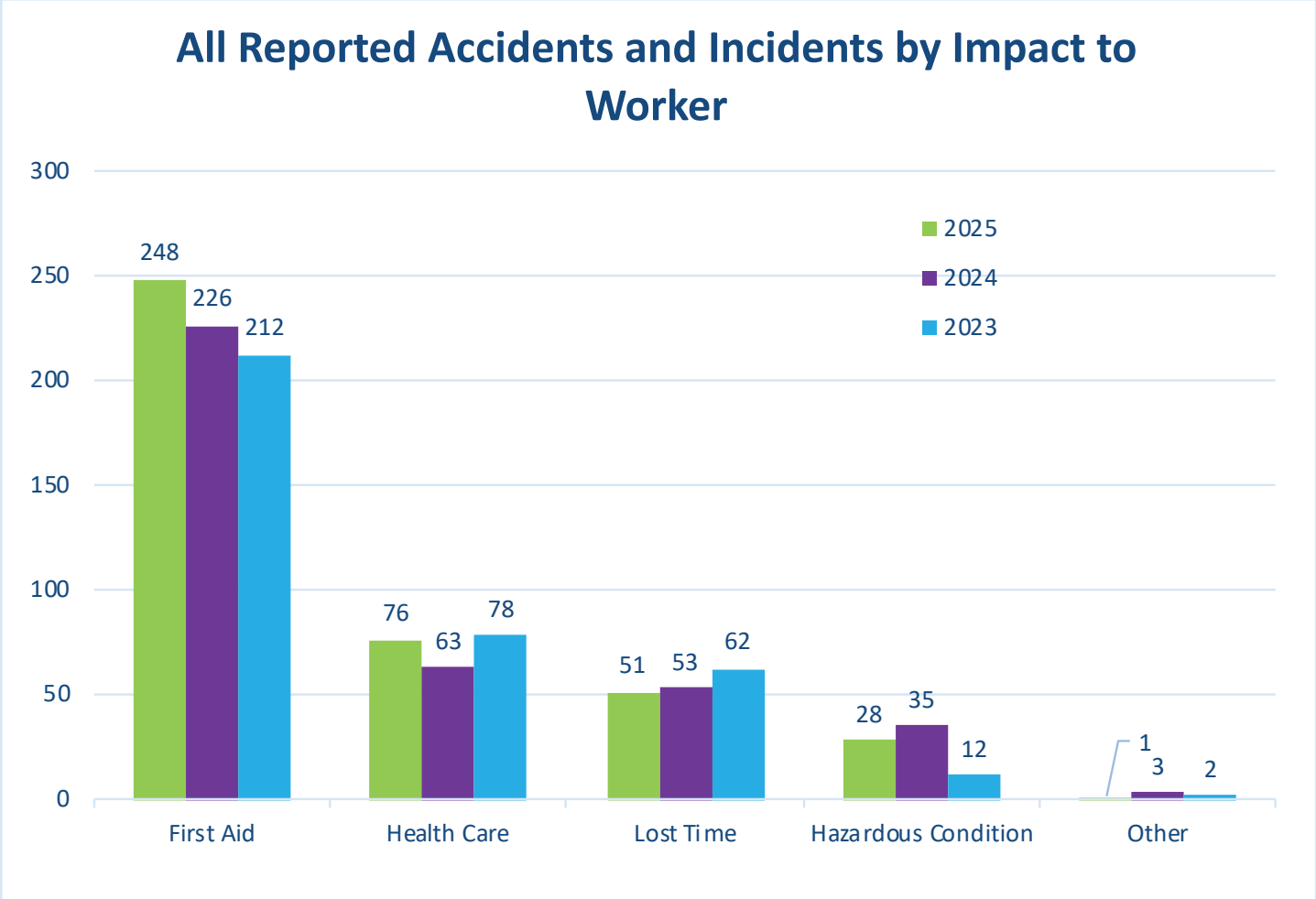
group of workers is concerning and we have initiated a number of measures to mitigate the risks they are exposed to. An intern joined our Health, Safety and Well-being team to analyze the incidents and identify the areas and work procedures that were commonly represented. In 2026, we expect to have improved checklists for supervisors and unit managers to improve focus on the areas of risk. Considerable improvements have been noted regarding knife safety and mitigating the risk of thermal burns. However, musculoskeletal injuries have been on the rise for this group. A refreshed review of job demands analysis and work station set up for some of the culinary support workers is needed to mitigate further injuries to workers.

Ongoing promotion and reinforcement of educational materials has also been prioritized, including training on:

- The selection and use of appropriate slip-resistant footwear;
- Implementation of task rotation to minimize exposures to vibrations, repetitive movements, pressure on feet and back, exposure to heat and steam;
- Safe materials handling techniques;
- Ensuring employees are selecting the right tools to perform their work safely;
- Identifying and selecting tasks that align with an individual's physical and cognitive limitations, especially for those returning from injury or managing ongoing medical conditions.

Appendix A: Incident Reporting and Management

Figure #11



The total number of reported incidents in 2025 is comparable to 2024 and 2023. It is encouraging when more hazardous conditions are reported (this allows us to investigate before any accidents occur).

In 2025, there were 20 potentially critical injuries reported on campus (i.e., a broken arm or leg, an unconscious individual, life in jeopardy, substantial loss of blood). Upon investigation, 15 of these incidents involved students or visitors and there was no similar hazard for workers. Three of the remaining 5 incidents were determined to be critical after investigation. The critical injuries included an arm fracture from a slip and fall, a foot fracture from a slip and fall and an ankle fracture of a soccer player. For each of the 5 incidents, our team notified the Ministry of Labour, Training and Skills Development (MLTSD) and worked with Western Special Constable Services, London Police Services and/or emergency response personnel to investigate the incident and identify any hazards in the workplace that could have a causal effect.

Appendix B: Workplace Safety Insurance Board Metrics

In 2025, the university paid $2.6 million in premiums to WSIB and WorkSafeBC (for a small group of workers located in that province). However, due to a gratuitous surplus in the WSIB program, the province provided distributions back to us in 2025 of $1.8 million. In addition, we earned a rebate of $23,435 in recognition for our risk management and controls improvements.

Figure #12

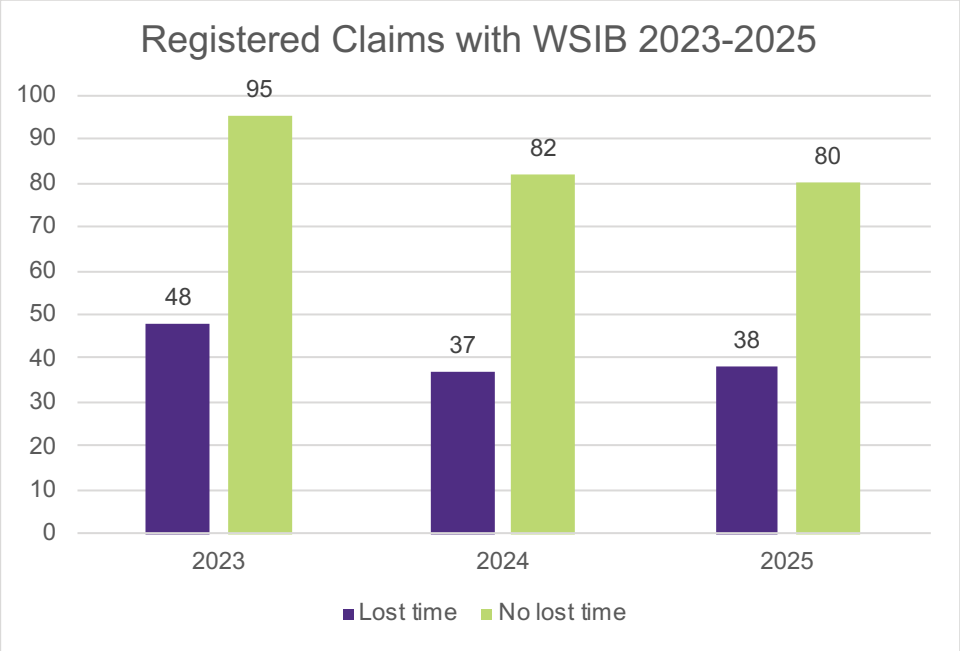
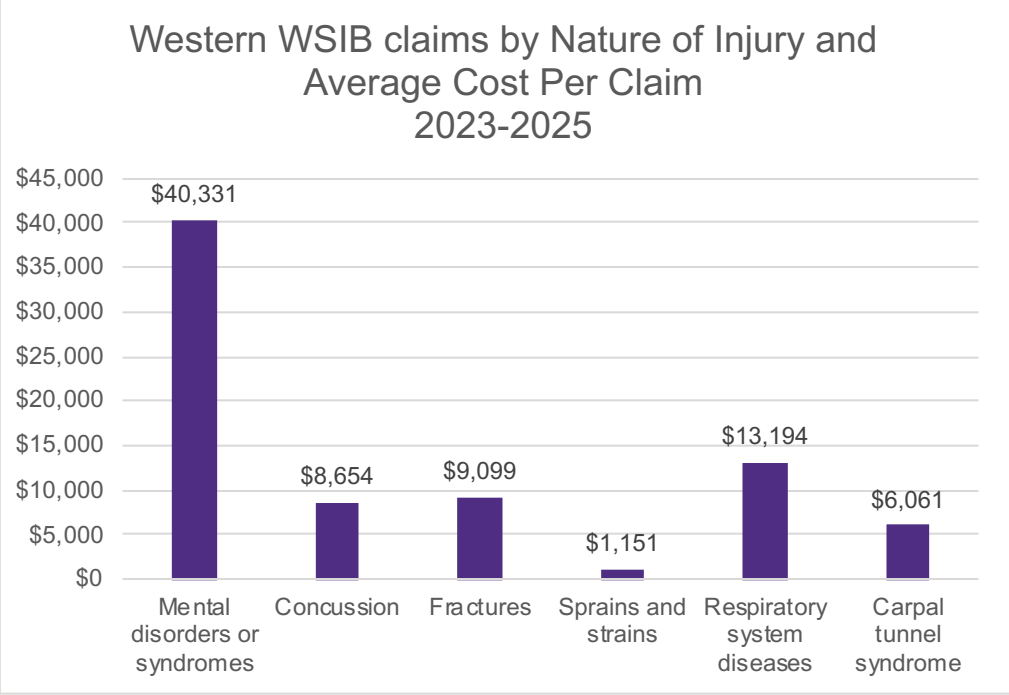


Figure #13



Appendix C: Training Records

Required Training for Workers and Students Completed in 2025			
Course Name	**Workers**	**Students** (For classes and experiential learning)	**Total**
AODA-Accessibility in Service	2,772	809	3,581
AODA-Accessibility in Teaching	371	147	518
Asbestos Awareness	148	4	152
Biosafety Training	848	312	1,160
Building Inclusivity / Anti-Racism (Employee Version)	2,467	561	3,028
Burn Safety Training	304	1	305
Comprehensive Asbestos	30	1	31
Cyber Safety Awareness	887	116	1,003
CyberSmart Training (Employee)	401		401
CyberSmart Training (Student)	983	264	1,247
Electrical Awareness	114	2	116
Electrical Safety Training	26		26
Ergonomics - Material Handling	420	10	430
Golf Cart Training	75	3	78
Hearing Conservation Program Safety Training	154	3	157
Knife Safety Training	406	1	407
Laboratory Safety & Hazardous Waste Management	1,014	492	1,506
Laser Safety	153	27	180
Lock-out / Tag-out	140	4	144
Mental Health eLearning Module (Employee Version)	419	51	470
Office Ergonomics	340	837	1,177
Personal Protective Equipment	242	20	262
Radiation Safety - Nuclear	31	1	32
Radiation Safety Refresher	65	1	66
Slips, Trips and Falls	204	11	215
Supervisor Health and Safety Awareness	832	120	952
Supporting Disclosures of GBSV	2,546	407	2,953
Western Safe Campus Community	3,104	1,169	4,273
WHMIS Training	4,040	3,232	7,272
Worker Health and Safety Awareness	2,696	1,117	3,813
X-ray Safety	166	121	287
TOTAL	**26,400**	**9,844**	**36,244**



Western

Health, Safety and Employee Well-being

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www.uwo.ca/hr/safety

Unanimous Consent Agenda

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That the items listed on the consent agenda be approved or received for information by the Board of Governors by unanimous consent.

Executive Summary:

The Board's parliamentary authority - *American Institute of Parliamentarians Standard Code of Parliamentary Procedure* (formerly called *Sturgis Standard Code of Parliamentary Procedure)* - explains the consent agenda:

> Organizations having a large number of routine matters to approve often save time by use of a *consent agenda*, also called a *consent calendar* or *unanimous consent agenda*. This is a portion of the printed agenda listing matters that are expected to be non-controversial and on which there are likely to be no questions.
>
> Before taking the vote, the chair allows time for the members to read the list to determine if it includes any matters on which they may have a question, or which they would like to discuss or oppose. Any member has a right to remove any item from the consent agenda, in which case it is transferred to the regular agenda so that it may be considered and voted on separately. The remaining items are then unanimously approved *en bloc* without discussion, saving the time that would be required for individual votes.

A number of Canadian university governing bodies have employed the consent agenda format to include not only routine approval items, but also information items. One reason for using this format is to allow the governing body to focus on major items of business. While approval of an omnibus motion saves time at meetings, Board members will want to review the agenda materials carefully in order that they properly discharge their responsibilities.

How it works:

The Secretary identifies action and information items that are routine and/or likely non-controversial. In so doing, they may consult with the Chair of the Board, the relevant committee chair, and principal resource persons. In each Committee's report, these items are noted in the list of items at the beginning of the report. Action and information items on the agenda that are not noted on the consent agenda will be presented singly for discussion and voting (when appropriate).

When members receive their Board agendas, they should review all reports in the usual manner. **If any member wants to ask a question, discuss, or oppose an item that is marked for the consent agenda, they can have it be removed from the consent agenda** by contacting the Secretary of the Board of Governors prior to the meeting or by asking that it be removed before the Chair calls for a mover and seconder for the motion to approve or receive, by unanimous consent, the items listed.

At the Board meeting, before the unanimous consent motion is presented for approval, the Chair of the Board (1) will advise the Board of items that are to be removed from the list, based on prior requests from Board members; and (2) will ask if there are any other items that should be removed from the list. The remaining items are then unanimously approved *en bloc* without discussion saving the time that would be required for individual presentation and voting. Those matters that have been struck from the consent agenda will be handled in the usual way as each Committee’s report is present.

The minutes of the Board meeting will report matters approved as part of the consent agenda as "carried by unanimous consent". Information items received as part of the consent agenda will be reported as received.

New Scholarships, Awards, and Prizes

Action: ☒ Approval ☒ Information ☐ Discussion

The Property and Finance Committee, on behalf of the Board of Governors, approved the Terms of Reference for the new scholarships, awards, and prizes as shown.

Executive Summary:

Scholarships, Awards, and Prizes are funded in two different ways: through donor funding and through operating funding (Western-funded).

The terms of reference for **donor-funded** scholarships, awards, and prizes are recommended by the Senate Committee on Academic Curriculum and Awards (ACA), on behalf of Senate, to the Board of Governors through the President & Vice-Chancellor. In accordance with the terms of reference for the Property and Finance Committee (PF), PF approves these on behalf of the Board.

The terms of reference for **Western-funded** scholarships, awards, and prizes are approved by the Senate Committee on Academic Curriculum and Awards (ACA), on behalf of Senate. There are none to report on for this meeting.

New Donor-Funded Scholarships, Awards and Prizes

Any Undergraduate Program

CIBC Black Excellence Scholarship in Science and Engineering
Awarded to full-time undergraduate students in Year 1 of the faculties of Science or Engineering who self-identify as Black, based on academic achievement. Preference will be given to candidates in any of the following programs: software engineering, artificial intelligence systems engineering, integrated engineering, engineering leadership and innovation, data science, computer science, or game development. Scholarships will continue for up to four years provided that recipients maintain full-time status, achieve a minimum 80% academic average and remain in an eligible program. If a recipient does not retain their scholarship, a replacement recipient will be selected from the same year. The Office of the Registrar will select the recipients.

Value: 3 scholarships of $24,000 ($6,000 annually continuing for 4 years). New recipients will be selected in 2026-2027 and 2030-2031 only.
Effective Date: 2026-2027 to 2033-2034 academic years inclusive

Athletics

The 62 Rowing Crew Award
Awarded to full-time undergraduate or graduate students in any year of any degree program at Western, including the Affiliated University Colleges, who are making a significant contribution as a member of the Rowing Team. As per OUA and U SPORTS

regulations, a non-entering student must have an in-course average of 70%. Candidates must be in compliance with current OUA and U SPORTS regulations. The Western Athletic Financial Awards Committee will select the recipients.

Value: 1 at $5,000, awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

This award is made possible by a generous donation in honour of the 1962 Western Rowing crew.

Faculty of Arts and Humanities

Donna Black Bursary in Visual Arts
Awarded to full-time undergraduate students in the Department of Visual Arts, Faculty of Arts and Humanities based on financial need. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: 1 at $10,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive
Donna Black is a lifelong artist, teacher, and Western Alumnus. She is a firm believer in the importance of the visual arts and its power to transform lives. Her son Christopher studied Visual Arts at Western and has established this bursary in honour of Donna to support student artists in their studies.

Faculty of Health Sciences

Baird Scholarship
Awarded to students entering a graduate Masters or PhD program in Nursing, Arthur Labatt Family School of Nursing, based on academic achievement. Candidates must have graduated with an undergraduate Nursing degree from Western University. A committee in the Arthur Labatt Family School of Nursing will select recipients. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $4,000, awarded annually
Effective Date: May 2026

This award was established with a generous bequest from Helen Marie Baird.

Dr. Joy MacDermid and Donna Beer Bursary
Awarded to full-time graduate students in the Faculty of Health Sciences based on financial need. Preference will be given to students in the Master of Physical Therapy program. A committee in the School of Physical Therapy will select the recipients. At least one member of this committee must hold membership in the School of Graduate and Postdoctoral Studies. This bursary was established with a generous gift from Dr. Jayaprakash Raman (Ph.D ’13), Malini Dhandapani, and Keerthana Jayaprakash, to

support students in financial need who are enrolled in the Master of Physical Therapy program.

Value: 1 at $1,000
Effective Date: May 2026

Hastings Family Memorial Bursary in Nursing
Awarded to full-time undergraduate students in the Arthur Labatt Family School of Nursing, Faculty of Health Sciences based on financial need. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: 1 at $10,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

Mary Hastings and her daughter Margaret both studied nursing and became RNs in the early twentieth century at St Joseph's Hospital in Hamilton. This bursary was established by their grandson and nephew, Paul Butler, a Western alumnus who appreciates the incredible value nurses bring to their patients every day.

Faculty of Law

Harrison Pensa Award
Awarded to full-time undergraduate students in the Faculty of Law based on academic achievement. Preference will be given to candidates who self-identify as belonging to an equity deserving group and are in Year 2 or Year 3 of the Law program. The Faculty of Law will select the recipients.

Value: 1 at $5,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive
This award is made possible by a generous gift from Harrison Pensa.

Faculty of Science

Glen Davis Environmental Science Award
Awarded to full-time undergraduate students in Environmental Science, Faculty of Science, based on academic achievement. The Office of the Registrar will select the recipients.

Value: 2 at $10,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

This award was established with a generous gift to honour Mr. Glen Davis (BA 1964, MA 1966).

Faculty of Social Science

Kaminoulu Family Award for Faculty of Social Science Students in Pursuit of Entrepreneurship
Awarded to full-time undergraduate students in the Faculty of Social Science who are enrolled in the Certificate in Entrepreneurship, based on academic achievement. The Office of the Registrar will select the recipients.

Value: 1 at 1,000 awarded annually
Effective Date: 2026-2027 academic year

This award was established by the Kaminoulu Family to champion the bold fusion of social insight and entrepreneurial action that will define Canada's future. This award recognizes students who are daring to explore bold ideas and, crucially, are applying their unique social science lens to create meaningful and lasting change within our communities and beyond. The Kaminoulu Family Award is an investment in the next generation of changemakers who will not only drive Canada's economic growth and innovation but will also shape a more just, equitable, and prosperous future for all.

Ivey Business School

Donald & Margaret Eiler Family Fund for MBA Students
Awarded annually to a full-time graduate student entering the MBA program at the Ivey Business School, based on academic achievement and financial need. Preference will be given to those who exemplify humanitarian principles through community leadership. Financial need will be determined by the Ivey Business School. The successful recipient will be selected by the MBA scholarship review committee. At least one member of the selection committee will hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $9,100
Effective Date: May 2026

This award was established through a generous estate gift from Donald Eiler, MBA '53.

Schulich School of Medicine & Dentistry

Braxton Stokes Brown Award in Paediatric Neuroscience
Awarded to full-time residents or graduate students in the Department of Paediatrics, Schulich School of Medicine & Dentistry, based on academic achievement and research excellence in paediatric neuroscience. Preference will be given to candidates who are residents. A committee in the Department of Paediatics will select the recipients. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies. Graduate student recipients will be selected in consultation with the Neuroscience graduate program.

Value: 1 at $1,000 awarded annually
Effective Date: 2025-2026 academic year

Braxton Stokes Brown was a healthy baby boy until a catastrophic birth accident left him deprived of oxygen, leading to his diagnosis of severe Hypoxic-Ischemic Encephalopathy (HIE). After fighting for 44 days, Braxton passed away in the arms of his parents and surrounded by family. During this time, Braxton's family learned there is no cure for brain damage. In his memory, this award supports vital research aimed at understanding the brain and advancing our ability to repair it—honouring Braxton's legacy with hope for future healing. The family extends their heartfelt gratitude to Glain Roberts-McCabe, President and Founder of The Roundtable, whose compassion and thoughtfulness inspired and gave life to the idea of honouring Braxton through this meaningful award.

Dr. Norman Ashurst Medical Bursary
Awarded to full-time undergraduate students in the Doctor of Medicine (MD) program, Schulich School of Medicine & Dentistry based on financial need. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: Number and value of bursaries will vary based on funds available
Effective Date: 2026-2027 academic year

This award was established in honour of Norman who finished his anesthesiology designation at The University of Western Ontario before spending a wonderful, lifelong career in medicine. Norman believed in supporting medical students and ensuring that deserving doctors didn't have financial barriers. Norman loved to travel, enjoyed the arts and left a lasting impact.

Dr. Paul Cooper and Dr. David Hiebert Medical Student Bursary
Awarded to full-time undergraduate students in the Doctor of Medicine (MD) program, Schulich School of Medicine & Dentistry based on financial need. Preference will be given to candidates who self-identify as a member of the 2SLGBTQIA+ community. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: 1 at $5,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

Schulich School of Medicine & Dentistry MD/PhD Award
Awarded to full-time undergraduate students entering the MD/PhD program in the Schulich School of Medicine & Dentistry based on academic achievement and evidence of research potential. The award will continue for each year of the recipient's MD program, if they remain in the MD/PhD program. The award does not continue for the PhD research phases of the program. If a recipient does not continue in the MD/PhD program, no replacement will be selected. The Schulich School of Medicine & Dentistry will select the recipients.

Value: 1 at $40,000, awarded annually ($10,000 each year, for 4 years). Only one student will hold the award in any given year.
Effective Date: 2026-2027 to 2029-2030 academic years inclusive.

Faculty of Education

Neil Family Award for Studies in Applied Behaviour Analysis
Awarded to graduate students in the Faculty of Education who are engaged in the study of Applied Behaviour Analysis (ABA). Preference will be given to candidates who are engaged in the professional practice of ABA and who demonstrate a strong commitment to serving the community through the practice of ABA. Selection is based on academic achievement and demonstrated or potential contributions to the practice or field of Applied Behaviour Analysis (ABA). A committee in the Faculty of Education will select recipients. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $1,000 awarded annually
Effective Date: May 2026

This award was established with a generous donation from the Neil Family.

Faculty of Law

Barry William McCormack Memorial Scholarship
Awarded to full-time undergraduate students entering first year in the Faculty of Law based on academic achievement (minimum 85%) and demonstrated financial need. Online financial assistance applications are available through Student Center and must be submitted by September 30. The Office of the Registrar will select the recipients.

Value: 1 at $5,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

Barry William McCormack, LLB '73, was a young father when he commenced his studies at UWO. He was a bright student with an aptitude for academics. After only two years of his undergrad program, his academic excellence earned him early acceptance to the Faculty of Law program. He worked tirelessly to balance a full-time course load with part-time work while always making his family a priority. Law school provided the introduction to lifelong close friendships and was the launching pad for his successful 35-year career practicing law in London. Barry passed away in 2025 at the age of 78 and is missed every day. This scholarship was created in loving memory of him through a gift from his daughter.

Faculty of Social Science

T. R. Balakrishnan Doctoral Scholarship
Awarded to full-time graduate students in Year 2 or beyond of the PhD program in the Department of Sociology, Faculty of Social Science, who have started their dissertation in Demography. Selection will be based on academic achievement, research excellence, and a commitment to the profession of Demography. A committee in the Department of Sociology will select the recipient. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $10,000 awarded annually
Effective Date: May 2026 to April 2031 inclusive

This scholarship is made possible by a donation from T.R. Bala Balakrishnan. This PhD scholarship in demography significantly strengthens the Department of Sociology's profile in quantitative methods and population research. By attracting outstanding graduate students, it creates strong incentives for emerging scholars to develop advanced methodological skills – ranging from statistical modelling and causal inference to the analysis of large administrative and survey data. These skills are essential not only within core demographic research, but also across closely related areas such as health, inequality, labour markets, and policy evaluation. This scholarship enhances our training environment, deepens faculty-student collaboration, and reinforces our commitment to rigorous, data-driven social science.

Ivey Business School

Carmen and Corrie Gicante Leadership Character Scholarship
Awarded to a full-time student in the MBA program at the Ivey Business School who demonstrates a deep commitment to developing their leadership character, positively influences others, uplifts humanity, and strives to make the world a better place. Academic achievement will also be considered. Nominations will be submitted by fellow Ivey MBA students. The successful recipient will be selected by the MBA scholarship review committee. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $10,000
Effective Date: May 2026 to April 2030 inclusive

This award was established with a generous gift from Corrie Gicante in memory of Carmen Gicante, MBA 2000.

Schulich School of Medicine & Dentistry

Dr. S. Mark Taylor Resident Teacher Award for Postgraduate Education
Awarded to senior residents in Otolaryngology, Schulich School of Medicine & Dentistry who have provided consistently outstanding teaching experiences to their junior residents. The Department of Otolaryngology- Head and Neck Surgery will select the recipients.

Value: 1 at $1,000 awarded annually
Effective Date: 2025-2026 academic year

This award was established through a generous gift from the Taylor family, led by Dr. S. Mark Taylor (MD '95), who completed both his medical degree and Otolaryngology residency ('00) at Western University. Dr. Taylor credits his formative years at Western with shaping his professional career and instilling a lasting passion for Otolaryngology and medical education. This legacy continues into the next generation, as one of his daughters pursues the same specialty. Through this award, the Taylor family seeks to support and recognize outstanding educators while advancing the training of future physicians in a field they care deeply about.

Dr. Sachin R. Pendharkar Bursary in Medicine
Awarded to full-time undergraduate students in the Doctor of Medicine (MD) program, Schulich School of Medicine & Dentistry based on financial need. Preference will be given to candidates in first year. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: 1 at $2,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

This award was established through a generous gift from Dr. Sachin Pendharkar (MD '02), who credits Western for the start of his career in healthcare, medical research and clinical leadership. Sachin was Vice President and President of the Hippocratic Council during his medical training, advocating for his peers and for future students to be able to access medical education. Through this award, Sachin hopes to enhance educational opportunities at Western and inspire future physicians to become strong leaders.

Ivey Business School

MBA 2000 Award
Awarded to a full-time graduate student in the MBA program at the Ivey Business School, based on financial need, once core courses are completed. Preference will be given to students who are a parent or guardian caring for a dependent/s under the age of 18 or a primary caregiver to another individual. Online financial assistance applications are available through Student Center and must be submitted by October 31. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at $10,000
Effective Date: May 2026 to April 2031 inclusive

This award was established with a generous gift from the MBA Class of 2000 in honour of their 25th reunion.

Ben Graham Centre for Value Investing Graduate Prizes
Prizes are awarded to full-time students at the graduate level at Ivey Business School in the following areas:

- For the best and highest-grade MBA value investing valuation report in each Value Investing class.
- For students who demonstrate exceptional promise in understanding and applying value investing concepts and techniques.
- For the group, among all value investing classes, whose stock recommendation received the highest recognition by the Fund's Advisory Board. The Ivey Business School will select the recipients in consultation with the Ben Graham Centre for Value Investing. At least one member of the selection committee will hold current membership in the School of Graduate and Postdoctoral Studies.

Number and value will vary annually based on funding available
Effective Date: May 2025 to April 2030

Prizes are supported by contributions from Fairfax Financial Holdings, Stacey Muirhead Capital Management Ltd., and Robotti & Company Advisors LLC.

Ben Graham Centre for Value Investing Undergraduate Prizes
Awarded to full-time undergraduate HBA students at the Ivey Business School in the following areas:

- For the best and highest-grade HBA value investing valuation report in each Value Investing class.
- For students who demonstrate exceptional promise in understanding and applying value investing concepts and techniques.
- For the group, among all value investing classes, whose stock recommendation received the highest recognition by the Fund's Advisory Board. The Ivey Business School will select the recipients in consultation with the Ben Graham Centre for Value Investing.

Number and value will vary annually based on funding available
Effective Date: 2025-2026 to 2029-2030 academic years inclusive

Prizes are supported by contributions from Fairfax Financial Holdings, Stacey Muirhead Capital Management Ltd., and Robotti & Company Advisors LLC.

Faculty of Engineering

Peter T. Johnston Bursary
Awarded to full-time undergraduate students in the Faculty of Engineering based on financial need. Online financial assistance applications are available through Student Center and must be submitted by October 31. The Office of the Registrar will select the recipients.

Value: 1 at $5,624 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

This bursary was established by a generous donation from Peter T. Johnston (BESc 1984).

Faculty of Social Science

Dr. David R. Pederson Award in Attachment and Early Development
Awarded to full-time undergraduate students in a Psychology program in the Faculty of Social Science based on academic achievement and a demonstrated academic or experiential interest in attachment, caregiving environments, or early social and emotional development. This interest may include honours research, independent studies, experiential learning, or related scholarly work aligned with these areas. Preference will be given to candidates who are in third or fourth year. The Faculty of Social Science, Department of Psychology will select the recipients.

Value: 1 at $5,600 awarded annually
Effective Date: 2026-2027 academic year

This award was established through the generosity of Dr. David R. Pederson and Deanne Pederson, both graduates of Western University, to support Western students.

Standard and Poor's (S&P) Global Ratings Report

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The S&P Credit Rating Report is published annually and provides the University's credit rating. The report is provided to the Property and Finance Committee and the Board of Governors on an annual basis for information. In February 2026, S&P Global re-affirmed Western's credit rating at AA+, with a stable outlook.

The AA+ rating is comparable to other Ontario institutions most recent ratings, such as the University of Toronto (AA+ Stable), Queens (AA+ Stable) and McMaster (AA Stable).

The attached report is consistent with the information provided to the Property and Finance Committee in February 2026.

Documentation Provided:

S&P Global Ratings Report

Western

Financial Services

MEMORANDUM

To: Property & Finance Committee

From: Eric Mallory

Date: February 20, 2026

Re: S&P Credit Rating Report – AA+ Stable

Members of the Committee,

I'm pleased to share that Western's credit rating of AA+ with a stable outlook was re-affirmed by S&P Global on February 19, 2026.

A credit rating is a forward-looking independent opinion regarding the credit worthiness of an organization (Western). In their report, S&P highlights Western's robust student demand and market position, sound management, and financial resources as part of their rationale.

The published credit rating report is attached for your reference and we'll have the opportunity for discussion when this item is presented for information in April.

Take care,

Eric Mallory
Associate Vice-President (Financial Services)

Western University, Support Services Building 6100, 1393 Western Road, London, ON, Canada N6G 1G9
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S&P Global
Ratings

RatingsDirect®

University of Western Ontario

February 19, 2026

This report does not constitute a rating action.

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Credit Highlights

Overview

Enterprise profile	Financial profile
--University of Western Ontario's robust local demand and market position underpin the university's strong enterprise risk profile.	--We expect Western to sustain very strong operating performance over the next two years despite limited financial flexibility and higher operating costs.
--Prudent management is addressing enrollment constraints resulting from the federal government's cap on international students including with strategic measures to manage domestic enrollment.	-- Western's debt burden will remain moderate while maximum annual debt service (MADS) will continue to decrease.
--The economic and demographic fundamentals of the Province of Ontario remain very strong and help sustain domestic demand.	--We expect that extremely strong financial resources compared with those of peers will continue to boost the university's financial risk profile.

S&P Global Ratings' long-term issuer credit rating on the University of Western Ontario is 'AA+'. The rating reflects Western's 'aa+' stand-alone credit profile (SACP), which is based on our combined assessment of the university's very strong enterprise and financial profiles. Western has faced financial pressures from years of the province's freeze on tuition for domestic students. The province's recent announcement of increased operating grants and more funded spaces for the sector, as well an end to the tuition freeze, will be positive for the university's revenues in the coming years, in our view, but we have not incorporated this into our base case and will monitor as more details emerge. Western also continues to struggle with the federal cap on new international students, and rising expenses, particularly for wages and benefits. However, it benefits from strong domestic demand and prudent management, which has enabled the university to build an exceptional level of cash and investments. We expect these financial resources to remain well above 6x debt outstanding, supporting a solid financial profile in the next several years and providing a substantial buffer to manage any near-term volatility. The rating also reflects our opinion of a moderately high likelihood that the Ontario government would provide extraordinary support in the event of financial distress.

Outlook

The stable outlook reflects our view that, in the next two years, Western will hold a strong market position supported by domestic demand. This will help the university post operating margins of more than 5% of operating expenditure on average while maintaining high cash and investments and a moderate debt burden.

Downside scenario

We could take a negative rating action, in the next two years, if Western experiences a drop in domestic demand that dampens operating performance and its debt burden increases such that cash and investments are no longer sufficient to cover more than 6x debt outstanding.

Upside scenario

Although we view it as unlikely in the next two years, we could raise the rating if Western strengthened its market position. In addition, if the provincial government materially increases its funding to public universities and relaxes its restrictions on tuition hikes, resulting in greater financial flexibility, and if Western's debt service decreases in line with that of 'AAA' rated peers, this could support an upgrade. In this scenario, we would expect our assessment of the university's role and link to the province to remain unchanged.

Rationale

Strong domestic demand and prudent management bolster the university's enterprise risk profile

We believe that Western has a solid market position based on strong domestic student demand and quality characteristics. In our assessment, the higher education sector has low industry risk, characterized by its high barriers to entry and typically countercyclical nature, which tends to withstand economic downturns better than other sectors. In addition, the university benefits from excellent economic fundamentals in its main service area, Ontario, the most populous province in Canada, with high GDP per capita, estimated at almost US$55,300 in 2026.

In 2024, the Canadian government implemented a cap on new international undergraduate study permits, which contributed to a drop in Western’s international enrollment. As a result, we expect Western’s total full-time equivalent (FTE) enrollment to remain flat over the next two years, following several years of stable growth. This moderate trajectory also reflects a deliberate management decision to preserve academic quality and ensure financial responsibility.

Western continues to demonstrate strong domestic demand, with rising in-province interest, as reflected in its steady application levels and the high number of applicants identifying it as their first-choice university.

For fall 2025, total FTE enrollment decreased by 0.5%, reaching 40,847. Graduate student numbers fell by 3%, while undergraduate numbers remained flat. We expect domestic demand will remain stable while international enrollment will likely struggle to recover in the next few years.

In our view, student quality remains strong, as evidenced by the university’s historically stable retention rate and selectivity rate (offers to applications), which have averaged 93% and 64%,

respectively, over the past three years. We expect selectivity to strengthen slightly but remain above 50%; overall, we anticipate both indicators will remain very strong.

Founded in 1878 and located in London, Ont., Western is a research-intensive, doctoral university with 12 faculties and schools, including medicine and dentistry, law, engineering, and business. It is a founding member of the U15, Canada's most distinguished research universities. Western also has affiliations with four research institutes, two teaching hospitals, and two university colleges (Huron and King's). Brescia College has fully integrated into Western.

In our view, Western demonstrates sound management and governance practices consistent with those of other rated Canadian universities. We consider the university to have prudent policies, procedures, and risk management capabilities. Senior administration's operational effectiveness is reflected in a track record of strong operating margins and investment policies that support a stable credit profile. We also believe that management has been prudent in its approach to enrollment planning and cost management, particularly given the constraints in the postsecondary sector. Western operates under an annually approved operating and capital budget, supported by multiyear projections that guide financial planning and decision-making.

A moderate debt level and extremely strong financial resources enhance Western's financial risk profile

We consider Western's financial risk profile to be very strong and resilient, supported by disciplined financial practices. Although international student enrollment has fallen at Canadian universities, Western is less exposed to this risk given its lower reliance on international students than peers. Wages and salaries remain the main pressure, representing 62% of Western's 2026 projected operating expenditures.

In February 2026, Ontario announced a new postsecondary funding framework that will allocate an additional C$6.4 billion over four years, bringing annual operating funding to C$7 billion beginning in fall 2026. The province will also end its freeze on domestic tuition and allow annual increases of up to 2% for the next three years. Although this announcement represents a positive development for the sector, we have not incorporated any changes into our projections for Western, as it is unclear at this point how the new funding will be allocated at the institution level. Despite this change, the tuition framework remains a constraint on the university's flexibility to raise student-generated revenues, in our view.

We expect revenue growth to remain steady while operating expenditures continue to increase. As a result, we expect operating margins as a percentage of operating expenditures will narrow over the next two years, averaging 9% during fiscal years 2024–2028.

In our view, Western has very strong liquidity, supported by above-average cash and investment performance that provides a buffer against volatility in operating performance as well as an offset against debt financing for its capital plan. We estimate that at fiscal year-end 2026, total cash and investments will amount to C$3.5 billion and will be sufficient to cover approximately 2.2x operating expenses. In 2025, 29% of these assets were held in externally restricted endowments. Western has the eighth-largest endowment among Canadian universities. The endowment market value rose to C$1.4 billion at the end of fiscal 2025 from C$1.3 billion in the previous year.

Western faces significant capital requirements, and we expect it will proceed with planned projects to meet these needs. Key projects include construction of a new engineering building, a new undergraduate residence, a new interdisciplinary research building, and several campuswide sustainability initiatives. These projects are financed through the proceeds of previously issued

debentures, reserves, donations, and grants. They could lead to some depletion of financial resources beyond our base-case scenario.

Total debt in 2025 consisted of two 40-year fixed-rate bullet debentures, amounting to C$288.7 million (maturing in 2047 and 2057), and C$13.5 million in 15-year amortizing banker's acceptances sourced from a C$100 million nonrevolving facility maturing in fiscal 2027. We believe the refinancing risks associated with the bullet debentures are partially mitigated by the time until maturity and the voluntary sinking fund, which exceeded C$52 million as of fiscal 2025 year-end.

We project total debt to be approximately C$295 million by 2026. Based on this, debt metrics indicate that the ratio of total cash and investments to total debt will be more than 12x, which is extremely strong and better than that of peers. We incorporate this ratio as a positive adjustment.

According to its capital plan, the university won't issue additional external debt over the next two years. However, Western remains open to issuing new debt if internal resources are insufficient or if external financing becomes a more cost-effective option. Should the university proceed with new borrowing, it would likely occur around 2030; however, given the uncertainty regarding the potential amount and terms, we have not incorporated this into our projections. We estimate that MADS will represent approximately 2.1% of adjusted expenses by fiscal year-end 2026.

Western has a defined-contribution pension plan for active employees, effectively transferring investment risks away from the institution. This compares with certain institutions that might encounter obligations for special solvency payments to address pension plan deficits. Most of Western's postemployment liabilities relate to unfunded nonpension benefits, such as medical and dental. As of fiscal year-end 2025, these liabilities totaled C$452.9 million.

We have not identified any additional contingent liabilities that could materially affect our assessment of Western's credit profile.

Moderately high likelihood of extraordinary provincial government support

The ratings reflect Western's SACP and our belief that there is a moderately high likelihood that the government of Ontario would provide extraordinary support to Western in the event of financial distress. The impact of this potential support on the ratings is neutral. This reflects our assessment of the university's important role in the province, given that postsecondary education is one of Ontario's priorities in both spending and mandate (after health care and school boards).

Moreover, our assessment of Western's important role recognizes the absence of viable private alternatives. The university's substantial size, distinguished reputation, and robust research capabilities make it difficult to replace. The province's oversight, program-approval rights, and tuition regulation over Western suggest a strong link to the government. Also supporting this view is that the province provides substantial operating grants, which account for a five-year average of 18% of the university's total revenue; in addition, it appoints four of 28 board members.

We rate Western two notches above Ontario. The differential reflects our view that there is a measurable likelihood that the university's financial resources would be sufficient to sustain ongoing operational and debt service obligations in the event of a government default or temporary suspension of payments. In addition, the differential reflects our belief that Western operates independently of the Ontario government as an autonomous legal entity with ownership of its assets. We consider the risk of extraordinary negative government intervention low, given

the university's operational independence, important public policy role, and the government's largely noninterventionist stance on the sector.

We expect that Western will hold higher cash and investments than those of peers, of more than 10x its debt outstanding, over the next two years. We also expect the university will maintain a very strong market position, supported by its superior domestic reputation, evidenced by its stable enrollment levels in line with its strategy, which will help to mitigate challenges related to reduced international student enrollment due to federal policy changes.

Key Statistics

University of Western Ontario -- Selected indicators

	--Fiscal year ended April 30--				
Mil. C$	**2022**	**2023**	**2024**	**2025**	**2026f**
Enterprise profile					
Full-time equivalent enrollment (FTE; no.)	36,904	38,013	39,454	41,035	40,847
Annual FTE change	4.7	3.0	3.8	4.0	(0.5)
Undergraduate selectivity rate (%)	63.5	67.1	68.3	67.6	56.7
Undergraduates as a % of total FTE enrollment	81.4	82.1	82.3	82.0	82.5
Retention rate (%)	92.0	92.5	92.6	94.3	-
Graduation rates (six years) (%)	84.5	83.7	85.1	84.9	-
Financial profile					
Adjusted operating revenue	1,445	1,426	1,533	1,613	1,656
Adjusted operating expense	1,184	1,299	1,376	1,442	1,527
Net adjusted operating margin (%)*	22.0	9.8	11.4	11.8	8.5
Student dependence (%)	34.2	36.7	35.5	35.1	34.7
Government operating grant dependence (%)	18.6	18.8	17.5	17.2	18.7
Endowment and investment income dependence (%)	7.8	8.6	15.5	14.6	10.7
Cash and investments	2,897	3,024	3,317	3,575	3,457
Cash & investments to adjusted operating expenses (%)	244.7	232.7	241.1	247.9	226.4
Outstanding debt	327	319	311	302	295
Cash & investments to debt (%)	884.8	947.0	1,066.5	1,182.6	1,169.8
Maximum annual debt service/total operating expense (%)	2.72	2.45	2.35	4.53	2.09

*As % of adjusted operating expense. f—Forecast.

Rating Component Scores

University of Western Ontario—Ratings score snapshot

Industry risk	2
Economic fundamentals	1
Market position	2
Management & governance	2
Enterprise risk profile	2
Financial performance	2

University of Western Ontario—Ratings score snapshot

Financial resources	1
Debt and contingent liabilities	2
Financial risk profile	2
Stand-alone credit profile	aa+
Issuer credit rating	AA+

S&P Global Ratings bases its ratings on global not-for-profit education providers on the seven main rating factors listed in the table above. S&P Global Ratings' "Global Not-For-Profit Education Providers," April 24, 2023, summarizes how the seven factors are combined to derive each global not-for-profit education provider's stand-alone credit profile and issuer credit rating.

Related Criteria

- Criteria | Governments | General: Global Not-For-Profit Education Providers, April 24 2023
- General Criteria: Environmental, Social, And Governance Principles In Credit Ratings, Oct. 10 2021
- General Criteria: Rating Government-Related Entities: Methodology And Assumptions, March 24 2015
- General Criteria: Methodology: Industry Risk, Nov. 19 2013
- General Criteria: Principles Of Credit Ratings, Feb. 16 2011

Related Research

- Public Not-For-Profit Higher Education In Australia, Canada, And The U.K. 2026 Outlook: Pressures Mount Amid Policy Changes, Dec. 8, 2025
- U.S. Not-For-Profit Higher Education 2026 Outlook: Lower Expectations For Higher Education, Dec. 2, 2025

Ratings Detail (as of February 19, 2026)*

University of Western Ontario	
Issuer Credit Rating	AA+/Stable/--
Senior Unsecured	AA+
Issuer Credit Ratings History	
20-Feb-2025	AA+/Stable/--
21-Feb-2024	AA/Positive/--
26-Feb-2013	AA/Stable/--

*Unless otherwise noted, all ratings in this report are global scale ratings. S&P Global Ratings' credit ratings on the global scale are comparable across countries. S&P Global Ratings' credit ratings on a national scale are relative to obligors or obligations within that specific country. Issue and debt ratings could include debt guaranteed by another entity, and rated debt that an entity guarantees.

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Annual Public Report re: Bill S-211 – Fighting Against Forced Labour and Child Labour in Supply Chains Act

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of the Property and Finance Committee, the Board of Governors approve the 2026 Public Report submission to comply with Bill S-211; and

Grant the President & Vice-Chancellor the authority to approve and attest to the report, on behalf of the Board of Governors.

Executive Summary:

Western is required to report our annual compliance with Bill S-211, Fighting Against Forced Labour and Child Labour in Supply Chains Act (the "Act"). Western's annual reporting must be submitted to the Department of Public Safety by May 31 of each year.

Our 2026 report shows Western's progress on the implementation of training and education programs at Western and in advancing overall practices in Canadian Higher Education.

Western Procurement Services continues to implement our Sustainable Procurement Strategy, launched in 2023, for which our response to Bill S-211 is a critical component. The team was recognized in 2025 by the Sustainable Purchasing Leadership Council, for a Leadership Award for Overall Program.

Links:

Sustainable Procurement - Financial Services - Western University (uwo.ca)

Documentation Provided:

Western's Public Report and Attestation

Bill S-211: Fighting Against Forced Labour and Child Labour in Supply Chains Act Public Safety Canada Report

University of Western Ontario

Reporting entity's legal name: University of Western Ontario
Financial reporting year: May 1, 2025, to April 30, 2026
Identification of a revised report: N/A
Business number(s), if applicable: 108162587 RR0001
Identification of a joint report: N/A
Identification of reporting obligations in other jurisdictions: N/A
Entity categorization according to the Act: Entity (University)
Sector/industry: Public Sector / Higher Education
Location: London, Ontario, Canada

Introduction

At the University of Western Ontario (Western University or Western) we recognize that modern slavery remains prevalent around the world. We are a leading research-intensive university and global community of individuals focused on making change in the world, today, and are committed to playing our role in mitigating all forms of modern slavery within our operations and supply chains. In addition to Western University's strategic plan, Towards Western at 150, which identifies global sustainability as a key focus, the University has initiated a number of activities to strive toward ethical supply chain management. This report will serve to address these activities as they relate to ***Bill S-211, Fighting Against Forced Labour and Child Labour in Supply Chains Act (the Act).***

Reporting Entity and Structure

The University operates under the governance framework set forth by the University of Western Ontario Act, 1982, which establishes its primary governance bodies: the Board of Governors, the Senate, and the University Council. The Board of Governors is responsible for the overall governance of the University. In consultation with Senate, the Board sets the strategic direction of the institution. The Board appoints the President and Vice-Chancellor, Vice-Presidents, Deans, and other senior administrators of the University. The Board has responsibility for all financial matters and matters related to property. It establishes and enforces regulations for the use of the University's buildings, grounds and ancillary operations, approves the University's operating and capital budgets, oversees expenditures from those budgets, and sets fees.

The University is globally minded and attracts students and staff from around the world. It aims to attract, develop, reward, and retain top-tier talent to maintain its status as a leading institution in teaching and research. Western has a strong international presence, with partnerships, research collaborations, and alumni networks spanning the globe.

In the 2024-2025 institutional data reporting period, the University employed 1,417 faculty members, 2,756 staff members, and welcomed approximately 41,000 full-time students[1]. The University reported revenues of $1.7 billion and had assets of $5.2 billion in fiscal 2025[2].

Supply Chain Activities

Western engages in extensive procurement activities, adhering to public procurement regulations and ethical sourcing practices. These activities encompass a broad spectrum of goods and services, including but not limited to construction, office supplies, electronics, food and catering, travel services, laboratory equipment and supplies, books, printing services, and waste management. The central Procurement Services unit manages oversight and compliance with domestic directives, legislation, and international trade agreements, and manages procurements through collaborative frameworks, notably with the Ontario Education Collaborative Marketplace (OECM) and other consortia, to leverage collective purchasing power and achieve cost efficiencies. Operating in a decentralized environment, individual units manage procurement processes where the value is less than the open competitive threshold as outlined in the Broader Public Sector Procurement Directive.

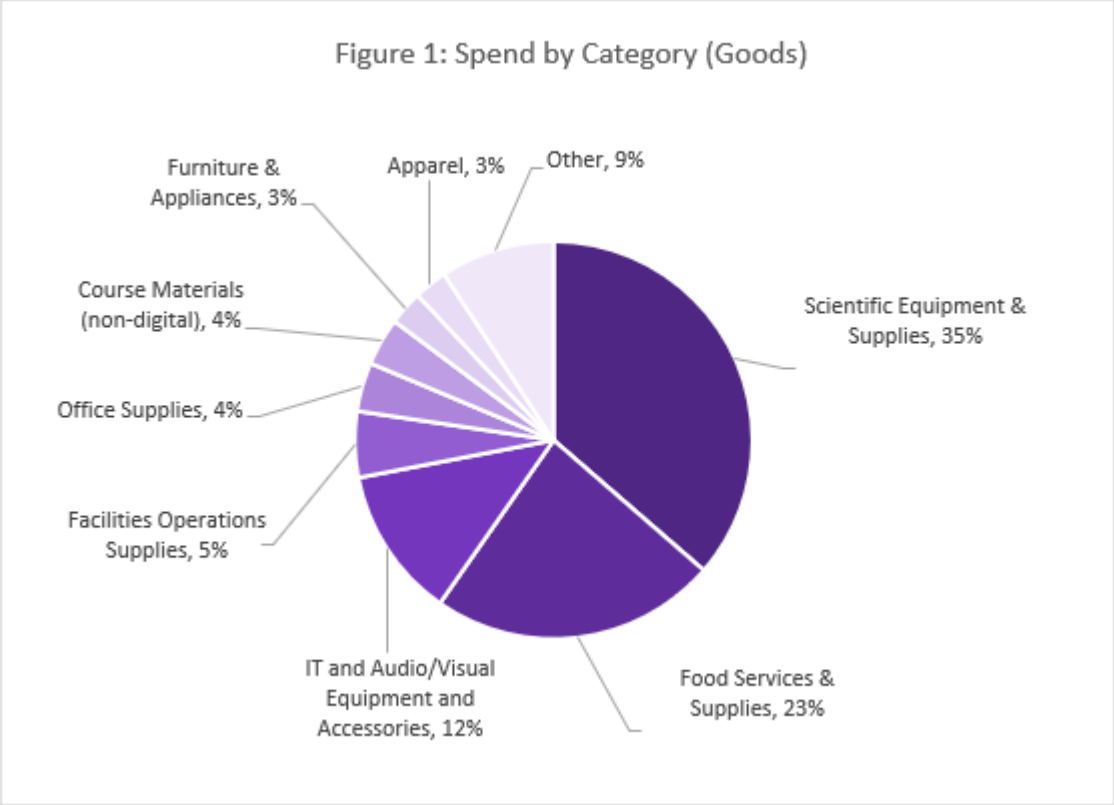
[1] Office of Institutional Planning & Budgeting https://www.ipb.uwo.ca/institutional-data/institutional-data-dashboards.html; Summary of Enrolment https://www.ipb.uwo.ca/db/student-enrolment/suepp.php

[2] Western University Financial Statements https://www.uwo.ca/finance/forms/docs/corporate_accounting/2025.pdf

The University recognizes the existence of modern slavery risk across its supply chains and, further, that these risks may be elevated in certain supply chains due to factors such as geographical location and/or source locations for materials and products the University procures. There is an identified lack of visibility in certain overseas markets which may present an increased risk of modern slavery, especially in secondary (and further) supply chain tiers, and in source materials used in the University's activities.

Category Spend

Western's spend on goods *in scope* of the Act during the reporting period was approximately $91 million (Figure 1).



The following are identified as high-risk categories relevant to the University. The U.S. Department of Labor report on Goods Produced by Child Labor or Forced Labor was consulted for the development of this list.

- Electronics
- Apparel
- Furniture
- Timber and paper products
- Food & beverage (coffee)
- Promotional and Branded Merchandise

In addition, scientific equipment and supplies is identified as a category which may carry risk in the supply chains.

Local Buying
Operational units strive to work with local suppliers. Approximately 84% of spend on all goods *in scope* of the Act is with Canadian businesses, and 14% with suppliers in the United States. In compliance with the Building Ontario Business Initiatives Act, effective in 2024, and the (U.S.) Procurement Restriction Policy, effective in 2025, as well as navigating evolving tariff impacts, Western further prioritizes spending with Ontario and Canadian-based businesses. As a research-intensive university, spending with U.S. based suppliers may fluctuate from year to year, driven primarily by the procurement of specialized scientific equipment not available from Canadian businesses.

A high-level assessment was conducted on international spend with suppliers located in high-risk countries. The result was a very nominal occurrence of spend, which was largely with service firms not in scope of this report. However, the University acknowledges the risk of forced or child labour in our supply chains which are not covered by our initial assessment of our direct (tier 1) suppliers.

Policies and Due Diligence Processes

The University's procurement policies and procedures govern our activities and aim to reduce the risk of modern slavery in our operations and supply chain. Western's Sustainable Procurement program incorporates social, governance, and ethical considerations into procurement policy. As part of the University procurement policy, employees are required to consider the ethical and governance impacts of all purchasing decisions.

In addition to internal programs, Western Procurement Services works collaboratively with the Ontario University Professional Procurement Management Association and as a member of CASPAR, a Canada-wide inter-university working group on Sustainable Procurement, on various initiatives including supplier engagement and development of training.

Supplier Code of Conduct
Western University is committed to sourcing in an ethical, legally compliant, and socially responsible manner and expects suppliers to adhere to equivalent standards. The Supplier Code of Conduct (SCoC), implemented in 2024, sets out the minimum ethical standards and business conduct for any supplier that provides the University with goods or services.

The standards set out in the SCoC address issues such as forced and child labour, fair treatment of employees, wages and benefits, worker health and safety, etc., that align with the International Labor Organization (ILO) and other applicable regulations such as the new Supply Chains Act, Canada. To further ensure adherence to these standards, Western updated the SCoC in 2025 to clarify the University's right to conduct risk-based due diligence when credible concerns arise regarding supplier compliance, including the review of relevant documentation and direct engagement with the supplier to clarify and rectify incidences of non-compliance. The Supplier Code of Conduct is a key component for the relationship between Western and its suppliers to share the responsibility of meeting regulatory compliance, managing risks, and reputation.

The Supplier Code of Conduct is distributed to suppliers through the following methods:

- New supplier onboarding
- Purchase order terms and conditions
- Tendering opportunities (RFx documents)
- Contracts and agreements
- Direct outreach to contracted and high-risk suppliers

Trademark Licensing and Fair Trade

Food and beverage and apparel have been identified as high-risk categories. Western's Hospitality and Food Services, and Retail Services (the Bookstore) have a history of practice related to ethical sourcing and reducing the risk of forced labour in supply chains.

For example, a variety of Fair-Trade products—such as coffee, tea, bananas, and chocolate—are available across residence dining operations, campus outlets, and vending services. Hospitality and Food Services also prioritizes buying locally, with tier one suppliers being predominantly located in Ontario.

Western's Dellelce Family Bookstore, managed by Western Retail Services, adopted Western's institutional Supplier Code of Conduct in 2024, and previously, have had a Code of Conduct with University licensees and their contractors since 2010. Both codes of conduct include, but are not limited to, establishing ethical principles, employment standards, and International Labour Organization practices for child labour and forced labour. This Code of Conduct helped to inform and develop Western's institutional Supplier Code of Conduct. The Bookstore's procurements are also integrated into Western's central Human Rights Due Diligence program.

The Bookstore works closely with the National Association of College Stores (NACS) and its network of members across North America to stay aware of potential issues and concerns in the industry. This vigilance is helping advance transparency and promote positive change to ethical principles and employment standards around the world. Additionally, on an annual basis, the Bookstore completes a trademark licensing review and report which is an opportunity to review supply chain issues relevant to the bookstore operations and incorporate findings into future action with suppliers and sourcing. Excerpted from the 2026 report: Most Canadian apparel brands are covered under Bill S-211 (Fighting Against Forced Labour and Child Labour in Supply Chains Act) reporting requirements, but enforcement and meaningful action on forced/child labour risks remain limited. No prominent domestic labour violations have led to public sanctions, though supply chain transparency continues to be a major concern. The Bookstore will continue to collaborate with suppliers, advocacy groups and other universities to keep monitoring all industry issues.

Risk Assessment and Management

We recognize the risks of forced labour and child labour remain prevalent in supply chains and that we have a shared responsibility with our suppliers. To go beyond compliance and proactively strengthen monitoring and mitigation efforts, Western's efforts include a Human Rights Due Diligence (HRDD) program focused on forced labour and child labour. This system uses best-practice methodologies to map risks within the supply chain and outlines actionable steps for identified high-risk suppliers. These steps include ensuring acknowledgement of the SCoC, follow-ups, integrating discussions into supplier

engagements, and identifying suppliers needing support to implement robust human rights standards and practices.

In 2025, Western transitioned its risk assessment framework from development to active implementation. This was supported by the formalized SCoC due diligence procedure and the launch of a formal grievance mechanism to capture potential concerns. To execute this framework, Western continues to utilize its Leadership Assessment Questionnaire to evaluate supplier compliance. Furthermore, following a scan of audit tools and peer benchmarking, Western has begun integrating proactive risk management, leveraging public sources to monitor high-spend and higher-risk suppliers for human-rights.

Leadership Assessment Questionnaire

Western continues to issue the environmental, social, governance & ethical Leadership Assessment Questionnaire to contracted, high spend, and/or high-risk suppliers. The goals of this questionnaire include:

- Provide an overview of our commitments to responsible sourcing and the expectation we have of our supply chain
- Obtain information from suppliers about their practices and commitments, to help us identify risks & opportunities and improve our collective impact through partnerships, collaboration and learning, and
- Distribute Western's SCoC.

The questionnaire, in relation to the ethical and governance pillars of sustainability, includes questions pertaining to responsible management practices and human rights due diligence practices. Data from these questionnaires helps Western identify emerging trends in supplier transparency and prioritize areas where targeted engagement is required.

Sustainable Procurement Toolkit and Request for Proposal/Quote Processes

Supply chains and procurement hold significant potential for both positive and negative sustainability impacts. It is essential to emphasize the collective responsibility of every purchase, regardless of its scale. A decision-making toolkit is utilized for centrally managed procurements to streamline the process of identifying and integrating sustainability considerations into purchasing decisions, including Request for Proposals (RFPs).

The toolkit helps to identify where there may be a high risk for ethical supply chain practices, based on the product category or commodity, and provides suggested questions to assess and evaluate in an RFP. This may include requesting information on systems, policies, practices, or codes of conduct to ensure compliance with human rights standards within their supply chain and/or operations. Every RFP issued by central Procurement Services, during the reporting period, included mandatory ethical questions.

In 2025, Western enhanced this toolkit and strengthened supplier support by introducing two dedicated supplier-facing resources: Responding to Sustainability Questions in Bids and the Supplier Sustainability Expectations Guide. These resources are designed to help suppliers understand Western's ethical requirements and provide comprehensive evidence of their human rights' due diligence practices during the RFP process. Where sustainability criteria are applied, suppliers are required to provide appropriate validation or documentation, ensuring a transparent and evidence-based procurement process that aligns with Western's sustainability priorities.

Remediation Measures

Grievance Mechanism
Following a review of best practices and as a key step in developing our remediation framework, Western established a formal grievance mechanism in 2025, providing a channel for stakeholders to report potential SCoC or other human rights violations directly to Procurement Services.

Corrective Action Process
Upon being notified of a potential violation of the SCoC, Procurement Services will validate the non-compliance with due diligence procedures. In the event that a supplier is confirmed to be non-compliant with Western's SCoC, they will be issued a notice of non-compliance and be expected to submit and implement a corrective action plan within thirty (30) days of receiving the notice. Consistent with Western's procurement contracts, Western shall have the option, at its sole discretion, to terminate the agreement with the supplier who fails to execute these plans.

Western does not have an institution-wide procedure addressing remediation specifically related to loss of income that results from any measure taken to eliminate the use of forced labour or child labour in its activities.

Training and Education

As a place of learning, we recognize our responsibility to raise awareness on the issue of modern slavery, and to educate, specifically, on modern slavery risks and best practices. Western Procurement Services has incorporated ethical supply chain management into internal employee training.

Staff and Faculty Training
In 2025, Western launched a Modern Slavery online training module available for all staff and faculty involved in purchasing activities.

Overall learning objectives:

1. Understand the concept of modern slavery, including forced labour and child labour.
2. Identify modern slavery risks in Western's supply chain
3. Western's ethical sourcing measures, including compliance with Canada's Supply Chain Act

The module includes practical steps to address these objectives. Module completion by staff members is recorded and measured as a Key Performance Indicator to assess the University's effectiveness in modern slavery risk awareness.

Procurement Professional Staff Training – OUPPMA Collaborative Working Group
As part of our collective efforts, Western continues to collaborate with the Ontario University Professional Procurement Management Association (OUPPMA) to advance a shared training framework aimed at addressing forced and child labour risks within university supply chains.

The objective of this framework is to enable procurement professionals with the knowledge and tools necessary to recognize and mitigate forced and child labour risks, support compliance with this Bill, and reinforce ethical procurement practices. The training emphasizes informed decision making, proactive stakeholder engagement, and clear supplier accountability.

In the previous reporting period, OUPPMA committed to a three-part training program that would deliver structured learning for procurement professionals on key forced and child labour considerations. The first module, which focused on "Awareness of Forced and Child Labour in Supply Chains", was delivered in Spring 2025.

In the coming year, OUPPMA will continue developing advanced training and best practice resources for procurement professionals to support effective supplier engagement. This work, which has already begun, will emphasize proactive communication of expectations, risk identification and assessment, and how to treat high-risk purchases through public procurement practices.

Additionally, the Ontario university sector continues its strategic collaboration with CASPAR—a Canada-wide working group of procurement professionals dedicated to sustainable procurement—to share best practices and collectively strengthen efforts related to compliance across Canadian universities. During this reporting period, CASPAR has adapted its approach and re-aligned objectives and best practices to support sector-wide awareness, including the continued development of shared resources including an awareness video on human rights risks, modern slavery, and responsible supply chain management and responsible purchasing.

Measuring Progress and Effectiveness

Key Performance Indicators – As of March 2026

Spend with Canadian Suppliers
Approximately 84% of spend on all goods in scope of the Act is with Canadian businesses.

Supplier Code of Conduct
Acknowledgments and signatures:

- 964 suppliers ($131 million in annual spend)

Training
Completion of Modern Slavery training:

- Over 100 staff and faculty members have completed Western's formal online training module
- 100% procurement professionals have completed the OUPPMA delivered training

Risk Assessment and Management
Investigated cases of forced or child labour:

- # of investigated cases in our direct areas of influence: Nil
- # of investigated cases resolved: Nil

Risk assessment mapping and supplier outreach, including addressing gaps and areas of risk, will continue as a fundamental element of our program.

Action Plan and Priorities – 2026 and beyond

Western's Sustainable Procurement program will continue to develop and incorporate best practices relevant to our sector. Based on the programs advanced in 2025, our priorities for 2026 and beyond may include the following:

Risk Management and Audit Programs
Western University reserves the right to audit suppliers and request additional documentation to ensure compliance with all applicable laws and standards as set out in the SCoC. Procurement Services will review best practices, including available audit tools, and take steps to develop an audit program. A comprehensive audit program may include:

- Conducting risk assessments and further due diligence inquiries
- Utilizing a verifiable audit tool to identify suppliers with forced labour in their supply chain
- Exploring pilot initiatives to map supply chains beyond Tier 1 for selected high-risk categories, aiming to address visibility gaps in secondary tiers and source materials.
- Transitioning from ad-hoc monitoring to a systematic risk intelligence approach, utilizing the benchmarking insights to refine continuous oversight of high-spend and high-risk suppliers.

Training Programs
As referenced in ***Training and Education***, scaling and sustaining educational reach to a wider group of decentralized staff and faculty members involved in purchasing activities across the University is a focus in 2026.

Approval for The University of Western Ontario

This report was approved by the Board of Governors on April 30, 2026.

Attestation for The University of Western Ontario

In accordance with the requirements of the Canada's *Fighting Against Forced Labour and Child Labour in Supply Chains Act*, and in particular section 11 thereof, I attest that I have reviewed the information contained in the report for the entity or entities listed above. Based on my knowledge, and having exercised reasonable diligence, I attest that the information in the report is true, accurate and complete in all material respects for the purposes of the Act, for the reporting year listed above.

Alan Shepard, President and Vice-Chancellor, XXX, 2026.
I have the authority to bind the University of Western Ontario.

Chair in Leader Character

Action: ☐ Approval ☒ Information ☐ Discussion

On behalf of the Board of Governors, the Property and Finance Committee approved the establishment of the Chair in Leader Character in the Ivey Business School.

Executive Summary:

Approval Process for the Terms or Reference/Establishment of this Chair

MAPP Policy 2.22 Appendix 2 provides both an open and a confidential process for the approval of academic positions. Western Advancement is utilizing the open process in respect of this academic position.

Under the open process, the proposal is submitted to the Property and Finance Committee for approval on behalf of the Board

Funding
An endowment to support the Chair has been established through a donation totaling $2,500,000.

Matching funds of $2,500,000 through the Ivey Matching Chair Program will provide an endowment of $5,000,000 in support of the Chair.

Effective Date
April 30, 2026

Purpose
The Chair in Leader Character in the Ivey Business School will be a senior academic appointment that will support a distinguished scholar with global, multidisciplinary expertise in leader character research. The Chair will play a central role in advancing the Ian O. Ihnatowycz Institute for Leadership's vision to become a global incubator for leader character research and education by leading groundbreaking scholarly work, fostering collaboration beyond Ivey, and helping position the Institute as the hub of a worldwide leader character ecosystem.

The Chair will have demonstrated a capacity to attract peer-reviewed research funding at the level needed to sustain a nationally and internationally leading research program, with a particular emphasis on Tri-Council grants or equivalents.

Criteria
Appointments to the Chair will be conducted according to the University's relevant Policies and Procedures and according to Policy 2.22 – Funding of Academic Chairs, Professorships and Designated Faculty Fellowships of the University.

(https://www.uwo.ca/univsec/pdf/policies_procedures/section2/mapp222.pdf)
Appointments will normally be for a period of five years, renewable.

It is expected that the Chair will have the credentials to apply for and secure tri-council funding/grants. The success with tri-council funding will form one of the criteria for renewal of the chair.

Allowable Expenses
As per the Gift Agreement and Policy 2.22, funds available will be used to support salary and benefits and/or research expenditures that directly support the work of the Chair or their research program.

In addition, funds may be used to support teaching and program development, collaboration and outreach initiatives, and/or other expenses directly related to advancing leader character research and strengthening Ivey's global research ecosystem.

The Dean of the Ivey Business School, or their designate, is responsible for allocating and spending available funds generated by the endowment, in consultation with the Executive Director of the Ian O. Ihnatowycz Institute for Leadership.

Reporting
The University agrees to report annually to the donor regarding the activities of the Chair.

Approval Process of the Name
MAPP Policy 1.44 – Namings establishes the process for the naming of university assets, including intangible assets such as Chairs and Fellowships.

The authority to name, change, or revoke a name rest with the Board or its delegate(s).

The Vice-President (Western Advancement) has delegated authority to approve a naming, change a name, or to revoke a name in recognition of gifts or grants of less than $1 million. The Fundraising and Donor Relations Committee has delegated authority to approve a naming, change a name, or to revoke a name in recognition of gifts or grants of $1 million or more but less than $10 million. The Board of Governors has the authority to approve a naming, change a name, or revoke a name in recognition of gifts or grants of $10 million or more.

As this gift is greater than $1 million but less than $10 million, the Fundraising and Donor Relations Committee of the Board of Governors will approve the name of this Chair.

Board of Governors Election Results (2026)

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

Elections for membership on the Board of Governors in the faculty, graduate student, and undergraduate student constituencies were held as follows:

- Faculty Constituency: February 10-12, 2026
- Graduate Student Constituency: February 10-12, 2026
- Undergraduate Student Constituency: February 2-4, 2026

The results of the elections are below.

Faculty Constituency		
Term: July 1, 2026 to June 30, 2030		
Name	**Academic Unit**	**Election Status**
LEBO, Matthew	Political Science / Faculty of Social Science	**Elected**

Graduate Student Constituency		
Term: July 1, 2026 to June 30, 2028		
Name	**Academic Program**	**Election Status**
CHUNG, Cherin	PhD / French Studies	**Elected**

Undergraduate Student Constituency			
Term: July 1, 2026 to June 30, 2028			
Name	**Academic Program**	**Year**	**Election Status**
HASSAN, Ayesha	Computer Science / Science	3	**Elected**

Documentation Provided:

Simply Voting Certified Results

Simply Voting
5160 Decarie Boulevard, Suite 502
Montreal, QC, H3X 2H9 Canada
1 (800) 585-9694

Feb 12, 2026

Western University Secretariat
Western University
Room 4101, Stevenson Hall
London, ON
N6A 5B8 Canada

To Whom It May Concern:

The following election results are certified by Simply Voting to have been securely processed and accurately tabulated by our independently managed service.

Respectfully yours,

Brian Lack
President
Simply Voting Inc.

Results - Board of Governors - Faculty Representative - February 2026

Start: 2026-02-10 12:00:00 America/Toronto
End: 2026-02-12 12:00:00 America/Toronto
Turnout: 623 (25.0%) of 2491 electors voted in this ballot.

Board of Governors - Faculty Representative - ONE position electable

Option	Votes
LEBO, Matthew	213 (36.7%)
STRONG, Michael	139 (24.0%)
GUNARATNAM, Lakshman	109 (18.8%)
KIRKWOOD, Kenneth	85 (14.7%)
SANTOS, Gildo	34 (5.9%)

VOTER SUMMARY	
Total Voters	623
Abstain	43 (6.9%)

Simply Voting
5160 Decarie Boulevard, Suite 502
Montreal, QC, H3X 2H9 Canada
1 (800) 585-9694

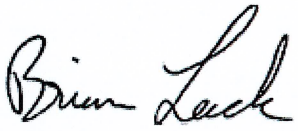
Feb 4, 2026

Western University Students' Council
340 UCC Building
Western University
London, ON
N6A3K7 Canada

To Whom It May Concern:

The following election results are certified by Simply Voting to have been securely processed and accurately tabulated by our independently managed service.

Respectfully yours,



Brian Lack
President
Simply Voting Inc.

Results - Board of Governors and Senate Election

Start: 2026-02-02 08:00:00 America/Toronto
End: 2026-02-04 20:00:00 America/Toronto
Turnout: 5388 (13.2%) of 40920 electors voted in this ballot.

Board of Governors

Restricted to **A;BUS;ED;ENG;HS;HS-FN;HS-HS;HS-K;HS-N;IMS;L;M;RX;RX-S;S;SS**

Option	Votes
HASSAN, Ayesha	1354 (38.0%)
YU, Bruce	821 (23.0%)
LI, Sarah	758 (21.3%)
GOYAL, Shreya	630 (17.7%)

VOTER SUMMARY

Total Voters	4755
Abstain	1192 (25.1%)

Simply Voting
5160 Decarie Boulevard, Suite 502
Montreal, QC, H3X 2H9 Canada
1 (800) 585-9694

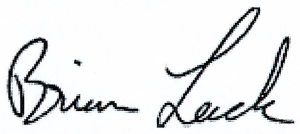
Feb 12, 2026

Western University Secretariat
Western University
Room 4101, Stevenson Hall
London, ON
N6A 5B8 Canada

To Whom It May Concern:

The following election results are certified by Simply Voting to have been securely processed and accurately tabulated by our independently managed service.

Respectfully yours,



Brian Lack
President
Simply Voting Inc.

Results - Board of Governors & Senate - Graduate Student Representative - February 2026

Start: 2026-02-10 12:00:00 America/Toronto
End: 2026-02-12 12:00:00 America/Toronto
Turnout: 356 (5.0%) of 7173 electors voted in this ballot.

Board of Governors - Graduate Student Representative - ONE position electable

Option	Votes
CHUNG, Cherin	178 (62.2%)
KAMAL, Rayyan	73 (25.5%)
YAN, Haiyi	35 (12.2%)

VOTER SUMMARY	
Total Voters	356
Abstain	70 (19.7%)

University Discipline Appeal Committee Membership

Action: ☒ Action ☐ Information ☐ Discussion

Composition:

The Board of Governors shall appoint a Chair and 15 members: 7 members of faculty and 8 students (5 undergraduates and 3 graduate students).

No more than two of the faculty members shall be from the same Faculty. Undergraduate students shall be appointed from a broad range of Faculties and no more than two of the graduate students shall be from the same division.

The Chair shall be appointed annually.

Current Elected Members:

Terms continuing to June 30, 2027:

Faculty: Mi Song Kim (Edu), Ken Kirkwood (HS)

Terms continuing to June 30, 2028:

Faculty: Amy Horton (HS), Anne Schuurman (AH)

Required: One (1) Chair (term from July 1, 2026 to June 30, 2027)

Nominees: Chris Sherrin (Law) (Chair) Term to June 30, 2027

Required: Five (5) undergraduate students from a broad range of faculties (terms from July 1, 2026 to June 30, 2027)

Nominees:

Brooklin Begg (AH)	(Student, UNDG)	Term to June 30, 2027
Jack Harris (Huron)	(Student, UNDG)	Term to June 30, 2027
Zahra Nadeem (HS)	(Student, UNDG)	Term to June 30, 2027
	(Student, UNDG)	Term to June 30, 2027
	(Student, UNDG)	Term to June 30, 2027

Required: Three (3) graduate students, no more than two of whom shall be from the same division (terms from July 1, 2026 to June 30, 2027)

Nominees:

	(Student, GRAD)	Term to June 30, 2027
	(Student, GRAD)	Term to June 30, 2027
	(Student, GRAD)	Term to June 30, 2027

Required: Three (3) faculty members, no more than two of whom shall be from the same faculty (terms from July 1, 2026 to June 30, 2029)

Nominees:	Randal Graham (Law)	(Faculty)	Term to June 30, 2029
		(Faculty)	Term to June 30, 2029
		(Faculty)	Term to June 30, 2029

UDAC Nominee Biographies

Chair

Chris Sherrin — *Faculty of Law*

I have been a member of UDAC since 2019 and the Chair since 2021. I would be happy to continue as Chair. I am a tenured professor at the Faculty of Law with experience and expertise in penal and disciplinary matters. I have served as the Faculty's Associate Dean (Academic) for eight of the last nine years. I have been an Adjudicator under the University's GBSV policy for five years. My academic work focuses on criminal law, evidence, criminal procedure, and wrongful convictions.

Undergraduate Students

Brooklin Begg — *Faculty of Arts and Humanities*

I, Brooklin Begg, would like to nominate myself for a seat on the University Discipline Appeal Committee (UDAC) to support fair and accountable student conduct processes at Western. Entering my third term as an Undergraduate Senator At-Large, and having previously served on UDAC twice, I recognize the importance of equitable and transparent appeal processes within the Code of Student Conduct. Through student leadership, I am committed to upholding governance, ensuring student perspectives are heard, and contributing to a safer campus through the consistent application of the Code.

Jack Harris — *Huron University College*

As Vice Chair of the USC Clubs Governance Board, I have sat across from difficult decisions and learned what principled judgement requires in practice. This experience in navigating competing interests, applying rules consistently, and arriving at defensible conclusions, is precisely what the UDAC demands. My studies in Philosophy/Theology have trained me to interrogate assumptions and follow arguments carefully, which matters enormously when a student's academic standing is on the line. I am seeking nomination because I understand the weight of these appeals and believe that I am a great candidate to handle them with the seriousness and attention they deserve.

Zahra Nadeem *Faculty of Health Sciences*

As a current undergraduate Senator and member of the Senate Review Board Academic, I have contributed to evidence-based adjudication of student appeals and procedural reviews. This experience has strengthened my ability to assess complex cases with careful attention to policy and procedural fairness. Through leadership roles as a USC councillor, member of the University Affairs Subcommittee, Purple Care Trustee, outgoing Off-Campus Soph, and incoming Off-Campus LST, I have developed a strong understanding of accountability structures and diverse student experiences across campus. I am committed to bringing a principled, equity-informed perspective to UDAC's critical work.

Faculty

Randal Graham *Faculty of Law*

I have been a professor at Western Law for twenty-four years. One of my primary research areas is legal ethics. I have considerable experience in the design and application of ethical codes, as well as two decades of experience in adjudication. I believe I could be of use on the committee.

Rescission of MAPP 1.7 – Chaplains to the University Community

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

Under MAPP Policy 1.51 - Establishing University Policies and Procedures, a "policy" is an official University directive that has broad application throughout the University and is binding on members of the University community. The President is authorized to approve policies, except for those policies that the Board of Governors reserves to itself for approval.

There are several university policies under the approving authority of the President.

To provide transparency, new policies, revisions to existing policies and rescission of policies under the President's authority will be communicated to the Board for information through the Senior Policy and Operations Committee.

MAPP Policy 1.7 – Chaplains to the University Community has not been revised since 1995. Over the past year, this policy has been reviewed in consultation with Student Experience and the Office of Equity, Diversity and Inclusion. A scan of other universities was also conducted in relation to comparable policies.

A recommendation was made to the President to rescind the MAPP Policy and reposition the responsibility as an operational guideline under the oversight of Student Experience and the Office of Equity, Diversity and Inclusion.

The Operating Guidelines for Spiritual Guidance at Western University was created as a result of this review. This new guideline broadens the language used in MAPP 1.7 from chaplain to spiritual guide, making the appointment of spiritual guides more inclusive and accessible to all major religions. Visit Spiritual Guides at Western for more information.

With the development of the Operating Guidelines for Spiritual Guidance, the President has rescinded MAPP Policy 1.7 – Chaplains to the University Community effective April 30, 2026.

Documentation Provided:

MAPP Policy 1.7 – Chaplains to the University Community

Operating Guidelines for Spiritual Guidance at Western University

POLICY 1.7 – Chaplains to the University Community

Policy Category: General

Effective Date: March 23, 1995

Supersedes: January 22, 1971

POLICY

1.00 A Clergyman who desires the status of Chaplain to The University of Western Ontario Community must be appointed by his/her own denomination through the appropriate church authority, and be responsible to the body or bodies designated by the appointing authority.

PROCEDURE

2.00 Nominations for the appointment of Chaplain shall be forwarded by the appointing authority to the President who may confirm the appointment on behalf of the Board of Governors. Failing confirmation, a denominational appointee will have no status on campus.

3.00 The appointment of a Chaplain shall be for five years and may be renewed at the discretion of the appointing authority and the University.

4.00 When facilities are established in the University Community Centre, duly appointed Chaplains will have the privilege of sharing those facilities also for appointments, consultations and for other appropriate purposes.

5.00 Chaplains wishing to serve on campus must discharge their functions under the rules and regulations established by the University. The University reserves the right to withdraw the privileges at any time.

6.00 Chaplains to The University of Western Ontario Community will be designated as "Anglican Chaplain to the University", "Lutheran Chaplain to the University", etc.

7.00 In the interest of better communications, the President will appoint his personal representative to act as a liaison between himself and the Chaplains to the University Community.

Western StudentExperience

Operating Guidelines for Spiritual Guidance at Western University

July, 2025

Introduction

At the request of the President, the Student Experience portfolio has introduced Operating Guidelines for Spiritual Guidance at Western University ("Operating Guidelines"), which update and clarify the processes that guide Western's support for student spiritual wellness. The Operating Guidelines situate spirituality in the context of student wellness, empower students to nominate Spiritual Guides, reflect the current operational engagement of the Vice-Provost (Students) and the Associate Vice-President (Equity, Diversity & Inclusion), and bring Western into alignment with best practices in the post-secondary sector. In Fall 2024 and Winter 2025, consultations were undertaken with Western's Chaplains and representatives of student cultural clubs. There were no reservations with this approach to supporting students' spiritual wellness. This change was welcomed as an initiative to renew and reinvigorate spiritual care at Western.

Operating Guidelines for Spiritual Guidance at Western University

Western University ("Western") recognizes that the members of its university community come from a wide variety of belief, spiritual practice and faith backgrounds. As part of its Spiritual Wellness offerings, the Spiritual Guidance program assists Western in addressing the spiritual, religious, faith and ethical needs of the campus community. Western's Spiritual Guidance program operates in support of Western's vision and mission in accordance with all relevant Western policies, procedures, and guidelines.

1.0 Appointment Procedure and Term

Western receives nominations, and carefully examines the credentials of Spiritual Guides from the various faith and spiritual traditions represented on campus to support the spiritual wellness, faith and religious needs of individual members of the university community, in accordance with the following procedure:

1.1 An individual wishing to be considered to become a Spiritual Guide requires a nomination from a group or community of students.

1.2 Nominations for the appointment of a Spiritual Guide are forwarded to the Vice-Provost (Students) and the Associate Vice-President (Equity, Diversity & Inclusion) ("AVP-EDI"). The nominee must provide a current Vulnerable Sector Check/Criminal Record Check, an updated resume, and a completed Western Code of Conduct for Spiritual Guides form (Appendix 1). The Vice-Provost (Students) and the AVP-EDI (or their designate) will determine the suitability of the nominee as a Spiritual Guide. Nominees who are not appointed will have no status on campus and will not have access to Western resources.

1.3 Spiritual Guides are volunteers and will normally be approved for a one-year term. Appointments will be reviewed annually and may be renewed with the recommendation of the Manager of Wellness & Equity Education, Student Experience.

1.4 Western reserves the right to revoke the approval of a Spiritual Guide at any time as determined by the Vice-Provost (Students) and the AVP-EDI. Reasons for revocation may include, without limitation, non-compliance with Western's policies, Code of Conduct for Spiritual Guides, and inability to fulfill the role of a Spiritual Guide in meeting the needs of Western's community in a manner aligned with Western's vision and mission.

2.0 Responsibilities of Spiritual Guides

2.1 Spiritual Guides are to support members of the Western community with their spiritual wellness and faith formation.

2.2 Spiritual Guides are to make themselves available to individual members of the Western community, in a manner that individual Spiritual Guides deem to be appropriate, taking into consideration both circumstances and the particular beliefs and traditions of their faith.

2.3 Spiritual Guides are encouraged to provide a connection between Western and their particular faith or spiritual community.

2.4 Spiritual Guides are required to work cooperatively with Spiritual Guides from other spiritual and faith affiliations on campus.

2.5 Spiritual Guides are required to discharge their functions in accordance with all rules and regulations established by Western. This includes, but is not limited to, these operating guidelines, MAPP Policy 1.52 ("Policy on Gender-Based and Sexual Violence"), MAPP Policy 1.35 ("Non-Discrimination/Harassment/Sexual Misconduct Policy"), MAPP Policy 3.4 ("Conflict of Interest") and MAPP Policy 3.1 ("Health and Safety Policy").

2.6 While providing services to members of Western's community, Spiritual Guides are to refrain from trying to coerce or persuade anyone to change their religious or spiritual beliefs to those of the Spiritual Guide's own particular faith.

2.7 Spiritual Guides are to be inclusive in their actions and respect the views and opinions of all members of Western's community, regardless of their personal faith or beliefs.

2.8 Spiritual Guides are not to visit student residences, unless such a visit has been approved in advance by Western's Housing Office.

3.0 Responsibilities of Western

3.1 Western will support in communicating to Western community members about the Spiritual Guides and their supports. This may include the inclusion of the name and emails of Spiritual Guides on webpages, social media posts, posters. This will be coordinated through the Manager of Wellness & Equity Education, Student Experience.

3.2 Western will support Spiritual Guides in booking and accessing space (in person and virtual) on campus in order to provide spiritual support and wellness through individual or group meetings. This will be coordinated through the Manager of Wellness & Equity Education, Student Experience.

Western StudentExperience

Code of Conduct for Spiritual Guides at Western University

In taking on the role of Spiritual Guide at Western University, I hereby affirm that I will abide by the following:

1. **Fostering an Inclusive Environment**
   I commit to creating an environment that is inclusive, compassionate, and supportive for all members of the Western community. I will uphold the principles outlined in MAPP 1.35, which includes a "commitment to providing a learning and working environment free of Discrimination, Harassment, and Sexual Misconduct," and MAPP 1.52's provision that "Gender-Based and Sexual Violence is prohibited."
2. **Respecting Privacy and Confidentiality**
   I pledge to respect the privacy and confidentiality of all members of the Western community, ensuring that personal and sensitive information shared within the context of my role is safeguarded with the utmost care and professionalism.
3. **Maintaining the Integrity of the Role**
   I will refrain from using my role as Spiritual Guide to promote non-faith-related activities, engage in political campaigning, or pursue personal self-promotion. My focus will remain on providing spiritual support and guidance in alignment with the mission of the University.
4. **Encouraging Thoughtful and Respectful Dialogue**
   In all communications within my role, I will adhere to MAPP 1.54's directive, which states that "In the exercise of free expression, members of the University community are encouraged to consider the value of mutual respect and the possible impact of that expression on others." I understand that the University's role, as stated in MAPP 1.54, is to provide an open and inclusive environment in which debate, challenge, and disagreement should be expected, and controversial and offensive ideas may be advanced. I will promote informed, thoughtful, and respectful exchanges, recognizing the importance of diverse perspectives while fostering mutual respect. Additionally, I understand the responsibility of maintaining a positive, respectful, and constructive presence online.

By signing this declaration, I affirm my commitment to uphold these values in my role as Spiritual Guide at Western University, ensuring that I contribute to the well-being and unity of the University community.

Signed,

[Your Name]
[Date]

Senate Advice re: 2026-27 University Operating and Capital Budgets

Action: ☐ Approval ☒ Information ☐ Discussion

Senate, at its meeting on April 17, 2026, reviewed the 2026-27 University Operating and Capital Budgets and offered its advice to the Board by recommending approval of those budgets.

Executive Summary:

The Operating and Capital Budgets and setting of tuition fees are in the purview of the Board of Governors. The Senate may provide advice to the Board under the authority of Section 30(f) of the UWO Act:

> The Senate may pass resolutions and make recommendations to the Board with respect to any matter connected with the administration of the University and the promotion of its affairs, but this clause shall not be construed to subtract from the powers and duties conferred on the Board elsewhere in the UWO Act.

Subcommittee on Enrolment Planning and Policy (SUEPP) Report

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

On the recommendation of the Senate Committee on University Planning (SCUP), Senate approved the plans and processes for first year, first-entry undergraduate enrolment for the University and Affiliated University Colleges and the use of the 2026-27 enrolment projections as provided for Western's budget planning purposes.

The Subcommittee on Enrolment Planning and Policy (SUEPP) Report is provided annually to SCUP for recommendation to Senate for approval. The report recommends targets and processes for first-year undergraduate enrolment and provides overall enrolment projections for Western and its Affiliated University Colleges in alignment with the University's strategic plan priorities and objectives.

Documentation Provided:

2025-26 Enrolment Update

Fall 2026 First-Year Undergraduate Admissions

Enrolment Projections for 2026-27 to 2030-31

2025-26 ENROLMENT UPDATE

		Actuals					2025-26		
		2020-21	2021-22	2022-23	2023-24	2024-25	Plan	Nov. Actual	Difference
1	**Constituent University**								
2	**Full-Time Undergraduates**								
3	Arts & Humanities	877	853	864	923	1,030	1,009	990	-19
4	Business (HBA)	1,057	1,072	1,210	1,336	1,376	1,356	1,368	12
5	Dentistry	263	264	281	281	283	284	284	0
6	Education	677	697	703	783	887	772	866	94
7	Engineering	2,151	2,293	2,497	2,590	2,919	2,929	3,109	180
8	Health Sciences								
9	Foods & Nutrition					237	172	229	57
10	Family Studies					140	150	168	18
11	BHSc Program	1,339	1,424	1,437	1,546	1,603	1,575	1,755	180
12	Kinesiology	1,285	1,283	1,311	1,293	1,337	1,281	1,350	69
13	Nursing	989	1,028	1,180	1,326	1,325	1,376	1,417	41
14	Law	490	482	496	503	510	520	509	-11
15	MACS (Media and Communication Studies)	871	899	880	909	994	988	961	-27
16	Medicine								
17	MD Program	686	688	689	698	716	735	742	7
18	B.Med.Sci. Program	1,161	1,252	1,305	1,199	1,117	1,129	1,151	22
19	Music	443	434	410	375	414	451	425	-26
20	Science - B.Med.Sci.	1,731	1,905	1,546	1,500	1,529	1,512	1,609	97
21	Science - Computer Science *					481	1,520	1,317	-203
22	Science - All Other	3,804	3,904	4,416	4,763	4,377	3,505	3,388	-117
23	Social Science - MOS	3,056	3,315	3,397	3,457	3,433	3,218	3,315	97
24	Social Science - All Other	3,826	4,033	4,280	4,469	4,510	4,248	4,282	34
25	**Total Full-Time Undergraduates**	**24,706**	**25,826**	**26,902**	**27,951**	**29,218**	**28,730**	**29,235**	**505**
26	Concurrent Programs	345	380	370	384	381	402	370	-32
27	ISSAP					7	7	15	8
28	Medical Residents	940	968	999	1,023	1,048	1,025	1,084	59
29	**Full-Time Graduates**								
30	Masters	3,869	4,360	4,231	4,370	4,664	4,557	4,410	-147
31	Doctoral	2,231	2,345	2,415	2,477	2,557	2,536	2,602	66
32	**Total Full-Time Graduates**	**6,100**	**6,705**	**6,646**	**6,847**	**7,221**	**7,093**	**7,012**	**-81**
33	**Total Full-Time Enrolment**	**32,091**	**33,879**	**34,917**	**36,205**	**37,875**	**37,257**	**37,716**	**459**
34	**Part-Time FTEs**								
35	Undergraduate	2,563	2,408	2,537	2,671	2,614	2,670	2,506	-164
36	Education (AQs)	447	460	416	452	361	375	388	13
37	Masters	122	128	111	96	89	100	90	-10
38	Doctoral	35	29	32	30	29	30	30	0
39	**Total Part-Time FTEs**	**3,167**	**3,025**	**3,096**	**3,249**	**3,093**	**3,175**	**3,014**	**-161**
40	**Total Constituent FTEs**	**35,258**	**36,904**	**38,013**	**39,454**	**40,968**	**40,432**	**40,730**	**298**
41	**Affiliated University Colleges**								
42	**Full-Time Undergraduates**								
43	Brescia	1,301	1,171	1,099	1,125				
44	Huron	1,431	1,525	1,560	1,729	1,981	1,987	2,285	298
45	King's	3,415	3,253	3,150	2,986	3,053	3,004	3,258	254
46	**Total Full-Time Undergraduates**	**6,147**	**5,949**	**5,809**	**5,840**	**5,034**	**4,991**	**5,543**	**552**
47	**Part-Time Undergraduate FTEs ****								
48	Brescia	70	72	65	65				
49	Huron	57	58	50	51	52	50	61	11
50	King's	299	266	272	257	251	265	208	-57
51	**Total Part-Time FTEs**	**426**	**396**	**387**	**373**	**303**	**315**	**269**	**-46**
52	**Graduate FTEs**								
53	Brescia	35	31	31	32				
54	Huron	13	10	7	8	7	13	4	-9
55	King's	60	62	65	64	64	65	68	3
56	**Total Graduate FTEs**	**108**	**103**	**103**	**104**	**71**	**78**	**72**	**-6**
57	**Total Affiliate FTEs**	**6,681**	**6,448**	**6,299**	**6,317**	**5,408**	**5,384**	**5,884**	**500**
58	**Total FTEs - Western Complex**	**41,939**	**43,352**	**44,312**	**45,771**	**46,376**	**45,816**	**46,614**	**798**

2025-26 ENROLMENT UPDATE

		Actuals					2025-26		
		2020-21	2021-22	2022-23	2023-24	2024-25	Plan	Nov. Actual	Difference
	Rows 59 to 98 Included above								
59	**International Students**								
60	Constituent Full-Time								
61	Undergraduates	2,822	2,761	2,593	2,398	2,212	1,974	1,949	-25
62	Medical Residents	130	173	189	207	225	200	235	35
63	Masters (excluding Ivey)	695	826	818	905	1,016	820	655	-165
64	MBA (Regular), Ivey MSc	159	199	222	239	254	200	281	81
65	Executive MBA	1	2	1	0	0	0	2	2
66	Doctoral	686	798	875	941	954	907	954	47
67	Affiliates								
68	Undergraduates	1,390	1,233	1,144	1,027	784	669	658	-11
69	Masters	4	4	3	3	0	1	1	0
70	**Year 1 Only**								
71	**Constituent**								
72	Arts & Humanities	221	248	202	257	281	280	259	-21
73	Engineering	704	774	893	848	948	850	985	135
74	Health Sciences								0
75	Foods & Nutrition					39	65	58	-7
76	Family Studies					17	50	52	2
77	BHSc Program	407	421	387	477	466	430	528	98
78	Kinesiology	335	351	351	344	369	335	373	38
79	Nursing	159	142	142	176	187	190	208	18
80	MACS (Media and Communication Studies)	226	270	212	244	324	300	287	-13
82	Music	117	94	88	98	144	145	114	-31
83	Science - B.Med.Sci.	1,092	1,049	1,000	981	920	1,000	1,028	28
85	Science - Computer Science					481	500	332	-168
84	Science - All Other	709	967	1,033	1,084	518	550	564	14
81	Social Science - MOS	1,072	1,052	1,151	1,200	1,054	950	909	-41
86	Social Science - All Other	965	1,054	1,009	990	900	850	905	55
87	**Total Year 1 - Constituent**	**6,007**	**6,422**	**6,468**	**6,699**	**6,648**	**6,495**	**6,602**	**107**
88	**Affiliated University Colleges**								
89	Brescia	270	258	244	304				
90	Huron	489	448	417	575	685	720	791	71
91	King's	968	840	721	650	774	728	944	216
92	**Total Year 1 - Affiliates**	**1,727**	**1,546**	**1,382**	**1,529**	**1,459**	**1,448**	**1,735**	**287**
93	**Total Year 1 - Western Complex**	**7,734**	**7,968**	**7,850**	**8,228**	**8,107**	**7,943**	**8,337**	**394**
94	**Masters**								
95	All Programs (excluding MBAs)	3,301	3,545	3,429	3,512	3,803	3,689	3,550	-139
96	Ivey (excl EMBA)	466	665	631	653	654	618	687	69
97	Executive MBA	102	150	171	205	207	250	173	-77
For Information									
98	Year 1 Constituent International Students	592	610	684	622	523	580	427	-153

** Computer Science - Year 1 to 3 only*

*** 2025-26 Part-time FTEs are estimates -- and will be updated when second/January-term course registrations are finalized.*

Western University

SCUP's Subcommittee on Enrolment Planning and Policy (SUEPP)

Fall 2026 First-Year Undergraduate Admissions

A. Background/Context

History

Over the past twenty+ years, Western's enrolment planning has placed the highest priority in increasing the quality of our incoming first-year class – which has moved the overall average grade of our first-year class from a position of "below the Ontario average" in 1993 to the top among Ontario universities. In order to achieve that goal, our approach to first-year admissions has included the following high-level priorities:

1. Our objective should be to continue to maintain and increase the quality of our incoming class – and we should continue to maintain and increase entrance standards.
2. The approach of using the common minimum entrance requirement for the direct-entry programs should be continued. For limited-enrolment programs – based on annual reviews by the Provost and the Deans – the entrance requirements could be higher. The result of this approach is that student demand/choice drives program-specific enrolments.
3. We should work to increase our first-year international enrolments.
4. We should continue to monitor the gap in entrance requirements between Western and the Ontario average – with the objective of maintaining/increasing the gap.

In 2010, in order to be aligned with the Constituent University's strategy on enrolment planning, the Affiliated University Colleges committed to narrowing the gap in entrance requirements between the Colleges and the Constituent University. This commitment was met for Fall 2018 admissions. As part the current Affiliation Agreement (renewed in May 2019), the Colleges agreed to a further "narrowing of the gap" by increasing minimum entrance requirements as follows: 78.5% for Fall 2019, 79.0% for Fall 2020, 79.5% for Fall 2021, and 80.0% for Fall 2022. *(FYI – renewal of the Affiliation Agreements with Huron and King's is in final stages)*.

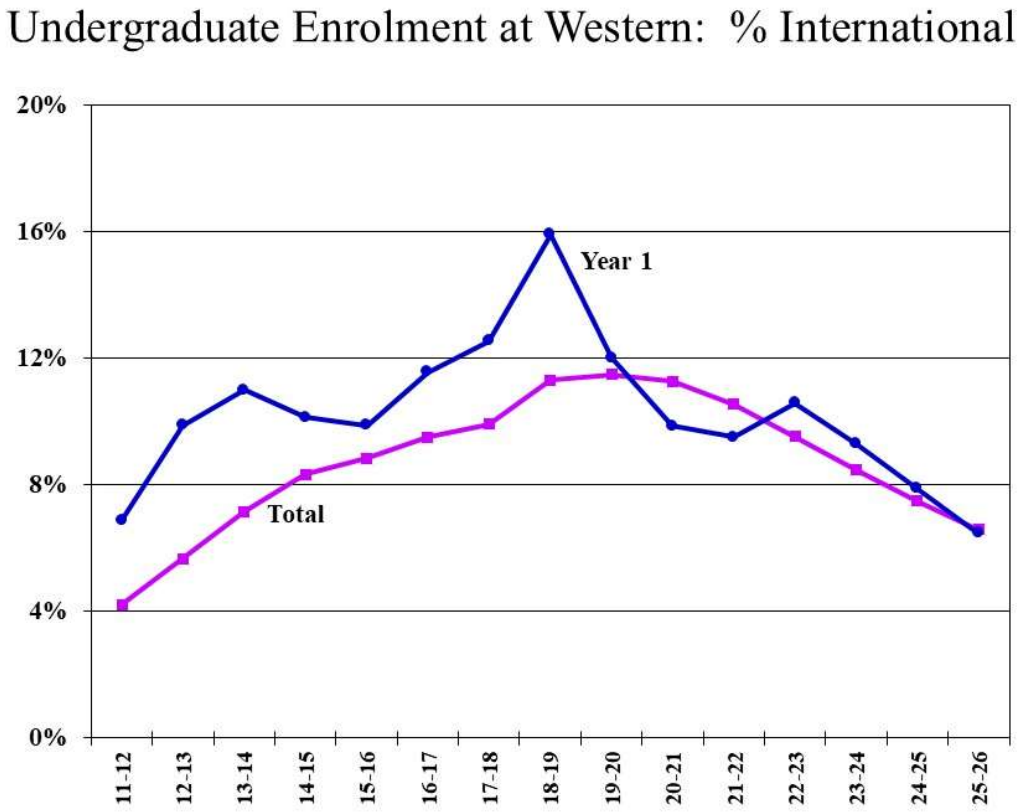
Current Strategic Plan Priorities

Our current Strategic Plan – *Towards Western at 150* – includes the following enrolment-planning related objectives:

a. With the aspiration to "grow strategically", the plan commits to expanding student enrolment (undergraduate, graduate, postdoctoral, and lifelong learners) – in areas of demand and societal need and with deliberate intention to be equitable and inclusive.
b. Achieve the highest student retention and graduation rates among Canada's leading research-intensive universities.
c. Increase our international undergraduate student population to 20% and out-of-province students to 15%.
d. Promote diverse qualifications as an admissions category to support the recruitment of a more diverse student population.

Western International College

As noted earlier, our Strategic Plan aspires to increase undergraduate international enrolments to 20% of total undergraduate enrolment. Starting in 2011, Western made progress towards this goal between 2011 and 2019. Due to a number of external factors – including the global pandemic, increased competition for international students, changes in global political landscapes, and Canadian government policies on international study permits – recruiting international students has become a challenge. As a result, the proportion of international undergraduate students has declined substantially between 2019 and 2025 – as shown in the figure below.



In order to enhance our international recruitment capabilities, Western's Senate and Board of Governors approved a collaboration with Navitas to establish the Western International College (WesternIC). Through this collaboration, WesternIC will recruit international students into first-year Western programs in the Fall of 2026. WesternIC students who meet Western's progression (to second year) requirements will enroll at the Constituent University in the Fall of 2027 – and this process/structure will be continue in subsequent years. Over time, we expect WesternIC to support us in moving towards the 20% international aspiration.

B. Update on the Fall 2025 Entering Class and Entrance Standards

Constituent University

1. The Constituent University's full-time first-year enrolment was 6,602. Of this, 427 (or 6.5%) were international students.
2. The minimum entrance requirement was a mid-year offer grade of 82.5% for Arts & Humanities, MACS (offered through FIMS), Foods & Nutrition, and Family Studies, and the mid-year offer grades for all other programs ranged from the common minimum requirement of 83.5% up to 92%. At offer time, the condition for the final grade was a minimum of 80.0% for Arts & Humanities, MACS, Music, Foods & Nutrition, and Family Studies (year three of a three-year pilot approved by SUEPP) and 83.5% for all other programs.
3. For information, full-time graduate enrolment was 7,012 – which equates to 18.6% of total full- time enrolment.

Affiliated University Colleges

4. Full-time first-year enrolment at the Colleges were as follows:
    - Huron 791 (of which, 44 or 5.6% were international)
    - King's 944 (of which, 85 or 9.0% were international)
5. The final grade requirement at each of the Colleges was 80.0%.

C. Fall 2026 Admissions Plans

Constituent University

1. Domestic Students: The general approach to admissions from recent years will continue for the Fall 2026 admissions cycle – and it is expected that our mid-year offer grade for most programs will be no less than 83.5%, with a final grade requirement of at least 83.5%. The pilot – where the final grade requirement for Arts & Humanities, MACS, Music, Family Studies, and Foods & Nutrition is 80% – will be extended for another year to better assess outcomes.

2. International Students: The establishment of the Western International College (WesternIC) requires two entry points into Western: direct-entry into the Constituent University and entry into WesternIC for certain programs (currently Social Science – including MOS, and Science).
    a. The final grade requirement for direct entry will be 83.5% for all programs, except for those included in the pilot (see C.1 above), for which a final grade requirement of 80% will apply.
    b. The final grade requirement for entry into WesternIC in the fall of 2026 will be 80%.

    Entry into WesternIC and directly into Western will be co-ordinated in a manner that ensures collaboration to achieve the best outcomes for students and for Western. The decision of stream for international students applying to programs offered at WesternIC will normally be made based on mid-year grades at the time of application, with students with a mid-year

grade above 85% offered direct admission and students with mid-year grades from 80% to 85% referred to WesternIC.

Upon successful completion of their first-year requirements, students studying at WesternIC will be eligible to enter modules on Main Campus provided they achieve a minimum cumulative average of 60% (consistent with Level 2 progression requirements) and meet the admissions requirements for their intended module. Some modules may have higher admissions standards, as specified in the Academic Calendar.

3. Based on the input from our Deans and current application data, we are estimating a first-year class in the range of 6,600 – which includes about 465 international students. We will work to achieving higher international enrolments – in the context of diversifying country of origin and destination program.

Affiliated University Colleges (Affiliates)

4. The final grade requirement at each of the Affiliates will be no less than 80% – as per the commitment in the current Affiliation Agreement.
5. As is the case at present, in situations where additional assessment is required (for students with exceptional/unusual circumstances), the Affiliates may admit students with grades below the minimum final grade requirement (down to only 2.5% points below the minimum requirement). The proportion with final grades below the minimum requirement (i.e. down to 77.5% which is 2.5% points below the 80% minimum requirement) shall not exceed 5% of the new students in the entering class.
6. The planned first-year class sizes are as follows:
    - Huron 800 (720 domestic and 80 international)
    - King's 1,139 (1,049 domestic and 90 international)

ENROLMENT PROJECTIONS: 2026-27 to 2030-31

		Actuals					Projections/Plans				
		2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
1	**Constituent University**										
2	**Full-Time Undergraduates**										
3	Arts & Humanities	853	864	923	1,030	990	987	975	971	977	980
4	Business (HBA)	1,072	1,210	1,336	1,376	1,368	1,356	1,356	1,356	1,356	1,356
5	Dentistry	264	281	281	283	284	284	284	284	284	284
6	Education	697	703	783	887	866	864	762	668	668	668
7	Engineering	2,293	2,497	2,590	2,919	3,109	3,095	3,112	3,055	2,970	2,986
8	Health Sciences										
9	Foods & Nutrition				237	229	173	171	188	190	189
10	Family Studies				140	168	169	165	166	164	163
11	BHSc Program	1,424	1,437	1,546	1,603	1,755	1,854	1,897	1,919	1,827	1,825
12	Kinesiology	1,283	1,311	1,293	1,337	1,350	1,379	1,397	1,374	1,333	1,331
13	Nursing	1,028	1,180	1,326	1,325	1,417	1,556	1,653	1,510	1,330	1,333
14	Law	482	496	503	510	509	530	530	530	530	530
15	MACS (Media and Communication Studies)	899	880	909	994	961	976	992	982	993	997
16	Medicine										
17	MD Program	688	689	698	716	742	749	748	748	748	748
18	B.Med.Sci. Program	1,252	1,305	1,199	1,117	1,151	1,217	1,345	1,459	1,462	1,468
19	Music	434	410	375	414	425	460	487	470	491	490
20	Science - B.Med.Sci.	1,905	1,546	1,500	1,529	1,609	1,725	1,730	1,743	1,740	1,739
21	Science - Computer Science *				481	1,317	1,538	1,360	1,263	1,309	1,352
22	Science - All Other	3,904	4,416	4,763	4,377	3,388	2,951	3,111	3,242	3,331	3,339
23	Social Science - MOS	3,315	3,397	3,457	3,433	3,315	3,350	3,287	3,294	3,415	3,461
24	Social Science - All Other	4,033	4,280	4,469	4,510	4,282	4,189	4,194	4,282	4,377	4,381
25	**Total Full-Time Undergraduates**	**25,826**	**26,902**	**27,951**	**29,218**	**29,235**	**29,402**	**29,556**	**29,504**	**29,495**	**29,620**
26	Concurrent Programs	380	370	384	381	370	370	370	370	370	370
27	ISSAP				7	15	15	15	15	15	15
28	Medical Residents	968	999	1,023	1,048	1,084	1,100	1,100	1,100	1,100	1,100
29	**Full-Time Graduates**										
30	Masters	4,360	4,231	4,370	4,664	4,410	4,582	4,714	4,758	4,797	4,825
31	Doctoral	2,345	2,415	2,477	2,557	2,602	2,546	2,504	2,504	2,495	2,493
32	**Total Full-Time Graduates**	**6,705**	**6,646**	**6,847**	**7,221**	**7,012**	**7,128**	**7,218**	**7,262**	**7,292**	**7,318**
33	**Total Full-Time Enrolment**	**33,879**	**34,917**	**36,205**	**37,875**	**37,716**	**38,015**	**38,259**	**38,251**	**38,272**	**38,423**
34	**Part-Time FTEs**										
35	Undergraduate	2,408	2,537	2,671	2,614	2,506	2,600	2,600	2,600	2,600	2,600
36	Education (AQs)	460	416	452	361	388	375	375	375	375	375
37	Masters	128	111	96	89	90	90	90	90	90	90
38	Doctoral	29	32	30	29	30	30	30	30	30	30
39	**Total Part-Time FTEs**	**3,025**	**3,096**	**3,249**	**3,093**	**3,014**	**3,095**	**3,095**	**3,095**	**3,095**	**3,095**
40	**Total Constituent FTEs**	**36,904**	**38,013**	**39,454**	**40,968**	**40,730**	**41,110**	**41,354**	**41,346**	**41,367**	**41,518**
41	**Affiliated University Colleges**										
42	**Full-Time Undergraduates**										
43	Brescia	1,171	1,099	1,125							
44	Huron	1,525	1,560	1,729	1,981	2,285	2,512	2,629	2,686	2,682	2,682
45	King's	3,253	3,150	2,986	3,053	3,258	3,491	3,527	3,717	3,905	4,066
46	**Total Full-Time Undergraduates**	**5,949**	**5,809**	**5,840**	**5,034**	**5,543**	**6,003**	**6,156**	**6,403**	**6,587**	**6,748**
47	**Part-Time Undergraduate FTEs**										
48	Brescia	72	65	65							
49	Huron	58	50	51	52	61	55	55	55	55	55
50	King's	266	272	257	251	208	250	250	250	250	250
51	**Total Part-Time FTEs**	**396**	**387**	**373**	**303**	**269**	**305**	**305**	**305**	**305**	**305**
52	**Graduate FTEs**										
53	Brescia	31	31	32							
54	Huron	10	7	8	7	4	3	1	0	0	0
55	King's	62	65	64	64	68	100	100	100	100	100
56	**Total Graduate FTEs**	**103**	**103**	**104**	**71**	**72**	**103**	**101**	**100**	**100**	**100**
57	**Total Affiliate FTEs**	**6,448**	**6,299**	**6,317**	**5,408**	**5,884**	**6,411**	**6,562**	**6,808**	**6,992**	**7,153**
58	**Total FTEs - Western Complex**	**43,352**	**44,312**	**45,771**	**46,376**	**46,614**	**47,521**	**47,916**	**48,154**	**48,359**	**48,671**

ENROLMENT PROJECTIONS: 2026-27 to 2030-31

		Actuals					Projections/Plans				
		2021-22	2022-23	2023-24	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30	2030-31
	Rows 59 to 98 Included above										
59	**International Students**										
60	Constituent Full-Time										
61	Undergraduates	2,761	2,593	2,398	2,212	1,949	1,731	1,687	1,712	1,875	1,993
62	Medical Residents	173	189	207	225	235	225	225	225	225	225
63	Masters (excluding Ivey)	826	818	905	1,016	655	698	729	759	792	816
64	MBA (Regular), Ivey MSc	199	222	239	254	281	245	254	233	233	233
65	Executive MBA	2	1	0	0	2	0	0	0	0	0
66	Doctoral	798	875	941	954	954	901	885	875	868	863
67	Affiliates										
68	Undergraduates	1,233	1,144	1,027	784	658	567	538	592	666	712
69	Masters	4	3	3	0	1	1	1	1	1	1
70	**Year 1 Only**										
71	**Constituent**										
72	Arts & Humanities	248	202	257	281	259	265	265	265	265	265
73	Engineering	774	893	848	948	985	850	860	865	870	870
74	Health Sciences										
75	Foods & Nutrition				39	58	60	60	60	60	60
76	Family Studies				17	52	50	50	50	50	50
77	BHSc Program	421	387	477	466	528	455	450	450	450	450
78	Kinesiology	351	351	344	369	373	340	340	340	340	340
79	Nursing	142	142	176	187	208	205	205	205	205	205
80	MACS (Media and Communication Studies)	270	212	244	324	287	290	290	295	295	295
82	Music	94	88	98	144	114	135	135	135	135	135
83	Science - B.Med.Sci.	1,049	1,000	981	920	1,028	1,020	1,030	1,035	1,030	1,030
85	Science - Computer Science				481	332	330	355	365	380	380
84	Science - All Other	967	1,033	1,084	518	564	600	610	615	630	630
81	Social Science - MOS	1,052	1,151	1,200	1,054	909	1,000	1,020	1,040	1,060	1,060
86	Social Science - All Other	1,054	1,009	990	900	905	1,000	1,000	1,000	1,000	1,000
87	**Total Year 1 - Constituent**	**6,422**	**6,468**	**6,699**	**6,648**	**6,602**	**6,600**	**6,670**	**6,720**	**6,770**	**6,770**
88	**Affiliated University Colleges**										
89	Brescia	258	244	304							
90	Huron	448	417	575	685	791	800	800	800	800	800
91	King's	840	721	650	774	944	1,139	1,215	1,274	1,355	1,389
92	**Total Year 1 - Affiliates**	**1,546**	**1,382**	**1,529**	**1,459**	**1,735**	**1,939**	**2,015**	**2,074**	**2,155**	**2,189**
93	**Total Year 1 - Western Complex**	**7,968**	**7,850**	**8,228**	**8,107**	**8,337**	**8,539**	**8,685**	**8,794**	**8,925**	**8,959**
94	**Masters**										
95	All Programs (excluding MBAs)	3,545	3,429	3,512	3,803	3,550	3,664	3,738	3,768	3,807	3,835
96	Ivey (excl EMBA)	665	631	653	654	687	738	789	799	799	799
97	Executive MBA	150	171	205	207	173	180	187	191	191	191
For Information											
98	Year 1 Constituent International Students	610	684	622	523	427	465	510	560	610	610

** Computer Science - Year 1 to 3 only*

*** 2025-26 Part-time FTEs are estimates -- and will be updated when second/January-term course registrations are finalized.*

Report of the Academic Colleague

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

This report provides a summary of the December 9-10, 2025 and February 10-11, 2026 meetings of the Council of Ontario Universities Academic Colleague.

December 9-10, 2025

The Council of Ontario Universities (COU) Academic Colleagues met on December 9–10, 2025. The meeting focused primarily on the implications of artificial intelligence (AI) for teaching, research, and institutional strategy, alongside broader sector updates from COU leadership. A significant portion of the agenda was devoted to a consultation with COU's Artificial Intelligence Task Force, chaired by Dr. Vivek Goel, President and Vice-Chancellor of the University of Waterloo. The discussions offered timely insight into how Ontario universities are collectively responding to AI's rapid evolution and its consequences for pedagogy, research training, policy, and institutional culture.

The meeting opened with a presentation by Dr. William Turkel (Professor of History, Western University), who framed AI not as a discrete tool but as a methodological apparatus for teaching and learning. Drawing on his classroom practice in courses on 21st-century history, Dr. Turkel emphasized that the pace of AI development renders long-term planning less effective than pedagogical improvisation and adaptability. In this context, the priority for students is not mastery of particular platforms, but the development of transferable skills that allow them to engage critically with rapidly changing technologies.

Several key themes emerged from Dr. Turkel's remarks. Assessment should increasingly privilege synthesis, interpretation, and critical analysis over recall. AI is already reshaping labour markets, particularly entry-level roles, creating a corresponding opportunity for universities to prepare students for higher-order responsibilities earlier in their careers. Doctoral training is likely to shift away from extensive comprehensive examination reading toward strategic thinking, proposal development, and research design. Although legitimate political and ethical concerns surround the corporate development of large language models, AI is now embedded in the fabric of contemporary life. The challenge for universities is therefore not avoidance, but responsible, reflective, and pedagogically meaningful integration.

This framing set the stage for the subsequent AI Task Force consultation led by Dr. Goel. Academic Colleagues were invited to reflect on several themes related to AI adoption in higher education.

Colleagues noted that AI offers significant potential to support the achievement of course and program learning outcomes and to deepen student learning. At the same time, AI

challenges foundational assumptions about how universities operate and how knowledge is produced, assessed, and shared. Participants reflected on the need to identify which core elements of disciplinary learning must be preserved as institutions adapt to this new landscape.

A central concern is the difficulty of aligning institutional policy and pedagogy with the pace of AI innovation. Many institutions are experiencing gaps or ambiguities in policies related to academic integrity, acceptable use, and assessment. Additionally, some colleagues raised concerns that reliance on AI-mediated processes may erode collaborative brainstorming and diminish interpersonal engagement within academic communities.

A strong consensus emerged that students should be required to disclose their use of AI in academic work in a manner analogous to citing traditional sources. Examples were shared of faculty incorporating AI into teaching through assignments that require students to critique AI-generated outputs, AI-assisted case study development, and scenario-based and project-management learning exercises. These approaches position AI as an object of critical inquiry rather than a shortcut around learning.

Colleagues emphasized the need for institutions to reassess existing risk frameworks and to cultivate cultures that support pedagogical innovation and experimentation. It was noted that institutional access to AI tools and software licenses varies considerably across the sector, creating uneven conditions for experimentation and adoption. AI literacy—for both students and faculty—was identified as an urgent priority, alongside the development of clear, principled policies on acceptable use.

Participants also observed that AI increasingly allows learners to determine how they access and engage with information, requiring universities to reconsider traditional instructional models. Particular attention was paid to the implications for doctoral education, with some institutions already exploring shifts from comprehensive examination structures to proposal-based program models. Colleagues stressed the importance of maintaining academic rigour while rethinking the purpose, structure, and outcomes of the PhD in an AI-inflected environment.

The second day of the meeting included institutional updates from Colleagues and a sector overview from COU President Steve Orsini. The president highlighted the significant financial pressures facing Ontario universities, exacerbated by recent federal reductions to international student allocations. Ongoing advocacy for stable, predictable, long-term funding was emphasized, including recent engagement with provincial officials at Queen’s Park.

AI was identified as a central theme in COU’s strategic messaging, particularly in relation to the role universities can play in economic transformation and workforce preparation. In discussion, Colleagues noted COU’s continued emphasis on the role of universities in addressing Canada’s productivity challenges. Reference was made to a recent Canadian Council of Academies report on science, technology, and innovation, which described the

higher education sector as a “rare bright spot” in producing world-leading talent and research.

Academic Colleagues expressed strong interest in continuing to support COU’s work on major issues such as AI and the future of higher education and welcomed the provision of key messages to assist in institutional advocacy and communication.

The meeting underscored that AI is not a peripheral technological issue but a transformative force requiring pedagogical, policy, and strategic responses from universities. Across institutions, there is recognition that the challenge is not whether to engage with AI, but how to do so in ways that preserve academic rigour, foster deep learning, and prepare students for a rapidly changing intellectual and professional landscape. The discussions at COU demonstrate that Ontario universities are actively grappling with these questions collectively and provide important context for ongoing work within the sector.

February 10–11, 2026

The meeting of Academic Colleagues convened by the Council of Ontario Universities (COU) on February 10–11, 2026, provided an opportunity for sector-wide consultation, information sharing, and discussion of strategic priorities shaping the future of postsecondary education in Ontario.

1. COU Paper on the Future of Postsecondary Education

A central focus of the meeting was a presentation by COU President and CEO, Steve Orsini, who outlined ongoing advocacy efforts and introduced a draft framework for a forthcoming COU paper on the future of postsecondary education. This document, being developed in collaboration with the Ontario Council of Academic Vice-Presidents (OCAV), is intended to articulate a university-driven vision to inform internal sector discussions and broader national dialogues.

The presentation emphasized that recent COU advocacy efforts, including engagement with the Standing Committee on Finance and Economic Affairs, have been well received and have contributed to increased public visibility for the sector’s priorities. The draft paper situates Ontario’s universities within a rapidly evolving global context shaped by technological, economic, and societal change.

Key external pressures identified include the accelerating impact of artificial intelligence and emerging technologies, shifting geopolitical and global economic conditions, ongoing social transformation and the need for civic renewal, and the growing urgency of climate change. In response, the paper proposes that the postsecondary sector must evolve in both structure and mission.

Several strategic priorities were highlighted:

- The modernization of learning, including the redefinition of lifelong learning, the integration of AI-enabled pedagogies and assessment practices, and the development of future-ready skills;
- The expansion of work-integrated learning opportunities;
- The strengthening of research capacity and partnerships with industry and community stakeholders;
- Enhancements to student supports; and
- Innovation in sustainability practices across institutional operations and mandates.

The discussion underscored that financial sustainability is a necessary precondition for meaningful sectoral transformation. The paper also affirms the critical role of universities in driving talent development, research innovation, economic prosperity, and broader contributions to civil society. Achieving these goals will require coordinated engagement among universities, all levels of government, and external partners.

Discussion among Academic Colleagues highlighted several key themes, including the need to further articulate sustainability (both financial and environmental), the transformative implications of artificial intelligence for teaching and research, and the enduring importance of universities as sites of knowledge creation, community engagement, and civic dialogue.

2. Institutional Updates

Academic Colleagues shared updates from their respective institutions, noting a range of current priorities and challenges. These included ongoing responses to financial pressures, efforts to expand experiential learning opportunities, and initiatives related to curriculum innovation and student support. While institutional contexts vary, there was broad alignment regarding the need to balance fiscal constraints with continued academic and research excellence.

3. Quality Assurance Framework (QAF) Update

Chris Evans (Executive Director) and Cindy Robinson (Director of Operations) from the Quality Assurance Secretariat provided an overview of the Quality Assurance Framework (QAF), emphasizing its central role in maintaining academic standards and public accountability within Ontario’s university sector.

The presentation reviewed key components of the QAF, including program approval processes, cyclical program reviews, and institutional quality assurance mechanisms. In the subsequent discussion, Academic Colleagues raised concerns regarding the timelines associated with new program approvals and the administrative burden posed

by QAF requirements. These concerns reflect a broader tension between maintaining rigorous quality assurance standards and ensuring institutional agility and responsiveness to emerging educational needs.

4. Concluding Observations

The meeting underscored the extent to which Ontario's universities are navigating a period of significant transformation. There is a clear sector-wide commitment to innovation in teaching, research, and community engagement; however, this ambition is tempered by ongoing financial constraints and increasing regulatory and administrative demands.

The forthcoming COU paper represents an important opportunity to articulate a cohesive and forward-looking vision for the sector. Its emphasis on adaptability, collaboration, and sustainability aligns with many of the strategic priorities currently being pursued across institutions.

Developments arising from this work will continue to be monitored, and updates will be provided to Senate as further information becomes available.

Academic Administrative Appointments

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

Faculty Relations advised of the following academic administrative appointments as of March 13, 2026.

Start Date	End Date	Name	Department	Admin. Appointment
8/1/2025	7/31/2030	Haddara,Wael	Department of Medicine	Clinical Department Chair
8/18/2025	6/30/2027	Stanley,Meagan	WL - Teaching and Learning	Acting Library Head
9/1/2025	8/31/2030	Urquhart,Brad	Schulich - Office of the Dean	Associate Dean
9/1/2025	6/30/2026	Plug,Jan	Arts - Office of the Dean	Associate Dean (Acad Programs)
10/1/2025	6/15/2026	Cato,Jacqueline	WL - Content Mgmt (CMDA)	Acting Library Head
11/15/2025	4/30/2026	Mills,Melanie	Office of the Chief Librarian	Acting Associate Chief Librarian
11/16/2025	4/30/2026	Bourgard,Erin	Info & Media Studies - General	Acting Library Director
12/1/2025	11/30/2030	Rushlow,Walter	Schulich - Office of the Dean	Assistant Dean
12/1/2025	11/30/2030	Bauman,Glenn	Schulich - Office of the Dean	Vice Dean
1/1/2026	6/30/2028	Jean,Melissa	Soc Science - Office of Dean	Assistant Dean
1/1/2026	6/30/2026	Bains,Sukhveer	Schulich - Office of the Dean	Associate Dean
1/1/2026	12/31/2026	Choi,Kate	Soc Science - Office of Dean	Acting Associate Dean (Research)
1/1/2026	12/31/2028	Robinson,Daniel	Info & Media Studies - General	Associate Dean (Ugrd Program)
1/1/2026	12/31/2030	Crumley,Tracey	Obstetrics & Gynaecology	Clinical Department Chair
1/1/2026	6/30/2026	Schemitsch,Emil	Surgery	Clinical Department Chair
1/1/2026	6/30/2031	Kotsopoulos,Donna	Education - Office of the Dean	Dean
1/1/2026	12/31/2026	Mequanint,Kibret	Chemical &Biochem Engineering	Acting Department Chair
1/1/2026	6/30/2031	Molnar,Sheri	Earth Sciences	Department Chair
1/3/2026	4/30/2026	Mantz,Elizabeth	WL-Archives / Special Collect	Acting Library Head
1/19/2026	4/30/2026	Carlisle,Emily	WL-User Experience Student Eng	Acting Library Director

2/1/2026	1/31/2031	Dikeakos,Jimmy	Microbiology & Immunology	Department Chair

Western Libraries Annual Report

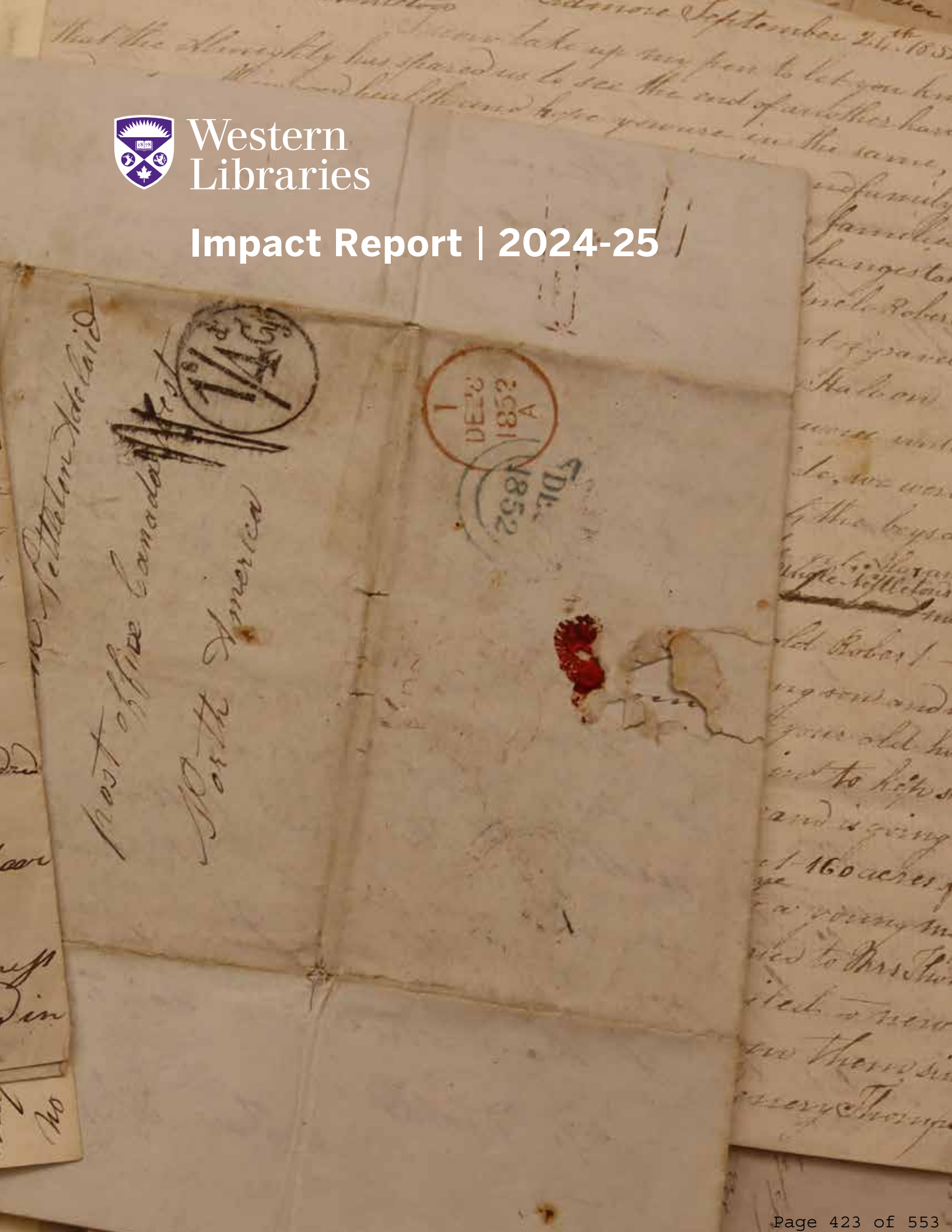
Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Western Libraries Annual Report, prepared by the Vice-Provost & Chief Librarian (Western Libraries), is provided for information to the Board through Senate.

Documentation Provided:

Western Libraries Impact Report



Western Libraries

Impact Report | 2024-25

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Western Libraries Impact Report 2024-25

Western Libraries
Western Libraries is the library system of Western University in London, Ontario. As the university's academic commons, we provide essential library and archival expertise, information resources, technology, collaborative spaces, and specialized staff. We support the university's research mission by cultivating and mobilizing knowledge across campus. Western Libraries engages, inspires, and empowers students, scholars, and researchers to achieve excellence in teaching and scholarship, and supports their development as global citizens and leaders.

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A Message from Geoffrey



In reviewing an early draft of this Impact Report, I was struck by the scope, scale, and breadth of the work taking place in Western Libraries, and by the expertise and deep knowledge of our staff. Together we have achieved much over the last year.

In this report, you'll learn about new spaces, including Scholars Lab on The D.B. Weldon Library's ground floor and a new silent study space on its first floor, as well as our support for innovative scholarship and research creation such as the Black Londoners Project and Emma Donoghue's new play, *The Wind Coming Over the Sea*, which premiered at the Blyth Festival this summer. We are also celebrating some exciting new acquisitions, including the historical records of the London Health Sciences Centre, which was originally founded in 1875, three years before Western University itself. Another 15th-century Book of Hours donated by professor Jane Toswell in honour of her father. Designed to aid and guide an individual's daily prayer cycle, it features appeals to Saint Apollonia, the patron saint of dentists and those suffering from toothache. You'll have to read on in this report to understand the connection between the manuscript and professor Toswell's dad.

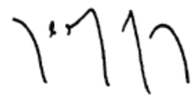
Student success is central to our mission. In the fall, and for the second year, we presented the Western Libraries Undergraduate Research Awards, or WLURAs, which honour exceptional scholarship by undergraduate students. The award recipients, and the high number of submissions we received, are a testament to the intellectual and creative power of Western students and to the important role that librarians, archivists, staff, and library collections play in their success. As part of the ambitious *All in* campaign, which Western launched in September, we are looking to create an endowment to ensure the future of the WLURAs.

We are also committed to our community. This year we abolished borrowing fees for members of the public, granting them free access to most of our vast print collection. More recently, we became only the second Ontario university to join the Community Scholars Program, which connects the staff of non-profit, charitable, and public service organizations with more than 20,000 academic journal titles and e-books.

Finally, we are supporting EDIDA (Equity, Diversity, Inclusion, Decolonization and Accessibility) in numerous ways, including a new joint fellowship with the Faculty of Information and Media Studies to support Black and Indigenous students in the Master of Library and Information Science program.

Like many parts of the university, Western Libraries is facing a challenging period. We are being asked to think differently about how we do our work within a resource-constrained environment. Responding to that call will require creativity, ingenuity, and collaboration. I am confident in our ability to navigate these challenges with care, thoughtfulness, and integrity.

My sincere thanks go to my colleagues in Western Libraries for their many contributions over the last year. We should be proud of much.



Geoffrey Robert Little
Vice-Provost & Chief Librarian

Emma Donoghue Brings Western's 19th Century Letters to Life at Blyth Festival

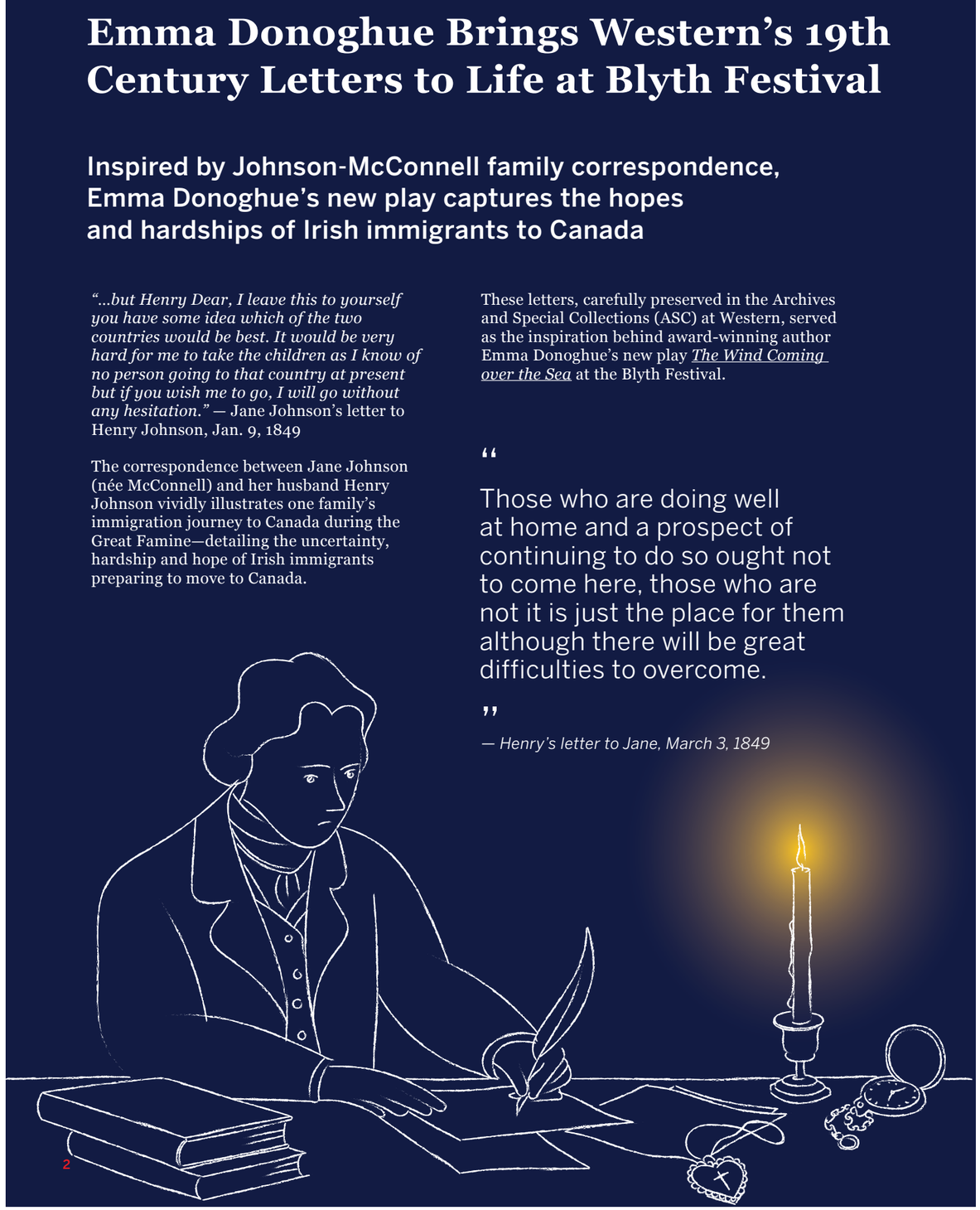
Inspired by Johnson-McConnell family correspondence, Emma Donoghue's new play captures the hopes and hardships of Irish immigrants to Canada

"...but Henry Dear, I leave this to yourself you have some idea which of the two countries would be best. It would be very hard for me to take the children as I know of no person going to that country at present but if you wish me to go, I will go without any hesitation." — Jane Johnson's letter to Henry Johnson, Jan. 9, 1849

The correspondence between Jane Johnson (née McConnell) and her husband Henry Johnson vividly illustrates one family's immigration journey to Canada during the Great Famine—detailing the uncertainty, hardship and hope of Irish immigrants preparing to move to Canada.

These letters, carefully preserved in the Archives and Special Collections (ASC) at Western, served as the inspiration behind award-winning author Emma Donoghue's new play *The Wind Coming over the Sea* at the Blyth Festival.

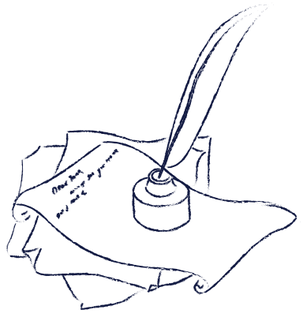
> "Those who are doing well at home and a prospect of continuing to do so ought not to come here, those who are not it is just the place for them although there will be great difficulties to overcome."
>
> *— Henry's letter to Jane, March 3, 1849*



Donoghue, LLD'13, first came across the letters as a footnote in a text she was researching in 1999, when she was Western's writer-in-residence. She had been looking to learn more about the immigrants who had come before her, especially Irish immigrants. The letters inspired her to write a short story about the Johnsons. Years later, when the Blyth Festival approached her to write a play about Irish immigrants, she immediately thought back to the letters because they were so "eloquent, sturdy, practical and yet emotionally expressive."

In hopes of writing about the letters in more detail, she travelled 5,566 km to Belfast in an effort to find the original copies, only to learn the letters had been in her own city—in the same archives where some of her own work and archival records are kept.

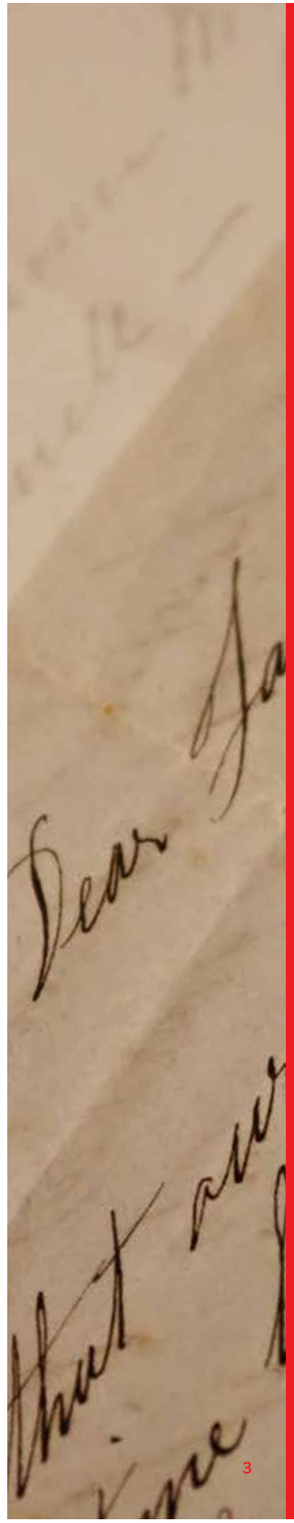
"I was so moved to be laying my hands at last on the actual pages. Not only had Jane and Henry written to each other, but they had managed to keep the letters safe on their travels all that time. Some of them were dirty, some were tattered, some with pages missing and some entire letters were missing," said Donoghue. "I think the letters were so important to the couple, to keep them going. They were an emotional lifeline so they each carefully preserved the ones that they had."



For Amanda Jamieson, a Western archivist at ASC, the letters stand out among the 19th century collections. Often records capture one side of a story, because the person only has the correspondence they received, not the ones they sent.

"With these letters, we can read the back and forth. It's a conversation. You can see two sides of a story, and you also get the family connection as well," said Jamieson. "They're from the 1840s predominantly and our collection only has a small number of letters from that timeframe. These letters are so detailed. There's so much yearning and hyperbole and they're so well written."

The collection includes correspondence from Jane's father and other relatives of the couple. Preserved with unusual completeness, the letters provide insight into the family's private lives and the broader context of mid-19th century immigration.



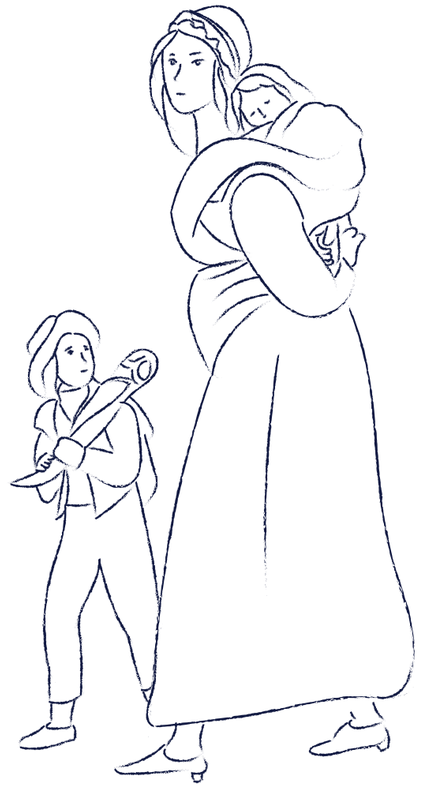


"It was around that turbulent time of immigration. Their town, Antrim in Ireland, was becoming destitute and people were becoming so impoverished they had to leave the country. I think that's why the letters are so emotional as well, because they were leaving under such duress," said Jamieson, who noted that about 200,000 people fled the country in 1847.

She pointed out the physical documents themselves are striking. Made of high-quality cotton rag paper, the letters have endured with minimal damage. Even the addresses, often as simple as "Post Office, Canada West, North America," reveal a glimpse of a world where mail still reached its intended recipient across the Atlantic.



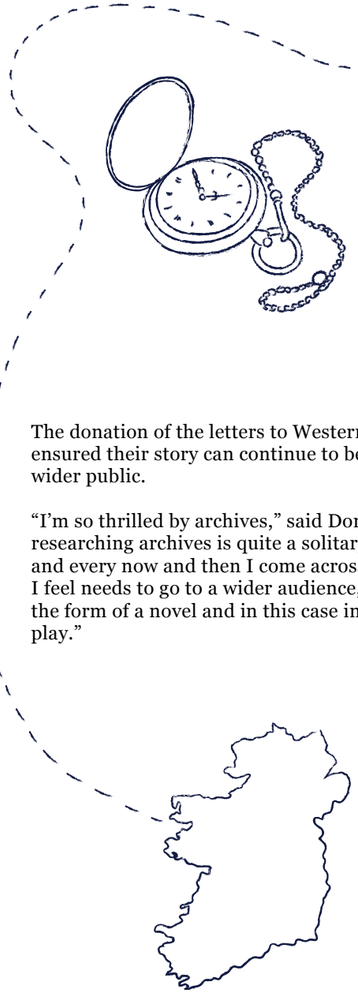
> "I am not able to do much; but the little that I can, I will do. I intend therefore in my next letter to send each of you a small matter to show you that though absent, none of you are ever forgotten by me."
>
> *— Arthur McConnell's letter to his daughter Jane, July 5, 1855, sent from Antrim, Ireland to Canada*



"We have such a large archives program for the region, and we have the ability to provide really great access with a wonderful reading room and resources to preserve and digitize one-of-a-kind records," said Jamieson.

The letters were safeguarded for generations by their descendants, including Jane's great-granddaughter Louise Wyatt, a teacher in London, Ont. who published some of the letters in *Ontario History*.





The donation of the letters to Western in the 1970s ensured their story can continue to be shared with the wider public.

"I'm so thrilled by archives," said Donoghue, "But researching archives is quite a solitary experience, and every now and then I come across something that I feel needs to go to a wider audience, sometimes in the form of a novel and in this case in the form of a play."

From the Archives to the Stage

Donoghue used fragments and details from the letters to build monologues that honour the family's voices while shaping a narrative for the stage.

"Their marriage was this living thing where they both brought skills and strength. This is not what we think of as a classic sort of Victorian marriage. He wasn't making the decisions for the family, so these letters are a rich source that lends itself well to a 21st century play about two equal parties, full of humour, satire and human warmth," said Donoghue.

The play is a musical featuring traditional Irish ballads and folk music.

Donoghue described watching her words take shape on the stage for the first time as everything she had wanted.

"It feels particularly alive. Watching these actors play Jane and Henry, it's sort of like we're letting the dead walk again. It's a kind of thrilling magic," she said. "At the very origin of theatre is having people let themselves get kind of possessed by either imaginary people or dead people or people far away."

The Blyth Festival, known for championing Canadian and rural stories, proved an ideal home for the production.

"It's extraordinary that this play has managed to find such an audience and people are relating to it so much based on their own history of their families coming to Canada from many different places—it seems to have touched a real nerve. It's celebration of the ups and downs of immigration," said Donoghue.

The Detective Work of an Archivist

One archivist's journey through the clues of history, from paper composition to Victorian mourning customs

When Amanda Jamieson picks up a stack of old letters, her mind immediately begins piecing together clues. The colour of the paper. The style of cursive. The way a letter has been folded and sealed. To the untrained eye, these are simply old documents. To Jamieson, an archivist at Western Libraries, they're a puzzle waiting to be solved.

"Usually what we're trying to do is date something—that's our number one priority as archivists," Jamieson explains, carefully handling a blue-tinted letter from the 1850s. "We're trying to give it a date, a context, and a creator."

But dating historical documents requires a specialized skill set that Jamieson has honed over two decades working in archives. Her expertise includes palaeography—the study of handwriting and writing systems—along with an intimate knowledge of paper types, ink styles, and historical writing conventions that most people never think about.

The Paper Tells a Story

Take paper, for instance. Jamieson can tell at a glance whether she's looking at cotton rag paper (common before the 1850s) or wood pulp paper (which became standard after). "This paper, to me, is cotton rag paper," she says, examining a letter. "And for the most part, you see lots of blue papers from this era. The paper gets whiter and cleaner and more standardized later on."

The cursive itself offers clues too. Jamieson watches for the presence of a "long S"—a letter that looks like an 'f' but represents an 's', common in 18th century writing. Its absence helps her narrow down dates. She notices how people's penmanship varies, how some writers cram words together to save space while others sprawl luxuriously across the page.

Creative Solutions to Postal Costs

One of the most fascinating practices Jamieson encounters is cross-hatching—when letter writers, concerned about postage costs based on the number of sheets mailed, would write in one direction, then rotate the paper 90 degrees and write perpendicular lines over the first layer of text. "You'd read it one way, and then you'd have to flip it to read it the other," she explains. "It was quite common in the 19th century to keep that postage down."

Even the envelopes tell stories. In the mid-1800s, the paper and envelope were often the same document, folded and sealed with wax. Jamieson points to a letter with a black border: "When we see black on the outside of a letter, we usually know that the person who's sending the letter is in mourning. This was a common practice from the Victorian era."



Building Context and Provenance

Currently, Jamieson is working with the Johnson-McConnell letters, a collection of letters between family members during the Irish Famine that inspired the work of internationally bestselling author, screenwriter, and playwright Emma Donoghue (story on page 2). But Jamieson's detective skills extend far beyond reading old handwriting. She's also piecing together context and provenance, figuring out who sent letters to whom, and maintaining what archivists call "original order"—preserving the relationships between documents as they were kept by their creators.

"We're creating context. That is a key task in archives," Jamieson says. Sometimes this means using a perpetual calendar to determine which year a partially dated letter was written. Other times, it's recognizing that houses in 1850s London, Ontario didn't have street numbers yet—crucial information for researchers doing genealogical or built heritage work.

What strikes Jamieson most is how these skills have become second nature. "I've internalized a lot of this at this point," she admits. "These are just thoughts that happen, and I don't really give them too much depth because that's not necessarily the most important thing I need to know."

The most important thing? Making sure researchers can access and understand these materials and preserving the voices of ordinary people experiencing extraordinary circumstances.

HIDDEN TREASURES

Rare Medieval Music Pages Join Western's Collection

Western has acquired two complete pages of medieval neumes—early forms of written music. Complete neume pages are rare. These are Western's first, purchased from an Ontario vendor with support from legacy donors. They'll enable hands-on research for students studying early musical history.

What Are Neumes?

Unlike modern sheet music, neumes show melodic direction and rhythm without specifying exact pitch. Monks already knew the melodies; neumes were memory aids, not sight-reading tools.

Why They Matter

Dating to the 9th–12th centuries, neumes reveal that Western music developed through oral tradition and memorization—similar to Eastern cultures—rather than rigid notation.

"Neumes are the closest thing to an actual transcription of an intangible idea in someone's mind," said music professor Kate Helsen.

Bringing History to Life

To make neumes come alive for modern audiences, Helsen created "sound walks," featuring posters with images of neume fragments found by Meert-Williston in manuscript waste. Paired with sound beacons linked to a smartphone app, visitors can hear the chants as they approach each one.

"We forget there was a time when sheet music was a momentous discovery," Helsen said. "...Now Western has actual examples of the earliest efforts to capture music."

For a full version of this story, visit Medieval Neumes.



FROM TRASH



to Treasure



Fourth-year classical studies student Stephanie Leith spent her summer searching for medieval manuscript fragments used to support spines and reinforce bindings in the production of the world's first books. She worked under the guidance of special collections librarian Deborah Meert-Williston and her research supervisor, classics professor Kyle Gervais.

Fourth-year classical studies student Stephanie Leith (left) spent her summer searching for medieval manuscript fragments used to support spines and reinforce bindings in the production of the world's first books. She worked under the guidance of special collections librarian Deborah Meert-Williston (centre) and her research supervisor, classics professor Kyle Gervais (right).

Medieval manuscript fragments, once buried in bindings of early books, offer 'window into the past'

She once worked in the high-tech world for search engine giant Google. Now, Stephanie Leith is manually searching early print books, looking to uncover even older works within.

Leith's quest started this past summer, delving into volumes housed in the Archives and Special Collections (ASC) of Western Libraries, hunting for fragments of medieval manuscripts, once used to make bindings of the world's first books.

As bindings and covers fall away over time, the fragments of parchment become visible. Because the text of these fragments was not typically erased before being repurposed for bookbinding, it's often possible to read and analyze that text. Researchers can sometimes identify the work from which it was drawn and determine the approximate date of when the manuscript was first produced.

"These fragments offer a window into the past, telling us more about what life was like in a given time," said Leith, who took on the project through Western's undergraduate student research internship (USRI) program.

The opportunity brought the fourth-year classical studies student the satisfaction she was seeking when she left her career and returned to school.

"I was driven by a need and thirst for meaning and to contribute to something larger than myself, which is how I see academia," Leith said. "Now I'm contributing to a piece in the giant puzzle of history."

Research Opportunity 'Too Exciting to Let Go'

Leith first learned of the use of early medieval manuscripts in the art of bookbinding as part of classics professor Kyle Gervais' Introduction to Medieval Manuscripts course, during a class visit to the ASC.

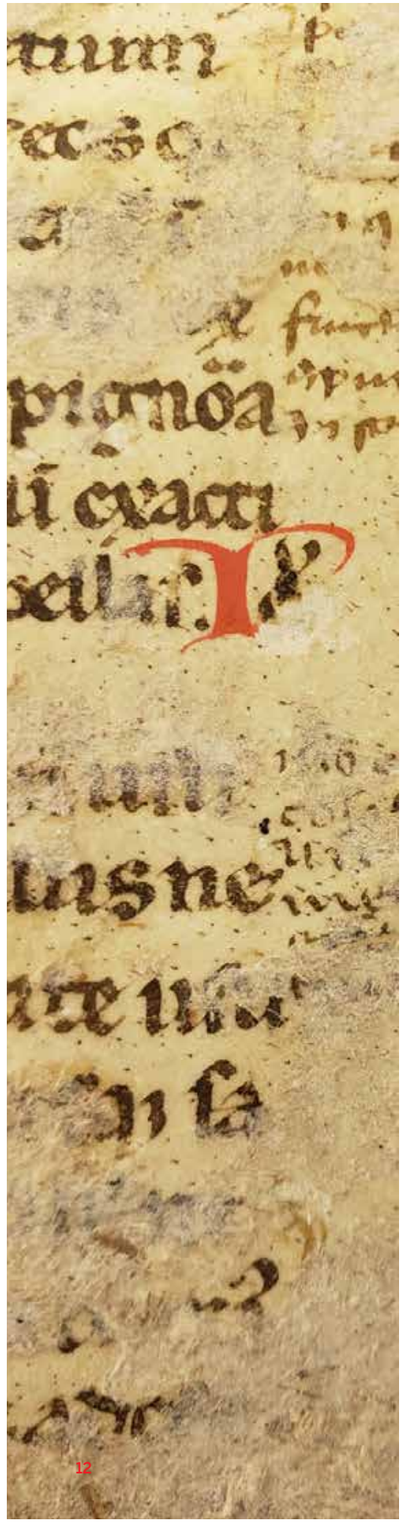
"As we shifted from medieval manuscripts on parchment to print books, manuscripts became 'old tech' as printing could ramp up the dissemination of written works faster," Leith said.

"Manuscripts weren't thought to be exciting anymore and were often cut into strips to support the spines of books, reinforcing the sewing supports to make sure the books would still open nicely."

As special collections librarian Deborah Meert-Williston showed examples of fragments found in some of the ASC's rare books, Leith became fascinated, eager to learn more.

"Western Libraries had already identified fragments dating back to the early 12th century, and the possibility of finding more was too exciting to let go. When Dr. Gervais pitched the USRI project to me, I absolutely knew that's how I wanted to spend my summer," Leith said.

Under the supervision of Gervais, whose research interests include digital humanities and the study of pre-modern manuscripts, and with the guidance of Meert-Williston, an expert on rare books and medieval manuscript materials, Leith reviewed 200 early books from the 16th century.



She discovered 16 books containing 62 individual fragments, which she photographed, catalogued and recorded. She also created a website to document her findings.

Fascinating Findings Buried in Bindings

The limp parchment bindings of 12 out of the 16 books show they've remained untouched for almost 500 years. The fragments predominantly feature texts written in Latin, with two in Dutch and Hebrew. Others, not yet identified, could be in German or Middle English.

The manuscript fragments vary in size and content, falling in four categories: Christian theology, history of medicine, classical history and English literature.

Highlights include three large fragments from the 13th century decretals of Pope Gregory IX, created to organize and clarify the laws of the Roman Catholic Church.

They hold what Leith calls the "little gem" of her discoveries.

It's not just the main text that's intriguing, but the commentary surrounding it.

"You can see two different people had used it for study. Their handwritten notes are around it and they've done a medieval version of 'highlighting,' where they draw a little finger to point out what's important. This is an example of how these tiny fragments tell their own story. Those students, through their notes, are showing this was important enough to be studied, how it was interpreted and what it meant to them at the time."

A small 1562 edition of *The Epistles of St. Ignatius of Antioch* contained not one, but three different fragments.

Gervais identified one of the fragments to be from Julius Caesar's *De Bello Civili 2.4*. 'Hidden' on the spine of the book, it was only found because the book fell apart.

"To discover a pagan work supporting the spine of a Christian one is fascinating," said Leith, who's also pursuing a major in Catholic studies. "In the medieval period, Christianity became dominant, prompting an ongoing debate about classical works—the idea they were valuable, but how could Christians reconcile that if pagans wrote them? Finding writings of Julius Caesar under a religious book shows someone found enough value in it to save it, even if they later turned it into trash. It also tells us they were reading Caesar's works and that Caesar's works were being reproduced into the 13th and 14th century."

Relevance of Research at Western and Beyond

Meert-Williston said Leith's research is helping advance important work for the ASC and Western.

"Although we knew that our early print collection contained manuscript 'waste', so far there has not been a systematic approach to gathering the fragments all together and creating a record of what we have. Most of the fragments Stephanie identified have not been studied and some of what she uncovered was being seen for the first time in hundreds of years," Meert-Williston said.

She also noted the relevance Leith's and Gervais' ongoing research has beyond Western.

"There is great interest in our medieval manuscript collection, not just from our campus community, but from around the world. Finding, identifying, and describing these fragments is an extremely worthwhile effort because it adds to the quantity and quality of our existing collection, which supports both teaching and research," said Meert-Williston. "Since each medieval manuscript is a unique object, and may contain information not available anywhere else, every fragment offers the academic community the possibility of learning something about the world we didn't know before."

Gervais said the discoveries help give humanities students direct connections to the materials they're studying, a rarity in the field.

"For the classics of Ancient Greece and Rome, the texts we study are here thanks to copies handwritten over time. We have all these fragments, thanks to the fact somebody had an old book kicking around. They no longer saw it as valuable and cut it up to support a new book they did value. Five hundred years later, it is suddenly significant to us, because it's preserving a document hundreds of years older than the book we're looking at."

Preservation, Gervais added, is another important aspect of the manuscript fragment project.

Libraries around the world, including Western, are preserving fragments of ancient medieval manuscripts within early modern books, without knowing they are there. That puts the fragments at risk, often when someone has good intentions of repairing them.

"When a rare book is recovered and rebound, all of this, 'waste' gets thrown away," Gervais said. "That's why it's important to find it, catalog and preserve it."

Next Steps

Fuelled by the findings of her summer internship, Leith is continuing to work on the project with Gervais.

"It's become a bit of an obsession, like solving a mystery," she said. "And there's so much more to explore."

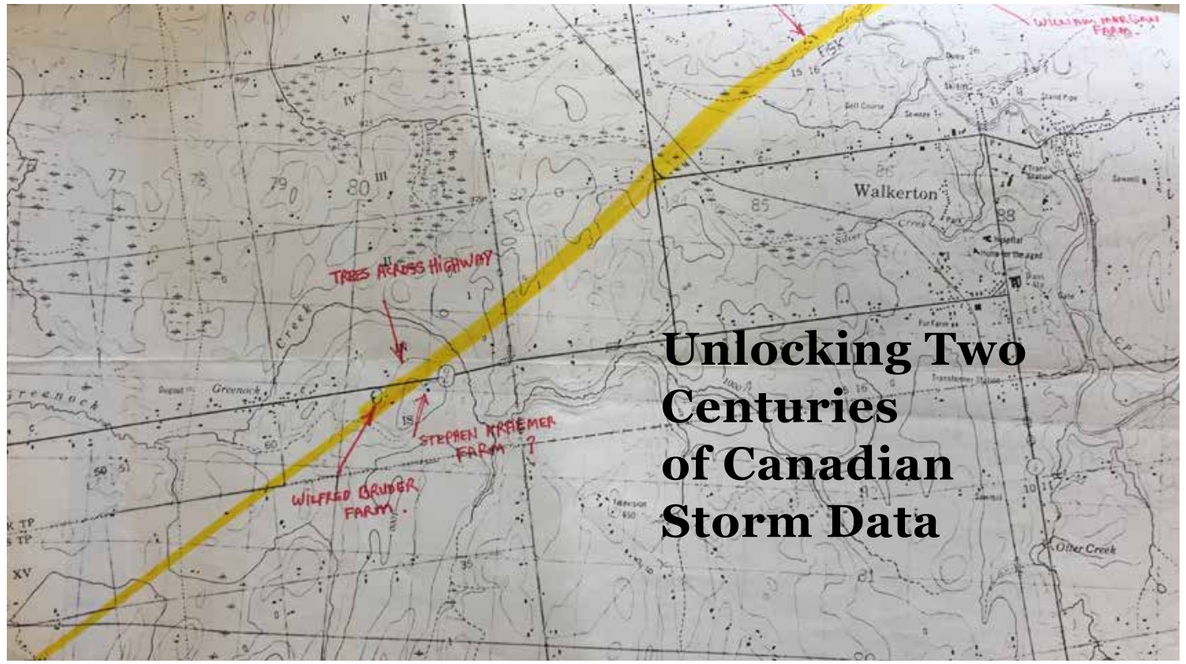
Once Leith finishes studying books in the ASC's 16th century collection, she'll turn her focus to those from the 17th century.

Other next steps include developing a fragment catalogue for Western Libraries and sharing that data on Fragmentarium, a digital laboratory cataloguing medieval manuscript fragments from around the world. This opens the possibility of collaborating with scholars around the world to piece together a manuscript, once cut into pieces and scattered across the globe.

That would be "a gift," for Leith, who's glad to have transferred her love for sharing knowledge at Google to sharing knowledge through tiny pieces of history.

"Working in tech, everything phases out approximately every six months, because things iterate so fast," she said. "What's fascinating about this work is its enduring nature. It's a little footprint in the path of time and part of my footprint now. ■





Unlocking Two Centuries of Canadian Storm Data

Michael Newark's pioneering tornado research archive has been transformed into a comprehensive digital resource, making centuries of Canadian storm data accessible to researchers worldwide

For decades, retired Environment Canada meteorologist Michael Newark pursued a singular mission: tracking down every piece of tornado documentation he could find. Newspaper clippings, investigation reports, photographs—Newark methodically assembled Canada's first national tornado database, with records stretching back to 1792. Yet this treasure trove of storm data remained locked away in filing cabinets, invisible to the researchers who could put it to use.

That changed when the Northern Tornado Project (NTP) approached Western Libraries with a challenge: transform Newark's comprehensive collection into an accessible online resource. After a two-year collaboration, they succeeded, launching the digital archive in July 2024.

The Challenge: Organizing a Whirlwind of Information

"When we first got [Newark's archive], it was really just like folder of digital documents of various types and sizes," says Arielle VanderSchans, the research and scholarly communications librarian who co-led the project with her colleagues Joanne Paterson and Courtney Waugh.

The scope was daunting. Thousands of documents needed organizing. Photos were labelled with random numbers. News clippings from different decades were mixed together. Nothing was searchable.

"It was like getting a file cabinet with no order," VanderSchans explains. "There was a lot of organizing to do before we even got started on metadata, which is where the real work began."

The team spent 18 months organizing and creating detailed digital records for each tornado event by systematically adding titles, locations, dates, and times—metadata that would make the archive useful for research.

"As my colleague Joanne likes to say, 'It all starts with a spreadsheet,'" VanderSchans notes.

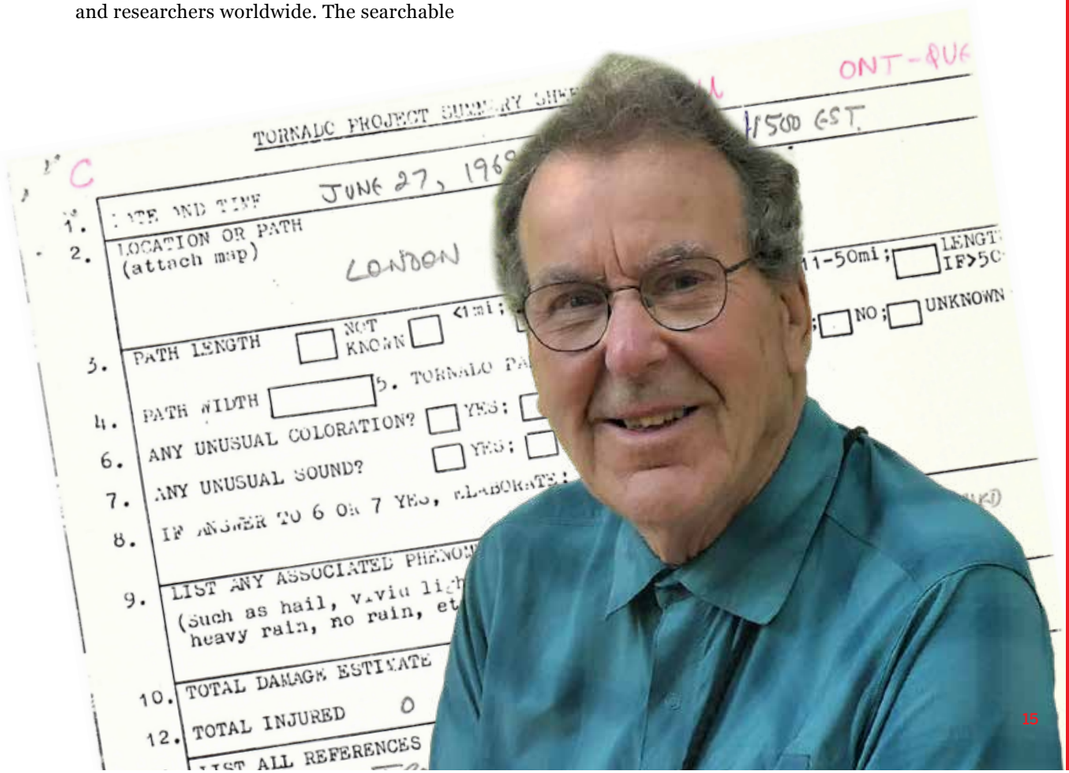
A Tool for Modern Research

The Michael Newark Digitized Tornado Archive now serves meteorologists, emergency planners, insurance companies, and researchers worldwide. The searchable database allows for better risk assessment, improved forecasting, and stronger preparedness planning.

The project shows how careful organization can transform a static collection into a dynamic research tool. By making the historical record openly available online, researchers can now analyse patterns and trends that were previously locked away.

By summer 2026, the team plans to migrate to a new platform with enhanced mapping capabilities, using the geographic coordinates they catalogued to enable better spatial analysis.

The collaboration between Western Libraries and the NTP has preserved an important piece of Canadian meteorological history while creating a foundation for ongoing tornado research and education.



Michael Newark, University of Toronto graduate, retired Environment Canada meteorologist, and a 1969 London Tornado Project Summary Sheet

Making Invisible Histories Visible



The Black Londoners Project

A groundbreaking collaboration between Western researchers and Western Libraries is recovering lost stories from London, Ontario's past

Harpers Weekly. 1864. Negroes Leaving Their Home. Internet Archive.

"I keep a boarding-house, and have now ten boarders, all fugitives, as nearly as I can recollect. One of them came last winter. They have all got employment."

These words from 1855, spoken by a formerly enslaved woman known only as Mrs. Brown, offer a rare glimpse into a thriving but largely invisible community of Black freedom seekers in London, Ontario. Her testimony, recorded in abolitionist Benjamin Drew's *A North-Side View of Slavery*, represents one of just 16 documented accounts of Black Londoners whose stories have been systematically erased from the historical record.

Walking through downtown London today, PhD candidate Ronique Gillis sees invisible histories everywhere. "I think about how some of these places once belonged to Black Londoners as Black businesses or households," she reflects in a 2025 Western News article. "The erasure is shocking to me." Her words capture the central challenge facing The Black Londoners Project: how do you recover entire communities that have been systematically written out of history?

The answer lies in an innovative collaboration between Western researchers and Western Libraries Map and Data Centre, using Geographic Information Systems (GIS) technology to transform scattered historical traces into an interactive digital map that makes invisible histories visible for the first time.

> "My name is – – – but you must not tell it, for I have children at the South, who would be eaten up if their masters knew."
>
> *— An 80-year-old freedom seeker, known simply as "An Old Woman,"*



Auguste Edouart. 1844. Dalmany. Glenn Tilley Morse Collection. The Metropolitan Museum of Art.

Why Black Histories Disappeared

The Black Londoners Project, co-founded by English and Writing Studies professors Alyssa MacLean and Miranda Green-Barteet, confronts a stark reality about historical preservation in 19th century Canada. London's memory of Black history is very limited, even though Black communities were very much present in the early 19th century.

Because the historical record was so systematically biased against people of colour, many records simply weren't preserved. Records for women of colour were even more rarely kept. The record-keeping itself was male-dominated and focused almost entirely on London's white population, leaving Black lives largely undocumented.

Beyond institutional neglect, many formerly enslaved individuals—known as freedom seekers—deliberately avoided documentation due to fear and vulnerability. Some were afraid of being found by former enslavers or had family members who had not yet escaped. This apprehension extended to interactions with census takers and officials, leading many to remain hidden from public records.

The consequences of this systematic erasure are profound. An 80-year-old freedom seeker, known simply as "An Old Woman," instructed Drew: "My name is – – – but you must not tell it, for I have children at the South, who would be eaten up if their masters knew." Her words reveal how survival often required invisibility—creating the very silence that historians now struggle to overcome.

> "These records are very hard to find. It's really hard to trace any sort of Black history in London, and a lot of those records have been erased"
>
> — *Maia Somers, GIS Technician*

Mapping the Unmappable: Technology Helps Reveal Hidden Lives

In addition to traditional archival research, reconstructing the lives of early Black Londoners required spatial thinking, data management, and technical innovation. This is where Western Libraries' Geographic Information Systems (GIS) expertise became crucial.

GIS technology allows researchers to create digital maps that layer different types of information—historical documents, census records, property deeds, and personal testimonies—onto geographical locations. For Maia Somers, GIS technical specialist at the Western Libraries Map and Data Centre, this presented both opportunities and challenges. "These records are very hard to find. It's really hard to trace any sort of Black history in London, and a lot of those records have been erased," she explains.

Initially supported by GIS specialist Liz Sutherland and now guided by Somers, the team developed an interactive dashboard mapping birthplaces, arrival points in London, and final destinations for the 16 documented individuals. Users can click on these points to explore each person's journey, transforming abstract historical data into tangible human stories.

The project currently features three detailed stories online: Mrs. Brown, whose boarding house sheltered other freedom seekers; Margaret Henderson; and the anonymous "Old Woman" whose protective silence speaks volumes about the dangers these individuals faced. Each represents a different facet of the freedom seeker experience in London.

"The map really gives life to the data," Somers explains. "It makes it easier to understand the story and connect with the individuals behind it."

The team is now working toward a more advanced map that will integrate spatial data with archival materials—newspaper clippings, sketches, and other documentation—to create an even richer, interactive experience.

A Model for Uncovering Hidden Histories

This collaboration represents more than a single research project—it's a model for how academic libraries can support community-driven research into underrepresented histories. By combining historical research with spatial data visualization, Western Libraries continues to provide GIS guidance and technical support to help researchers manage and visualize their data in ways that traditional archival methods cannot achieve.

The project builds infrastructure that can support similar efforts to uncover erased or marginalized narratives across Canada and beyond. The methodology developed here—using GIS technology to map fragmented historical records—offers a blueprint for other researchers working to recover lost communities and forgotten voices.

The Black Londoners Project interactive map and database is available online. If our GIS experts can help you bring stories connected to your research to life, please reach out to rsclib@uwo.ca.



Timothy H. O'Sullivan. 1862-1865. Five Generations on Smith's plantation, Beaufort, South Carolina. New York Public Library.



HIDDEN TREASURES

Maia Somers
Geographic Information Systems Technician, Map and Data Centre, Western Libraries

"It's super interesting to see how history and spatial data can combine and create a really powerful story."

Maia Somers (BSc [Hons] '17, Geology and Physical Geography, Western University; MSc '23, Physical Geography, Queen's University) works as a GIS technical specialist at Western Libraries. The primary focus of her work is with the Canadian Severe Storms Laboratory (CSSL) to manage project data including aerial, drone, satellite, and ground surveys. She supports the field survey team with data collection methods and maintains Open Data sites and event dashboards for both the Northern Tornadoes Project and Northern Hail Project.

Maia also collaborates with a variety of other groups in the Western community applying GIS tools and software to create educational maps and applications. She believes GIS is most powerful when it reveals a story in the dataset, making it easier for users to understand and connect with the information.



Western Libraries Joins National Digitization Effort

Through a national partnership, Western Libraries is helping unlock new research possibilities by digitizing a vital piece of Ontario's newspaper history

When Western Libraries digitization librarian Leanne Olson packed up 87 reels of microfilm containing editions of the London Advertiser, she wasn't just mailing old newspapers—she was ensuring a piece of Ontario's history would be widely accessible for generations to come.

Thanks to a new partnership with the Canadian Research Knowledge Network (CRKN), Western University Libraries is helping digitize 11 additional years of the *London Advertiser*, a once-prominent daily newspaper that served London, Ontario, until 1937. The project is part of CRKN's inaugural call for Canadiana Collection Development Projects, a national initiative to expand access to Canada's diverse and rich past.

"This is a great partnership," says Elizabeth Mantz, Acting Head of Archives and Special Collections. "It's not just about preserving the past—it's about making it accessible to researchers, genealogists, and the public across Canada and beyond."

A National Stage for Local Stories

The *London Advertiser* was a vital source of news for southwestern Ontario in the early 20th century. Covering everything from local elections and real estate sales to world wars and influenza outbreaks, the paper offered a daily snapshot of life in a growing Canadian city.

> "This is a great partnership. It's not just about preserving the past—it's about making it accessible to researchers, genealogists, and the public across Canada and beyond."
>
> *— Elizabeth Mantz, Acting Head of Archives and Special Collections*

One of the world's largest digital archives of Canadian heritage, CRKN's Canadiana platform already hosts issues from 1890 to 1925. With Western's contribution of microfilm from 1925 to 1936, the collection will now offer a more complete historical record—freely accessible to anyone, anywhere.

"Local newspapers are really heavily used," says Olson. "Now access won't be limited to those who are able to access our collections. They'll be fully searchable online and part of a much larger national collection."

The demand is clear. In 2024, the *London Advertiser* ranked #42 among the top 50 most consulted titles in CRKN's Canadiana Collections. A user survey, which gathered over 13,000 responses, found that most users are interested in history, genealogy, and Indigenous studies—areas where historical local newspapers can be an invaluable resource.

A Win-Win Collaboration

For Western, the project is a milestone in its growing digitization efforts. "We don't have the equipment or staff to digitize microfilm at this scale," Olson explains. "This partnership allows us to contribute to a national collection without needing to invest in specialized technology or staffing we simply don't have."

CRKN is handling the digitization, metadata creation, and hosting. Western provides the content and curatorial expertise. "It's a great model," Olson says. "We're learning a lot, and we're contributing to something bigger than ourselves."

The project also reflects Western's strength in regional history. "We're very well resourced in Canadian newspapers, especially for southwestern Ontario," Mantz notes. "This could open the door to digitizing other regional newspapers in the future."

Research That Reaches Beyond Campus

The impact of digitizing historical newspapers is already evident in the broader research community. Alyssa MacLean, a professor in Western's Department of English and Writing Studies, offers a compelling example. Her research relies heavily on digitized newspapers like *The Provincial Freeman* and *London Free Press*, many of which are available through platforms like Canadiana.

"One of the helpful aspects of having sources online is that we can consult them as a team in asynchronous contexts," she explains. "We can interact with the entire newspaper page, rather than just a photocopy from microfilm."

Her experience highlights the value of making historical newspapers digitally accessible—for academic researchers, but also for genealogists, educators, and community historians alike.

Looking Ahead

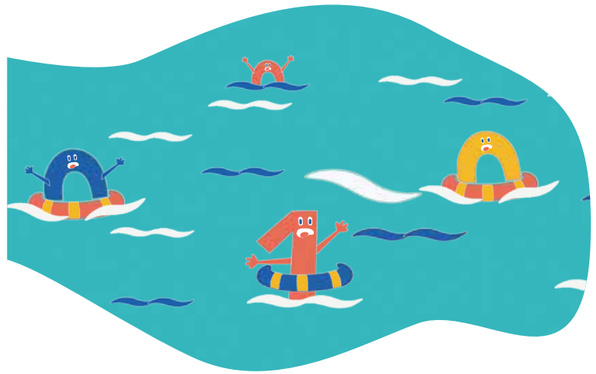
For Western Libraries, the project is just the beginning. "We're already thinking about the next call," Olson says. "It takes time and a lot of collaboration across our units to develop a solid project, so we're starting to plan ahead."

Western's digitization efforts continue to grow, with projects like the digitization of the *Western Gazette*, the university's official student newspaper, also underway. "We're really seeing growing interest in local history," Olson says. "Whether it's alumni researching the university, genealogists tracing family roots, or community members learning about their neighbourhoods, these digitized materials are filling in important gaps."

As Western approaches its 150th anniversary in 2028, projects like this one ensure that the university's legacy—and the stories of the communities it serves—are preserved for generations to come.

For the Record: A Librarian's Fight to Rescue Public Data

As government datasets began to vanish, Kristi Thompson mobilized a national initiative to keep critical evidence accessible



On Jan. 20, 2025—the day of the U.S. presidential inauguration—a quiet digital purge began. Federal agencies began removing thousands of pages and datasets, erasing content related to diversity, gender identity, climate science, and public health almost overnight. This wasn't arbitrary: new executive orders ended DEI programs and ordered agencies to strip related language from public platforms. The impact quickly extended beyond messaging. The National Center for Education Statistics lost most of its staff, climate monitoring initiatives were defunded, and key health and social data portals went offline.

For researchers and the public, the information gap was immediate—and potentially catastrophic. Without access to these datasets, tasks like tracking inflation, modeling climate risk, or evaluating education policy are at risk of becoming increasingly speculative. The loss undermines evidence-based decision-making across sectors, leaving policymakers, analysts, and communities to navigate critical issues with incomplete or outdated information.

"This kind of destruction goes beyond data loss—it is a deliberate effort to disrupt and control discourse by limiting what can be known," says Kristi Thompson, research data management librarian at Western Libraries. She adds: "An even bigger threat is that the U.S. government has stopped collecting certain data. If the data isn't collected, it never existed. You can't go back and fill in the gaps later."

Thompson documented these events in her recent peer-reviewed article, *The Data Resistance: Preserving Data Set Integrity During Federal Purges*, published in *Behavior and Social Issues*. In her article, she describes how automated web crawlers failed to capture many of the datasets. Manual intervention was required—fast.



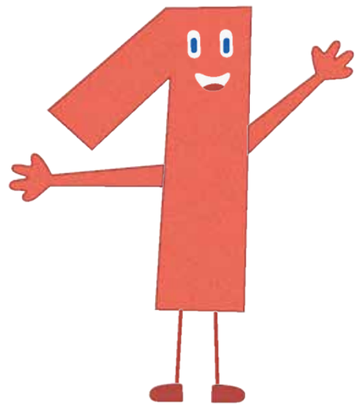
A Coordinated Canadian Response

As U.S. librarians scrambled to copy and preserve what they could, Thompson saw the alarm spreading north.

"We've had our own history of data loss in Canada," she says, pointing to the 2011 cancellation of the long-form census and the closure of the First Nations Statistical Institute. "It can happen here."

In February 2025, she co-founded the Canadian Public Data Rescue Initiative with Alexandra Cooper of Queen's University. What began as a listserv post quickly evolved into a multi-institutional collaboration. The initiative now includes three subgroups: one focused on rescuing U.S. data, another on mass downloading Canadian government data, and a third to curate and publish individual datasets so they remain usable—not just stored.

"Our job is to turn a disappearing link into durable evidence—cleaned, documented, and deposited where people can actually find and use it," says Thompson.





From Rescue to Reuse

While downloading raw data can come with its own challenges, making sure a file is usable—and safe—is a whole other matter.

Some data collections are only accessible through interactive web tools. Others require registration or a data use agreement. File sizes can be massive, and often special expertise is needed to structure the data and import it into statistical software for analysis.

"If you just grab the raw file, it's like finding a box of lab notes in a language you don't speak," Thompson explains. "Without proper processing, a file can be meaningless."

Turning a panicked download into a durable public resource requires a series of unglamorous but essential steps: writing metadata, reviewing and organizing documentation, and performing ingest—the process of uploading and preparing files for long-term preservation.

Privacy adds another layer of complexity. Some datasets include survey responses or health details. Even without names, combinations like postal code, age, and language can identify someone. These sensitive variables can make individuals traceable. For example, if a dataset shows a Danish-speaking researcher in a specific region with 45 years of experience, that person could be singled out.

While anonymization isn't always part of the rescue process itself, Thompson's broader work in this area has helped researchers prepare sensitive datasets for public sharing. In May 2025, she co-authored a paper on reducing re-identification risk—the chance that someone could be identified from supposedly anonymous data. Her approach: check for sensitive variables, group rare values into broader categories, and document every change so the dataset remains trustworthy.

These same principles are essential when rescued data is intended for reuse. Saving a dataset isn't just about copying it before it disappears—it's about ensuring it can be shared responsibly and understood by others.

> "When government data disappears, it disrupts the entire system of knowledge that allows governments to function effectively—and allows the public to see whether they are functioning effectively. Data collection and analysis is inherently a political act. A society makes implicit statements about what it values by what it chooses to count."
>
> *— Kristi Thompson, Research Data Management Librarian*

From Emergency to Infrastructure

By spring 2025, the Canadian data rescue team had moved from crisis mode to building systems for the future. One major contribution: preparing rescued U.S. datasets for deposit in DataLumos, a public repository hosted by the Inter-university Consortium for Political and Social Research (ICPSR) at the University of Michigan. The team is also establishing a dedicated archive on Borealis, a national research data repository, to host the Canadian datasets being rescued.

Depositing datasets in repositories like DataLumos or Borealis means they are preserved in a trusted archive, assigned a permanent link (a DOI), and made discoverable for researchers worldwide. It also ensures the data is documented and curated so others can understand and reuse it.

The initiative also ran download sprints to safeguard Canadian government data and began drafting repeatable workflows—step-by-step guides for what to grab, how to describe it, and where to publish it—so future rescue efforts can start faster and finish stronger.

What's at Stake

Government data is more than numbers. It's the evidence base for public policy, disaster planning, social equity, and much more. When it disappears, decisions get made in the dark.

"When government data disappears, it disrupts the entire system of knowledge that allows governments to function effectively—and allows the public to see whether they are functioning effectively," says Thompson.

"Data collection and analysis is inherently a political act. A society makes implicit statements about what it values by what it chooses to count."

In the face of current and threatened data destruction, Thompson urges researchers to take action—starting with safeguarding their own materials. She encourages them to become "data hoarders," keeping local copies and tracking the provenance of every file.

"Even if you think the material is backed up elsewhere," she says, "remember the LOCKSS principle—Lots Of Copies Keep Stuff Safe."

Practicing good data management, supporting preservation efforts, and using public datasets in their own research are all ways researchers can demonstrate the value of open data—and help protect it.

For Thompson, the work is urgent but also hopeful.

"If data destruction is a way to limit what people can know," she says, "then preserving data is an act of resistance."

> "If data destruction is a way to limit what people can know, then preserving data is an act of resistance."
>
> *— Kristi Thompson, Research Data Management Librarian*



OPEN DOORS

Kristi Thompson
Research Data Management Librarian, Western Libraries

"Data preservation isn't just technical work—it's about protecting evidence for the public good."

Kristi Thompson is a national leader in research data stewardship and co-founder of the Canadian Public Data Rescue Initiative, which mobilizes librarians and researchers to safeguard vulnerable government data. She also serves as an advisor to Western's Research Ethics Boards and co-chairs the Digital Research Alliance of Canada's Sensitive Data Expert Group. Her work spans data rescue, data anonymization, and open education. Thompson co-edited Canada's first open, bilingual textbook on research data management and has published widely on privacy and preservation.



A New Open Resource Invites Us to Rethink the Answer

A free, interactive teaching tool challenges educators, students, and professionals to build more inclusive, justice-oriented classrooms and practices

In 2022, Western Libraries made a bold commitment: to decolonize its curriculum and move beyond traditional approaches to teaching information literacy. That commitment has now evolved into a national resource—an Open Educational Resource (OER) titled *Knowledge Justice in the Helping Professions: From Theory to Practice*, launched in August 2025.

Though titled for the helping professions, the resource offers insights and strategies that extend far beyond nursing, psychology, or librarianship. Its core questions—about whose knowledge counts and how we make space for diverse voices—are relevant across disciplines, institutions, and professions.

This free, interactive teaching tool is already generating national interest, with close to 100 educators and librarians signed up, even before the resource had officially launched.

"We built this resource for educators, librarians, and students across Canada," said Heather Campbell, curriculum librarian and co-lead author. "But its lessons are relevant anywhere—the questions it asks about whose knowledge counts are universal."

> "We built this resource for educators, librarians, and students across Canada, But its lessons are relevant anywhere—the questions it asks about whose knowledge counts are universal."
>
> *— Heather Campbell, Curriculum Librarian*

A Spark in Nursing

The OER's roots trace back to Western's 2022 Fall Perspectives on Teaching conference, where Ashley McKeown, a lecturer in the Arthur Labatt Family School of Nursing, first encountered Western Libraries curriculum work.

"I realized my students—and even my own practice—were relying on a narrow slice of evidence," McKeown recalls. "I went home and rewrote my assignments that night."

That moment sparked an ongoing partnership between McKeown, Campbell, and teaching and learning librarians Lea Sansom and Kathryn Holmes. Together, they began experimenting with how to teach epistemic justice—the idea that social identities influence whose knowledge is heard, valued, or dismissed.

Their work resonated deeply with students and faculty, inspiring new assignments, classroom discussions, and even a presentation to the Canadian Association of Schools of Nursing (CASN), where McKeown, Campbell, and doctoral student V. Logan Kennedy shared their curriculum work with nursing educators and regulators.

From Curriculum to OER

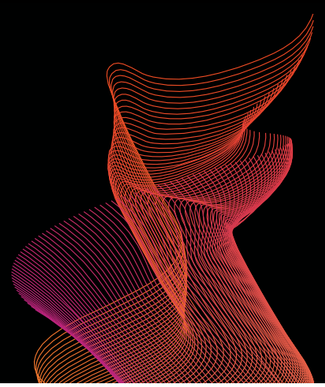
Western Libraries Teaching and Learning team quickly realized that putting knowledge justice into practice would require experimentation—and collaboration.

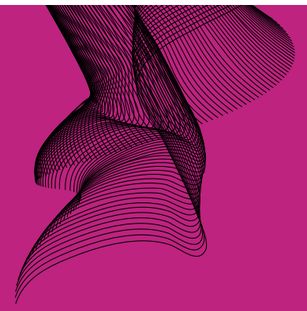
"As librarians, we often teach in other people's classrooms," said Campbell. "Ashley gave us the chance to test new approaches, and together we developed something that truly resonated."

The project was made possible by a dedicated Open Educational Resource (OER) grant from Western Libraries, which provided the primary funding for development. Additional support came from the Centre for Teaching and Learning, the Instructional Technology Resource Centre, and faculty from Education and Health Sciences. Co-authors from across Western—including the Faculty of Education, Faculty of Health Sciences, Arthur Labatt Family School of Nursing, Centre for Teaching and Learning, and Western Libraries—played a vital role in shaping the resource and championing its inclusive vision.

Built in Pressbooks and licensed under Creative Commons, the OER is free to access, share, and adapt. It includes six chapters, embedded videos, reflection activities, and a downloadable workbook.

> "This resource exists because so many people came together around a shared belief that students deserve to engage with knowledge in more inclusive and critical ways."
>
> *— Lea Sansom, Teaching and Learning Librarian*





What Makes This Resource Different

Unlike traditional information literacy modules, the OER reframes how learners engage with knowledge. It introduces tools like the Voices Flower, which shifts the focus from "finding sources" to "seeking voices," and the Framework of Harms, which helps learners evaluate all forms of evidence—peer-reviewed articles, government reports, or social media posts—based on their potential to help or harm.

Rather than relying on checklists or source types, learners are guided to assess the diversity and sufficiency of their evidence, and to reflect on whose perspectives are missing.

"We're teaching students to seek voices, not just sources," said Campbell. "And to ask: What evidence do we value most—and whose voices are being left out as a result?"

The OER also offers practical guidance on Generative AI, helping learners navigate these tools with care and intention. Rather than treating systems like ChatGPT or Gemini as neutral sources, the resource encourages students to reflect on how such technologies—trained on dominant cultural data—can shape the knowledge they encounter.

What's Inside the OER?
Each chapter explores a different facet of knowledge justice:



Chapter 1:

Identity, positionality, and power



Chapter 2:

Epistemic injustice—recognizing who is missing



Chapter 3:

Defining knowledge justice and its role in evidence-based practice



Chapter 4:

Strategies to seek missing voices, including guidance on AI and seeking others lived experience



Chapter 5:

Evaluating knowledge sources through the *Framework of Harms*



Chapter 6:

Real-world applications, featuring interviews with professionals in nursing, psychology, and librarianship



The final chapter is a standout. It builds on the foundation laid in the first five chapters by bringing those ideas into the real world, featuring candid reflections from professionals who are learning to apply knowledge justice in their daily work—often in messy, complex, and emotionally charged contexts. It's where theory meets practice, and where readers see how small, intentional shifts can lead to meaningful change.

"It shows what happens when professionals choose to act differently, when they confront epistemic injustice, reflect on their own social locations, and commit to change," said Campbell. "These stories are an invitation to imagine new ways of practicing."

Why It Matters

The OER asks difficult but essential questions, such as: Whose evidence are we relying on? Who is missing from our understanding of the world? How can we practice knowledge justice in spaces dominated by hidden algorithms and systemic biases?

“Our students know that inequities exist. They live them every day,” said McKeown. “Avoiding those conversations in the classroom does them a disservice.”

For Western Libraries, the OER is more than a teaching tool.“This resource helps us fulfill our operational goal of being leaders in library instruction,” said Campbell. “It’s also a concrete example of how we’re embedding our curriculum across the university.”

Early Impact and Future Plans

Western instructors in nursing, health sciences, dietetics, medicine, library and information science, and philosophy plan to integrate the OER into their courses this year. Nationally, the resource’s authors have presented the curriculum at conferences across the country, sparking conversations in disciplines from psychology to library science.

Looking ahead, the team plans to release a companion teaching guide and explore future volumes focused on academic research and knowledge production.

“Knowledge justice is a collaborative practice,” said Sansom. “We hope this inspires faculty at Western and beyond to reach out to their librarians and explore these ideas together.”

Ready to Explore?

Visit Knowledge Justice in the Helping Professions or the Western Libraries curriculum online and discover how you can bring knowledge justice into your classroom or professional practice.

Want to Learn About Valuable Resources Like This, and More?

The Western Libraries Newsletter connects you with the expertise, services, and programs that can catalyse your research and enhance your teaching.

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OPEN DOORS



Beyond Basic Weather Maps: Creating Tools for Tornado Professionals

How the Map and Data Centre transformed decades of tornado data into one of Canada's most sophisticated weather research tools

250
previously unknown tornadoes discovered

When the Northern Tornadoes Project (NTP) approached Western's Map and Data Centre with decades of tornado research, the challenge was clear: how do you transform raw historical data into something meteorologists, emergency planners, and researchers can actually use? The answer required sophisticated Geographic Information Systems (GIS) expertise, careful platform design, and ongoing technical maintenance—exactly what GIS technician Maia Somers and her colleagues specialize in.

The result, launched in May 2024, is Canada's Advanced Tornado Dashboard—a platform that does more than display data. It reveals patterns, enables complex filtering, and has helped document over 250 previously unknown tornadoes across the country, including 45 newly identified fatalities from 1980-2009.

Designed for Professional Users

The Map and Data Centre's first task was understanding what professionals actually needed. Weather Network reporters covering severe storms, insurance companies assessing regional risks, and municipal planners developing emergency protocols all required analytical capabilities that basic public dashboards couldn't provide.

The solution meant building two complementary systems with distinct technical requirements. While the NTP's main dashboard needed to stay simple and updated regularly with recent events from 2017 forward, the Advanced Dashboard required sophisticated filtering, historical depth, and membership-based access control.

"We'll get reporters from newspapers or the Weather Network or meteorologists that will come in and look at this dashboard to analyze the historical database," explains Somers.

The technical architecture the Map and Data Centre created using ArcGIS Online goes far beyond basic mapping. For the first time, users can view actual tornado tracks where documented, with enhanced detail for complex, non-linear paths. The platform enables filtering by month, time of day, tornado length and width, Enhanced Fujita rating (a scale used to measure tornado intensity), motion patterns, and economic losses.

"The filters that we create in the back end help them do that," Somers says. "If researchers are going in there to use it, they are now able to find specific subsets of a dataset."

Building the Platform

The project began in 2023 when GIS specialist Liz Sutherland and former Map and Data Centre employee Jordan Fuller started developing the technical framework. When Somers joined in April 2024, she brought the dashboard to completion before its summer launch, working closely with the NTP team led by David Sills.

3084
tornado events mapped across Canada from 1980-2024

The technical work involved more than just displaying points on a map. The Map and Data Centre had to create systems for visualizing tornado paths, building intuitive filter mechanisms, managing membership access, and ensuring the platform could handle 3,084 tornado events spanning from 1980 through 2024—with plans to eventually extend back to 1792.

> "ESRI has asked us if we would be able to include NTP's tornado event layer in the Living Atlas of the World, because it is important information that is consistently being collected and updated live. This is positioning Western's Map and Data Centre among elite institutions creating GIS infrastructure with global impact."
>
> *— Maia Somers, GIS Technician*

Each technical decision shaped how users interact with the data. The backend filtering system allows researchers to quickly isolate specific subsets—say, all major tornadoes (rated EF3 or higher) in Quebec during summer months, or all tornadoes causing fatalities in a specific decade. This granular control transforms how professionals analyze historical patterns and assess risk.

The Technical Heavy Lifting

For Somers, launching the dashboard was just the beginning. Her role requires continuous technical maintenance and refinement—what she calls "the technical heavy lifting."



Each year, she integrates new field season data into the Advanced Dashboard. The 2024 tornado season data was incorporated last winter, requiring careful quality control and metadata updates. But the work extends far beyond these annual additions.

"We're constantly in discussion about it with the team," she explains. "I get emails multiple times a month and then do an annual update as well, on top of the small little tweaks that I make every month. It's constantly evolving."

Those "small tweaks" involve updating attributes as the NTP research team confirms new details about historical events, refining visualizations, and ensuring data accuracy.

The Map and Data Centre also manages the entire membership system, processing requests and controlling access to maintain the platform's professional focus.

National and International Recognition

The technical sophistication of the platform hasn't gone unnoticed. ESRI, the leading geographic information systems company, has invited Western Libraries to include tornado data in their Living Atlas of the World—a collection of authoritative geographic datasets used by GIS professionals globally.

"ESRI has asked us if we would be able to include NTP's tornado event layer in the Living Atlas of the World, because it is important information that is consistently being collected and updated live," Somers explains.

This recognition positions Western's Map and Data Centre among elite institutions creating GIS infrastructure with global impact. The platform supports scientific studies, helps industry professionals assess risk levels, and enables municipalities to improve emergency management planning. The historical data also helps improve tornado probability modelling and challenges the misconception that tornadoes rarely occur in Canada.

The Advanced Dashboard demonstrates how specialized GIS expertise transforms research data into genuinely useful tools. By creating sophisticated technical infrastructure and maintaining it through ongoing collaboration, the Map and Data Centre has built a platform that serves both immediate professional needs and long-term scientific understanding of severe weather patterns across Canada.

The NTP Advanced Dashboard is available by membership request. The Map and Data Centre provides GIS support for research projects across Western University.



What's Next: Creating Canada's First Hail Intensity Scale

Unlike tornadoes, which have the Enhanced Fujita scale for measuring intensity, hailstorms have no standardized classification system. The Northern Hail Project (NHP), supported by Western Libraries' GIS expertise, is working to create Canada's first hail intensity scale—a critical step given that hail has been identified as the largest contributor to insured losses from severe convective storms globally, with Canada experiencing its first billion-dollar hailstorm in Calgary in 2020.

The challenge? "Hail is ice and it melts, so as a researcher, you have to be right there while the hailstorm is still happening," explains Maia Somers, GIS technical specialist at Western Libraries. This has led the research team to become storm chasers, racing to collect samples.

Since taking over the project from former colleague Jordan Fuller, Somers has worked with the team to develop new types of weather mapping, including "hail swath" visualization that tracks entire storm footprints using radar data combined with ground samples.

With the help of GIS technical specialist Liz Sutherland, the project has also launched an open data site with an interactive dashboard where users can explore hail events investigated by the NHP Storm Survey Team. This work could influence how hailstorms are understood across North America.

MADE IN CANADA

A bilingual, open textbook co-created by Western librarians is setting the national standard for research data management

When Canada's Tri-Agency Research Data Management Policy introduced new requirements for data planning and sharing, researchers, librarians, and educators across the country faced a challenge: there was no comprehensive, Canadian-specific resource to guide them. In response, Western Libraries helped lead a national effort to fill the gap. The result: *Research Data Management in the Canadian Context*, a bilingual, open textbook co-edited by Western librarians Kristi Thompson, Elizabeth Hill, and Emily Carlisle, alongside Danielle Dennie (Laurentian University) and Émilie Fortin (Université Laval), who oversaw French-language submissions and led development of the French edition.

Today, it's being adopted in courses and training programs across the country.

Building Canada's RDM Playbook

The idea began in 2021 as a conversation among research data management (RDM) professionals who saw a gap in Canadian resources.

"We saw a real need for Canadian-specific guidance," says data librarian Hill. "Before this, instructors had to rely on U.K. materials that didn't reflect our laws, policies, or infrastructure. This book reflects our bilingual context and Indigenous data sovereignty considerations—turning policy into practical, teachable workflows."

With Hill's and Thompson's expertise in data management and Carlisle's background in open access publishing and editorial management, the team launched a national call for contributions—accepting chapters in English and French and securing professional translation and copyediting

"The editorial work was intensive but essential," says Hill. "Emily led that effort with care and coordination to ensure consistency across chapters and translations."

To support this ambitious work, they raised close to $45,000 in grants, including a prestigious SSHRC Connection Grant and significant support from Compute Ontario. This national backing ensured the book met professional standards while remaining freely available as an open resource. Additional support came from Western University, the University of British Columbia, Dalhousie University, Western Libraries, Concordia University Library, and the Digital Research Alliance of Canada.

From Policy to Practice

RDM can sound abstract, but it's essential for research quality and compliance. Good RDM supports replicability, protects public trust, and is now required under Canada's Tri-Agency RDM Policy, which mandated in 2021 that researchers applying for grant-funded, data-related research must write Data Management Plans and prepare data for archiving.

> "This book reflects our bilingual context and Indigenous data sovereignty considerations—turning policy into practical, teachable workflows."
>
> — *Elizabeth Hill, Data Librarian*

"Research data management is about planning for the future—so others can verify, build on, and reuse what we discover," says Thompson, a research data management librarian at Western Libraries.

The textbook explains these principles in plain language and connects them to Canadian requirements—such as where to deposit data and how to handle sensitive information.

The opening chapter of the second section of the book, co-authored by Hill and colleagues from across Canada, provides a historical and policy overview of Canadian RDM and links it directly to practical steps researchers can adopt.

The resource also aligns directly with funder expectations and Canadian infrastructure, helping researchers meet compliance while elevating research quality.

Impact so Far

Since its launch, the textbook has gained significant traction:

High engagement: As of August 2025, the English edition has drawn 16,700 visitors and 33,900 page views, with about 28,000 chapter views.

Adoption in courses: Library and Information Science (LIS) programs at multiple Canadian universities—including Western, UBC, and Dalhousie—now use it as a core text, giving students a Canadian-focused foundation in RDM.

OPEN BY DESIGN



Emily Carlisle
Research and Scholarly Communication Librarian, Western Libraries

Emily Carlisle supports researchers, students, and faculty in making their work openly accessible. As Western Libraries research and scholarly communication librarian since 2020, she provides guidance on Open Access publishing, Open Educational Resources (OER), and the use of open publishing platforms like Pressbooks. Her work helps scholars make informed decisions about licensing, reuse, and adaptation—advancing both research visibility and student success.

Her current research explores the history of Open Education and publisher "openwashing." She also co-led the launch of Western's inaugural OER Grant and Support Program, which funded five faculty-led projects in its first year.

Policy support: Institutional RDM teams report using the book to train staff and guide the creation of compliance workflows.

National Recognition: The Digital Research Alliance of Canada featured the book in bilingual webinars, and the Tri-Agencies recommend it as a learning resource.

Global interest: A group of Japanese academics has begun translating the book for local use, and international audiences have been eager to learn about Canada's bilingual approach, geographic diversity, and funding systems.

Thompson credits the strong collaboration of Canada's RDM community for the book's success. "The level of interest from authors across the country made developing content smooth," she says. "It showed the strength and partnership of this community."

Designed for Adoption, Built for Adaptation

The textbook's modular structure allows instructors to assign individual chapters or the full text. It's available online through eCampusOntario Pressbooks, downloadable in multiple formats, and openly licensed for adaptation.

> "Open was non-negotiable. If we're telling others that open access to information is important, we should follow suit by making our own publications open access, too. This project was an example of us doing just that."
>
> *— Emily Carlisle, Research and Scholarly Communication Librarian*

The book's organization reflects how RDM is taught: foundational principles, Canadian context, practical workflows, and specialized topics like sensitive or geospatial data. Fully bilingual and professionally edited, the resource is easy to remix. Pressbooks supports embedded media, updates, and export to print-ready PDF or EPUB.

What is RDM, and why does it matter?

Research data management (RDM) is the process of organizing, documenting, storing, and preserving research data so it can be understood, verified, and reused. Good RDM practices:

- Support research integrity by making results reproducible.
- Meet funder requirements, such as the Tri-Agency RDM Policy.
- Protect sensitive information through proper handling and documentation.
- Increase impact by enabling data sharing and reuse.

In short, RDM ensures that research data remains a valuable, trustworthy resource—long after a project ends.

Crowdsourcing Project Makes Rare Handwritten Documents Accessible and Searchable

Western Libraries invites community volunteers to help transcribe historical records

When the pandemic prevented visitors from accessing Western Libraries Archives and Special Collections in person, archives assistant Theresa Regnier and archivist Anne Quirk found a creative solution: invite the community to help make handwritten documents accessible anywhere through volunteer transcription.

Using FromThePage software, the team launched a crowdsourced transcription project that allows volunteers to convert handwritten historical documents into typed, searchable text. Community members can sign up to help transcribe materials ranging from Victorian-era diaries to World War I letters.

"The response was overwhelming," says digitization librarian Leanne Olson. The pilot project's success led to its continuation, with Olson helping with digitizing materials and archival staff regularly uploading new items to the collection.

Available collections include diaries from London's Harris Family women in the late 1800s, journals from nursing student Kathleen McIntyre at Victoria Hospital School of Nursing in the 1920s, and records from the Wawanosh family, band chiefs of the Aamjiwnaang First Nation. Volunteers can also transcribe material from John Davis Barnett, Western's first librarian, along with various university and city records.

The platform displays page images alongside text boxes where volunteers type what they see. This simple approach makes historical documents accessible to everyone while creating searchable digital archives.

FromThePage has helped institutions worldwide engage the public with their collections. Over one million pages have been transcribed through the platform, which is used by Harvard, Stanford, the British Library, and other major institutions.

For Western's archives, the project offers a way for history enthusiasts to contribute meaningfully from home while preserving and sharing London's rich historical legacy.

12 collections

196 contributors

2799 pages transcribed

3300 active pages

THE COMMUNITY SCHOLARS PROGRAM

Western Libraries Bridges Research Gap for Local Non-Profits

Community Scholars Program provides free access to thousands of academic journals and e-books

Western Libraries is proud to announce its Community Scholars Program (CSP), effective Oct. 1, 2025. This innovative initiative currently provides free access to over 20,000 academic journal titles and e-books to Community Scholars—staff at charitable and non-profit organizations in partner universities' communities.

Led by Simon Fraser University Library in partnership with Canadian university libraries, the CSP addresses a critical gap in research access. While thousands of researchers publish findings on social challenges in peer-reviewed journals, these resources remain largely inaccessible to the more than 170,000 non-profit organizations across Canada working on the front lines of social issues.

Western Libraries' participation expands this program's reach into southwestern Ontario, connecting local organizations working in social services, arts, human rights, housing, health, and environmental conservation with the research they need to strengthen their impact.

"Academic libraries can help ensure that research serves not just the university community, but the broader public good," said Geoffrey Robert Little, vice-provost and chief librarian of Western Libraries. By joining the CSP, Western Libraries is helping to democratize access to knowledge and ensuring that evidence-based research can directly inform the work of organizations making a real difference in our communities."

Community Scholars will be able to search and access publications from anywhere with an internet connection, receive support from library staff, and participate in specialized workshops. The program also provides access to "grey literature" through the Policy Commons database—including government reports, policy documents, white papers, and research from think tanks and NGOs—materials that are often unavailable through traditional academic databases but can be highly relevant to community-based work.

Ready to apply? Local organizations interested in joining the CSP can contact Western Libraries directly.

> "By joining the Community Scholars Program, Western Libraries is ... ensuring that evidence-based research can directly inform the work of organizations making a real difference in our communities."
>
> *— Geoffrey Robert Little, Vice-Provost & Chief Librarian*

Current Library Partners

- The University of British Columbia Library, Irving K. Barber Learning Centre
- KPU Library
- University of the Fraser Valley Library
- UNBC University of Northern British Columbia
- Western Libraries
- McConnell
- McMaster University Libraries

OPEN DOORS

Breaking Down Barriers to Knowledge

Western Libraries waives fees for community members

In January 2025, Western Libraries eliminated borrowing fees for members of the public and organizations, granting them free access to most of its extensive print collections.

Previously, organizations were charged $500 annually, while individuals paid $35 for three months or $100 yearly. Removing these fees aligns with the accessibility and inclusion goals of both Western Libraries and the University.

"We believe that everyone should have the opportunity to learn, discover, and engage with knowledge, regardless of their affiliation or background," says Geoffrey Robert Little, vice-provost and chief librarian of Western Libraries. "By removing these fees, we are reinforcing our commitment to supporting the intellectual curiosity and research needs of our entire community."

Expanding Community Impact

The change opens doors for community members to support research and professional development, program development, advocacy and policy work, industry research, and grant writing. Guest borrowers can now access most materials and utilize library services and spaces open to the public at Western Libraries and its affiliated university college libraries, strengthening Western's role as a vital resource for the broader London community and region.



Western Libraries Launches Open Repository

As an early adopter of Scholaris, Western advances Open Access and shapes Canada's shared research infrastructure

In 2025, Western Libraries launched the Western University Open Repository, marking a major milestone in our commitment to advancing open access and supporting sustainable, community-driven infrastructure at Western and beyond.

The Open Repository replaces the legacy Scholarship@Western platform and is now part of Scholaris, Canada's new national shared repository service developed by the Canadian Association of Research Libraries (CARL), the Ontario Council of University Libraries (OCUL), and other partners using open-source DSpace software.

Shaping Canada's Repository Future as an Early Adopter

This migration represents a critical opportunity to help shape the direction of shared repository infrastructure across Canada. As an early adopter of Scholaris, Western doesn't just benefit from this national initiative—we help guide it, ensuring Western's voice and values influence how Canadian institutions approach scholarly repositories for years to come.

By moving away from a commercially owned platform and working with colleagues from across the country, we're embracing a cost-effective, open-source solution aligned with our values of openness and transparency.

Impact and Benefits

Scholaris provides Western with a streamlined interface, scalable infrastructure, technical expertise, and community support while combining institutional branding with centrally managed hosting and access to a national repository network. The platform enhances the discoverability and impact of Canadian research through improved knowledge sharing and collaboration.

Western's Open Repository provides global access to our scholars' work—from theses and dissertations to publications and research outputs—positioning Western as a leader in building systems that make scholarship open, equitable, and impactful.

Archives Launches New Search Tool

Western Archives has migrated to AtoM (Access to Memory), a new web-based platform providing easier access to archival collections. Ongoing refinements will continue into 2026.

The database includes more than 72,000 descriptions of fonds, collections, and items, plus over 8,000 searchable digital images. The open-source software supports international archival standards and makes it simpler for researchers to discover and explore Western's rich archival holdings. Visit AtoM to start searching.

Western Libraries Supports Launch of Research Information Management System

Western Libraries is playing a key role in the implementation and ongoing support of Western's new Research Information Management System (RIMS), working in collaboration with the Office of the Provost and Western Research.

Built on the Symplectic Elements platform—used by leading institutions like U of T, University of Michigan, and Carnegie Mellon—RIMS is designed to showcase research accomplishments, streamline reporting, and reduce duplication of work across campus. The centralized system draws data from trusted sources including ORCiD, Scopus, PubMed, and Web of Science to build up-to-date researcher profiles that faculty control and customize.

A phased rollout began in 2025 with librarians, archivists, and senior academic leaders. Faculty-by-faculty onboarding is anticipated to begin in early 2026. Western Libraries provides comprehensive support throughout implementation, including guides, FAQs, workshops, and profile-building assistance.



DESIGNED FOR DISCOVERY

“This is a space where ideas take shape—where students and faculty come together to explore, create, and contribute meaningfully to the global research conversation.”

— Geoffrey Robert Little, Vice-Provost & Chief Librarian

Designed to meet the evolving needs of researchers, the new Scholars Lab at Weldon Library enhances Western's capacity to foster meaningful, interdisciplinary scholarship

Western Libraries has opened the doors to a transformative new space designed to elevate research, collaboration, and creativity across disciplines: the Scholars Lab. Located at the heart of campus, this dynamic environment is already reshaping how graduate students, faculty, and research partners engage with knowledge.

"The Scholars Lab is a bold investment in the future of research at Western. It reflects our deep commitment to fostering scholarship that is collaborative, inclusive, and forward-looking," says vice-provost and chief librarian Geoffrey Robert Little. "This is a space where ideas take shape—where students and faculty come together to explore, create, and contribute meaningfully to the global research conversation."

More than just a physical space, the Scholars Lab is a hub for intellectual exploration and scholarly exchange. With 80 mix-used seats and cutting-edge technology, the open-plan Scholars Square is ideal for workshops, presentations, and community events.

The Scholars Lab was conceived with graduate students in mind, offering them a dedicated environment to dive deep into their research, collaborate with peers and faculty, and share their work with the world. It complements the Learning Commons, which primarily supports undergraduate learning, by providing a parallel space for advanced scholarship.

Already, the lab has hosted a public lecture by the Starling Centre and a student-led research showcase. Looking ahead, it's slated to host the 40th Society of Graduate Students Research Forum.

As Western continues to invest in research excellence, the Scholars Lab is emerging as a cornerstone of that vision—an incubator for ideas, a platform for discovery, and a vibrant community for scholars at every stage of their journey.

Five Zones for Every Research Journey

Beyond Scholars Square, the Lab features five distinct zones, each tailored to support different facets of scholarly work:

Scholars Lab Instruction Room

- A 36-seat active learning space designed for hands-on engagement with library resources, such as rare books or archival material.

Project Room

- A collaborative boardroom-style space for up to 28 people, equipped for hybrid meetings and group work.

Graduate Student Commons

- A thoughtfully designed area for focused study and small-group collaboration, featuring height-adjustable desks and private rooms.

Creation Suite

- A blank canvas space designed for the development and exploration of various types of programming.

Media Suite

- A production suite for audio and video recording—ideal for podcasts, research presentations, and digital storytelling.











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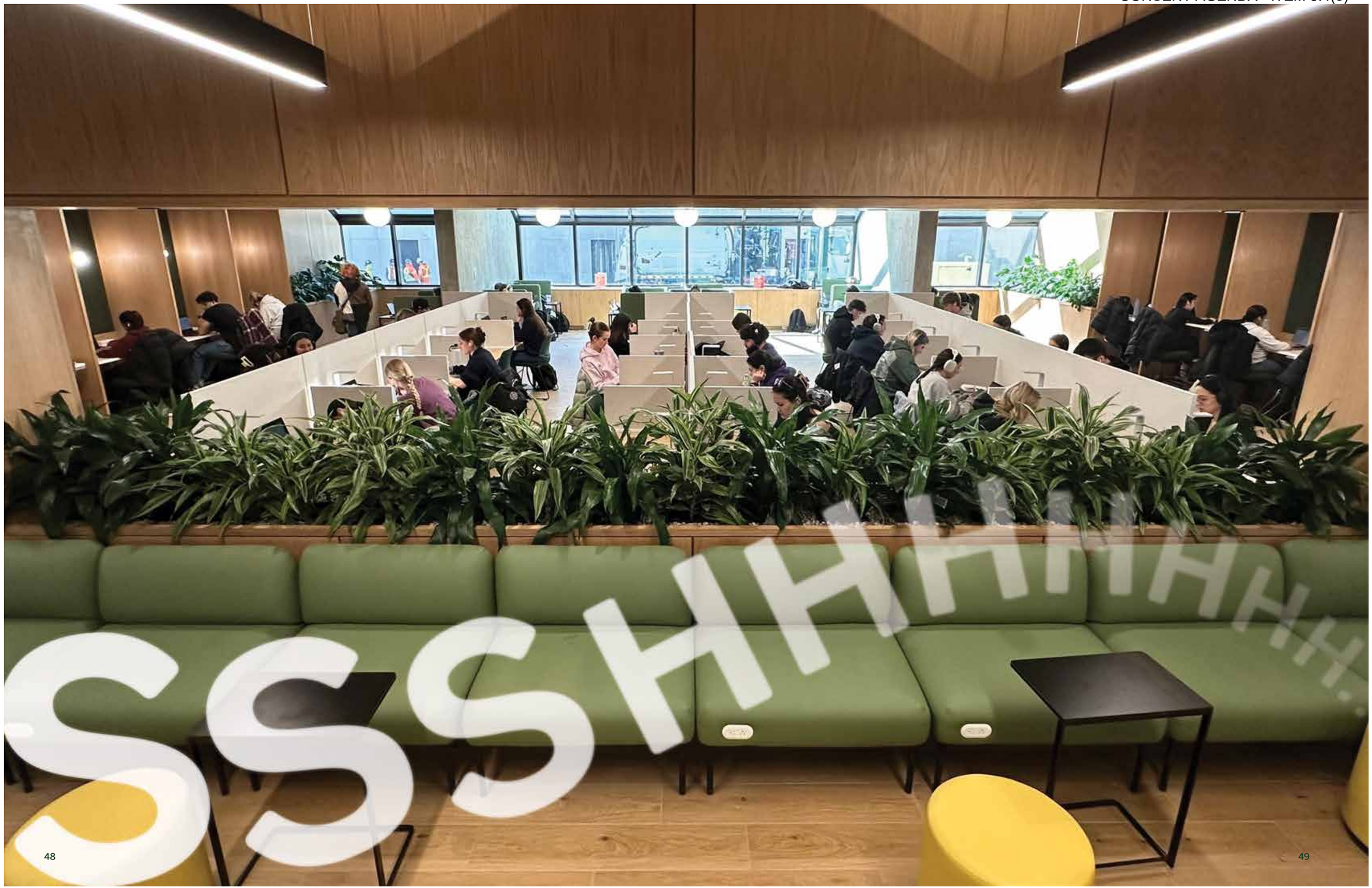
Amplifying Student Voices at Western Libraries

In 2024, Western Libraries launched the Library Student Advisory Council (LSAC) to strengthen communication between students and library administration

This diverse group of 12-14 undergraduate and graduate students—including representatives from the University Students' Council (USC) and the Society of Graduate Students (SOGS)—meets with library leadership to provide feedback on services, spaces, and programs. Through constructive dialogue, the LSAC helps shape the future of Western Libraries, ensuring student perspectives are heard and, where possible, actioned.

Recent discussions have addressed exam hours, study space needs, collection management, and the development of new facilities like the Scholars Lab. Student participation is recognized through the Co-Curricular Record (CCR), empowering students to collaboratively influence library enhancements that support their academic success.




SSSHHHHHH

Student feedback inspired a brand-new space with everything needed for deep, uninterrupted study

When students told us what they needed most from their library, reducing noise levels in study areas was top of the list.

As one undergraduate student from the Faculty of Social Sciences put it: "Weldon is way too noisy, especially in the quiet areas there is never silence."

We took this feedback to heart. In late 2024, Western Libraries opened a brand-new silent study room at the base of the grand stairwell in what was formerly the Centre for Teaching and Learning (CTL). The space provides a dedicated environment for students, faculty, and staff to focus, featuring 90 seats and a range of seating options including individual study carrels. Acoustic panels on the walls and ceiling help absorb sound for an even quieter experience.

I enjoy studying here. It is quiet and everyone seems to put in effort to keep it that way. I also like that it has standing desks.

I really like this silent study room. The sunlight that comes through the windows is very comfortable. The table variety is also great. It gives students a space to study without having to worry about booking a study room every time. I also like how the space is actually silent.

Ergonomic height-adjustable desks

Customizable workspaces for maximum productivity.

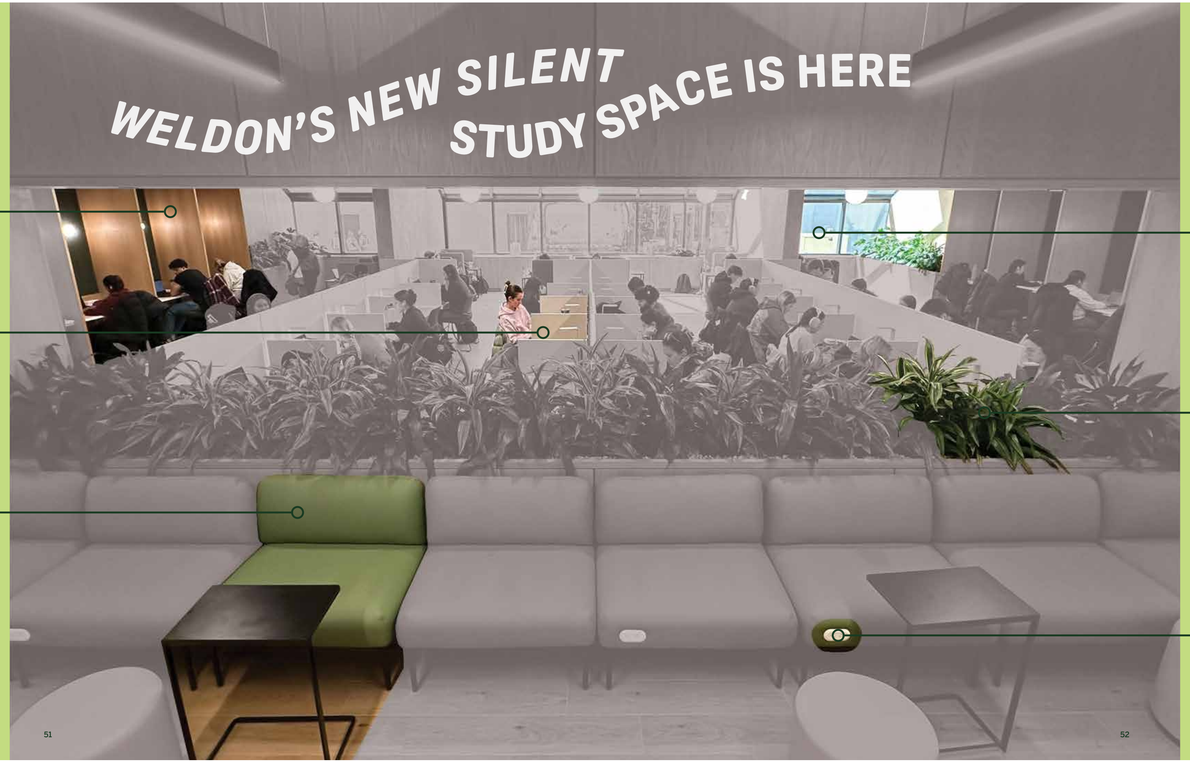
Individual study carrels

Private nooks for distraction-free focus.

Comfy couches

Plush seating to make those long study sessions more relaxing.

WELDON'S NEW SILENT STUDY SPACE IS HERE



Large windows

Plenty of natural light to boost mood and productivity.

Room dividers

Living plants bring a touch of nature indoors while creating separation between zones.

Abundance of power outlets

Power outlets are built into surfaces throughout the room, including lounge chairs.

Additional features include ergonomic height-adjustable desks and an abundance of power outlets. We even embedded outlets into the comfy lounge chairs, so visitors can charge up while they study, wherever they settle! With large windows and (soon-to-come) living room dividers made of real plants, the design creates an inviting atmosphere that promotes productivity and relaxation.

This spectacular space has been three years in the making and marks a significant milestone in Weldon's Library Revitalization, Phase 2. Phase 1 introduced a new two-story student learning commons and restructured staff areas to maximize study space.

The success of these renovations earned Weldon multiple awards, including the title of "Best of Year" in the library category from Interior Design Magazine, an esteemed U.S. publication with an international audience.

Amazing! I can focus here better than in my office at home. Always had a great experience because I get my stuff done. No distractions. Also, I go outside for lunch, go to the bathroom, and make a call and I can leave my stuff here, never have missed anything.

I really appreciate the silent study room. It's quiet, clean and a great place to focus, but the temperature can be a little cold.

Bringing Art and Ideas to Life in the Library

A new display program invites the campus community to share ideas and spark conversation

You may have noticed fantasy-inspired sculptures in Weldon's display cases, tiny paintings on the walls, or a variety of themed book displays near the entrance of Weldon this year. If you wondered what (or who) is behind these exhibits, it's all part of a new display program launched by user experience librarian Jennifer Robinson.

The Learning Commons Display Program invites students, faculty, researchers, and staff to collaborate with the library on displays that engage, educate, and enrich the campus community. Display cases, bookcases, and art rails throughout the Weldon Learning Commons are available for exhibits that explore a variety of topics and highlight library collections, services, or areas of expertise.

Since the program's inception, Weldon hosted a diverse array of exhibits: the Gender Studies Student Collective explored themes of feminism and anti-colonialism; *Fallen Tales from the Bookshelf* featured 3D-objects inspired by fantasy literature; first-year SASAH students displayed their "everyday life projects"; and the Western Ukrainian Club's *On the Ruins with Hope* shared photographs documenting the resilience of Ukrainian women.

In the summer, the library featured books removed from the U.S. Naval Academy's library, prompting conversations about intellectual freedom and the right to read. Staff also contributed their own creative work to a staff creativity display, from pottery to poetry.

The response has been positive. "So cool and informative. Love this and gave me an educational study break!" wrote one visitor. Survey results from the *Fallen Tales* exhibit showed that 93% of respondents found the library an appropriate place for art, and 83% enjoyed sharing library space with creative work.

Interested in participating? We'd love to hear your idea. Please reach out to jrobins@uwo.ca.



Jade Dunn, Ella Rose Brown and Jennifer Robinson (l-r)





Gender Studies Student Collective (GSSC) Art Show
November-December 2024

Student-organized art exhibit exploring feminism, LGBTQ+, body positivity, anti-racism, and anti-colonialism. An experiential learning opportunity sponsored by SASAH and visual arts faculty.



Fallen Tales from the Bookshelf
February 5-26, 2025

Fantasy-inspired 3D objects that appear to have stepped out of storybooks, curated by artLAB Gallery Intern Venus Nwaokoro. Paired with related books from Weldon's collection.



Small Intentions
March 12-26, 2025

Curated by artLAB Intern Maggie Shook, this exhibit explored the unique charm and quiet power of small paintings, featuring works by eight artists.



SASAH Students ARTHUM 1020
March-April 2025

First-year SASAH students displayed their "everyday life projects"—eight-week experiments in attention and observation inspired by works like Thoreau's Walden.



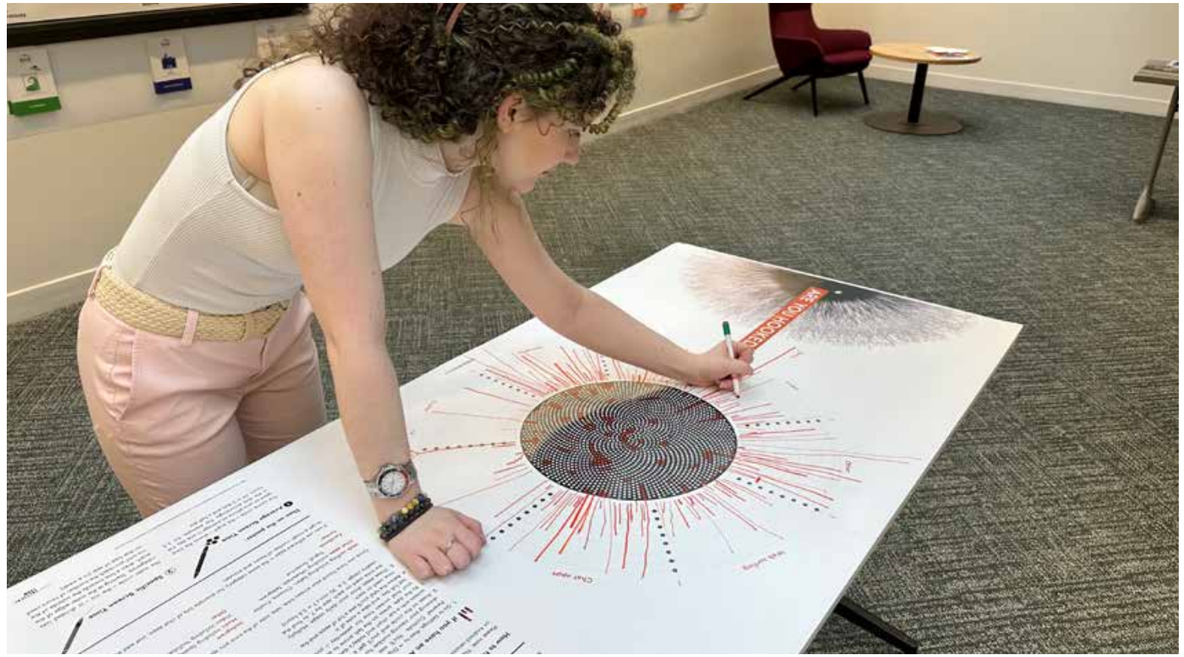
On the Ruins with Hope
April 2025

Photography exhibition by the Western Ukrainian Club documenting the resilience of Ukrainian women, connecting scholarly research on war and displacement with personal perspectives.



Banned Books
May-August 2025

Featured books removed from the U.S. Naval Academy based on an executive order targeting works about diversity, equity, inclusion, and 2SLGBTQ+ and Black experiences. Displayed with context about intellectual freedom and censorship challenges in Canada.

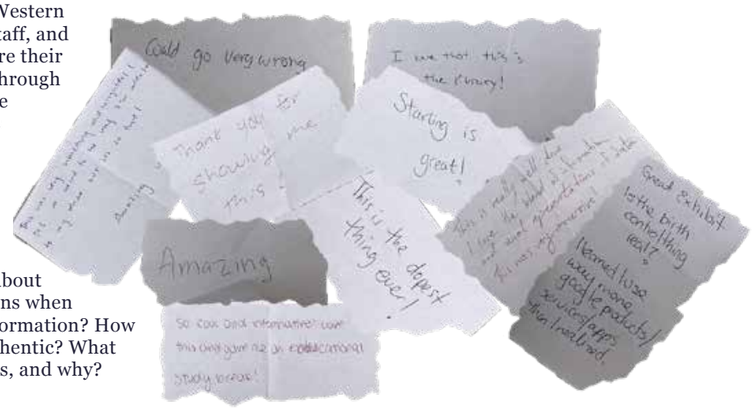


Confronting the Digital Age

The Glass Room Exhibit at Weldon sparked conversation about technology and privacy

From January to April 2025, Western University students, faculty, staff, and Londoners, were able to explore their relationship with technology through The Glass Room, an interactive exhibition housed in Weldon's Learning Commons.

Developed by Berlin-based non-profit Tactical Tech, the internationally acclaimed exhibition challenges visitors to examine critical questions about their digital lives: What happens when we rely on social media for information? How can we verify if images are authentic? What data is being collected about us, and why?



Visitors to the Weldon stop of The Glass Room were encouraged to share their reflections on post-it notes, and their responses revealed the exhibition's impact.

> "This is the dopest thing ever!"
>
> *— Feedback from a student attendee*

"This is the dopest thing ever!" one student wrote, while another noted it was "so cool and informative" and provided "an educational study break." Other comments ranged from enthusiastic praise for "the blend of information and visual representations of data" to one anonymous submission that simply stated, "We are cooked."

This was only the second time The Glass Room has been installed in Canada, following the country's first Glass Room at the Satellite Project Space in downtown London in October 2024, which attracted over 200 community members. The exhibition has reached more than 500,000 participants across 71 countries since 2016.

Hosted by the Starling Centre for Just Technologies and Just Societies and Western Libraries, the exhibit fulfilled one of Starling's core pillars: fostering community awareness and engagement in emerging technologies like artificial intelligence, as well as technologies already embedded in our everyday lives.









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Beryl Ivey Library Collection Joins Western Libraries

Following the integration of Brescia University College with Western University in May 2024, Western Libraries successfully incorporated the Beryl Ivey Library collection into its system



The integration, completed in spring 2025, involved the careful relocation and processing of nearly 49,000 items from the former Brescia library. Collections were strategically distributed across all five main Western Libraries locations to best support continuing academic programs and research needs.

Notable additions include materials supporting the Brescia School of Food and Nutritional Sciences—now part of Western's Faculty of Health Sciences—which have been housed at Taylor alongside other specialized health sciences resources. These materials include an extensive cookbook collection originally donated to Brescia by Martha Molina Steers. Business, law, and music collections found new homes in their respective libraries, while archival materials were preserved for their future home, the Ursuline Museum and Archives.

Western Libraries welcomed four former Brescia library staff members to the organization: Kate Beswick, Kathleen Dahl, Katie Holmes, and Alicia Calkins. The project's success was made possible through the collaborative efforts of the Libraries Integration Steering Committee, collections librarians, technical services staff, facilities teams, and student library assistants who managed the physical transfer and processing of materials.

This integration honours Brescia's legacy while ensuring continued access to resources that support student success and scholarly research across Western's academic community.

Two MLIS Fellowships for Black and Indigenous Students Awarded

In September 2025, the Faculty of Information and Media Studies (FIMS) and Western Libraries announced that Master of Library and Information Science (MLIS) students Savannah Simon and Olivia Couchie were named the inaugural recipients of the Western Libraries-FIMS MLIS Fellowships for Black and Indigenous Students. The fellowships, funded by FIMS and Western Libraries as part of a commitment to increasing diversity within librarianship and the information profession, were awarded for the first time.

"Librarianship is rooted in the stewardship of knowledge, and that responsibility demands diversity of thought and experience," said Geoffrey Robert Little, vice-provost and chief librarian of Western Libraries. "These fellowships are an investment in voices and perspectives that will strengthen librarianship, advance equity in access to information, and honour multiple knowledge traditions. By supporting these students, Western Libraries and FIMS are acting on their responsibility to ensure libraries reflect and serve the diversity of the communities they support."

Olivia Couchie is a member of the Nipissing First Nation and is local to London, Ontario. She has previously completed a double major in Gender and Women's Studies and Criminology, as well as a Master of Arts in Gender, Sexuality and Women's Studies, both at Western. As a new Master of Library and Information Science student, Olivia says she's "most looking forward to the courses in the MLIS program and the chance to learn from and alongside others who care about access to knowledge and community."

Savannah Simon is from Natoaganeg First Nation, just outside Miramichi, New Brunswick. She completed her BA (Honors) in History at St. Thomas University in Fredericton. This year Savannah is looking forward to the mentorship and experiential learning opportunities available through co-op placements and other student activities.

"I am so excited to see how this opportunity will help me grow and learn, not only as a student, but also as an upcoming professional in this field. My goal has always been to give back to my community with the utmost of my abilities, and I believe that the MLIS program at Western will prepare me to do just that," she said.

As the home Faculty for the Master of Library and Information program, Acting Dean Susan Knabe said that FIMS is very pleased to be involved in the partnership with Western Libraries, and that the initiative will "provide students like Olivia and Savannah with the opportunity to explore how information, knowledge and librarianship can meet the needs of diverse communities."

The Western Libraries—FIMS MLIS Fellowships for Black and Indigenous Students are intended to recruit and support applicants who identify as Indigenous (First Nations, Inuit or Métis) or Black who demonstrate academic achievement, community involvement, and a desire to build a career in libraries and the information profession. Recipients receive funding for tuition and fees and are provided with a two-term, paid co-op placement with Western Libraries.



Savannah Simon (l) and Olivia Couchie (r)

WLURA

Celebrating Excellence in Undergraduate Research

Nicole Bussey, Victoria Chechulina, Olivia Holland, Joel Friesen Waldner, and Karen Wen are the five recipients of the 2024 Western Libraries Undergraduate Research Awards (WLURAs). The WLURAs recognize the outstanding research of undergraduates from across all programs at Western. Award winners are chosen based on their exceptional use of library and archival resources, their insightful reflections on the research process, and their adherence to proper citation practices, with a careful evaluation of these criteria guiding the selection process.

"The WLURAs are an amazing way to recognize exciting undergraduate research and celebrate connections between student researchers, and our expert librarians and archivists," said Geoffrey Robert Little, vice-provost and chief librarian of Western Libraries. "I am proud of the ways in which we are supporting student success while promoting the thoughtful use of Western Libraries' deep and rich collections."

This year's submissions featured a diverse array of research projects spanning Japanese American music, equity-efficiency trade-off studies, World War I, unmanned underwater vehicles, and Shakespeare.

To be considered for a WLURA, applicants were required to submit a research project from one of their courses, accompanied by answers to four reflection questions about their research process. Their submission also included a bibliography in the citation style of their discipline.

"Before the WLURA application, I had never really considered my research process," said Holland, whose research project focused on the life and death of Edward Martin Roberts, a Canadian soldier wounded in the Battle of Vimy Ridge during the first World War. "During research, I was more focused on what information I found rather than how I discovered it."

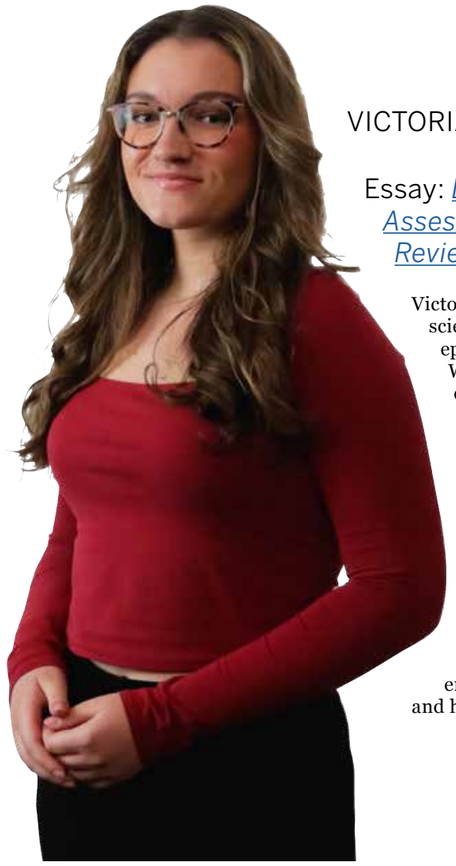
WLURA winner Wen, whose submission investigates the theme of jealousy in Shakespeare's Othello, said she had a similar learning experience: "I've realized that I can sometimes get too focused on the final product that I overlook the significance of the research journey itself. But the application has helped me see the process as equally important."

Applications are due each year on April 30. Winners receive a certificate and a $1,000 scholarship. Their projects can be accessed through Western University Open Repository.

"The WLURA application allowed me to reflect on the iterative, scholarly process I had to follow to arrive at my research question," Chechulina noted, "and how I can apply this important skill in the future."

Meet this year's WLURA winners!

"I hope this project can be used to inform future studies and maybe even shape how we apply research to health policy."



VICTORIA CHECHULINA

Essay: *Do Equity-Efficiency Trade-Off Studies Assess Validity and Reliability? A Systematic Review*

Victoria Chechulina, a third-year student in the medical sciences and scholar's electives programs, specializes in epidemiology and biostatistics. She conducts research at Western and Sepsis Canada, focusing on sepsis, health economics, and clinical epidemiology.

Victoria's current work aims to improve research methods for integrating health equity into economic evaluations, crucial for addressing inequities in health outcomes. Outside of academics, she is passionate about mentorship and trying every item on the Spoke Kitchen menu.

"The WLURA application helped me appreciate Western Libraries' resources, which were invaluable for my systematic review, from database access to discussing my search strategy with a librarian. It also encouraged me to reflect on the iterative research process and how to apply this skill in the future."

"This paper became something more than course work; I was trying to put the pieces of someone's life together. Don't wait to write something you are passionate about!"



OLIVIA HOLLAND

Essay: *"At Rest:" The Life and Death of Private Edward Martin Roberts*

Olivia Holland just graduated with an Honours Double Major in History and English from King's University College and she is now completing her MA in History at Western. Olivia's research focuses on Canadian women in varsity sports at the turn of the twentieth century, with plans to pursue a doctorate exploring the tourism of Canadian nurses during the World Wars.

When she is not in the library studying, Olivia can be found reading, figure skating, or rewatching *The Lord of the Rings*.

"Before the WLURA application, I focused on the information found rather than the discovery process. Reflecting on my research approach helped me identify ways to improve, making me a better researcher."

Nicole Bussey

Essay: *Don't Bite the Hand, Make Love to It: Disrupting Pervasive White Representation in Mitski's "Your Best American Girl"*

Nicole Bussey holds an Honours BA in both Media and Communications and Popular Music Studies from Western University, where she earned the Gold Medal for the highest GPA in the Media, Information and Technoculture (MIT) program. Her research focuses on women in music.

Completing three Western Undergraduate Summer Research Internships (USRI) projects at the Faculty of Information and Media Studies (FIMS) allowed her to hone her research skills, and her passion for artist development led her to a marketing internship at AWAL, SONY Music Canada.

A storyteller, songwriter and vocalist, Nicole is skilled in guitar, piano, and digital production. In her free time, she enjoys Tori Amos CDs and reading fiction.

"The WLURA application highlighted the importance of an accessible library database for research and motivated me to engage more with these resources for future projects."

Joel Friesen Waldner

Essay: *Recent Developments of Next-generation Unmanned Underwater Vehicle-based Structural Health Monitoring Technologies*

Joel Friesen Waldner is currently in his third year of studying Electrical and Artificial Intelligence Systems Engineering at Western University.

Over the last two summers, he interned at Western's Smart Cities Laboratory, conducting research on unmanned underwater vehicles for structural inspection and the application of virtual reality in civil engineering. His work has been published in the *Journal of Infrastructure Intelligence and Resilience*.

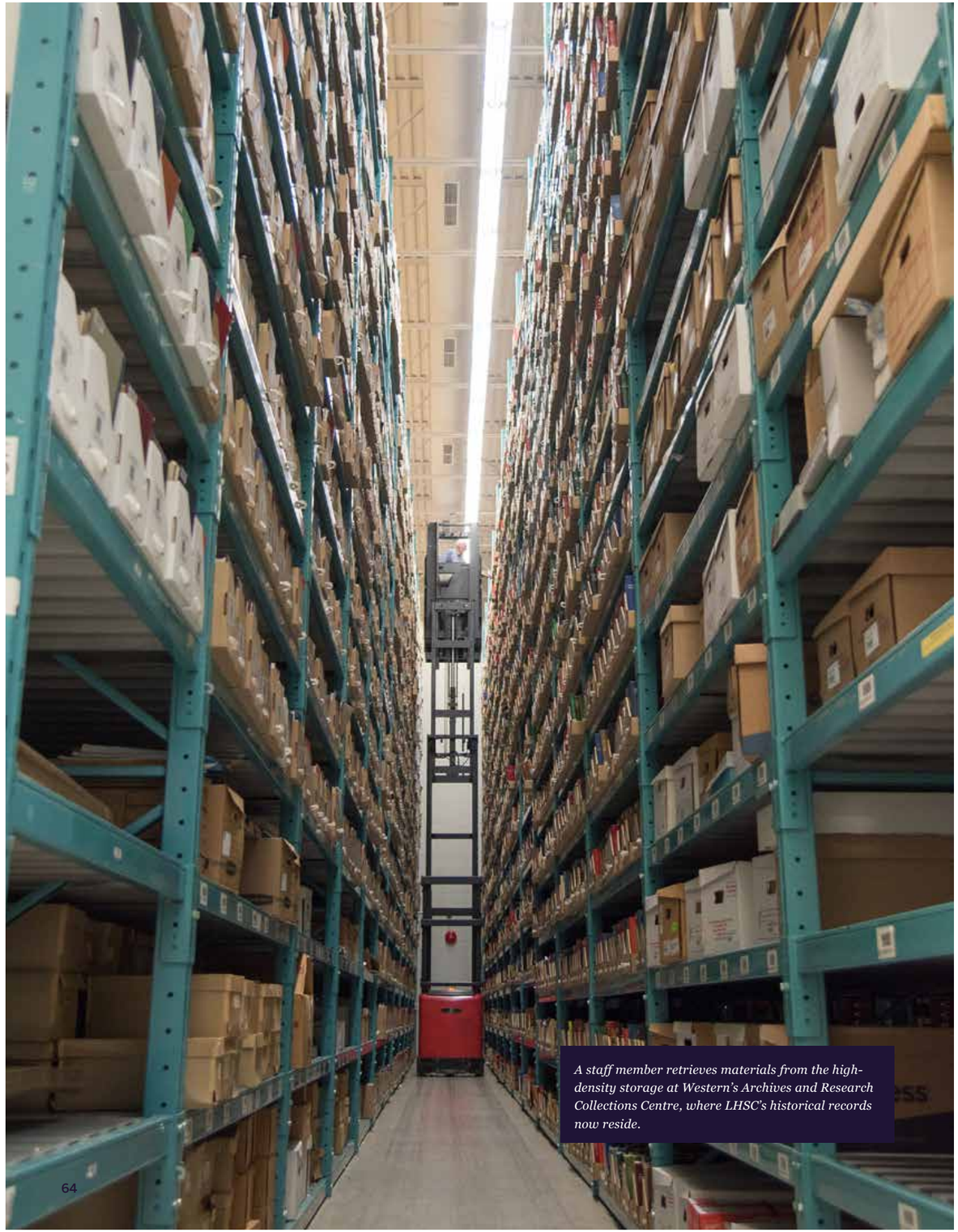
"The WLURA helped me think about how, with each new resource accessed, my understanding of the topic of underwater drones expanded and required a shift in how I defined the ultimate questions I was trying to answer."

Karen Wen

Essay: *Representation of Possessive Fear: Destructive Jealousy in Othello*

Karen Wen is a second-year student at Western pursuing an Honors Specialization in English Language and Literature and a Major in the School for Advanced Studies in the Arts and Humanities. She is passionate about the intersection of science and literature and actively involved in medical humanities initiatives outside of school.

"My research processes range from spontaneous brainstorming to structured approaches. The WLURA application has helped me reflect on these methods and recognize the importance of seemingly minor details. It also enhanced my appreciation for the support from librarians, professors, and TAs. I've come to value the research journey itself, making my experience more meaningful."



A staff member retrieves materials from the high-density storage at Western's Archives and Research Collections Centre, where LHSC's historical records now reside.

Preserving a Legacy: LHSC's Historic Archives Find a New Home at Western Libraries

A transformative donation opens new doors for research, discovery, and community memory

The sky-high shelves in Western's climate-controlled Archives and Research Collections Centre now house a remarkable gift: more than 150 years of medical history, entrusted to Western by the London Health Sciences Centre (LHSC).

This donation marks a meaningful chapter in the collaboration between two institutions with deep roots in London's medical and academic history. Comprising 152 boxes of photographs, handwritten letters, medical records, and other artifacts, the collection traces the evolution of health care in the region.

"These records are a major part of London's history and health care in Canada," said Anne Quirk, archivist in Archives and Special Collections at Western Libraries. "Bringing them into a secure, professionally managed archival environment means we can preserve them and eventually open them up to researchers. It's a celebration of this community's health-care legacy."

A Century and a Half of Stories

The donated materials span institutions such as Beck Memorial Sanatorium, South Street Hospital, War Memorial Children's Hospital, Westminster Hospital, and the London General Training School for Nurses—one of the earliest nursing programs in the region. Among the collection are items that speak to the lived experiences of health-care workers: letters from nurses, including one expressing frustration over not receiving time off for Christmas and





hinting at a potential strike; a nurse's uniform; a ceramic device for steam inhalations; and a wide range of medical records and administrative documents.

Darren Hamilton, clinical librarian specialist at LHSC, led the initiative to ensure the archives were preserved for future generations.

"I connected with archival experts from across Ontario," said Hamilton. "Anne Quirk and the team at Western Libraries were excited to develop this collaboration that maintains LHSC's history at home in London at Western. These items are invaluable to those researching health care in London and I am pleased that they will be well kept by the Western team."

Research Potential: Unlocking New Narratives

While the materials have not yet been processed, the potential for research is already clear. Plans are underway to create a finding aid, enter descriptive information into Western's searchable archives database, and explore digitization for broader access.

"We're excited about the possibilities," said Quirk. "These materials could support research in medical history, public health, nursing education, and even local business and social history. The scope is vast."

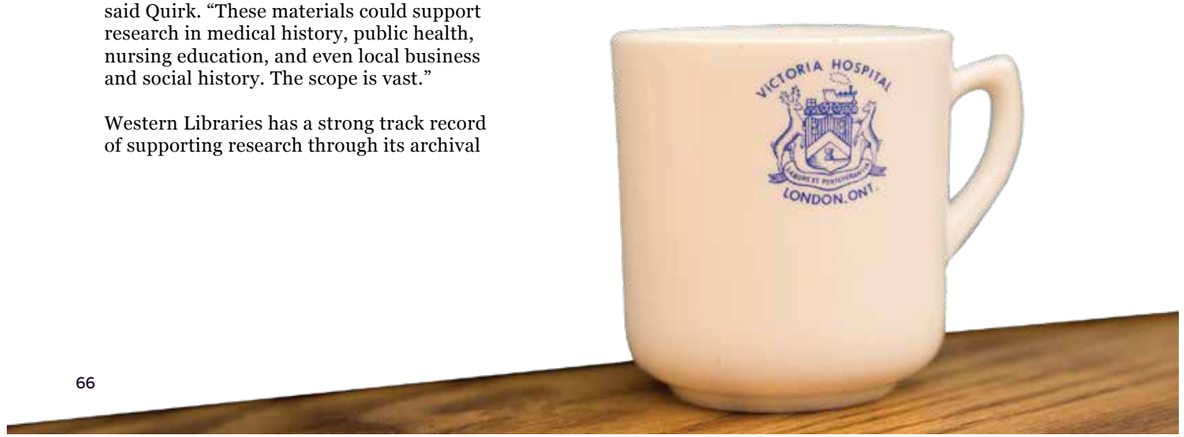
Western Libraries has a strong track record of supporting research through its archival holdings. A recent example is the Bucke-Grosh expedition project, where a team of endurance athletes retraced a 19th century gold-seeking journey using documents from the Dr. Richard Maurice Bucke and Family fonds. Bucke, a co-founder of Western's medical school, survived the harrowing trek and left behind journals and maps that helped modern history enthusiasts reconstruct the route.

"That project shows how archival materials can help in bringing history to life," said Quirk. "We scanned over 600 documents for the team, and they used them to correct and enrich the story of Bucke's journey. That kind of impact is exactly what we hope to see with the LHSC collection."

Looking Ahead

As Western Libraries begins the careful work of processing the LHSC archives, the academic community can look forward to new opportunities for interdisciplinary research, public engagement, and historical insight.

"This is more than a donation—it's an invitation to explore, question, and understand," said Quirk. "We're honoured to be the stewards of this legacy."



BUILDING FUTURES

Support Western Libraries

For nearly 150 years, Western Libraries has been the intellectual heart of our university—adapting to meet the evolving needs of students, researchers, and faculty

Your gift supports:

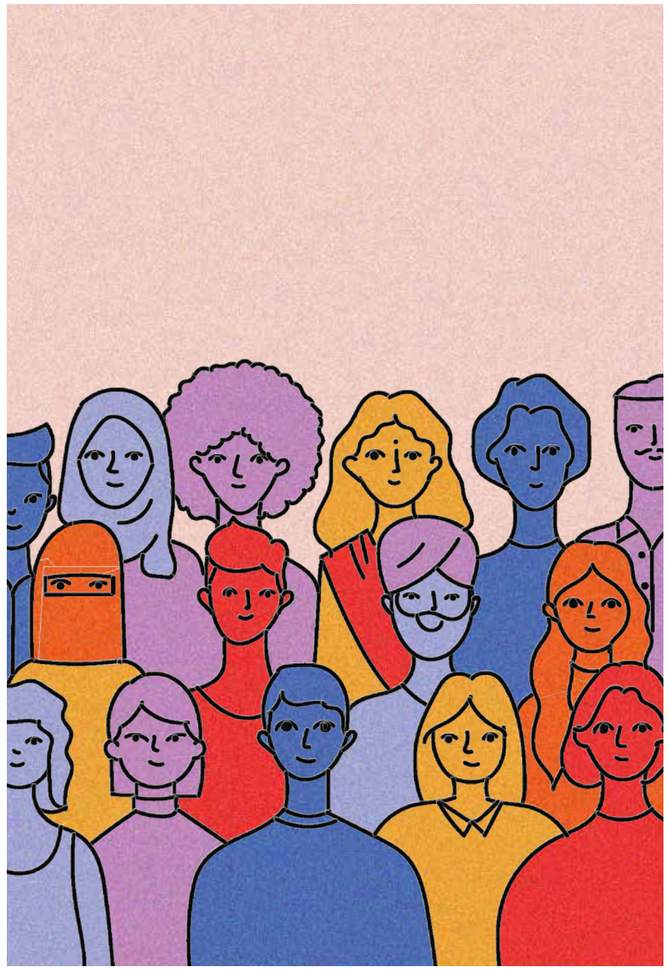
- **Innovation** in research and learning
- **Diverse collections** for current and future scholars
- **Undergraduate research awards** celebrating student excellence

Ways to give:

- One-time gifts
- Monthly giving
- Memorial gifts
- Securities
- Endowments
- Planned giving
- Gifts-in-kind

Every contribution makes a difference. Join our community of supporters and help us empower learning and discovery for generations to come.

Donate today!



Western Libraries Establishes EDIDA Committee to Advance Inclusive Excellence

Western Libraries has formed a dedicated EDIDA (Equity, Diversity, Inclusion, Decolonization and Accessibility) committee to support the implementation of Western University's EDIDA Strategic Plan. The committee, co-chaired by Alanna Marson and John Critchley, brings together members from across Western Libraries' units to identify, recommend, implement, and assess EDIDA initiatives and strategies at Western Libraries, working closely with the Office of Equity, Diversity and Inclusion and campus partners.

By May 2025, the committee compiled an Action Planning Tool submission featuring 16 tactical goals and 53 action steps spanning four of the five strategic priority areas. This work involved collaboration with 11 Western Libraries' units to identify ongoing and planned initiatives aligned with the university's strategic plan. Key initiatives include a joint fellowship with FIMS to support Black and Indigenous MLIS students, inclusive metadata practices, the Four Seasons of Reconciliation staff learning program, and partnerships with equity-deserving groups for appropriate stewardship of special collections.

On Nov. 4, 2025, the committee hosted an EDIDA showcase where Western Libraries staff explored eight initiative displays, reflected on progress, and identified collaboration opportunities across units.

The initial implementation phase runs through June 2027, with an interim progress report due in May 2026.



John Critchley

Records Management Operations Assistant, Archives and Special Collections

John operates the university's Records Centre. He also supports archivists and librarians, including organizing annual monetary appraisals of donations. John has a unique position in Western Libraries, with his primary focus in supporting all departments on campus by providing storage and retrieval services for administrative records.

Before joining Western Libraries, John worked as a field archaeologist and project director in Ontario and the US and participated in excavations in Cyprus and Crete. His use of Western Archives' collections for archaeological research, combined with his love of history, made his current position a natural fit.

Outside of work, John's passion is playing music. He's been playing bass in bands since he was a teenager, covering everything from punk/new wave to Celtic/East Coast, folk, Americana, and popular music. Currently, he is working on writing and recording music with his band *Codename Justine*.



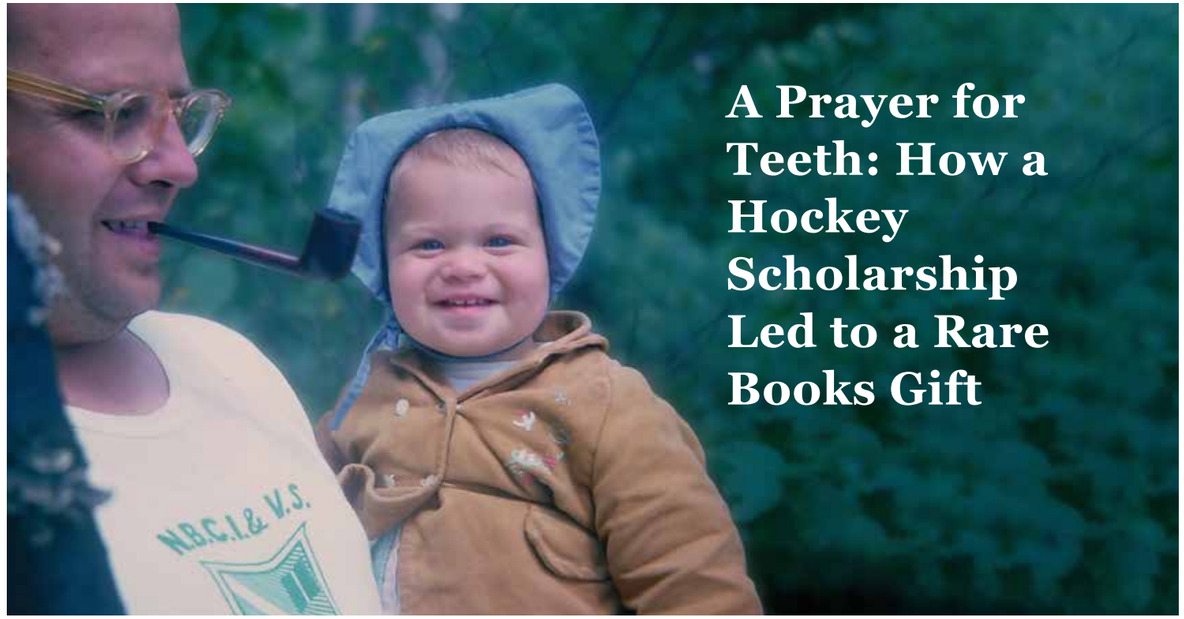
Alanna Marson

Acting Head of User Experience and User Services, Western Libraries

Alanna is the acting head of user experience and user services at Western Libraries and serves as an EDIDA co-lead. With close to 20 years of experience in academic and hospital libraries, she has worked across Western's research and scholarly communications, teaching and learning, and collections and content strategies teams.

She is passionate about advancing inclusive, community-centered library spaces through campus-wide committee work and is currently participating in the inaugural FLOURISH: BPOC Academic Library Leadership Program, hosted by the Canadian Association of Research Libraries (CARL), which aims to increase BPOC representation in library leadership.

Outside the library, Alanna finds joy in the outdoors—whether hiking trails or paddling in her canoe.



A Prayer for Teeth: How a Hockey Scholarship Led to a Rare Books Gift

Medieval scholar selects a 15th century manuscript to honour her father's legacy and becomes the first donor to Western Libraries' new rare books fund

When English professor Jane Toswell's father arrived at Western in the late 1940s on a hockey scholarship, he found two things he loved: tables laden with as much milk as a young man from northern Ontario could want, and a defenceman position that kept him skating backwards into pucks, sticks, and elbows.

After a year of taking hits, he made a practical decision. "Dad," Jane asked him once, "why did you give up the scholarship?" Her father replied: "Jane, I wanted to have some teeth."

Decades later, that memory would guide Toswell to an extraordinary find—a 15th-century Dominican Book of Hours containing prayers to Saint Apollonia, the patron saint of dentists and those suffering from toothache.

"A manuscript with prayers to Saint Apollonia just kind of spoke to me," says Toswell, program director of medieval studies at Western.

Honouring Multiple Legacies

Following her father's death just over a decade ago, Toswell's mother decided to make a gift to the university. As a scholar who has devoted her career to studying medieval manuscripts, particularly early medieval England psalters and texts, Jane knew she wanted to select a manuscript for the collection.

"I'm a manuscript person. This is what I love," she explains. "But my father was a hockey and football coach who later became a guidance counsellor. These were not obvious paradigms for medieval manuscripts. It took me a while to find the right one."

The manuscript she ultimately selected, acquired from the dealer who had sold Western its very first manuscripts when the medieval studies program was established, is a remarkably complete 15th-century Book of Hours—a personalized prayer book that offers an intimate window into medieval devotional life.

Toswell's gift marks an important milestone as the first donation to Western Libraries' newly established rare books fund, which enables supporters to contribute directly toward acquiring rare materials that support teaching and research across disciplines.

A Resource Across Disciplines

The Book of Hours exemplifies the scholarly value of these acquisitions. While it serves as a cornerstone resource for medieval studies, it also supports teaching and research in Classics, History, English, French, and related fields as part of Western's active medieval manuscript collection.

"I love seeing books that really represent not the highest end or the rarest aspects, but really the most common usage of a manuscript," Toswell notes, examining the beautifully justified script and alternating red and blue initials at its unboxing with classical studies graduate student James Kenneth. "Most everyday books would have been more like this—something a Dominican friar might have carried with them, used for daily prayer, small and light enough to fit in a saddle holster."

The manuscript features a complete calendar with saints' feast days marked in red and black (the origin of our phrase "red letter day"), prayers in both Latin and German, and meticulous hand-drawn initials that reveal the careful planning behind its creation. Despite being nearly 600 years old, it's missing only one page—an astonishing level of preservation.

Working with primary sources like this manuscript allows students to engage directly with history. "You can see the process," Toswell explains, pointing to a correction where a medieval scribe crossed out an error and added the proper word in the margin. And Kenneth adds: "It's almost like you're sitting there with that scribe. We



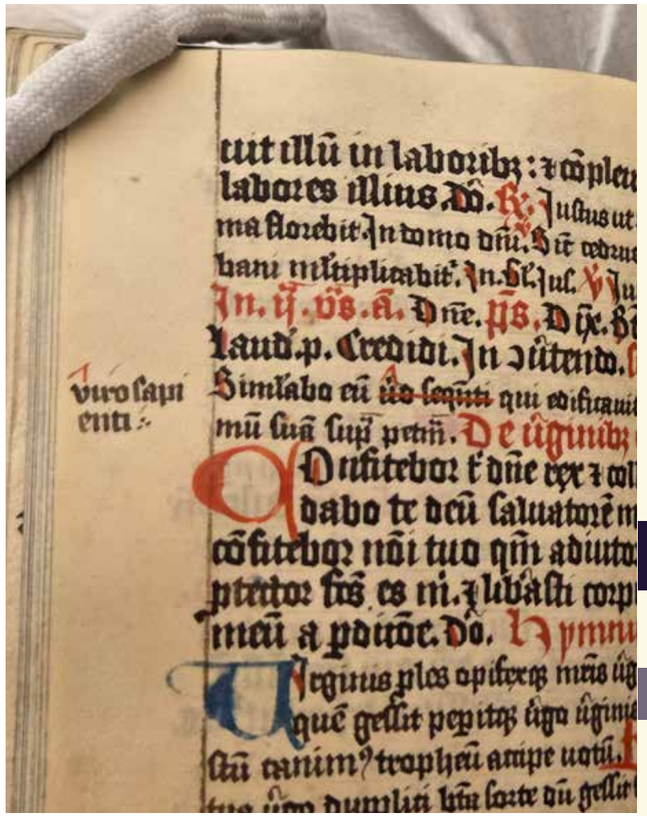
> "I asked my dad, why did you give up the scholarship? to which he replied, 'I wanted to have some teeth.'"
>
> — *Jane Toswell, English Professor*



Jane Toswell (r) and James Kenneth (l) at the official unboxing of the Book of Hours in the Scholars Lab Instruction Room.

“
It’s almost like you’re sitting there with that scribe. We all make mistakes when we’re writing—this gives you a glimpse into their world.
”

— James Kenneth, Master’s Student in Classical Studies, Western University



all make mistakes when we’re writing—this gives you a glimpse into their world.”

For Toswell, the gift brings together her father’s Western story, her mother’s generosity, and her own devotion to medieval manuscripts. In selecting a Book of Hours with prayers to Saint Apollonia, she found the perfect way to honour a young defenseman who once chose to keep his teeth—and stayed connected to Western for the rest of his life.

To learn more about supporting Western Libraries’ rare books fund, visit the library website or contact library@uwo.ca.



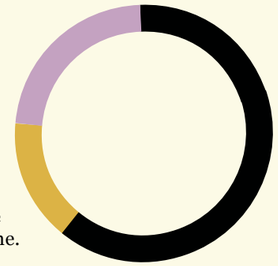
By the Numbers

Western Libraries provides the infrastructure and support needed to catalyse and transform research at Western. These numbers illuminate just some of the work that we do to power discovery, collaboration, engagement, and innovation across our campus and beyond.

Accelerating Research Discovery

Research support: **12,464 questions** answered

Via chat, email and in-person, helping researchers overcome roadblocks in real-time.



- 7,668 questions received via email and chat, ranging from access and discovery issues to specialized research support in data, GIS, and scholarly publishing
- 2,875 reference consultations at service desks
- 1,921 research consultations (in-person, email, phone, virtual)

Catalogue searches: **1,658,980**

Database searches: **4,781,088**

E-journal views: **5,629,946**

Breaking Down Barriers to Knowledge

Through Interlibrary Loans (ILL), we connect Western researchers to the world and connect the global research community to Western.

January 2025: **4,326 ILL requests** fulfilled in a single month

Our busiest ILL month in recorded history.

15,421 ILL requests fulfilled for partner libraries

Supporting the global research community.

17,544 ILL requests fulfilled for Western researchers

17.6% increase from 2023-24 | 49% increase from 2022-23

Growing & Evolving Collections

Library acquisitions budget: **$15,740,896**

Amount spent on collections per student: **$417.35**

Total collections: **6,107,486 items**

Physical and digital books, journals, and other materials
(5.6% growth from 2022-23 to 2024-25)

Volume holdings: **5,301,830 items**

Including 2,515,638 e-books supporting research and learning

Other materials: **805,656 items**

Scores, audio, video, maps, special collections, theses and dissertations

5,436 linear metres of archival collections

Supporting Teaching & Learning Excellence

Course readings: **305,155 uses**

Instruction sessions and workshops:
11,699 faculty, students, and staff engaged

Social Media Engagement

Instagram

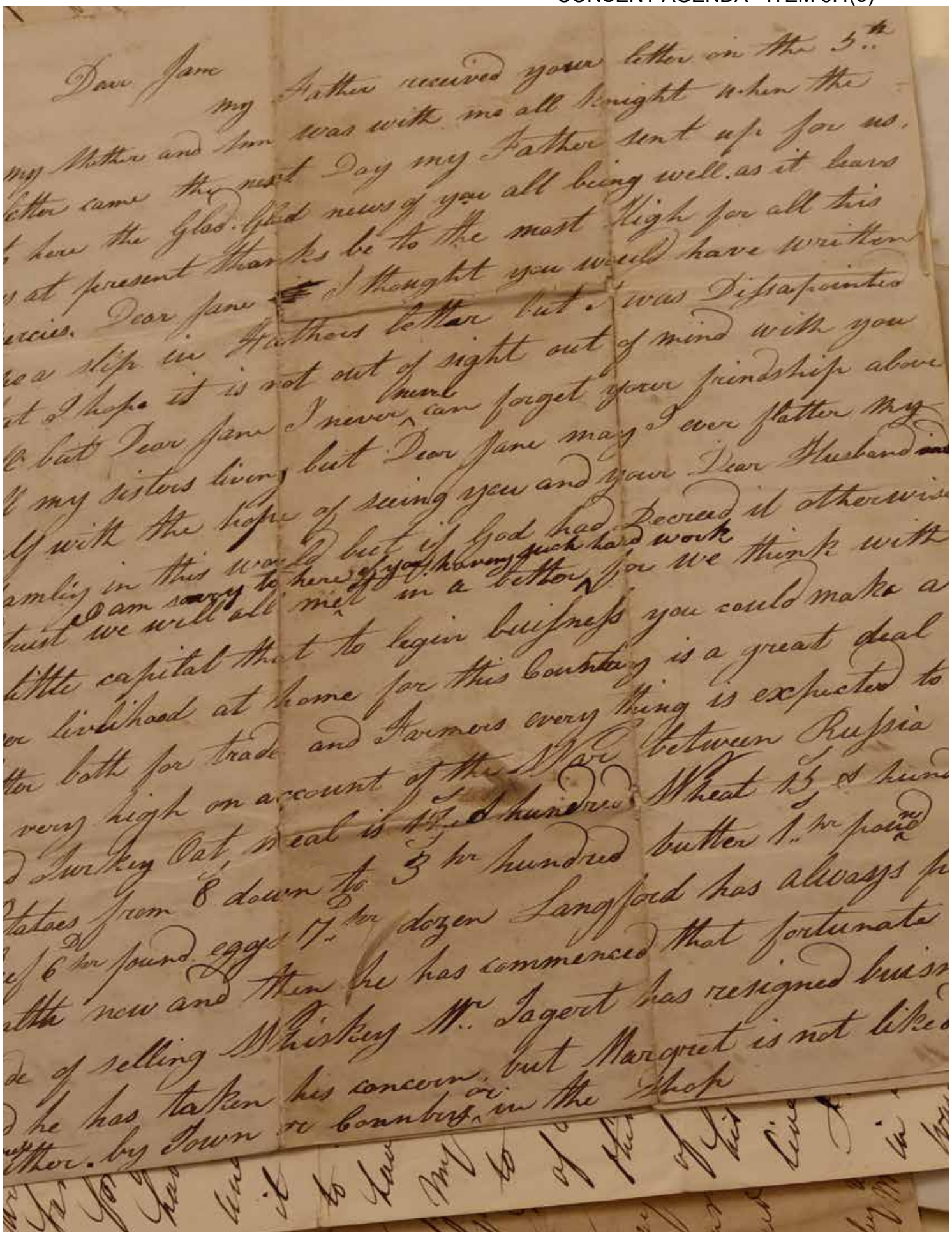
554K+ views on Instagram
8,076 likes
400 new followers for a total of **4,853** followers

TikTok

277K+ video views
12,052 likes
640 new followers for a total of **1,033** (more than doubling our followship)

YouTube

88,636 views on YouTube of "Evaluating Sources", a guide to confirming source validity for a total of **978,823 views**.



Dear Jane — my Father received your letter on the 3rd. my Mother and Sam was with me all Tonight when the letter came the next Day my Father sent up for us. I have the Glad Glad news of you all being well as it leaves us at present thanks be to the most High for all this Mercies. Dear Jane I thought you would have written a Line in Fathers letter but I was Disappointed but I hope it is not out of sight out of mind with you Dear Jane I never can forget your friendship above all my sisters living but Dear Jane may I ever flatter my self with the hope of seeing you and your Dear Husband again Dear Jane I am sorry to here of your hard work for we think with trust we will all meet in a better world if God had Decreed it otherwise little capital that to begin Business you could make a livelihood at home for this Country is a great deal better both for trade and Farmers every thing is expected to very high on account of the War between Russia and Turkey Oat Meal is 17 & hundred Wheat 15 & hundred States from 8 down to 3 hr hundred butter 1.. hr pound of 6 hr pound eggs 17 hr dozen Langford has always put the now and then he has commenced that fortunate de of selling Whiskey Mr. Jagert has resigned business he has taken his concern but Margret is not like other. by Down re Counters in the Shop

Annual Report on Faculty Recruitment and Retention

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Annual Report on Faculty Recruitment and Retention, prepared by the Office of the Vice-Provost (Academic Planning, Policy and Faculty), is provided for information to the Board through Senate.

Documentation Provided:

Annual Report on Faculty Recruitment and Retention

Western
UNIVERSITY · CANADA

Report to SCUP on Faculty Recruitment and Retention

Office of the Vice Provost (Academic Planning, Policy and Faculty)

April 2026

History, Purpose and Format of the Report

- Beginning 2014, the Faculty Collective agreement has required an annual reporting of metrics related to faculty recruitment;
- The data in this report fulfill that objective; as well, this report provides additional faculty recruitment & retention data;
- Data and analyses are provided with numerical “counts” in order to allow for readers of the report to extract and review these data from a variety of lenses.

Organization of the Report

The report is organized by the following groups:

1. Probationary and Tenured Faculty; Probationary Teaching Scholars and Continuing Status
2. Limited-Term non-Clinical Faculty
3. Part-Time non-Clinical Faculty
4. Full-Time Clinical Faculty
5. Full-Time Librarians and Archivists

Definitions for each group and descriptions of data sources are provided.

Section 1: Probationary and Tenured Faculty

- Data are counts as of October 1; the most recent data in Western's HRIS system is October 1, 2025; the most recent U15 (comparator) data are from the 2024 data
  - reflected by different timelines where comparator data are used
- This section pertains to all Full-Time Probationary (Tenure-track) and Tenured Faculty
- It includes those in senior academic administrative roles who are exempt from the UWOFA Collective Agreement. It excludes those on Long-term disability.
- Probationary Teaching Scholars received their first appointments in 2022 and are included in this section. Women represent 64.71% of these appointments.

Key Observations from slides 9 to 23: Probationary and Tenured Faculty

- The total number of Probationary/Tenured faculty increased from 1998 to 2008, stabilized, then decreased modestly since 2015; in 2019 and 2020 a further decrease was due largely to a retirement incentive window, followed by an increase in hiring in 2021 through 2023 with a substantial increase in 2024 due to the Brescia Integration;
- In the 2024 U15 data, women comprised 40.9% of all Western faculty and 52.6% of Assistant Professors, illustrating increasing representation (reflected in slides 11-12);
- In 2024, women made up 55.9% of new probationary/tenured faculty hires.

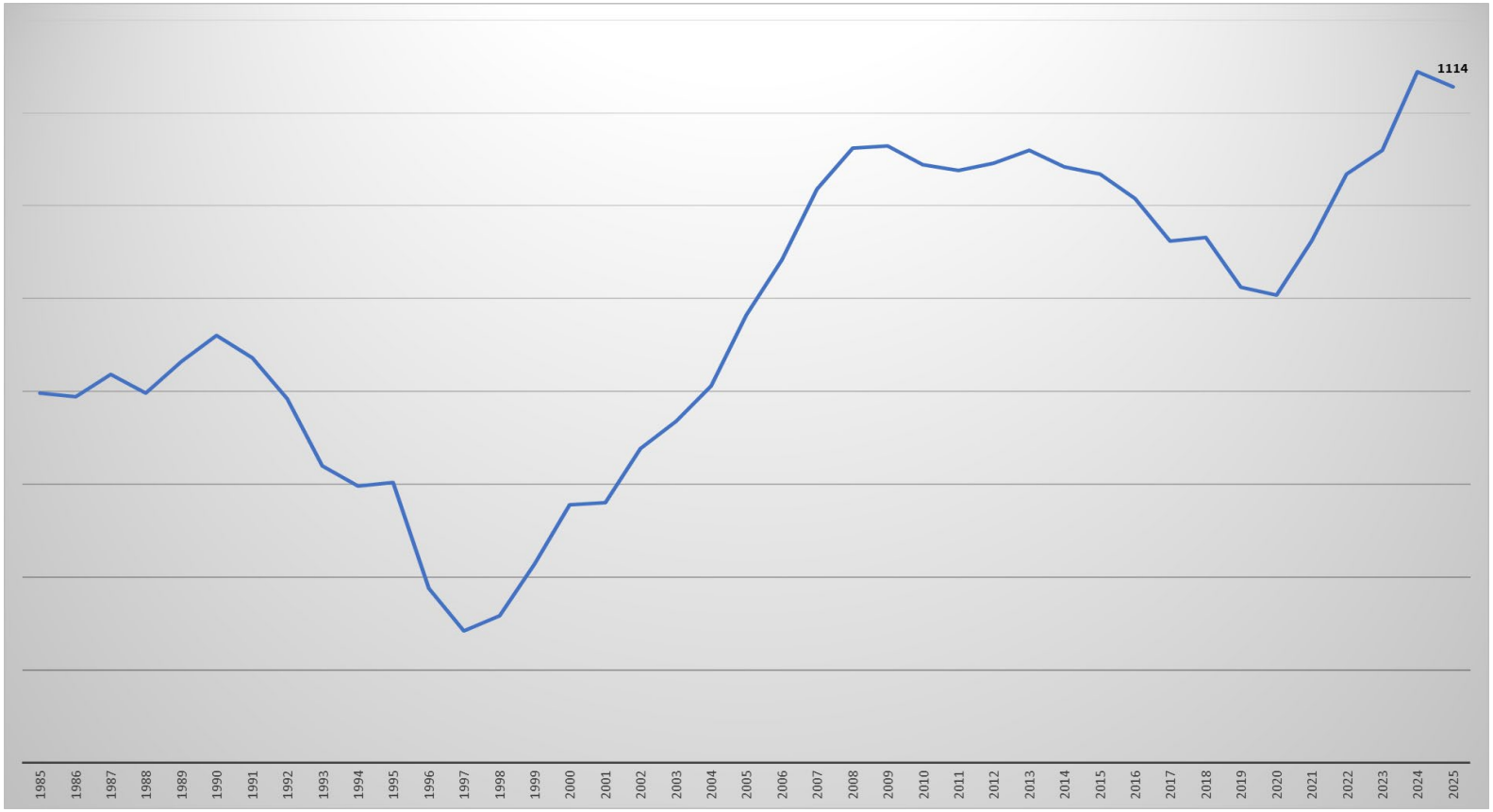
Key Observations from slides 9 to 23 *continued*

- Representation of women varies by discipline (the data include all faculty thus reflect historic, as well as recent, cohorts);
- Gender shows to have some influence on time-to-tenure in STEM disciplines and on time-to-promotion in both STEM and non-STEM disciplines;
- Discipline (STEM vs. non-STEM) shows to have a greater influence on time-to-tenure and time-to-promotion;
- Probationary cohort success rates were similar for men and women.

Key Observations from slides 9 to 24 *continued*

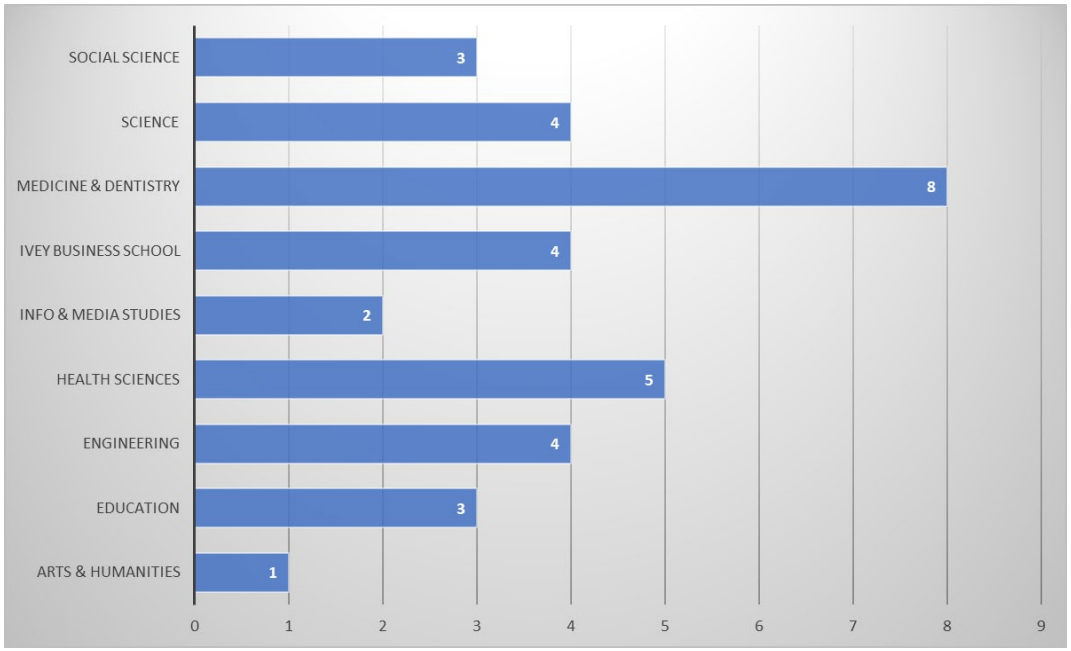
- Resignation patterns for tenured and probationary faculty illustrate disciplinary differences in retention with annual attrition rates of 1.55% for women and 1.24 % for men.
- The difference between the purple and grey lines in slide 24 reflect probationary and tenured faculty with a retirement plan on record;
- The number of probationary and tenured faculty continuing past normal retirement date (NRD) has been steadily increasing since 2019.

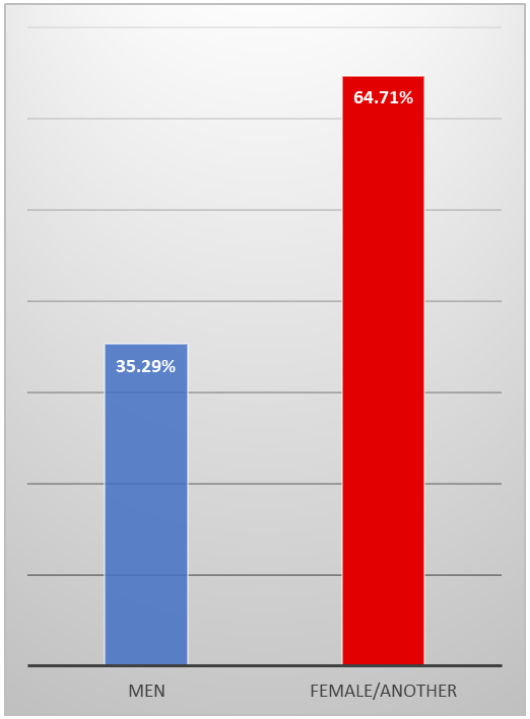
Probationary and Tenured Faculty at Western 1985 – 2025



Source: Western Corporate Information 1985 – 1999, UCASS Data 1999 – 2009, U15 Data 2009 – 2024 & Human Resources Information System 2025 (October)

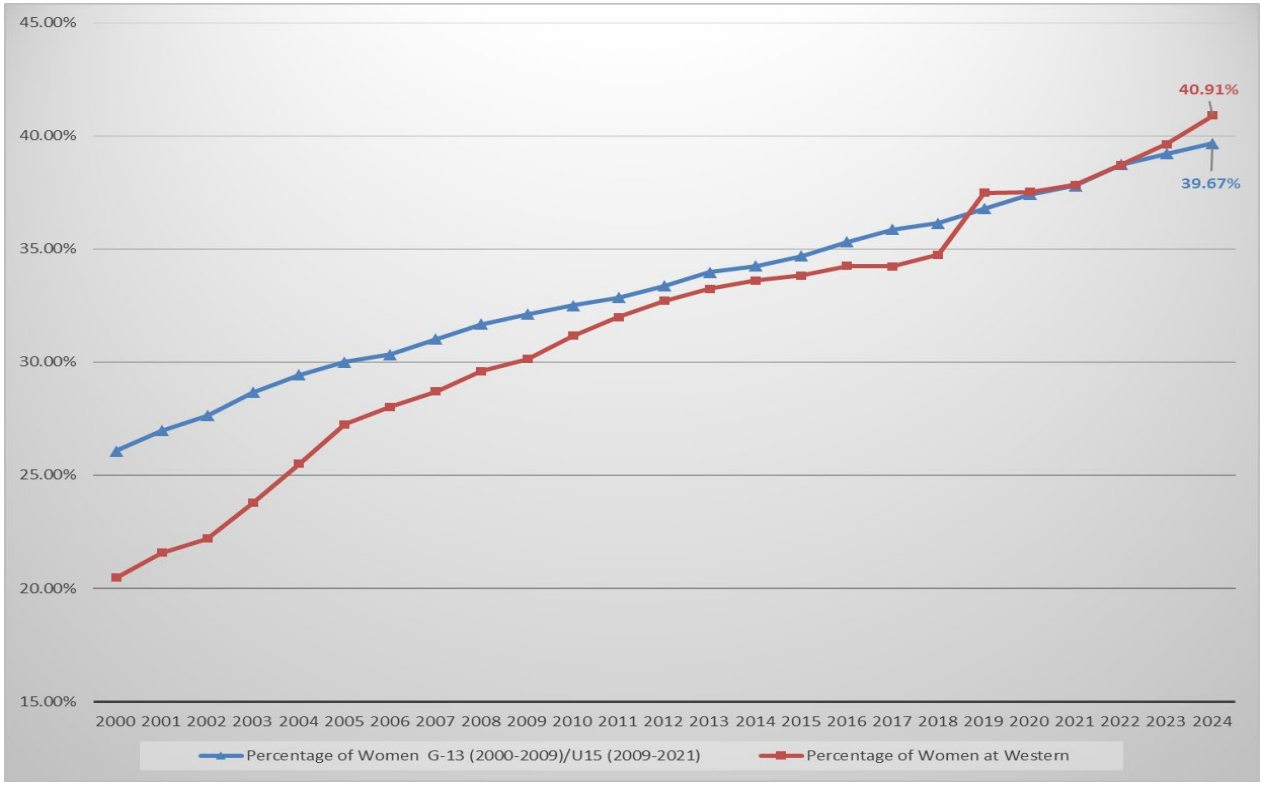
Probationary Teaching Scholars at Western 2025 by Faculty and by percentage of gender distribution





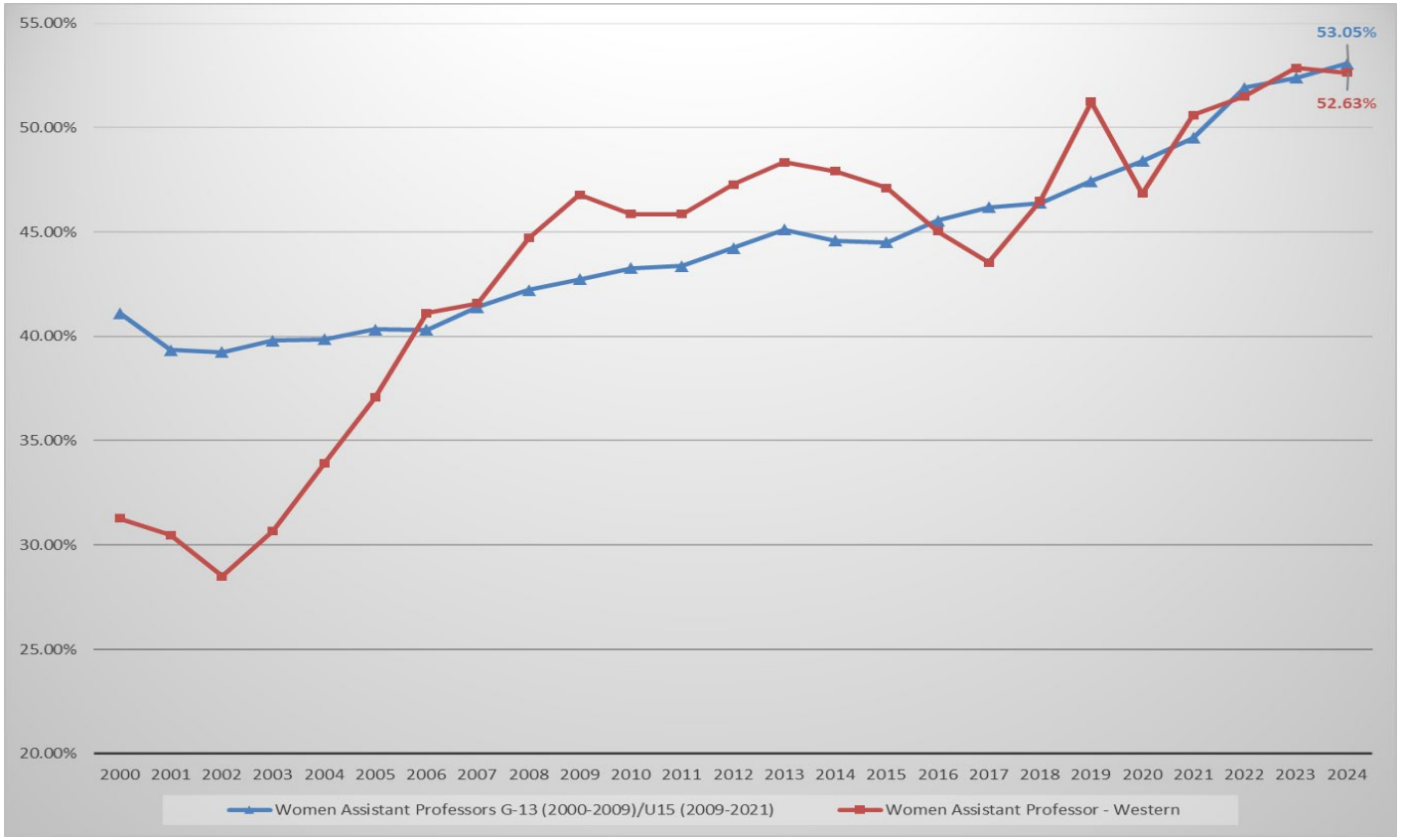
Western Human Resources Information System 2025 (October).

Women as a Percentage of Tenured/Probationary Faculty: G-13/U15 excluding Western vs. Western



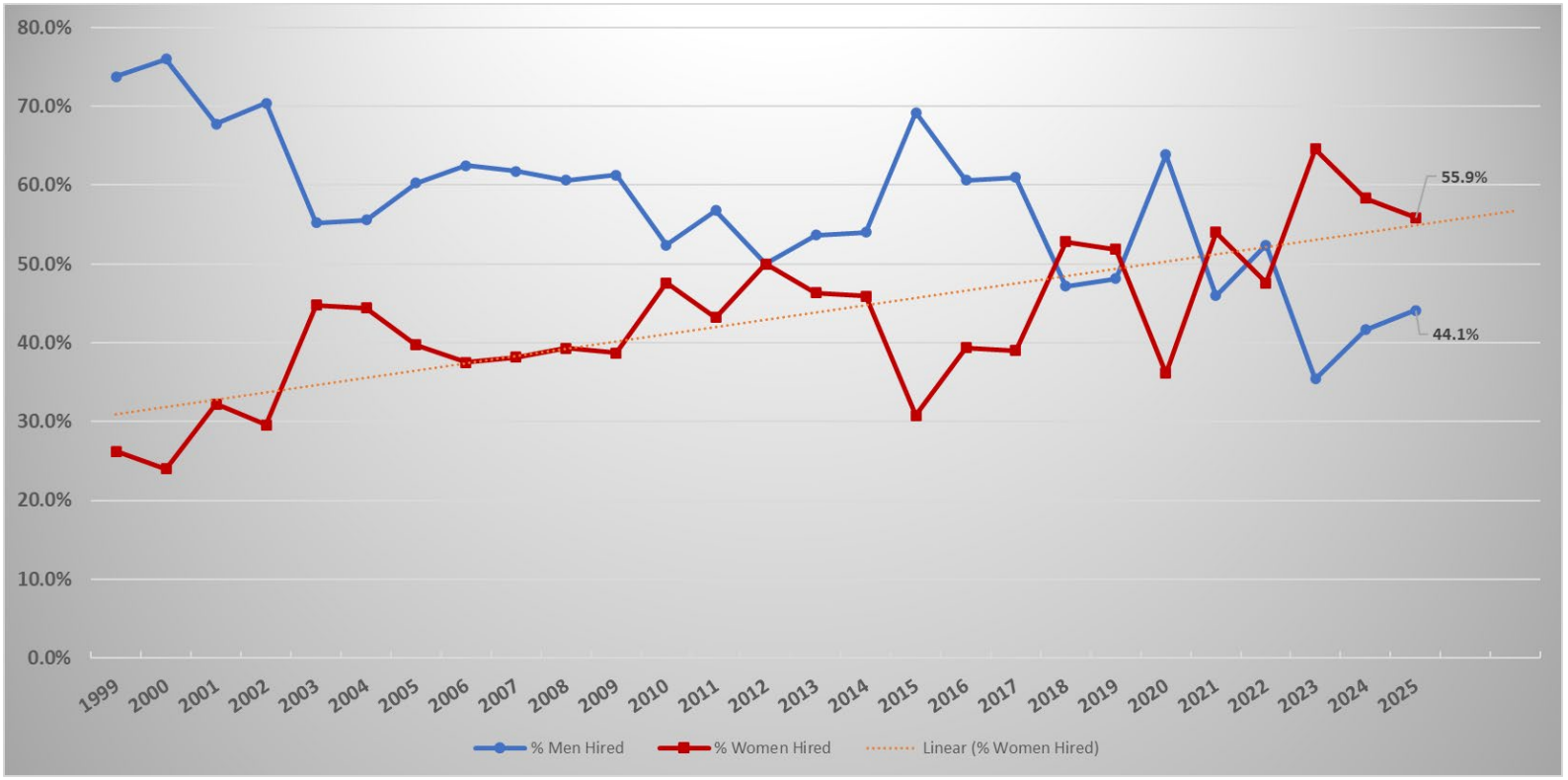
Source: UCASS Data 2000-2009, U15 Data 2009-2024
(Data unavailable for: Laval and Montreal for 2012-2013, Montreal for 2013-2016, Saskatchewan, 2015, and Toronto 2024. Montreal data includes Ecole Polytechnique & Ecole des Hautes Etudes Commericales)

Women as a Percentage of Tenured/Probationary Assistant Professors, G-13/U15 excluding Western vs. Western



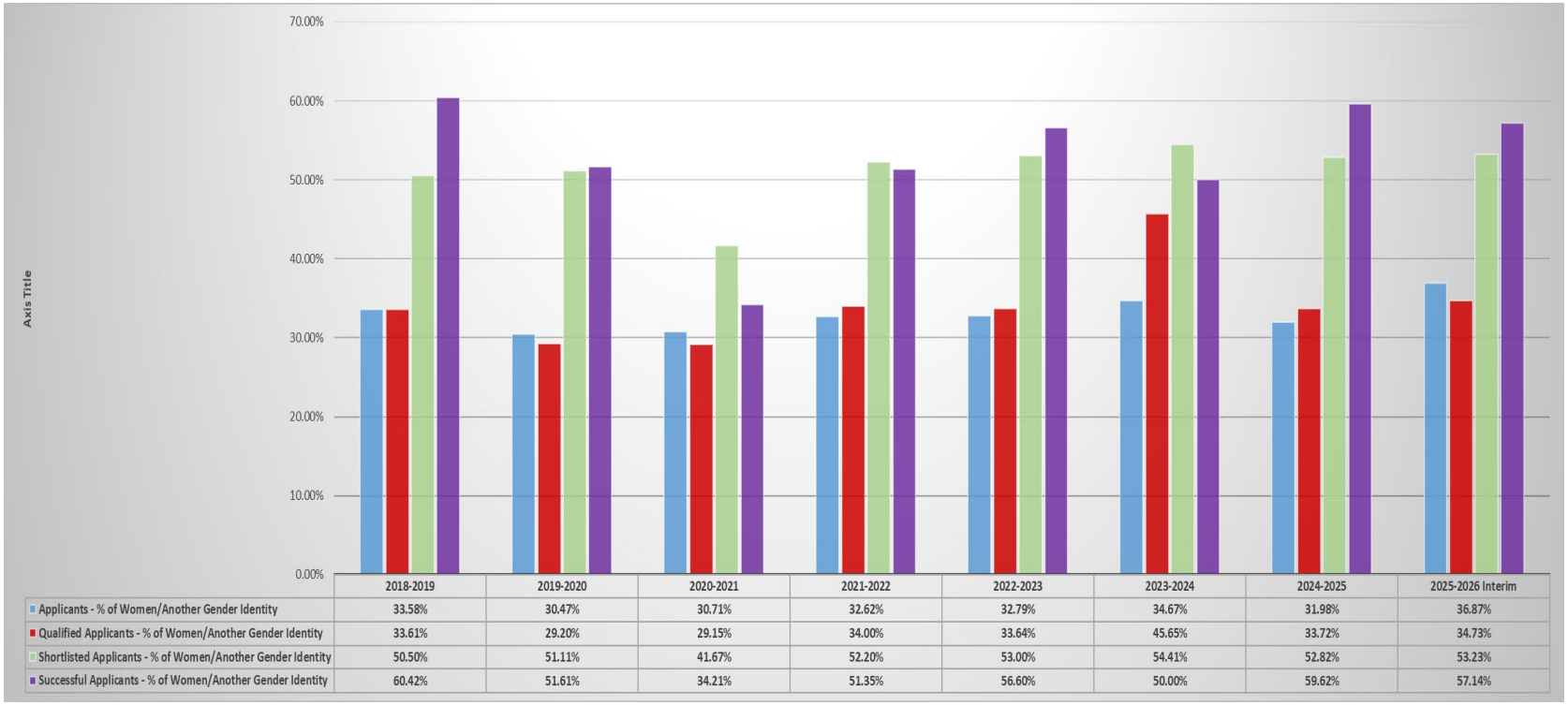
Source: UCASS Data 2000-2009, U15 Data 2009-2024
(Data unavailable for: Laval and Montreal for 2012-2013, Montreal for 2013-2016, Saskatchewan, 2015, and Toronto 2024. Montreal data includes Ecole Polytechnique & Ecole des Hautes Etudes Commericales)

Gender distribution, Newly hired Tenured/Probationary Faculty at Western (including those previously in a LT position at Western): 1999 – 2025 with linear trend line



Source: UCASS Data for 1999 – 2010, Western Human Resources Information Systems 2011 - 2025 (October)
Data includes Faculty hired through the Brescia Integration. Data excludes faculty joining from Robarts

Percentage of Women/Another Gender Identity as Applicants, Qualified Applicants, Shortlisted Applicants, and New Hires 2018-19 through 2025-26 (Interim) Academic Years



	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025	2025-2026 Interim
Applicants - % of Women/Another Gender Identity	33.58%	30.47%	30.71%	32.62%	32.79%	34.67%	31.98%	36.87%
Qualified Applicants - % of Women/Another Gender Identity	33.61%	29.20%	29.15%	34.00%	33.64%	45.65%	33.72%	34.73%
Shortlisted Applicants - % of Women/Another Gender Identity	50.50%	51.11%	41.67%	52.20%	53.00%	54.41%	52.82%	53.23%
Successful Applicants - % of Women/Another Gender Identity	60.42%	51.61%	34.21%	51.35%	56.60%	50.00%	59.62%	57.14%

Percentage is calculated using applicants with known gender. Unknown gender: 5.11% (2018-19), 1.51% (2019-20), 4.76% (2020-21), 3.27% (2021-22), 8.19% (2022-23), 12.69% (2023-24), 4.84% (2024-25), and 5.97% (2025-2026).
Excludes special call, advertising waiver hires, renewals, senior administration, and CRC searches.

Percentage of Women, Probationary Assistant Professor Rank 2009 to 2025

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Faculty of Arts and Humanities	55.56%	52.63%	55.88%	69.70%	58.06%	50.00%	54.17%	47.37%	53.33%	40.00%	50.00%	100.00%	100.00%	66.67%	85.71%	57.14%	63.64%
Ivey Business School	40.00%	39.13%	27.59%	27.59%	32.26%	29.03%	30.30%	26.92%	20.00%	30.43%	33.33%	34.78%	30.77%	41.18%	42.11%	50.00%	57.89%
Faculty of Education	80.00%	75.00%	77.78%	71.43%	60.00%	57.14%	50.00%	66.67%	66.67%	81.82%	81.82%	66.67%	76.92%	62.50%	77.78%	75.00%	66.67%
Faculty of Engineering	22.22%	18.75%	21.43%	18.18%	23.08%	18.18%	14.29%	12.50%	35.71%	29.41%	29.41%	31.25%	29.41%	38.10%	35.00%	42.11%	50.00%
Faculty of Health Sciences	71.43%	61.54%	65.38%	65.22%	68.42%	72.22%	80.00%	90.91%	84.62%	82.35%	90.00%	85.71%	85.71%	79.31%	75.53%	79.41%	77.42%
Faculty of Info/Media Studies	84.62%	80.00%	77.78%	75.00%	100.00%	100.00%	100.00%	--	--	--	100.00%	75.00%	83.33%	75.00%	75.00%	57.14%	42.86%
Faculty of Law	62.50%	71.43%	80.00%	100.00%	100.00%	100.00%	75.00%	57.14%	60.00%	50.00%	50.00%	44.44%	36.36%	33.33%	38.46%	41.67%	40.00%
Schulich School of Med & Dent	29.55%	30.00%	27.27%	32.26%	34.62%	35.71%	36.67%	38.71%	37.50%	37.93%	44.44%	39.13%	47.83%	55.56%	59.26%	53.85%	52.00%
Don Wright Faculty of Music	40.00%	40.00%	30.00%	28.57%	40.00%	50.00%	50.00%	40.00%	33.33%	50.00%	--	--	--	0.00%	0.00%	0.00%	0.00%
Faculty of Science	34.09%	38.89%	38.46%	35.00%	43.75%	50.00%	50.00%	50.00%	41.67%	45.45%	46.67%	47.06%	60.00%	47.62%	44.83%	38.24%	35.48%
Faculty of Social Science	44.00%	48.72%	52.94%	48.28%	57.14%	66.67%	57.89%	47.83%	37.50%	43.75%	47.06%	36.36%	40.63%	42.86%	51.28%	51.28%	51.43%

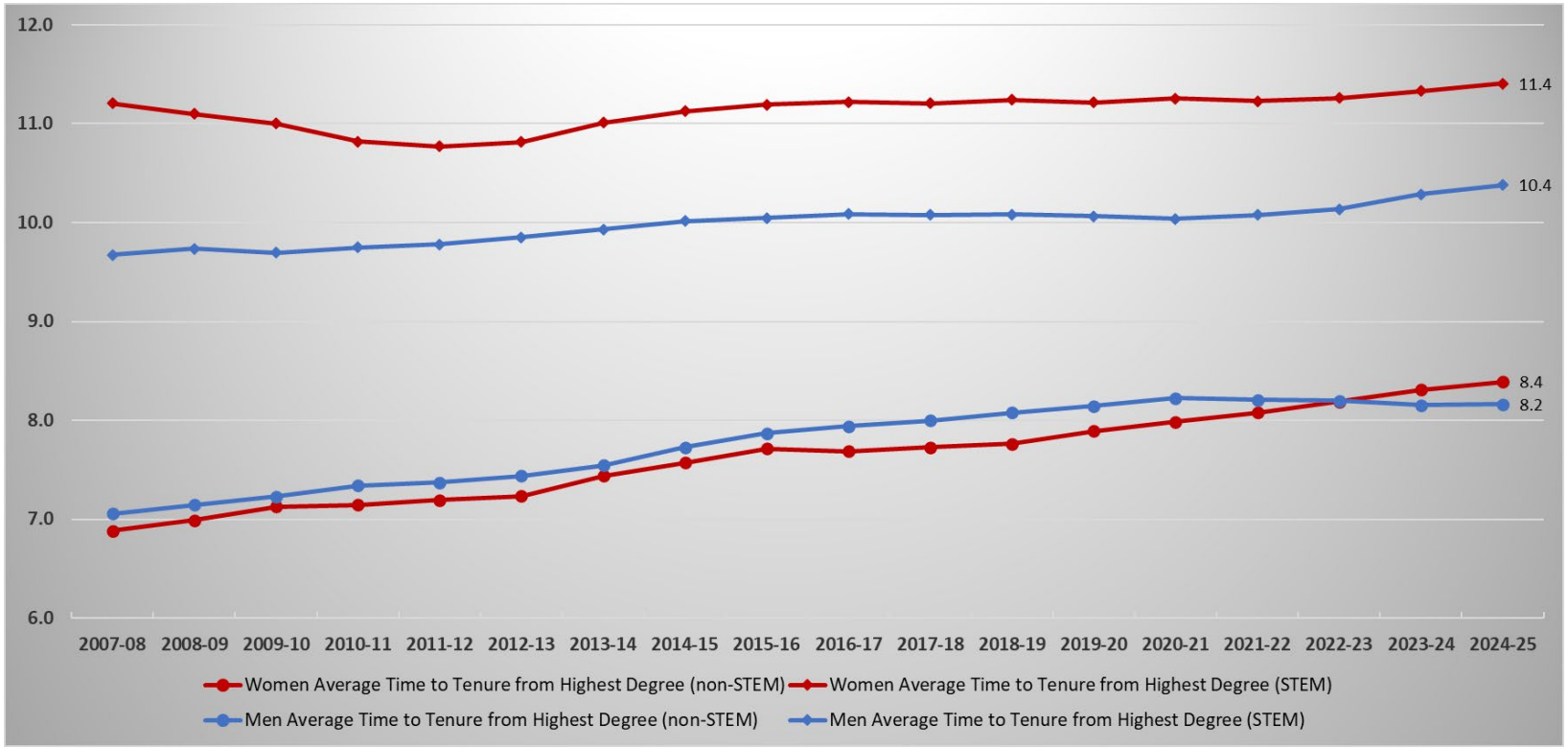
Western Human Resources Information System 2009 - 2025 (October).

Percentage of Women, Tenured/Probationary Faculty, 2009 to 2025

	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Faculty of Arts and Humanities	42.31%	44.19%	45.45%	47.06%	44.60%	45.00%	45.65%	45.52%	45.31%	42.62%	45.22%	45.54%	46.30%	46.36%	47.71%	49.11%	50.00%
Ivey Business School	21.67%	26.09%	24.00%	25.33%	26.92%	25.97%	22.22%	19.74%	18.57%	22.37%	25.00%	25.97%	25.00%	29.79%	32.63%	38.24%	37.86%
Faculty of Education	47.62%	48.72%	50.00%	52.94%	54.55%	54.29%	57.14%	61.90%	65.85%	69.05%	68.29%	65.91%	67.39%	66.67%	67.39%	68.18%	65.85%
Faculty of Engineering	11.63%	11.63%	11.49%	11.36%	12.36%	12.50%	11.63%	12.64%	15.96%	16.67%	17.35%	17.89%	16.67%	18.63%	19.80%	21.15%	21.70%
Faculty of Health Sciences	58.43%	58.70%	59.57%	59.78%	60.22%	60.87%	62.22%	63.33%	60.47%	62.07%	70.00%	70.37%	70.59%	71.74%	72.16%	74.34%	74.14%
Faculty of Info/Media Studies	59.46%	58.33%	57.14%	58.82%	58.82%	57.58%	59.38%	57.14%	57.14%	59.26%	60.71%	60.71%	62.07%	60.71%	61.29%	58.06%	63.33%
Faculty of Law	23.33%	22.58%	24.14%	27.59%	32.26%	31.03%	34.48%	35.71%	37.50%	39.29%	39.29%	34.62%	31.25%	29.41%	32.35%	33.33%	32.35%
Schulich School of Med & Dent	19.65%	20.12%	20.37%	21.34%	22.56%	22.94%	23.84%	24.00%	23.84%	23.39%	27.11%	28.22%	29.09%	29.07%	28.82%	29.14%	29.82%
Don Wright Faculty of Music	32.43%	33.33%	36.11%	35.14%	32.43%	33.33%	34.21%	37.14%	37.14%	36.36%	35.48%	35.48%	34.38%	35.29%	33.33%	34.38%	35.48%
Faculty of Science	19.15%	20.65%	21.98%	22.78%	23.89%	23.73%	24.72%	24.43%	23.70%	23.53%	25.75%	25.31%	26.19%	27.27%	26.90%	26.55%	27.43%
Faculty of Social Science	31.25%	32.16%	33.50%	32.50%	33.33%	36.13%	35.64%	36.61%	37.78%	40.11%	44.32%	43.02%	43.85%	44.09%	45.50%	45.08%	45.60%

Western Human Resources Information System 2009 – 2025 (October).

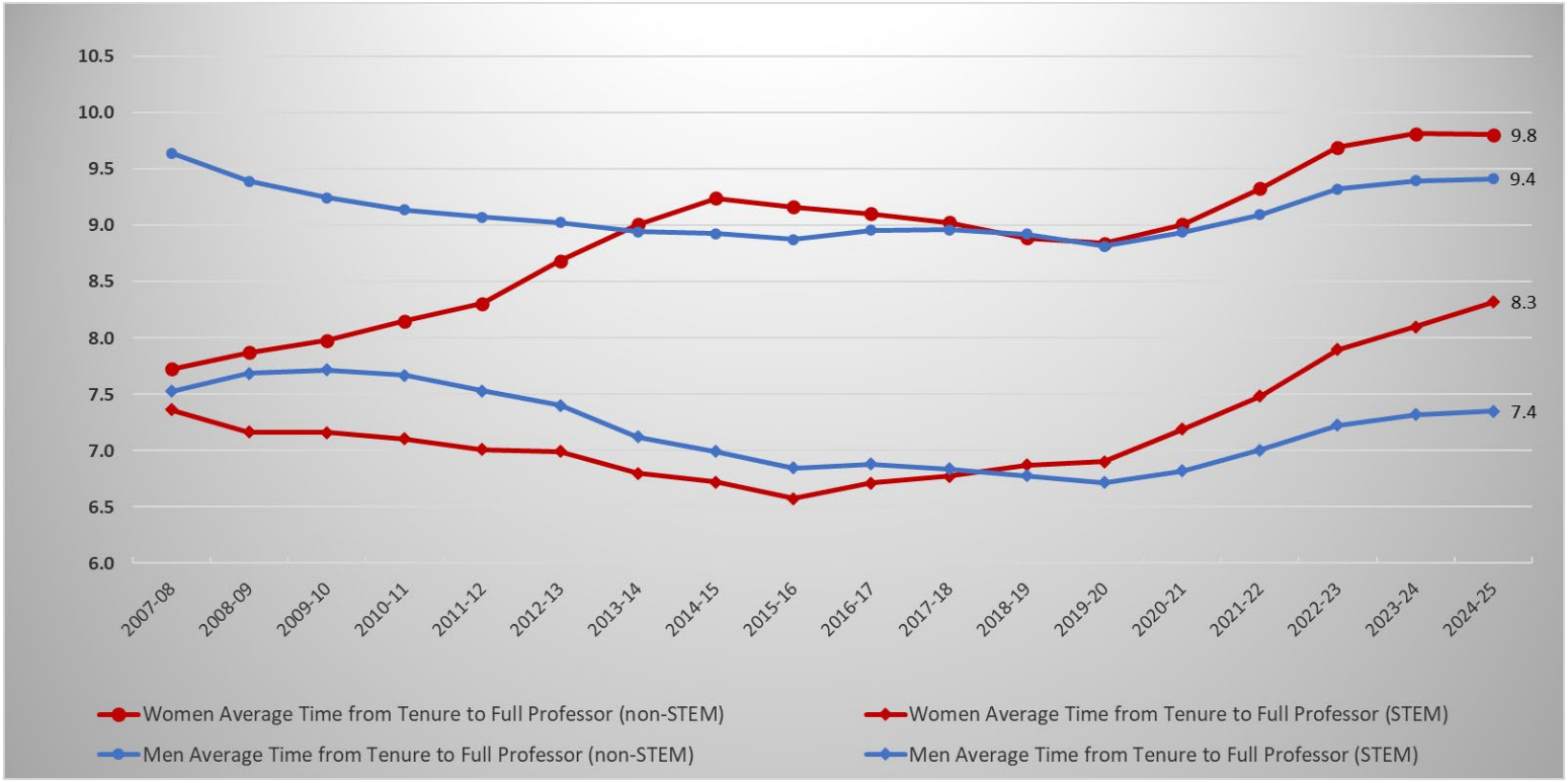
Time to Tenure from Highest Degree (STEM and non-STEM Disciplines)



STEM = Faculty of Engineering, Science, Medicine & Dentistry
Only those with > 3 years from RF to Tenure are included
3 Year rolling average

Source: Western HR Information System

Time to Full Professor from Tenure (STEM and non-STEM Disciplines)



STEM = Faculty of Engineering, Science, Medicine & Dentistry
Only those with > 3 years from RF to Tenure are included
3 Year rolling average

Source: Western HR Information System

Probationary Cohort Outcomes for Faculty with Probationary Start dates from 2002-03 through 2019-20

Action	Women (N)	% Women	Men(N)	%Men	Total (N)	% Total
Granted Tenure	253	74.631%	332	76.852%	585	75.88%
Denied P&T	4	1.180%	13	3.009%	17	2.20%
Withdrew from P&T*	4	1.180%	10	2.315%	14	1.82%
Moved to Limited Term**	4	1.180%	3	0.694%	7	0.91%
Resigned	52	15.339%	58	13.426%	110	14.27%
Other	4	1.180%	2	0.463%	6	0.78%
Probationary Extension***	17	5.015%	12	2.778%	29	3.76%
Still in Probationary Period***	1	0.295%	2	0.463%	3	0.39%
Grand Total	339	100.00%	432	100.00%	771	100.00%

Outcomes for Probationary faculty who have entered the P&T cycle:

Action	Women (N)	% Women	Men(N)	%Men
Granted Tenure	253	96.93%	332	93.52%
Denied P&T	4	1.53%	13	3.66%
Withdrew from P&T	4	1.53%	10	2.82%
Grand Total	261	100.00%	355	100.00%

* Withdrew after entering the P&T queue

** Hired into a new Limited Term role before entering P&T queue

*** Those continuing beyond their initial P&T consideration date (due to leaves etc.) or those hired in fall/winter of the 2018-9 academic year

Reasons for Resignation: Probationary Cohort with Start dates from 2002-03 through 2019-20

Reasons for Resignation During the Probationary Period (Exit Interviews)

Reason	Women (N)	% of Women Total	Men (N)	% of Men Total
Career Development and Salary	14	26.92%	22	37.93%
Family and Geography	30	57.69%	23	39.66%
Other	5	9.62%	7	12.07%
P&T Performance Problem	3	5.77%	6	10.34%
Grand Total	52	100.00%	58	100.00%

Data Source: Exit interviews conducted with the Faculty Member or Chair/Dean of the Department/Faculty and letters received from Faculty Member. Fractional numbers result when multiple reasons are given for resignation; one individual is fractionally attributed across reasons they gave.
*Includes only faculty under age 55 at the time of resignation

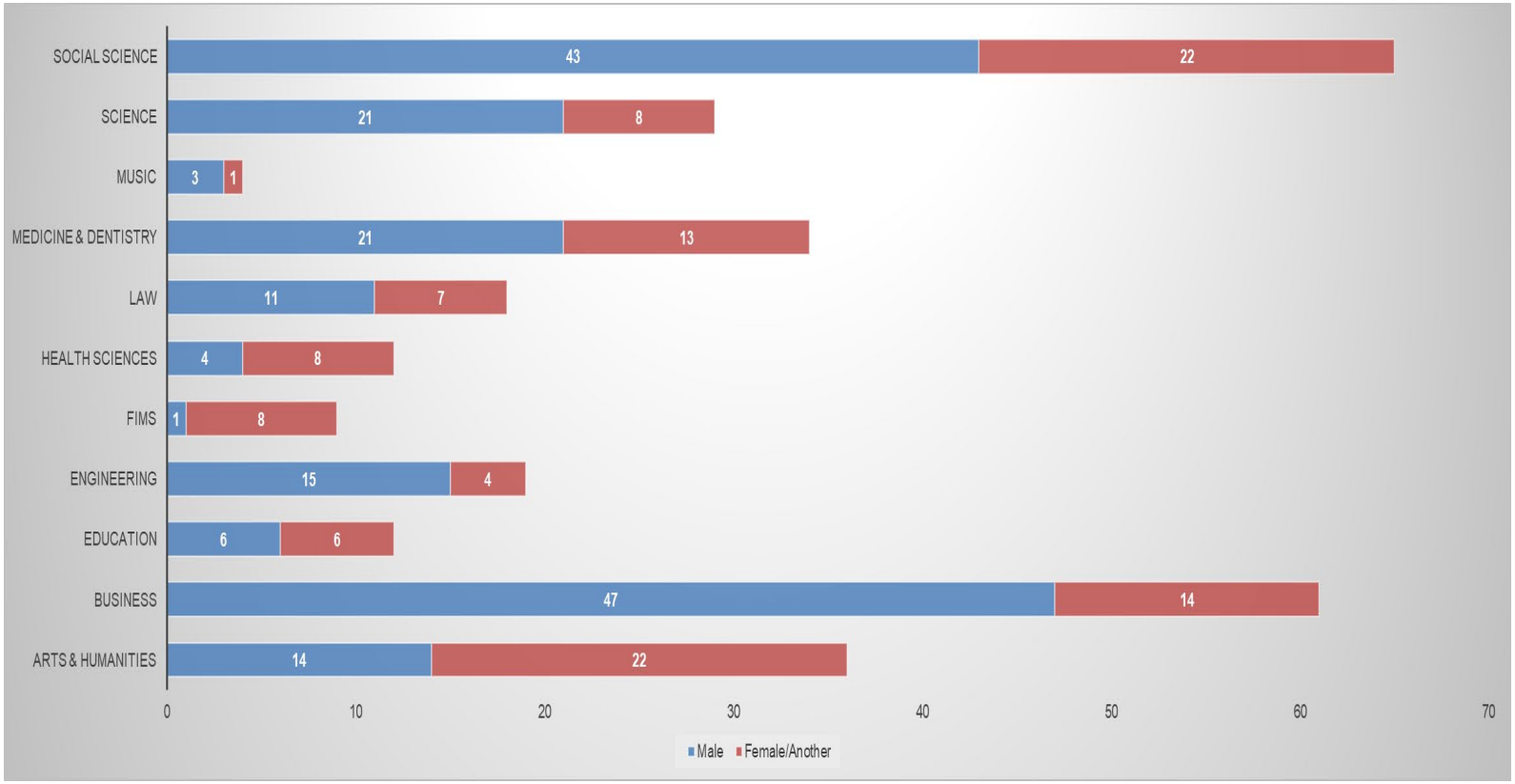
Reasons for Resignation: All Probationary and Tenured faculty resigning from 2004-05 through 2025-26 (interim)

Reason for Resignation	Women (N)	Women (%)	Men (N)	Men (%)
Career Development and Salary	52.0	46.0%	84.5	45.4%
Family and Geography	43.5	38.5%	52.8	28.4%
Other	11.5	10.2%	23.2	12.5%
Performance - Not Tracking to P&T	6.0	5.3%	25.5	13.7%
Grand Total	**113**	**100.0%**	**186**	**100.0%**

UWO Total Resignations: Women: 113, Men: 186
Women: 1.55 % average attrition rate (annual attrition rate = resignations/current year faculty count)
Men: 1.24 % average attrition rate (annual attrition rate = resignations/current year faculty count)

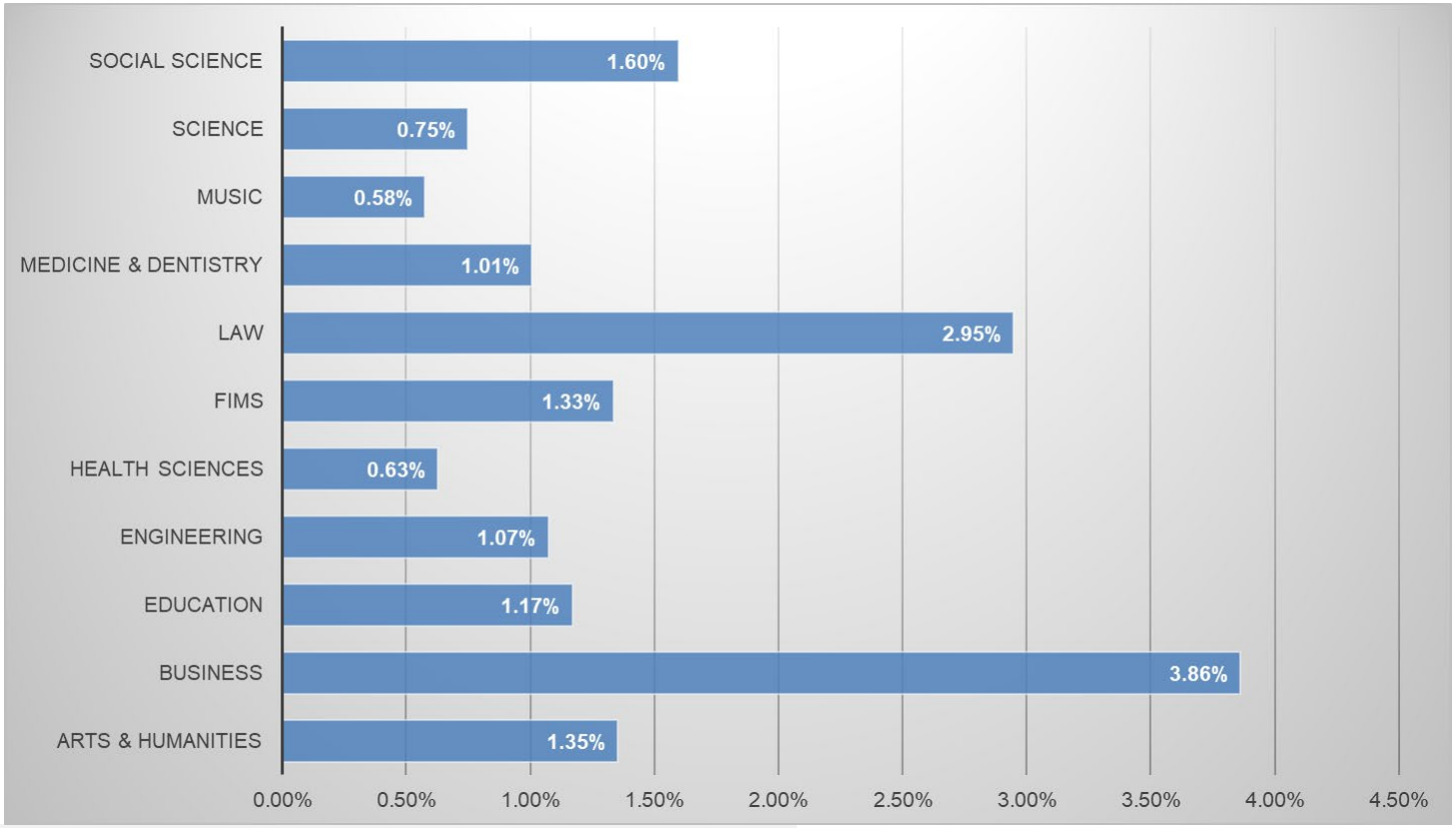
Data Source: Exit interviews conducted with the Faculty Member or Chair/Dean of the Department/Faculty and letters received from Faculty Member. Fractional numbers result when multiple reasons are given for resignation; one individual is fractionally attributed across reasons they gave.
**Includes only faculty under age 55 at the time of resignation

Total Probationary & Tenured Resignations by Faculty: resigning from 2004-05 to 2025-26 (interim)



Source: Western Information Systems as of January 2026
**Includes only faculty under age 55 at the time of resignation.

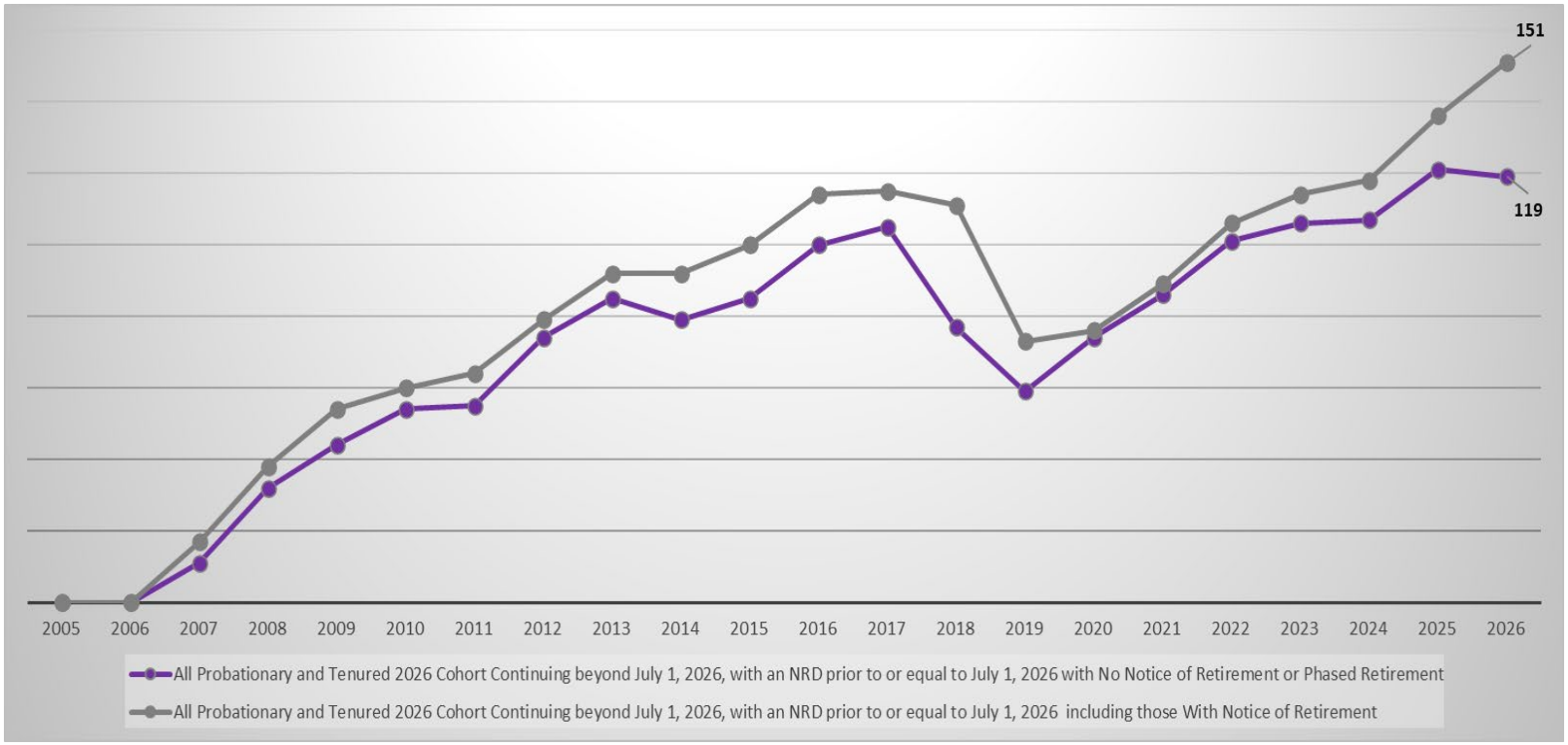
Total Probationary & Tenured Resignations % within each Faculty: exit dates 2004-05 to 2025-26 (Interim)



UWO Total Resignations: 299 (2004-2005 through 2025-2026 interim)
1.34% average attrition rate (attrition rate = resignations/faculty count)

Source: Western Information Systems as of January 2026
**Includes only faculty under age 55 at the time of resignation.

Probationary and Tenured Faculty at Western: Continuing Beyond Normal Retirement Date (NRD)



Source: Western Human Resources Information System
Cohort continuing with <= July 1 NRD in each year

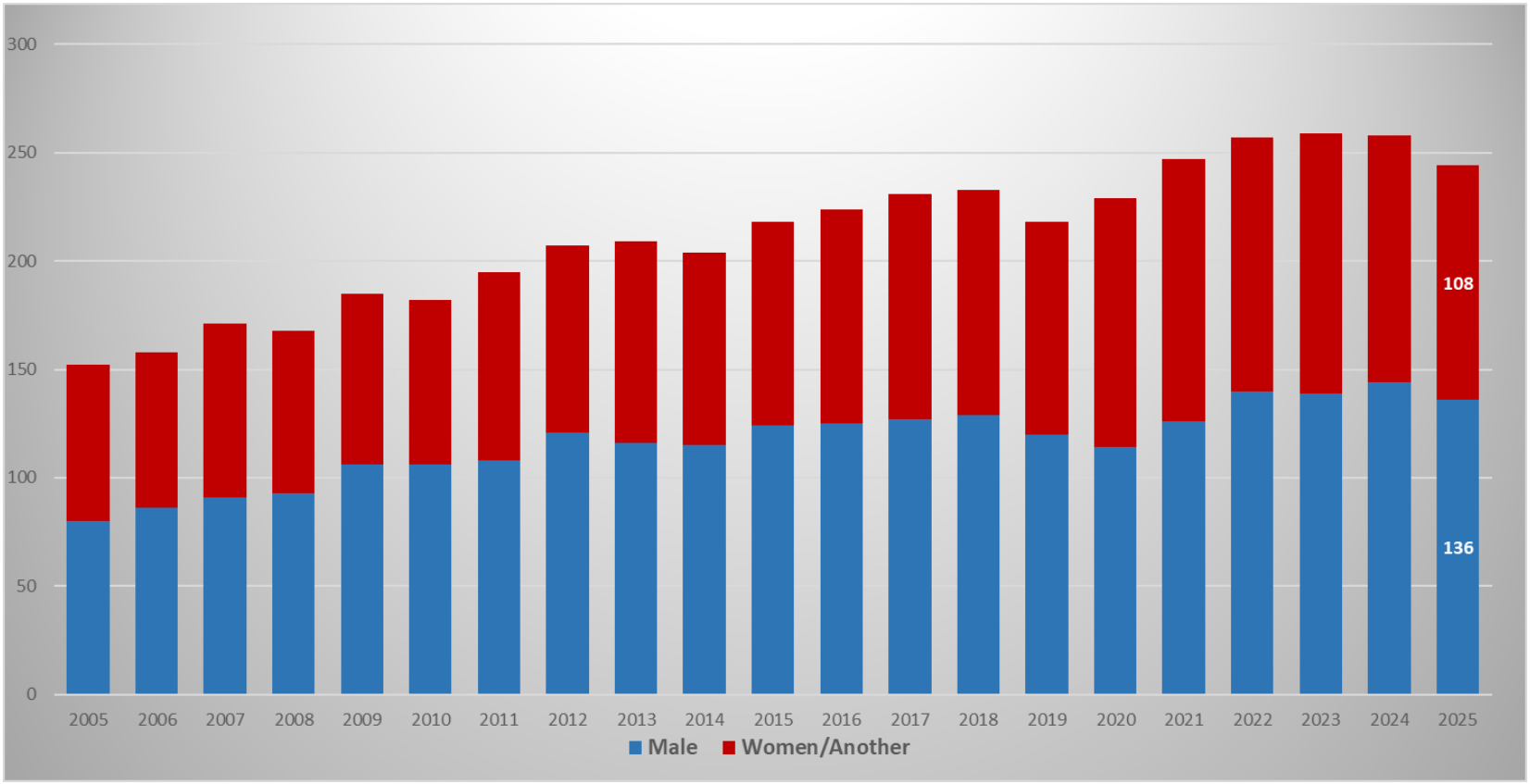
Section 2: Limited Term Appointments

- Data are counts as of October 1, 2025;
- Includes Limited Term UWOFA faculty:
  - Those with fixed-term (with end date);
  - Full-time contract faculty “without end date”;
- Does not include:
  - Visiting faculty;
  - Externally funded faculty.

Key Observations from Slides 27 to 30
Limited Term (LT) Faculty

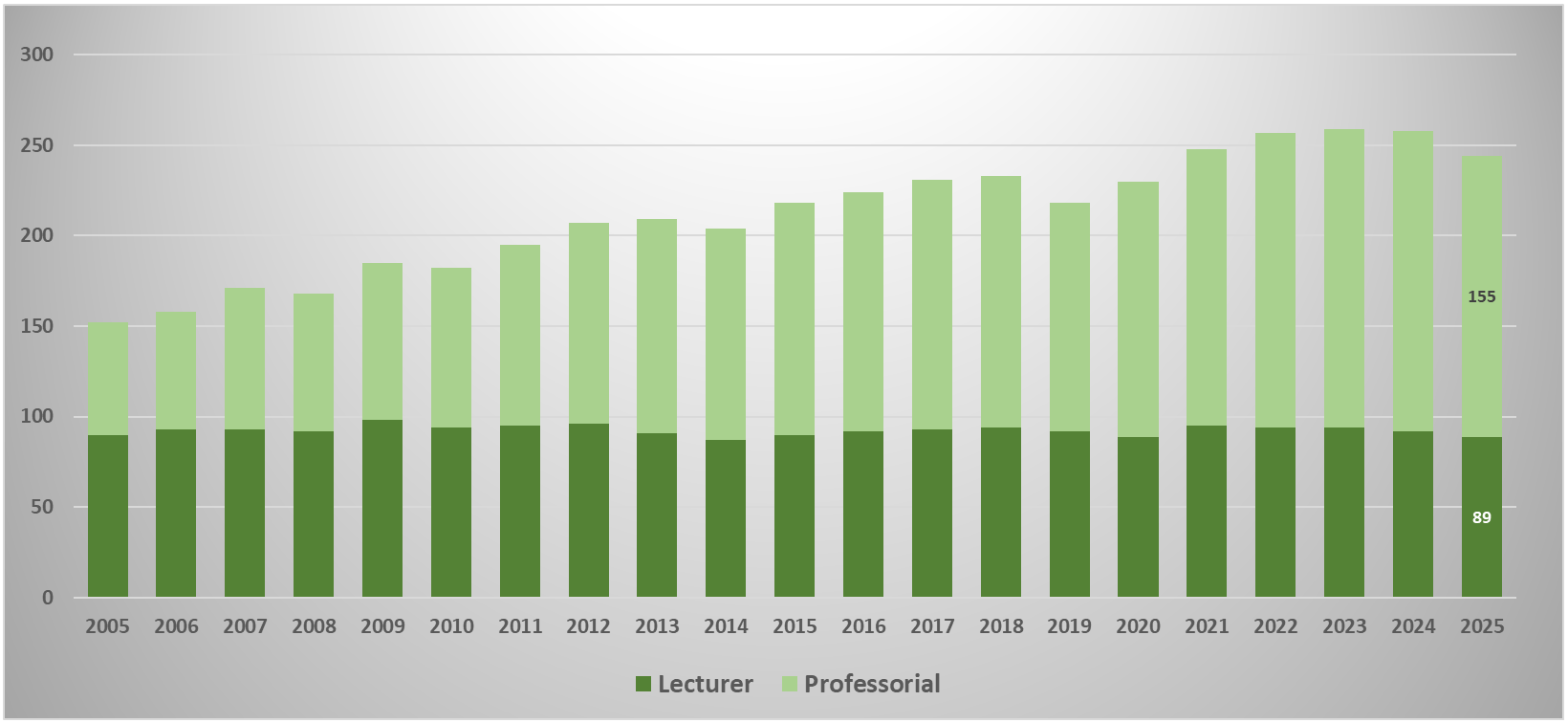
- On October 1, 2025 there were **244** LT faculty:
  - **108** (44.3%) women or other gender equity-seeking group and **136** (55.7%) men;
  - **155** (63.5%) were at the Professorial ranks
  - **87** (35.7%) had been employed ≥ 10 years (therefore are either "without end date" or "permanent" or eligible for "without end date" status at next renewal)
  - **128** (52.5%) have been in LT contract status for <7 years
- Each vertical bar in slide 30 represents the workload (WL) of one LT individual; most LT faculty are teaching-intensive; other WLs are seen (e.g. Basic Scientists in a Clinical Department are often research-focused)

Number of Individuals with Limited Term Appointments: Stratified by Gender 2005 to 2025



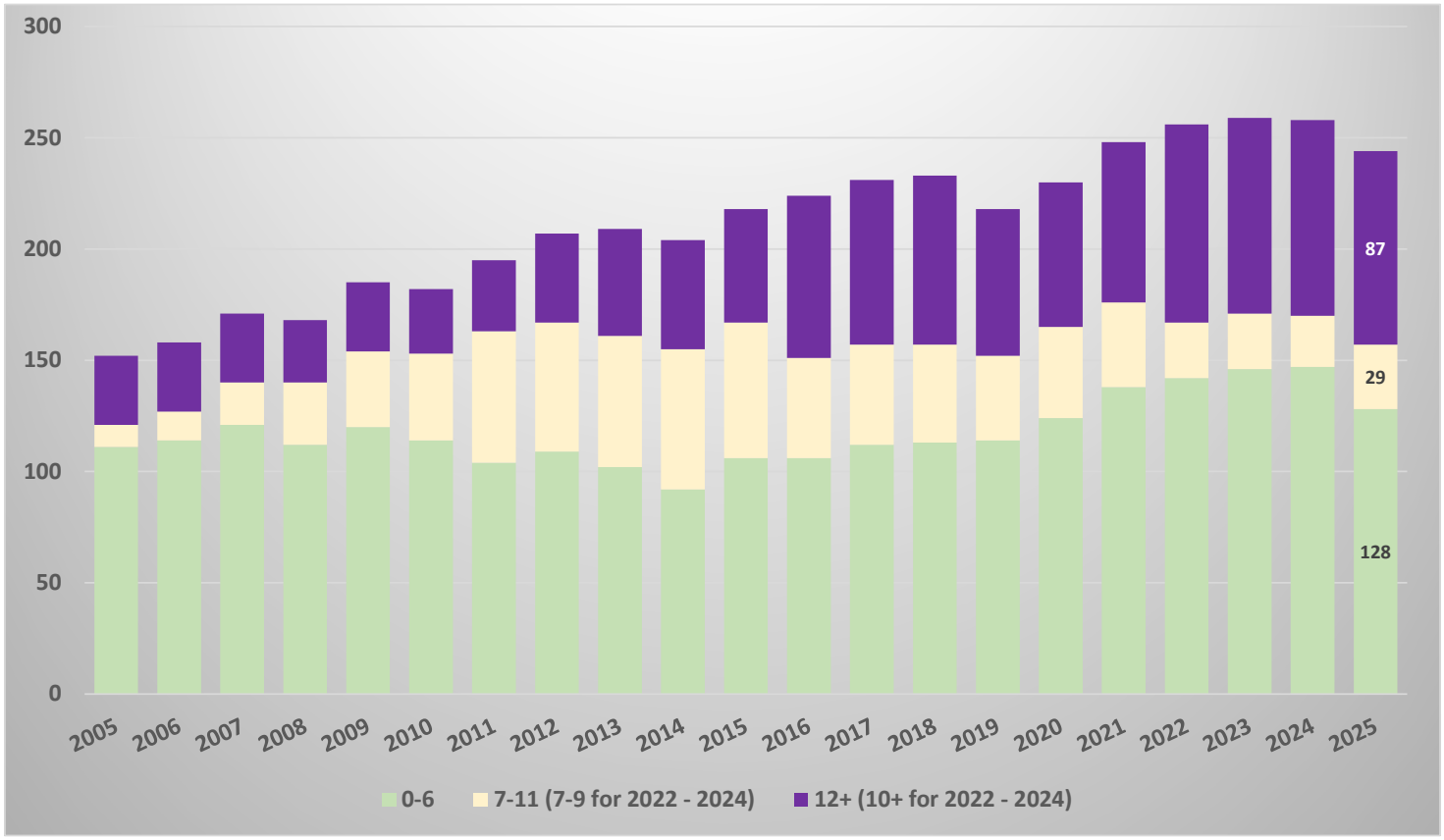
Source: Western's Human Resources Information Systems 2005 – 2025 (October)

Number of Individuals with Limited Term Appointments Stratified by Rank, 2005 - 2025



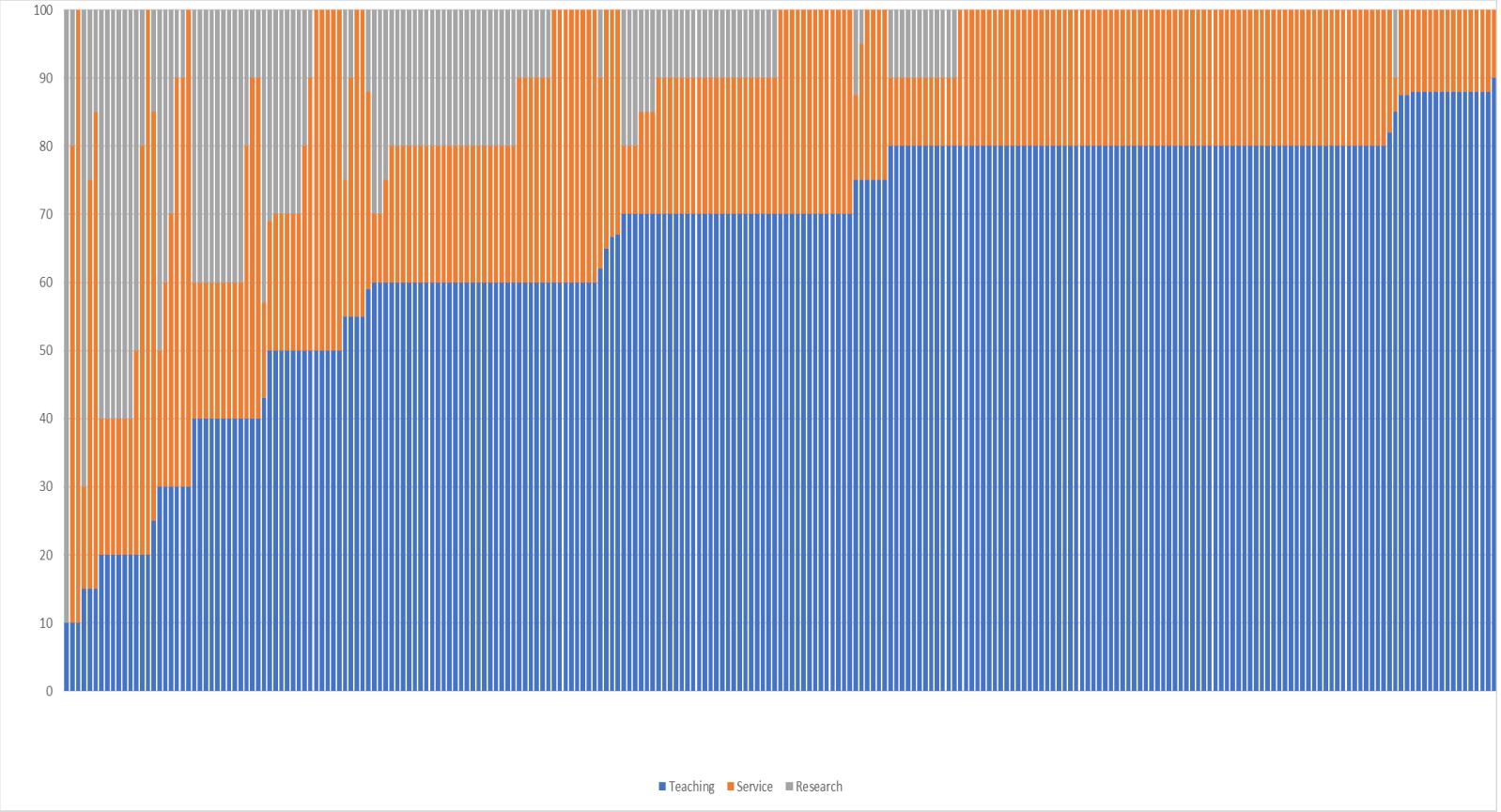
Source: Western's Human Resources Information Systems 2005 - 2025 (October)

Number of Limited Term Appointments by Years of Service 2005 – 2025



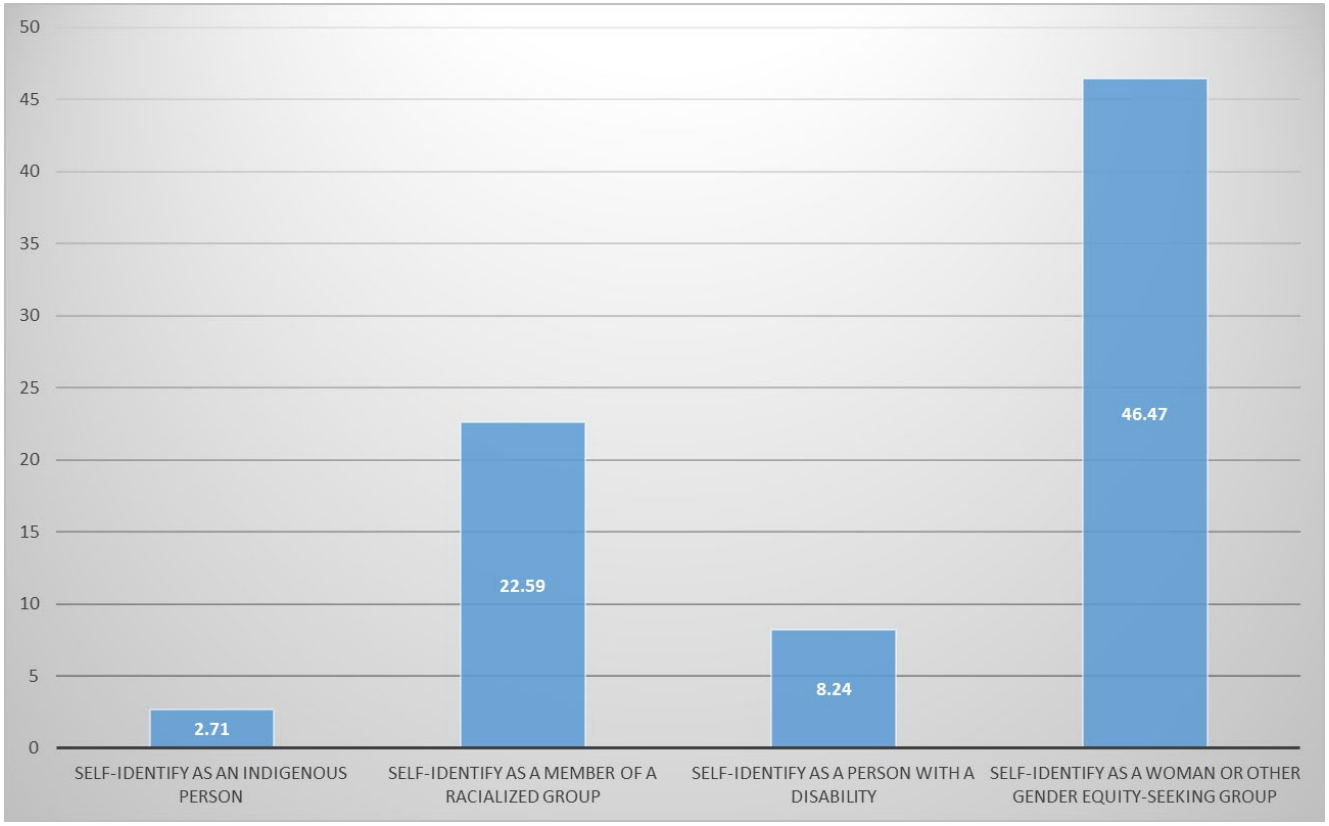
Source: Western's Human Resources Information Systems 2005 - 2025 (October)

All Active Limited Term Appointments by Workload Percentages as of October 2025



Source: Western's Human Resources Information Systems 2024 (October)

Full-Time UWOFA Faculty Respondents by Designated Group (Response Rate: 64.79% - Percentage of Total Headcount)



Note: Respondents who chose "I prefer not to answer / Skipped Question" are not included in the above percentages.

Source: Western Census Data as of August 2023

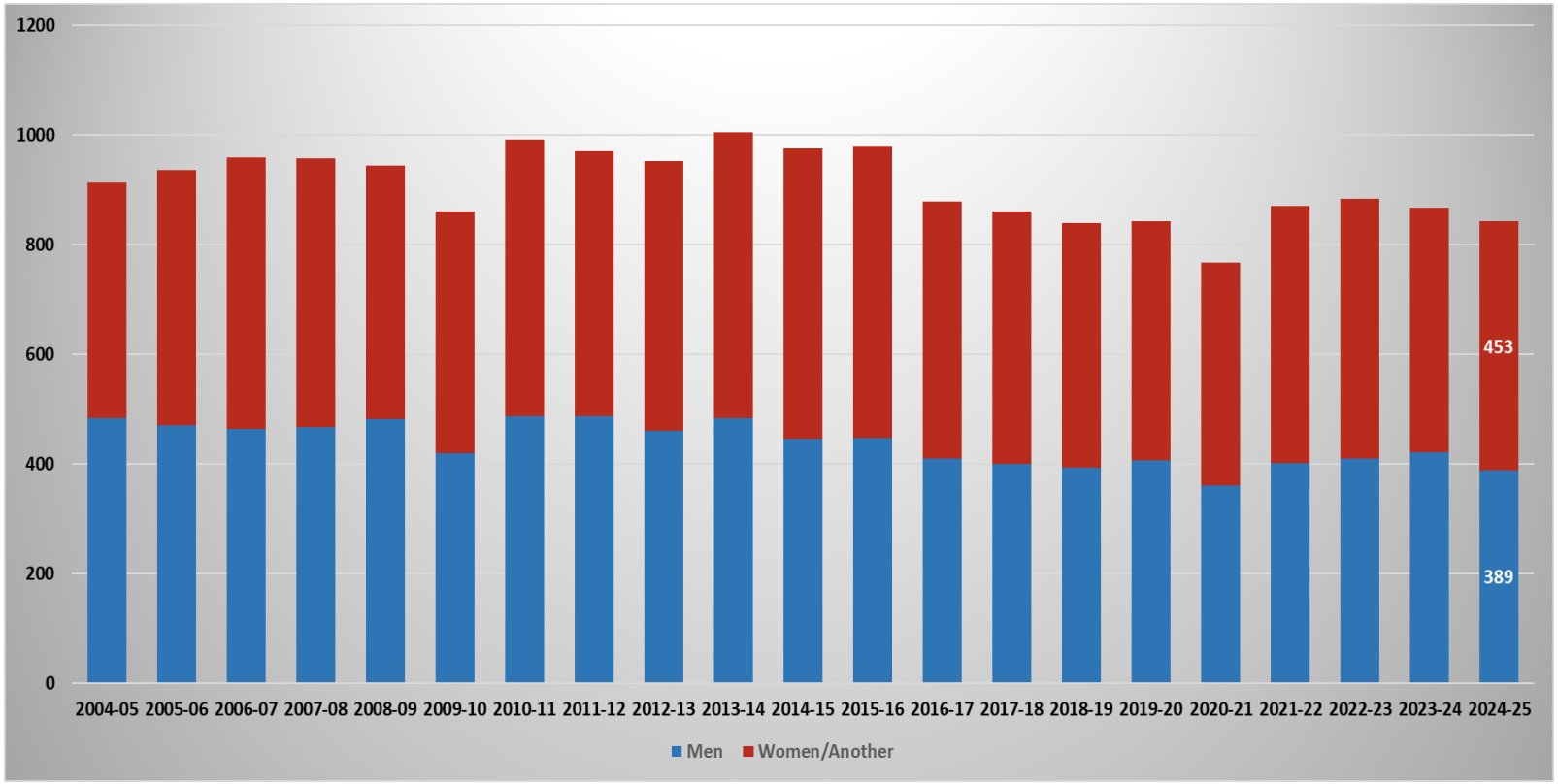
Section 3: Part-Time Faculty

- Count of individuals employed, by fiscal year, as part-time faculty including:
  - Limited Duties (LD) Appointments through competitive advertising (includes individuals with no other employment relationship with Western as well as Post-Retirement individuals, Extra-Load, and Graduate Students or Post Doctoral trainees who applied to an open LD competition) (please note: years of service slides exclude extra-load faculty members);
  - Standing Assignments and Course Authoring agreements;
  - Post Doctoral and Graduate Student Teaching Assignments hired under Appointments Article, Clause 3. d) of the UWOFA Collective Agreement;
  - Excludes LD Appointments at Trois-Pistoles.
- In fiscal 2024-25, there were **842** faculty teaching in part-time appointments; of these, **483** were UWOFA Part-Time Members(taught ≥ a half-course in each of 2 of the last 3 fiscal years).

Key Observations from Slides 34 to 39
Part-Time, Non-Clinical Faculty

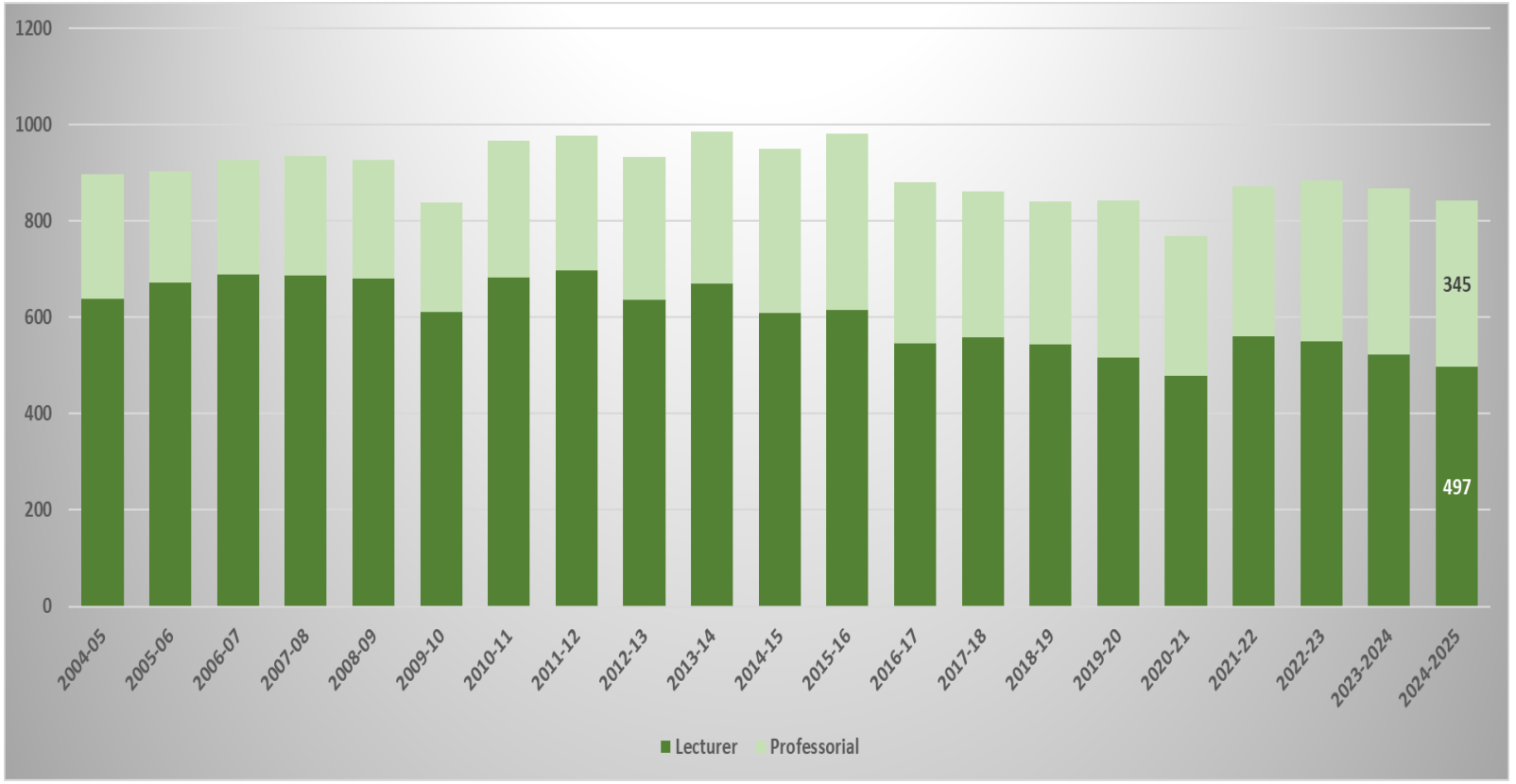
- Of the **842** faculty with a part-time appointment in fiscal 2024-25:
  - **453** (53.8%) were Women/Another Gender Identity
  - **345** (41.0%) were at a Professorial rank
- The number of part-time faculty varied by discipline (in Professional programs, this can reflect the part-time employment at Western of professionals employed elsewhere in the community);
- Most part-time faculty are employed for low teaching loads and short duration.

Number of Individuals with Part-Time Faculty Appointments, Stratified by Gender, Fiscal Years 2004-05 to 2024-25



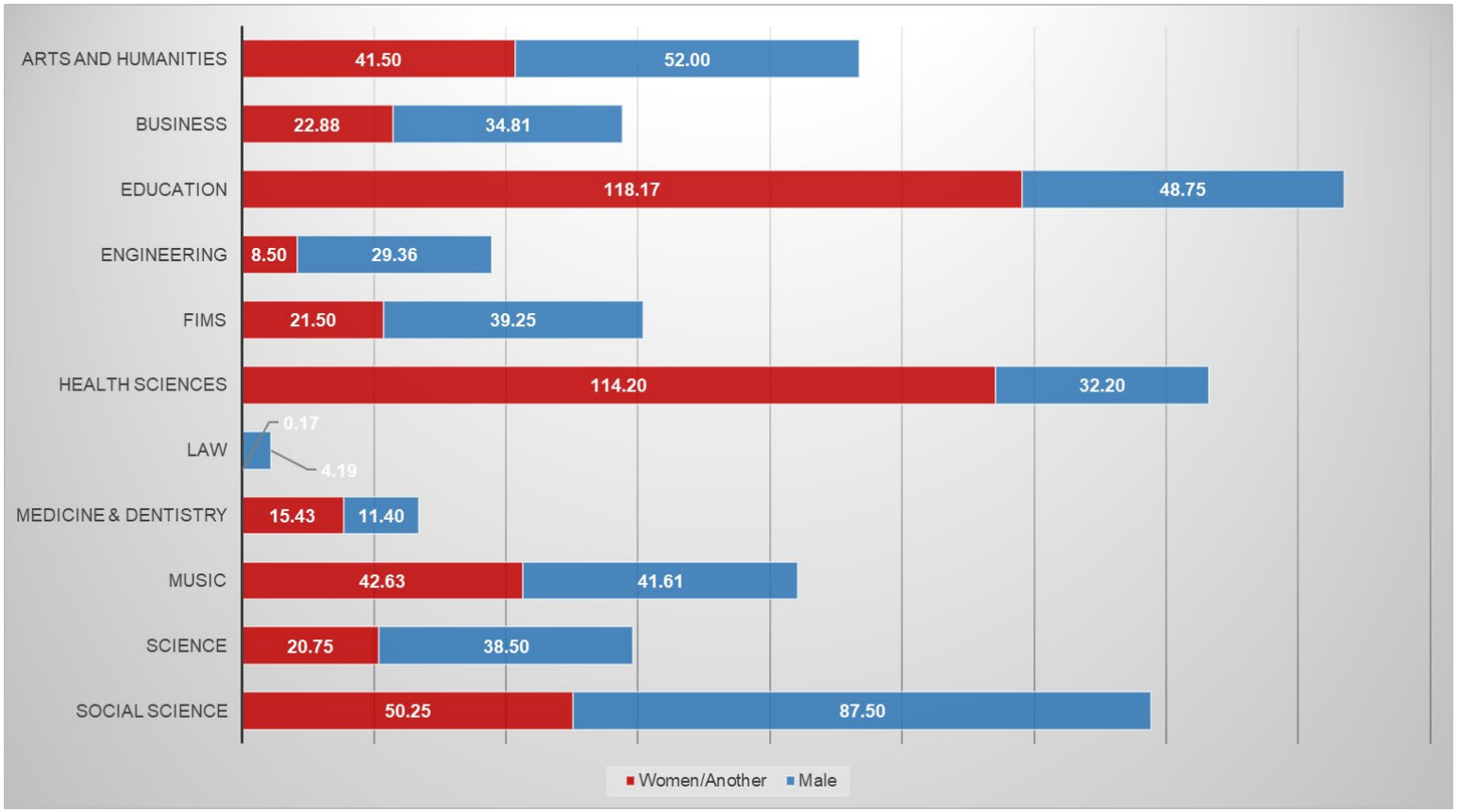
Source: Western Human Resources Information Systems

Number of Individuals with Part-Time Faculty Appointments Stratified by Rank, Fiscal Years 2004-05 to 2024-2025



Source: Western Human Resources Information Systems

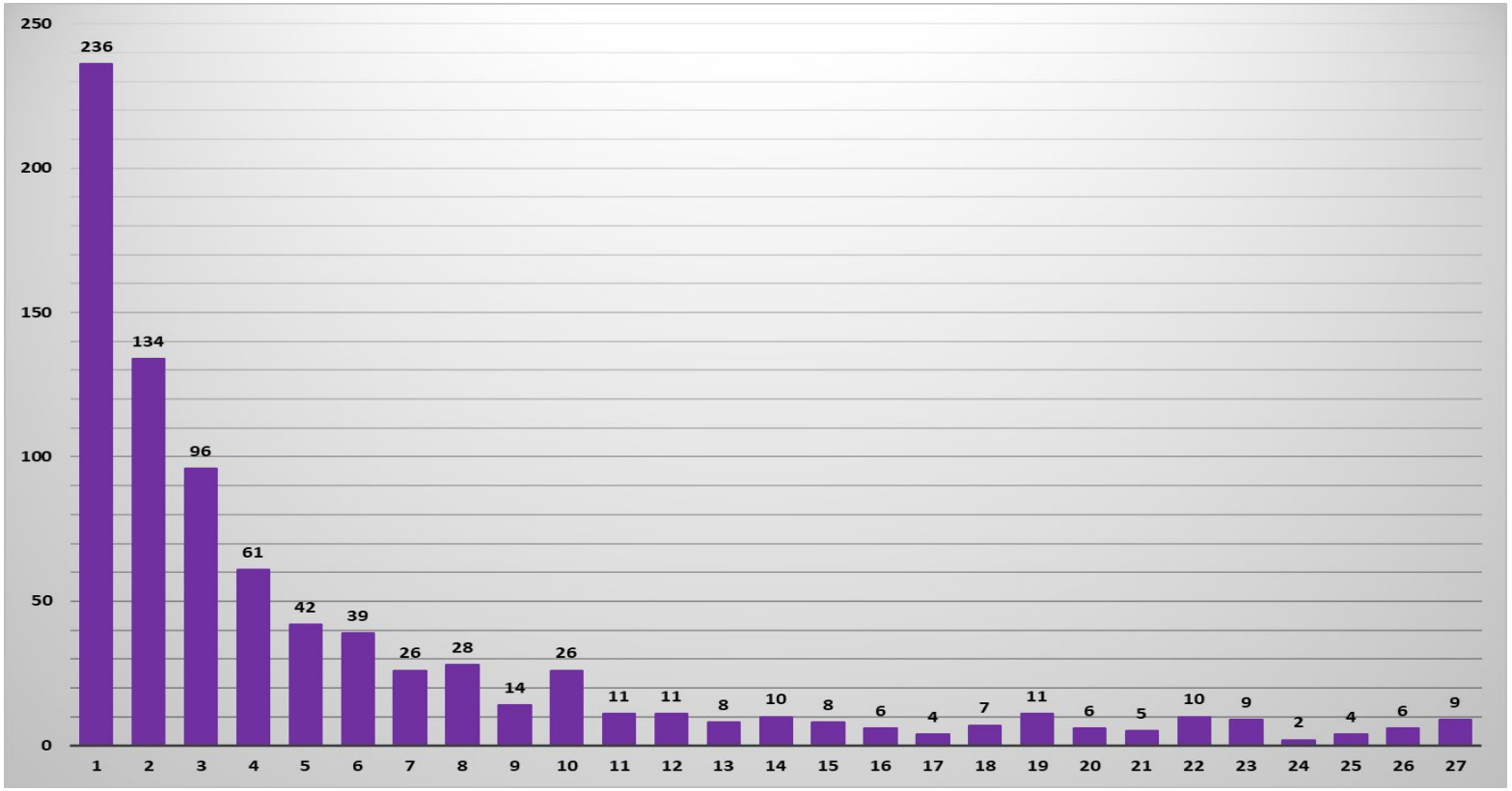
Degree Credit Courses taught by Part-Time Faculty by Faculty and Gender: 2024-25 (Fiscal Year)



Total FCEs: 875.5

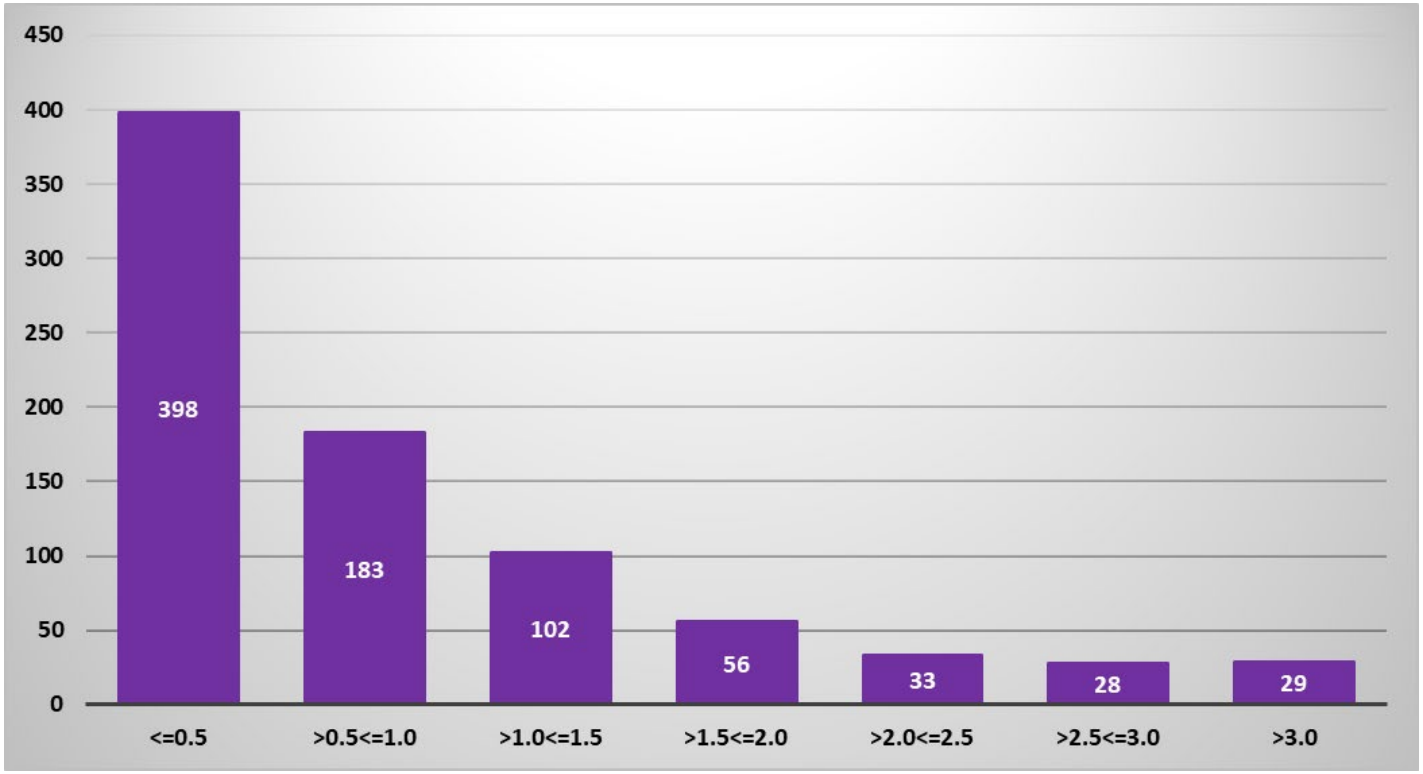
Source: Western Information Systems

Number of Individuals with Part-Time Faculty Appointments by Years of Service (2024-2025)



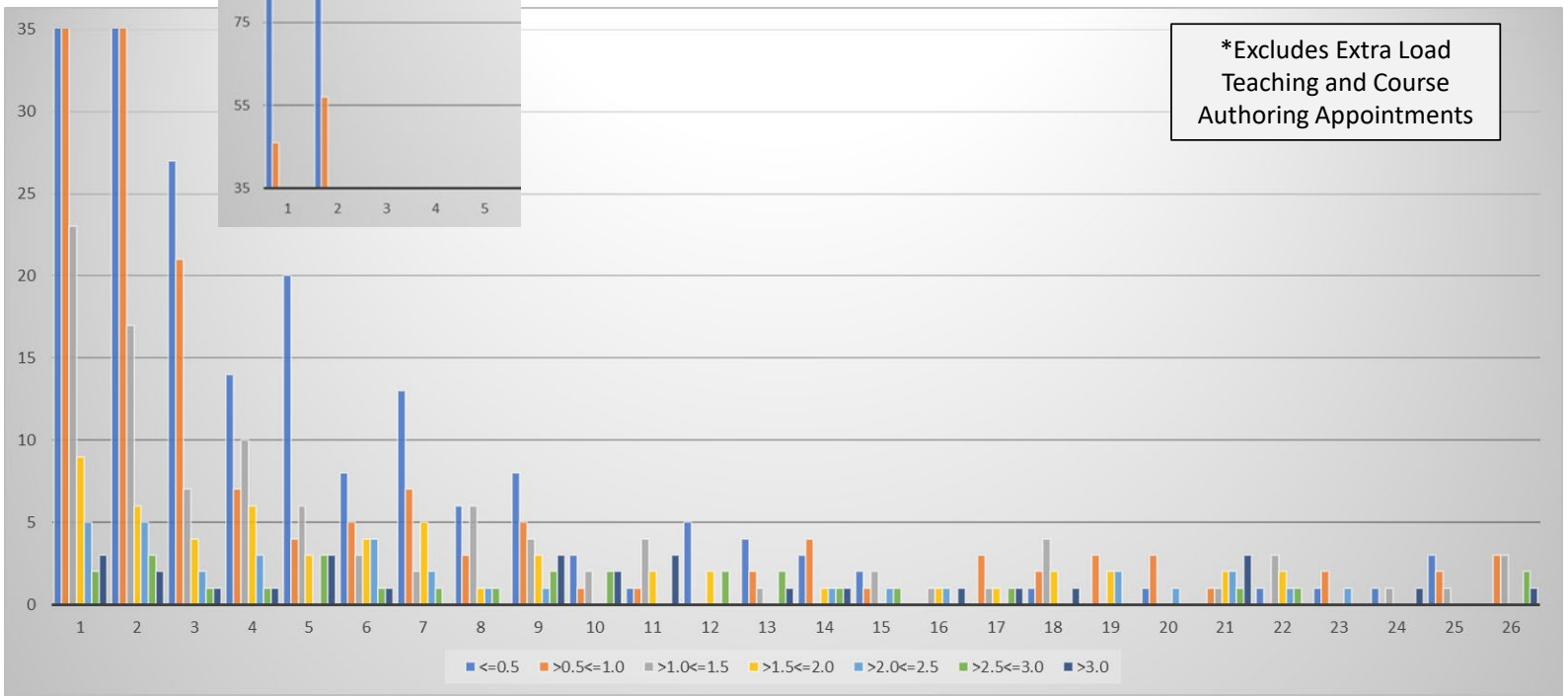
Source: Western Human Resources Information Systems
Includes Consecutive Years of Service, allowing for one single year gap
Excludes Extra Load Teaching and Course Authoring Appointments

Number of Individuals with Part-Time Faculty Appointments by Range of Full Course Equivalents (FCE), 2024-25



Source: Western Human Resources Information Systems
Excludes Extra Load Teaching and Course Authoring Appointments

Number of Individuals with Part-Time Faculty Appointments by Average Range of FCEs Taught by Years of Service 2024-2025



Source: Western Human Resources Information Systems

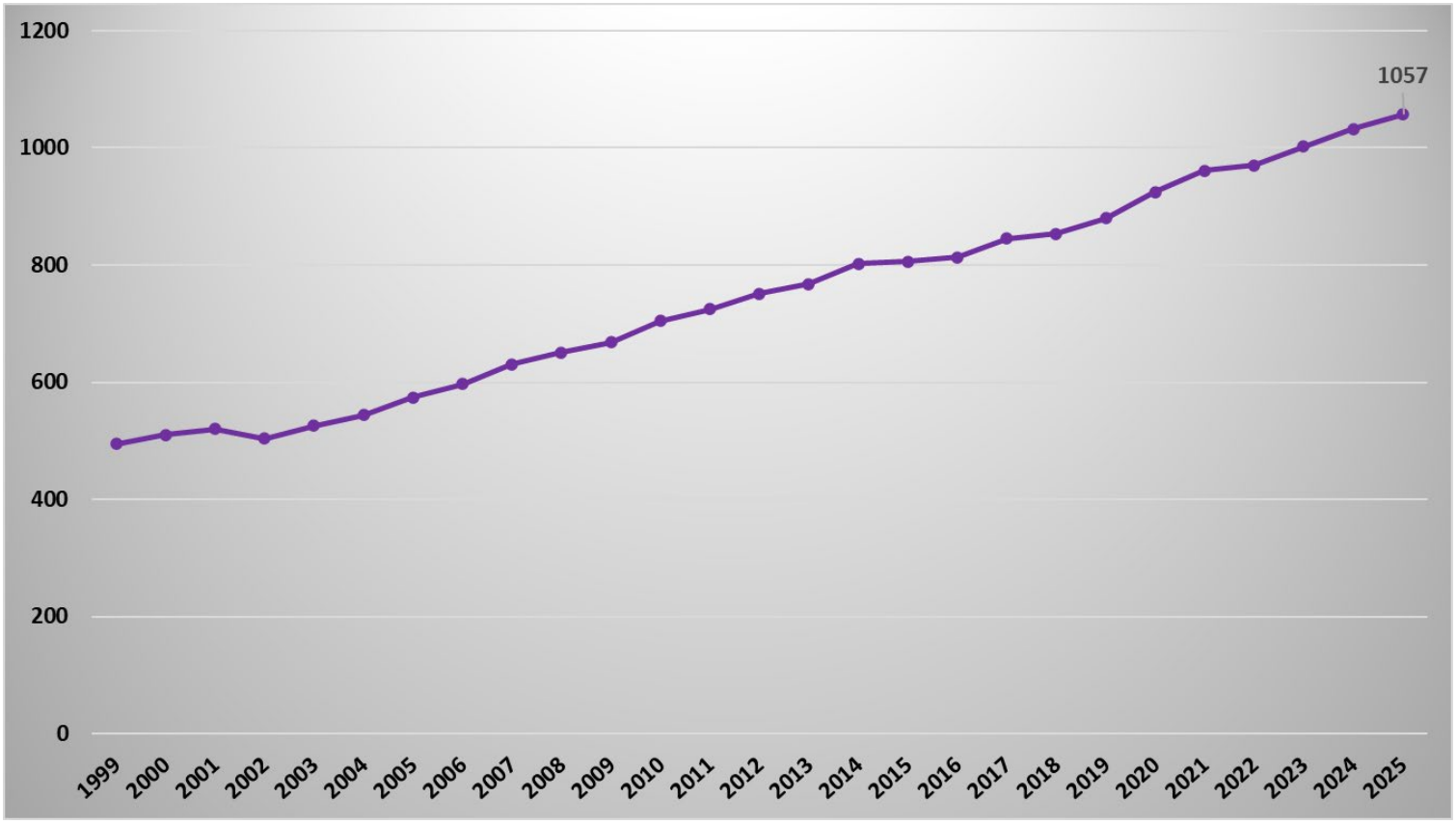
Section 4: Full-Time Clinical Faculty

- Data are counts as of October 1, 2025;
- Includes Physicians in Schulich hired under the “Conditions of Appointment for Physicians” under the following appointment types:
  - Continuing Clinical Appointment;
  - Clinical Limited Term Appointment (some of these will go on to become Continuing Clinical Appointments since “Continuing Track” hires are initially Clinical LT).

Key Observations from Slides 42 to 46: Full-Time Clinical Faculty

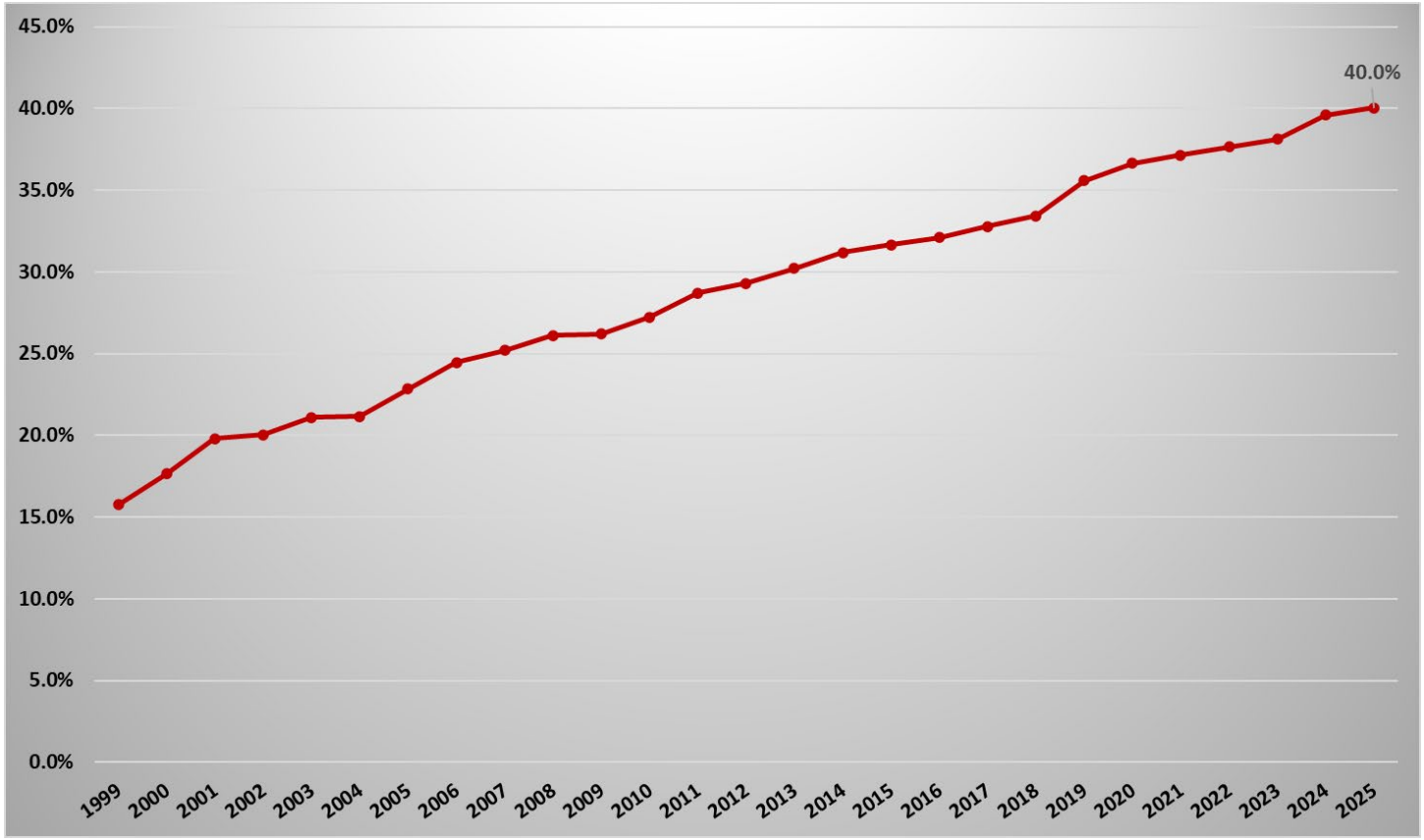
- The number of Clinical full-time faculty has been steadily increasing and is currently 1057 (excludes those on LTD);
- The percentage of women overall, inclusive of all career stages, has increased slightly and is currently 40.0%;
- The representation of women among those hired in 2024-2025 has decreased over the previous year and is currently 45.1%;
- Annual resignation rates fluctuate due to small numbers.

Full Time Clinical Faculty (Physicians in Schulich) at Western, 1999 – 2025



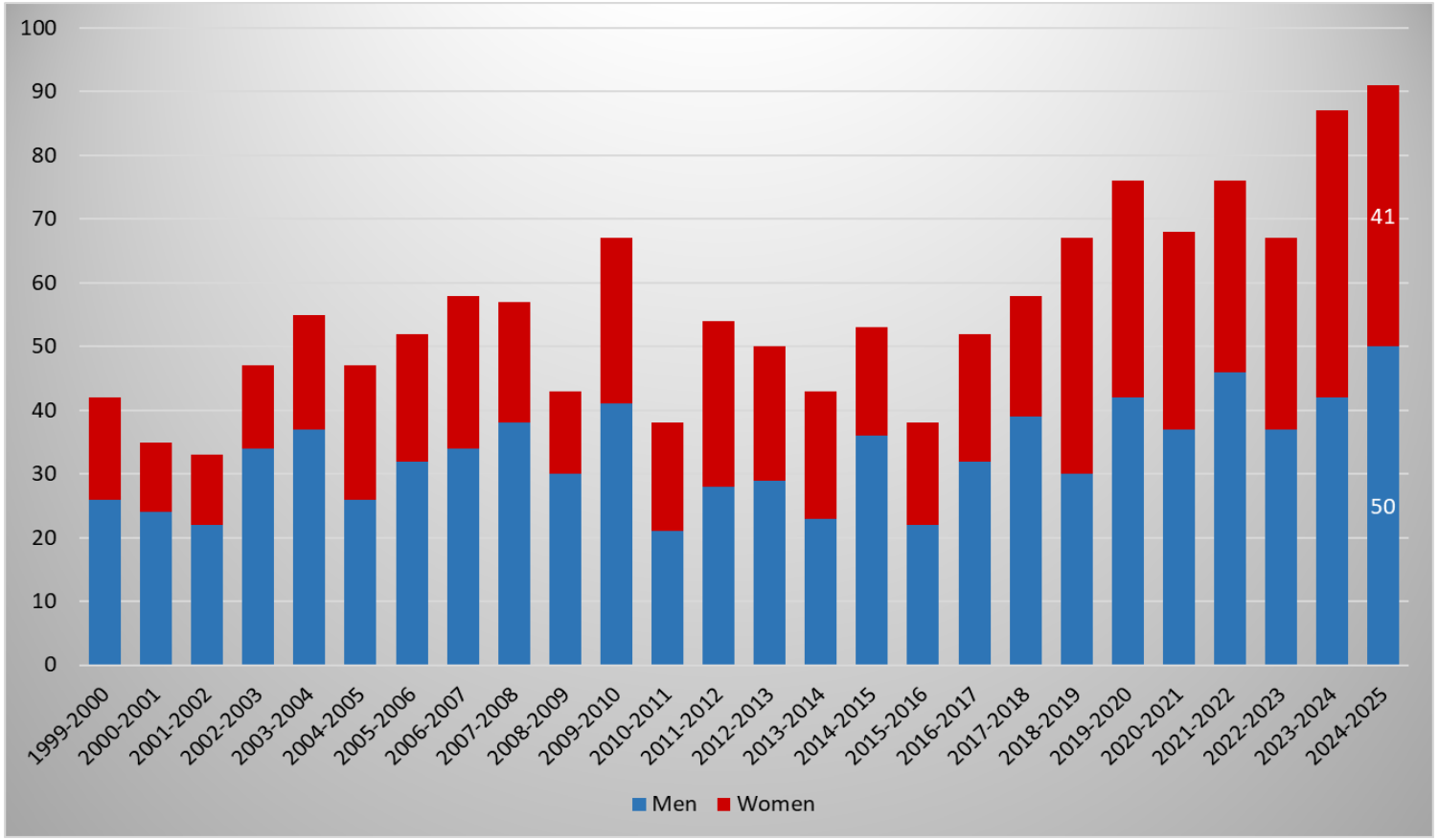
Source: Western Human Resources Information Systems (October)

Women as a Percentage of Full-Time Clinical Faculty at Western, 1999 – 2025



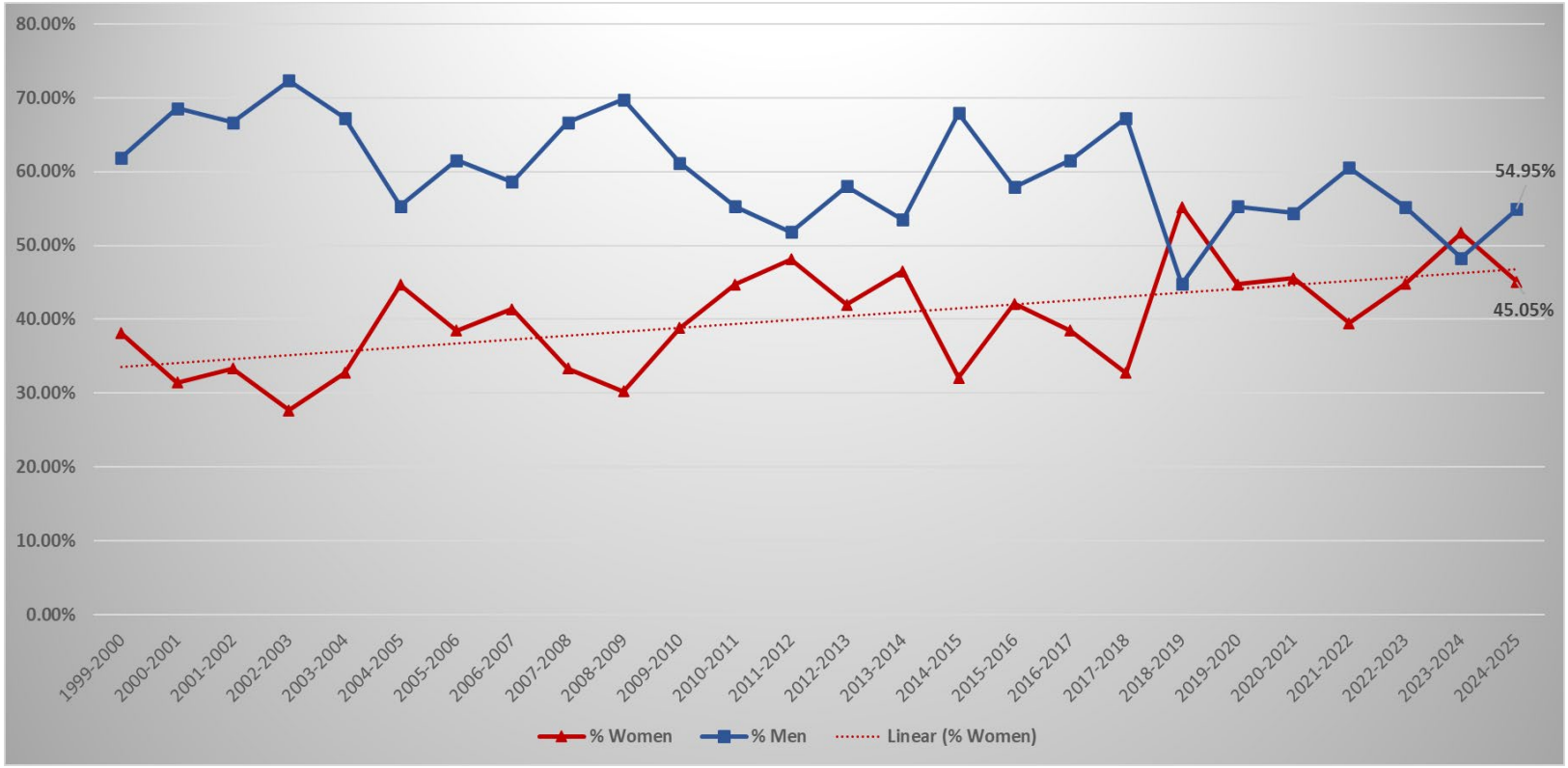
Source: Western Human Resources Information Systems (October)

Newly Hired Clinical Full Time Faculty (Physicians in Schulich) at Western by Gender: 1999 – 2025



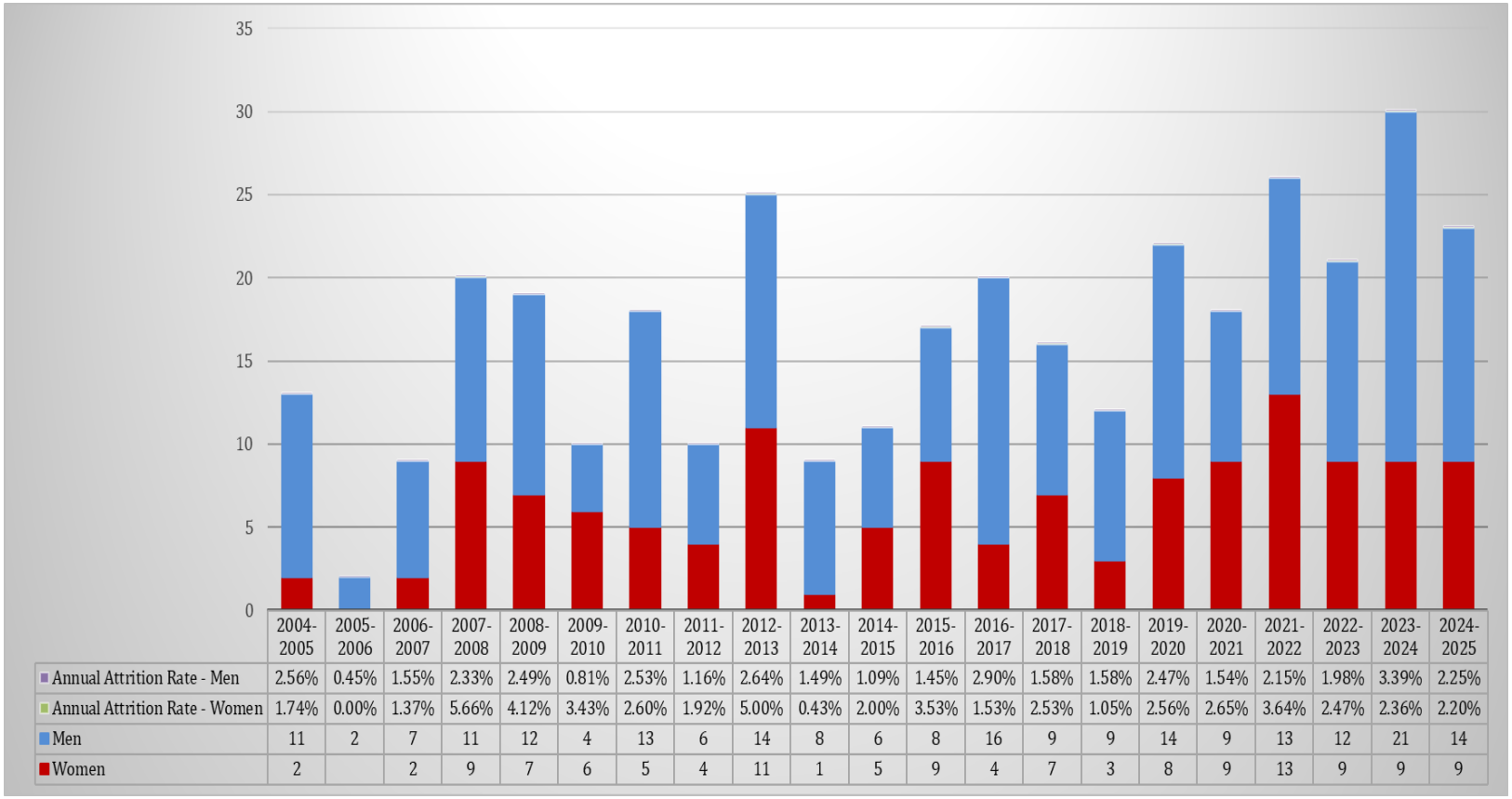
Source: Western Human Resources Information Systems

Percentage of New Full Time Clinical Faculty at Western by Gender: 1999-2025



Source: Western Human Resources Information Systems

Full-Time Clinical Faculty Resignations by Gender
2004-05 through 2024-2025



	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011	2011-2012	2012-2013	2013-2014	2014-2015	2015-2016	2016-2017	2017-2018	2018-2019	2019-2020	2020-2021	2021-2022	2022-2023	2023-2024	2024-2025
Annual Attrition Rate - Men	2.56%	0.45%	1.55%	2.33%	2.49%	0.81%	2.53%	1.16%	2.64%	1.49%	1.09%	1.45%	2.90%	1.58%	1.58%	2.47%	1.54%	2.15%	1.98%	3.39%	2.25%
Annual Attrition Rate - Women	1.74%	0.00%	1.37%	5.66%	4.12%	3.43%	2.60%	1.92%	5.00%	0.43%	2.00%	3.53%	1.53%	2.53%	1.05%	2.56%	2.65%	3.64%	2.47%	2.36%	2.20%
Men	11	2	7	11	12	4	13	6	14	8	6	8	16	9	9	14	9	13	12	21	14
Women	2		2	9	7	6	5	4	11	1	5	9	4	7	3	8	9	13	9	9	9

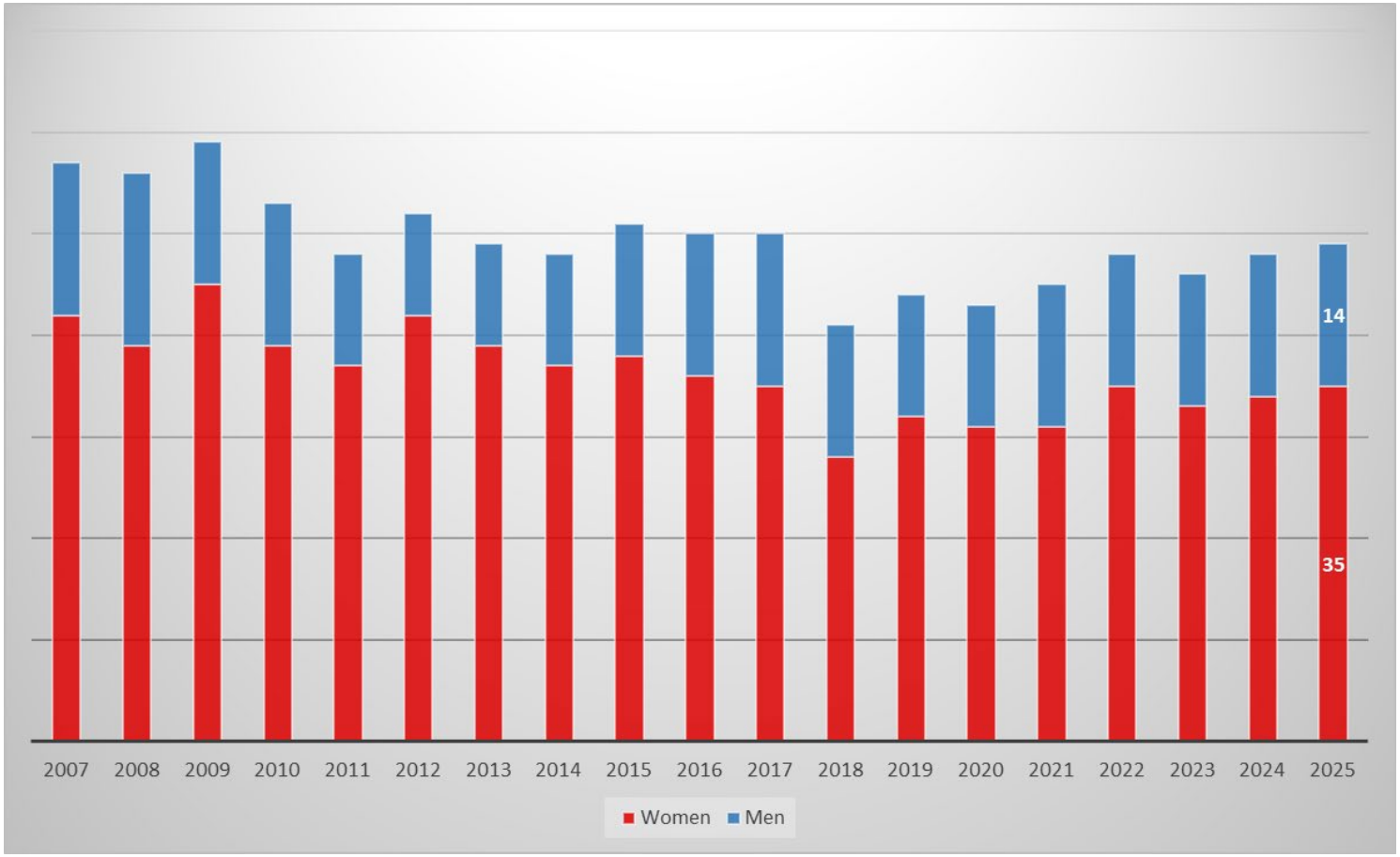
Section 5: Librarians and Archivists

- Data are counts as of October 1, 2025;
- Includes Librarians and Archivists hired under the "UWOFA-LA" Collective Agreement under the following appointment types:
  - Continuing Librarian / Archivist Appointment;
  - Probationary Librarian / Archivist Appointment;
  - Term Librarian / Archivist Appointment;

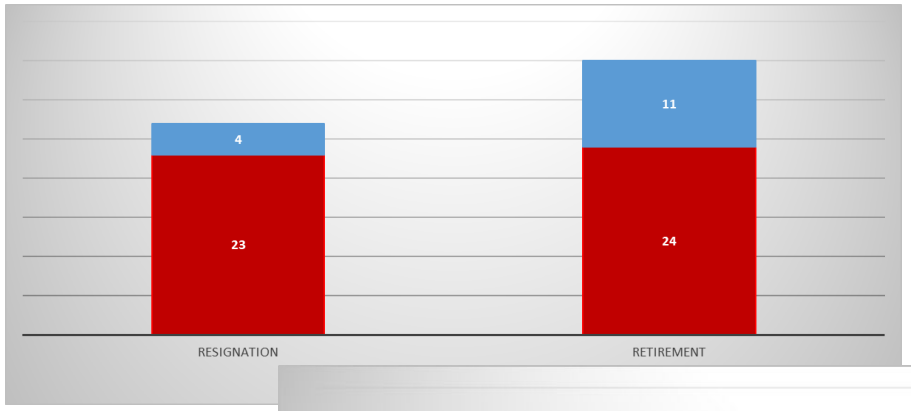
Key Observations from Slides 49 - 51: Librarians and Archivists

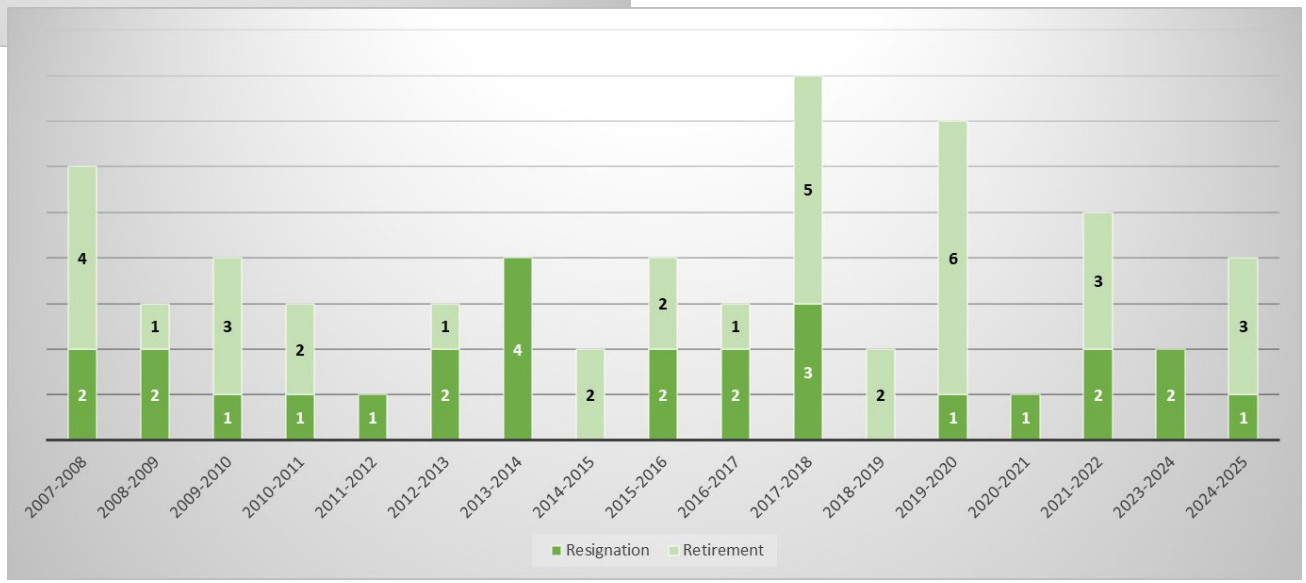
- The number of Librarians and Archivists had declined in 2017-2018 but stabilized in 2019 - 2025**;**
- The percentage of women overall is currently at 71.4%;
- The percentage of women of those resigning from 2007-2025 is at 85.2%;
- The number of Librarians and Archivists at the Senior Rank has decreased since 2007, while those at the Associate Rank have shown little change for the past several years until the latest Collective Agreement which introduced an *Appendix B: Promotion of Members with Continuing Appointment at Assistant Rank*

Full-Time Librarians and Archivists
2007 – 2025 (October 1 Count)

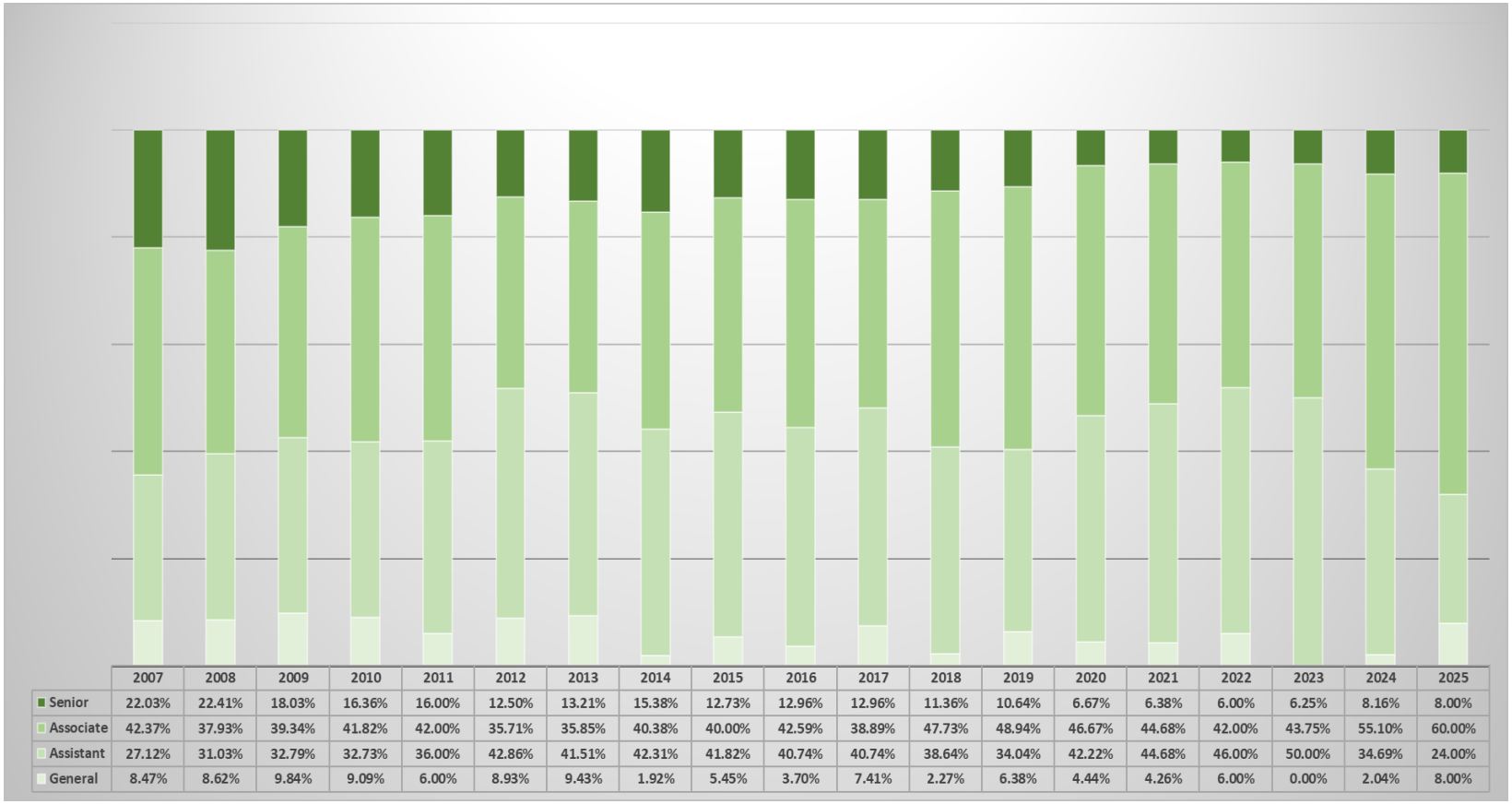


Full-Time Resignations and Retirements by Gender
2007-08 through 2025-2026 (interim)





Full-Time Librarian and Archivist Ranks
2007 through 2025



	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
Senior	22.03%	22.41%	18.03%	16.36%	16.00%	12.50%	13.21%	15.38%	12.73%	12.96%	12.96%	11.36%	10.64%	6.67%	6.38%	6.00%	6.25%	8.16%	8.00%
Associate	42.37%	37.93%	39.34%	41.82%	42.00%	35.71%	35.85%	40.38%	40.00%	42.59%	38.89%	47.73%	48.94%	46.67%	44.68%	42.00%	43.75%	55.10%	60.00%
Assistant	27.12%	31.03%	32.79%	32.73%	36.00%	42.86%	41.51%	42.31%	41.82%	40.74%	40.74%	38.64%	34.04%	42.22%	44.68%	46.00%	50.00%	34.69%	24.00%
General	8.47%	8.62%	9.84%	9.09%	6.00%	8.93%	9.43%	1.92%	5.45%	3.70%	7.41%	2.27%	6.38%	4.44%	4.26%	6.00%	0.00%	2.04%	8.00%

For further information

- After presentation at SCUP, this report can be found at:

  http://uwo.ca/facultyrelations/academic_planning

  Reports: Recruitment and Retention Report 2026

- The report on Promotion and Tenure of UWOFA faculty, librarians and archivists, which is presented at the end of each promotion cycle, can be found at:

  https://www.uwo.ca/facultyrelations/pdf/vice_provost/promotion-tenure-report-2024.pdf

- For additional information on academic staff, Institutional Planning and Budgeting's website contains additional data:

  https://www.ipb.uwo.ca/

(Note: definitions, inclusion criteria and the dates at which data are collected will influence counts. Therefore, counts may differ slightly among reports prepared from different data sources and for different purposes.)

Honorary Degree Recipients - Spring 2026

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The following list of Honorary Degrees recipients and the Spring 2026 Convocation ceremonies at which they will be awarded their degree was announced to Senate on March 13, 2026.

Nancy Margaret Reid (June 8, 2026 – 3:00 p.m.)
Nancy Reid is a pioneering statistician whose groundbreaking work has transformed how the world extracts, quantifies, and interprets information. Her research has reshaped best practices across biostatistics, epidemiology, physics, machine learning, and economics. A distinguished mentor and professor, she has guided generations of leaders in academia, industry, and government through her rigour, insight, and generosity.

Richard McLaren (June 9, 2026 – 10:00 a.m.)
Richard McLaren is a renowned legal scholar and one of Canada's leading experts in secured transactions, commercial and sports arbitration and a globally respected expert in sports law investigation, known for taking on some of the toughest challenges in international sport. From baseball and tennis to boxing and weightlifting, his work has helped expose systemic corruption and cheating at every level of competition. He is best known for uncovering Russia's state-sponsored doping program during the Sochi Olympics, an investigation that became the foundation of the Academy Award–winning documentary *Icarus*. For more than 50 years, Richard has shared his knowledge and passion with generations of lawyers as a professor at Western's Faculty of Law.

Daniel Haas (June 9, 2026 – 3:00 p.m.)
Dr. Daniel Haas is a globally recognized leader in dental anesthesiology and pharmacology whose work has transformed dentistry in Canada and worldwide. His research on local anesthetic risks has advanced patient safety and his advocacy for specialty recognition has helped shape regulatory standards. An outstanding educator, researcher, and clinician, he is the only Canadian to earn all four major international dental anesthesia and pharmacology awards. In 2024, the Governor General of Canada appointed him as a Member of the Order of Canada.

Richard Rooney (June 10, 2026 – 10:00 a.m.)
Richard Rooney's distinguished career in the investment industry has spanned more than four decades, most of it spent as President and Chief Investment Officer at Burgundy Asset Management. He and his partners transformed an embryonic company into a substantial investment firm that researches and invests client money globally. Involvement with cultural, educational, and health-care organizations has characterized the Rooney family's philanthropic efforts, through principled leadership, strategic insight and generous support.

Kevin Sullivan (June 10, 2026 – 3:00 p.m.)
Kevin Sullivan is an outstanding Canadian business leader whose deep commitment to Western University has supported the growth of entrepreneurship on campus and nationwide. A builder of GMP Securities and advisor through KMS Capital, he is a generous philanthropist whose leadership, service, and strategic guidance have helped to advance Western's innovation ecosystem.

Elizabeth Akiwenzie (June 11, 2026 – 10:00 a.m.)
Elizabeth Akiwenzie, Nistangekwe ("Understanding Woman"), Day ya^yut Do LA Doe ("She Who Sees Both Sides") is an Indigenous Knowledge Keeper and Cultural Educator who has spent nearly four decades advancing healing, cultural revitalization, and education. She helps reconnect Indigenous people back to their heart, mind, body, and spirit to reclaim their identity, and to relearn their purpose as First Nations / Anishabeknot Indigenous people. Her work across health, justice, and post-secondary sectors fosters emotional, spiritual, and cultural wellness and uplifts communities by teaching them to embrace the cultural ways of being on mother, the earth.

Sukhinder Singh Cassidy (June 11, 2026 – 3:00 p.m.)
Sukhinder Singh Cassidy is an award-winning technology executive, entrepreneur, and investor, and the CEO of global software platform Xero Inc. She is also recognized as a champion of diverse leadership and gender equity, and is the author of Wall Street Journal bestseller, "Choose Possibility". With decades of impact across major global companies, she continues to inspire future entrepreneurs and leaders.

Mike and Dave Wessinger (June 12, 2026 – 10:00 a.m.)
Mike and Dave Wessinger are the visionary founders behind PointClickCare, North America's leading healthcare technology platform. For more than three decades, their relentless dedication to innovation, customer partnerships, and purposeful leadership has transformed how care teams connect, collaborate, and deliver safer, smarter care. Guided by an unwavering belief that technology should create better experiences for seniors, caregivers, and the future of health, they continue to inspire the industry. Equally committed to developing future leaders, Mike and Dave share their expertise, invest in emerging talent, and mentor innovators who will shape the next generation of technology.

Report of the Senate Committee on University Teaching Awards: Recipients of Western's Excellence in Teaching Awards for 2025-26

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The recipients of Western's Excellence in Teaching Awards are selected by the Senate Committee on University Teaching Awards. The recipients of Western's Excellence in Teaching Awards for 2025-26 were announced to Senate on April 17, 2026 as follows:

The Angela Armitt Award for Excellence in Teaching by Part-Time Faculty

Denise Grafton
Faculty of Health Sciences, School of Health Studies

The Edward G. Pleva Award for Excellence in Teaching

Felix Lee
Faculty of Science, Department of Chemistry

Tara Mantler
Faculty of Health Sciences, School of Health Studies

The Marilyn Robinson Award for Excellence in Teaching

Christina Booker
Faculty of Science, Department of Chemistry

Lesley Gittings
Faculty of Health Sciences, School of Health Studies

Soheila K. Esfahani
Faculty of Arts and Humanities, Department of Visual Arts

Western Award for Innovations in Technology-Enhanced Teaching

Joshua Foster
Ivey Business School

One additional teaching award was provided through the Office of the Vice-Provost (Academic Programs):

The Vice-Provost (Academic Programs) Award for Excellence in Collaborative Teaching

David Sandomierski
Faculty of Law

Annual Report of the Office of Academic Quality and Enhancement

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Annual Report of the Office of Academic Quality and Enhancement is provided to the Board of Governors for information.

This report forms Western's Institutional Quality Assurance Report.

It is provided by the Subcommittee on Program Review – Undergraduate (SUPR-U) and the Subcommittee on Program Review – Graduate (SUPR-G) to the Senate Committee on Academic Curriculum and Awards (ACA) for information and transmittal to Senate.

Documentation Provided:

Annual Report: Office of Academic Quality and Enhancement (OAQE)

2024-2025



Annual Report

Office of Academic Quality and Enhancement (OAQE)

Supporting Academic Excellence and Innovation Through Continuous Program Enhancement

Quality assurance in higher education is fundamentally about ensuring that our academic programs remain responsive, relevant, and rigorous in a constantly evolving landscape. Programs must adapt to disciplinary advances, emerging career pathways, shifting pedagogical approaches, and the changing needs of students and society. While continuous enhancement occurs through the day-to-day work of faculty and program leaders, structured processes such as cyclical program review and new program development create crucial opportunities for deeper reflection, visioning, and strategic planning. These processes provide intentional space to examine alignment among learning outcomes, curriculum design, student supports, and operational structures, ensuring all components work together to advance student success and program excellence.

The 2024-2025 academic year has been one of transformation and renewal for the Office of Academic Quality and Enhancement (OAQE) and its partners. Following the first phase of Western's provincial quality assurance audit which was finalized in August 2024, the OAQE has actively implemented recommendations while building on commendations highlighted in the final report. This work aligns with broader provincial priorities for system transformation, emphasizing how quality assurance can better respond to large-scale forces for change, including reconciliation, technological advances such as Generative AI, and evolving societal needs.

Central to this transformation is an enhanced focus on the *student experience* as a core component of quality assurance. Throughout the year, the OAQE strengthened mechanisms for capturing the student voice in program reviews and new program development. Student-led focus groups, which proved highly successful last year, were expanded to support more programs in their self-study preparations. These sessions provide valuable insights into both strengths to celebrate and opportunities for enhancement, a balanced perspective that fuels meaningful reflection and planning.

Looking ahead, the OAQE will prepare for the second phase of the provincial quality assurance audit, once again taking stock of processes and refining practices and supports. The 2025-2026 cycle will bring the largest number of cyclical program reviews yet, with nearly 35 undergraduate and graduate programs scheduled. Even with this substantial volume, we remain committed to providing the same level of support and timeliness programs have come to expect.

None of this work happens in isolation. It reflects the shared efforts of Western's academic and administrative community—faculty, staff, students—and the many partners who contribute to strengthening quality assurance. Through committee deliberations, evolving processes, and collaborative program supports, we have collectively advanced practices that better serve our students. The OAQE remains committed to working alongside programs in cyclical review and new program development in ways that are enhancement-oriented, evidence-informed, and focused on achieving the best possible outcomes for our students.

Jovan Groen, Ph.D.
Director of Academic Quality and Enhancement

Newly Approved Programs

Undergraduate
Major in Black Studies
Major in Analytics and Decision Sciences, King's University College
Certificate in Critical Public Health

Graduate
Graduate Diploma in Management

11 Undergraduate Programs

3 at KING'S
3 at Huron
5 at Western

8 Graduate Programs

Cyclical Program Reviews

Major Modifications

68 Modifications Across All Programs

45% Changes to Program Requirements or Learning Outcomes
12% Addition of a New Field, Minor Module or Certificate
28% Program, Field or Module Closure
4% Integration of a Work-Integrated Learning Option
3% Change in Program Name
4% Change in Admission Requirements



Institutional Origin of This Year's 42 External Reviewers

Western's Academic Quality & Enhancement Team

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Visit the OAQE Website here

Key Partners

- Office of the Vice-Provost Academic Programs
- School of Graduate and Postdoctoral Studies
- Centre for Teaching and Learning
- University Secretariat
- Office of Institutional Planning and Budgeting
- Office of the Registrar
- Western Libraries
- Office of the Vice Provost, Academic Planning, Policy & Faculty
- Office of Equity, Diversity & Inclusion
- Office of Indigenous Initiatives
- Western Alumni



Western's OAQE works to ensure the quality of the University's undergraduate and graduate academic programs by leading quality assurance and enhancement processes in partnership with academic leaders and administrators across all departments, faculties, schools, and support units.

2024-2025 Cyclical Program Review Final Assessment Reports

The following programs were reviewed during this academic year. The full versions of each of the Final Assessment Reports (FARs) can be found on the OAQE website or by using the hyperlinks embedded in the program names below.

Arts and Humanities

- Gender, Sexuality & Women's Studies B.A.

Faculty of Science

- Chemistry B.Sc.
- Chemistry M.Sc., Ph.D.
- Mathematics B.Sc.
- Mathematics M.Sc., Ph.D.
- Statistics M.Sc., Ph.D.

Faculty of Social Science

- Anthropology B.A.
- Anthropology M.A., Ph.D.
- Economics, B.Sc. (Approved in January 2025)
- Economics, M.A, Ph.D (Approved in November 2024)

Faulty of Media and Information Studies

- Media and Communication Studies, B.A.
- Media Studies M.A., Ph.D. (Pending Final Approval)
- Library & Information Science M.L.I.S., Ph.D.

Western Law

- Law LL.M., Ph.D., M.S.L (Approved in September 2025)

Schulich School of Medicine and Dentistry

- Medical Education (Approved in March 2025)

Ivey Business School

- Business, HBA (Approved in January 2025)

Inter Faculty Programs

- Accounting G.Dip. (Social Science and Ivey)

Huron University

- Economics B.A.
- Management and Organizational Studies B.A.
- Global Studies B.A.

King's University College

- French B.A.
- Thanatology B.A.
- Disability Studies (Pending final approval)

School of Graduate and Postdoctoral Studies:
Introduction of a Doctor of Health Sciences in Interdisciplinary Health Sciences

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of Senate and conditional on approval by the Quality Council, the Board of Governors approve that effective September 1, 2026, a Doctor of Health Sciences in Interdisciplinary Health Sciences be introduced as shown.

Executive Summary:

The Faculty of Health Sciences proposes the introduction of a new Doctor of Health Sciences (DHSc) in Interdisciplinary Health Sciences. The proposed program will be a fully online, professional doctorate program designed to meet the growing demand for advanced, career-oriented education among health professionals (e.g., audiologists, nurse practitioners, public health administrators, occupational therapists, etc.) who are leading or aspiring to lead change across Canada's health systems and organizations. The proposed DHSc is designed to support mid- to senior-level professionals in health care, public health, and related sectors who are looking to deepen their impact through strategic leadership, innovation, and practical solutions to complex health system challenges.

The Subcommittee on Program Review – Graduate requested an external review of the program per Western's Institutional Quality Assurance Process for the introduction of new programs. The Final Assessment Report from the external review is provided.

Documentation Provided:

Extracted from the New Program Proposal for a DHSc in Interdisciplinary Health Sciences

Final Assessment Report

Extracted from the New Program Proposal for a Doctor of Health Sciences in Interdisciplinary Health Sciences

The Faculty of Health Sciences (FHS) proposes the introduction of a new Doctor of Health Sciences (DHSc) program – a fully online, professional doctorate program designed to meet the growing demand for advanced, career-oriented education among health professionals (e.g., audiologists, nurse practitioners, public health administrators, occupational therapists, etc.) who are leading or aspiring to lead change across Canada's health systems and organizations. The DHSc is designed to support mid- to senior-level professionals in health care, public health, and related sectors who are looking to deepen their impact through strategic leadership, innovation, and practical solutions to complex health system challenges.

This program responds to a national need for doctoral-level training that prepares professionals to navigate and influence an increasingly complex health care landscape. Unlike traditional PhD programs that focus on academic research, the DHSc takes a practice-oriented approach – focusing on leadership development, critical analysis of real-world challenges, and the application of knowledge to improve health services, workforce performance, and policy implementation. The flexible, fully online format allows learners to remain active in their current roles while applying their learning in real time to professional contexts.

The program builds on the success of the Faculty's existing online graduate programs, including the Applied Health Sciences Graduate Diploma (GDip) and the fully online Master of Health Science (MHSc) degree in the Advanced Health Care Practice Program. The MHSc has experienced a 482% increase in enrolment from 22 to 128 students since its introduction in 2019 – highlighting the success of flexible, online learning models and the appetite among health professionals for advanced, career-aligned educational opportunities. The DHSc extends this model to a new level, offering a structured but adaptable path to advanced credentialing for leaders across the health continuum.

Components of this full-time, 3-year online professional doctorate program include coursework in leadership development, health systems transformation, implementation strategy, and equity-driven decision-making. A defining feature of the DHSc is the required Dissertation in Practice (DiP) – a comprehensive, evidence-based project embedded in the learner's workplace or professional field, designed to address a meaningful and applied challenge. The project is action-focused, relevant to organizational or sectoral priorities, and intended to deliver tangible, practice-ready outcomes (e.g., competency/practice framework development, program or service redesign proposal, policy analysis with recommendations).

Creation of this program aligns with the strategic direction of FHS and the University to develop continuing education offerings that support career advancement in leadership roles through education, professional development, and sector-responsive programming. By fostering innovation, systems thinking, and strategic leadership within

the health care system, the DHSc will serve as a critical pathway for experienced professionals to address complex health organization and system challenges and implement innovation. Therefore, the Faculty is proposing to create the DHSc program – a fully online, professional doctorate focused on practical system transformation and leadership in health care and related sectors.

Rationale to Support the Introduction of the Program

To support the development of the DHSc program, the Faculty completed a review of existing Canadian and international doctoral-level programs in health sciences and related fields. In health sciences, Canadian doctoral programs remain predominantly structured as traditional PhD pathways (e.g., four-year duration, in-person requirements, traditional dissertation), with limited fully online, practice-based options designed for mid-career health professionals. Expanding the review to the United States and beyond revealed a small but growing number of DHSc or comparable professional doctoral programs, many of which are introducing flexible, fully online delivery models to better meet the needs of working health professionals seeking leadership development and system impact.

There are currently only two health-related programs in Canada comparable to the proposed DHSc: the Doctor of Applied Health (DrAH) at University of Prince Edward Island (UPEI) and the Doctor of Public Health (DrPH) at the University of Toronto, Dalla Lana School of Public Health. Both Canadian programs incorporate mandatory in-person components, presenting accessibility challenges for working health professionals seeking a fully online, practice-based doctorate.

A targeted review of international doctorate offerings identified nine online DHSc or comparable programs, primarily in the United States and New Zealand. While international programs are shifting toward flexible delivery, few fully integrate the leadership skills needed for digital transformation, system innovation, and knowledge translation – areas increasingly critical to health care system change.

The proposed DHSc program at Western University aligns with leading international programs by offering an applied, practice-based doctoral pathway focused on leadership development, health system transformation, and equity advancement. Similar to its international counterparts, the program incorporates a DiP model, flexible fully online delivery, a cohort-based structure, a streamlined time-to-completion of 3 years, and admission requirements aligned with global standards for professional doctorates.

However, Western's DHSc program is distinguished by several critical differentiators in the Canadian educational landscape:

- fully online delivery with synchronous components, ensuring national accessibility without compromising leadership development and peer engagement;
- a streamlined, focused course structure enabling completion within three years;

- delivery of core content on evidence-based leadership, communication, team management, and system-level change through required courses, while offering flexible electives that allow students to align their learning with their individual professional goals and sector priorities;
- no periodic in-person requirements, preventing travel-related costs and time away from work – supporting greater affordability and accessibility for mid-career professionals;
- integration of Knowledge Translation (KT) strategies, equipping graduates to drive evidence-informed action in organizational and system contexts; and,
- tailoring for the Canadian health system, preparing students to lead within national policy and organizational environments.

By advancing international best practices while addressing critical gaps in content focus and accessibility, Western's DHSc will position FHS and Western University as frontrunners in next-generation, practice-based doctoral education for health care system leaders.

Key features of the program include:

- Students can complete the program from their current geographic location while advancing their professional roles.
- Students will engage in primarily asynchronous learning, supported by minimally three synchronous live sessions embedded in core courses to accommodate diverse time zones and schedules.
- Students can tailor their learning by selecting elective courses aligned with their areas of professional interest and practice.
- Core courses will be intentionally linked across terms, allowing for progressive learning on key topics and providing structured support for the development and completion of the DiP.
- Milestone activities will guide academic and professional progression and DiP readiness.
- Mentorship from faculty and health care leaders will help students strengthen their leadership skills and expand their professional network.

The DHSc program is designed in direct response to a national labour market need for experienced health professionals equipped to lead system-level change. As Canada's health systems and related sectors face mounting pressures — including workforce shortages, system fragmentation, and demands for equity-driven, digitally-enabled innovation — there is a growing need for leaders who can bridge policy and practice to drive innovation. The target market includes mid- to senior-level professionals across public health, hospital systems, community care, government, and not-for-profit sectors. Graduates will be positioned for advancement into roles such as directors or managers in health systems, senior policy or program leads, knowledge mobilization specialists, and leaders in clinical education, organizational development, or health workforce planning. By preparing professionals to lead complex change, the DHSc addresses a critical gap in Canada's advanced health leadership training landscape.

Objectives of the Program

The DHSc program is a professional doctorate designed to prepare experienced health professionals to lead system-level transformation in complex and evolving environments. Rooted in applied scholarship, equity-driven leadership, and interdisciplinary learning, the program supports students in acquiring and applying advanced knowledge across multiple contexts — including policy, education, organizational leadership, and practice innovation. Delivered fully online and supported by structured milestone activities and a DiP, the program enables learners to remain embedded in their professional settings while contributing to meaningful change.

The objectives of the DHSc program are as follows:

- To provide a program with an emphasis on the acquisition of leadership knowledge and skills through theoretical, applied, and practice-based coursework.
- To provide students with opportunities to engage with leaders within health care and related sectors, while gaining practical experience addressing challenges within workplace settings.
- To reflect critically on personal and professional development and practice within interdisciplinary contexts.

These objectives are realized through a curriculum that combines asynchronous online learning, core and foundational coursework, experiential milestones and a multi-year DiP. Together, these elements prepare graduates to develop implementable evidence-informed change, lead interdisciplinary teams, influence policy and practice to drive innovation, and advance equity across Canada's diverse health systems and related sectors. The DHSc is distinct from traditional research doctorates (e.g., PhD) in its emphasis on applied leadership, professional impact, and knowledge translation in real-world settings.

The degree nomenclature for this program is Doctor of Health Sciences (DHSc). This title reflects established conventions used in both national and international professional doctoral programs that emphasize applied, interdisciplinary, and practice-based learning in health-related fields (as evidenced in the environmental scan), while appropriately differentiating from the degree nomenclature for traditional research doctorates (e.g., PhD). It aligns with the program's structure, objectives, and intended outcomes, and as a professional doctorate program, is increasingly recognized in Canada as an appropriate designation for advanced, practice-oriented health education at the doctoral level.

Program Requirements

This will be a three-year, nine-term program taken on a full-time basis. Students will complete ten courses, including a DiP course, across the three years.

Course credit requirements for the degree include:

- **Core Required Courses (3.0 FCE):** students take the following four core courses sequentially.
    - APPLHSCI 9015 Evidence-Based Leadership in Healthcare (0.5 FCE)
    - HEALTSCI TBD Managing Teams and Communication in Healthcare (0.5 FCE)
    - HEALTSCI TBD Leading Change and Organizational Transformation in Healthcare (0.5 FCE)
    - HEALTSCI TBD Dissertation in Practice (1.5 FCE; three 0.5 courses spread across three years with structured milestones)

- **Foundational Courses (1.0 FCE):** students take two of the following three electives.
    - APPLHSCI 9002 Equity and Health Systems (0.5 FCE)
    - HEALTSCI 9710 Reflective Practice & Professional Knowledge in Health and Social Care (0.5 FCE)
    - APPLHSCI 9010 Health Services, Systems, and Policy (0.5 FCE)

- **Electives (1.0 FCE):** students select two electives from existing FHS graduate course offerings, allowing flexibility to tailor learning to professional goals (e.g., Project Management, Program Evaluation, Indigenous Health).

Milestones (Non-course related requirements) include:

- SGPS Academic Integrity Module (completed at program start)
- Knowledge Translation Seminar Series
- Professional Development Seminar Series
- DiP with progression checkpoints for completion of key elements (i.e., project selection, proposal approval, completion of applied activities, completion of written report, and presentation of final report)

The DiP is designed to support the integration of academic learning with real-world leadership challenges in health systems and organizations, public health, and clinical practice. The DiP provides a structured opportunity for students to examine a complex problem of practice, apply theorical frameworks to its analysis, and develop an evidence-informed, actionable response that contributes to organizational or system-level change.

The DiP reflects the program's emphasis on applied scholarship, leadership, and knowledge mobilization, rather than original empirical research. The DiP addresses a

field-relevant problem, challenge, or opportunity situated in the student's professional context (e.g., health care delivery, health equity, leadership development, workforce planning, public health, or health system integration). Students are expected to synthesize and apply relevant literature, analyze context-specific barriers and enablers, use theoretical frameworks to inform practice, and develop a well-reasoned, evidence-informed strategy or intervention. Examples may include policy briefs, program evaluation frameworks, implementation roadmaps, workforce strategies, or applied health leadership models.

Progress on the DiP is embedded throughout all three years of the program, via three courses (totaling 1.5 credits) and a milestone, the Knowledge Translation Seminar series. Students begin exploring a problem of practice and relevant literature in Year 1 (first .5 FCE course), continue developing their approach and engaging in applied activities in Year 2 (second .5 FCE course), and complete and present their final project in Year 3 (third .5 FCE course). To support continuity and mentorship, the same core faculty member will instruct the sequence of DiP courses, providing consistent guidance across the three years. This continuity is reinforced through regular meetings between the instructor and each student cohort, typically held at least once per term, where students discuss progress, receive formative feedback, and set goals for the next stage of their DiP. Meetings may combine synchronous sessions with asynchronous feedback to provide both structured guidance and flexible support.

Additionally, each student will have a field mentor for their DiP, a content expert who will provide context-specific mentorship. Within this dual-supervision model, the core academic faculty member will support research methods and project management while the field mentor will provide profession/organization-specific guidance (e.g., relevance of the DiP to the professional context; feasibility of the proposed practice solution within the organization). In addition to regular supervisory team meetings, each student will meet annually each spring with their academic faculty and field mentors to review their progress with the DiP and other aspects of the program.

The Knowledge Translation Seminar Series consists of eight sessions (offered once per term from the second through final term), where students present, discuss, and appraise their DiPs. Periodic guests — such as community partners and Western faculty — will be invited to give presentations and provide feedback on students' work. In the final term, an arms-length faculty evaluator assesses the completed DiP to ensure a fair and rigorous evaluation process.

Program Learning Outcomes

By the end of the program, DHSc students will be able to demonstrate the following learning outcomes:

1. Demonstrate advanced leadership competencies to guide system- or program-level transformation in diverse professional contexts, drawing on evidence, values-based frameworks, and inclusive strategies to foster change.

2. Critically evaluate and apply theory, policy, and practice-based knowledge to develop feasible solutions to improve health outcomes, equity, and quality within organizations, sectors, or communities.
3. Frame solutions to complex problems across local, national, and global contexts by integrating interdisciplinary perspectives and drawing on diverse forms of knowledge, professional practices, and lived experience.
4. Design and lead applied, practice-based inquiries that address meaningful sectoral challenges and translate into measurable outcomes through the DiP.
5. Build collaborative relationships that can translate knowledge and mobilize change across professional settings, using inclusive engagement strategies.
6. Demonstrate core leadership and management capabilities that can effectively lead people, support team performance, and foster inclusive, respectful, and accountable work environments.
7. Translate leadership into action by effectively collaborating, setting priorities, managing projects, and implementing communication strategies to align with strategic goals and enable sustainable impact.
8. Engage in critical self-reflection, leadership growth, and professional learning through ongoing development, coaching, and milestone-based feedback to strengthen confidence, competence, and purpose as a system leader.

Program Design

Expected Duration: 3 years

Courses (5.0 Total Credits)

REQUIRED COURSES (3.0 Credits)			Each course must be completed by all students		
Subject	**Course #**	**Length (in terms)**	**Course Title**	**Course Weight**	**Description**
HEALTSCI	TBD	2 terms	Dissertation in Practice (DiP) - I	.5	Addresses real-world health care challenges through applied inquiry and action. Students identify a problem in their professional context, review relevant literature, apply theory, and implement a practical intervention. The final project demonstrates their ability to drive meaningful change in health outcomes, policy, or practice – bridging academic rigour with professional impact. Students will be required to complete the Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans course [TCPS 2: CORE 2022]) within the Dissertation in Practice (DiP) – I.
HEALTSCI	TBD	3 terms	Dissertation in Practice (DiP) - II	.5	(see above)
HEALTSCI	TBD	3 terms	Dissertation in Practice (DiP) - III	.5	(see above)
APPLHSCI	9015	1 term	Evidence-Based Leadership in Healthcare	.5	Focuses on applying evidence-based leadership in real-world health care settings. Students learn how to use data, proven practices, and critical insight to lead

					teams, strengthen performance, and support better outcomes across complex health systems.
HEALTSCI	TBD	1 term	Managing Teams & Communication in Healthcare	.5	Develops essential skills for managing people, leading teams, and communicating effectively in health care. Students learn how to coach others, foster inclusive teams, and build strong working relationships across diverse roles and settings.
HEALTSCI	TBD	1 term	Leading Change & Organizational Transformation in Healthcare	.5	Explores how to lead change and strengthen organizations in complex health systems. Emphasizes leadership, change readiness, capacity-building, and equity-driven transformation.

FOUNDATIONAL COURSES (1 Credit)			2 of 3 courses must be completed by all students		
Subject	**Course #**	**Length (in terms)**	**Course Title**	**Course Weight**	**Description**
APPLHSCI	9002	1 term	Equity and Health Systems	.5	Examines health equity as a driver of care delivery and system design. Students engage with key concepts, frameworks, and real-world initiatives from global and Canadian contexts, learning to apply equity principles from both professional and community perspectives.
HEALTSCI	9710	1 term	Reflective Practice & Professional Knowledge in Health and Social Care	.5	Looks at how reflection shapes professional learning in health and human service settings. Students engage with different forms of reflection – from narrative to critical reflexivity – to deepen knowledge, bridge theory and practice, and support meaningful dialogue within professional communities.
APPLHSCI	9010	1 term	Health Services, Systems, and Policy	.5	Introduces the key structures, actors, and policies that shape the Canadian health care system. Using systems theory and public policy design, students develop a foundational understanding of how health care policy is formed, reformed, and evaluated within complex health systems.

ELECTIVE COURSES (1 Credit)			See below note.		
Subject	**Course #**	**Length (in terms)**	**Course Title**	**Course Weight**	**Description**
FIMS	9331-001	1 term	Artificial Intelligence & Human Health	.5	Explores how artificial intelligence and digital technologies are transforming health and health care. Through examples from clinical care, genetics, and mental health, students examine AI's capabilities, social impacts, and its role in shaping the future of health systems in Canada and beyond.
APPLHSCI	9009	1 term	Project Management	.5	Introduces project management principles for planning, implementing, and completing health-related initiatives. Students apply key tools – such as project charters, timelines, communication plans, and stakeholder strategies – by managing a project of their choice through individual and group activities.
APPLHSCI	9012	1 term	Program Evaluation	.5	Builds foundational knowledge of program evaluation in health systems. Students learn to design evaluation plans, apply key frameworks, and assess the effectiveness of health programs through practical, hands-on activities.
AHCP	9606	1 term	Research Team Leadership and Infrastructure Management	.5	Focuses on how to build, manage, and support effective research teams in clinical settings. Topics include team development, hiring and mentoring, ethics and regulatory processes, multi-site coordination, data collection, communication strategies, and preparing work for publication.
APPLHSCI	9005	1 term	Indigenous Health	.5	Explores Indigenous health through diverse

					worldviews and lived experiences. Grounded in critical race theory, it examines how history, policy, and practice shape health equity, while encouraging reflection and critical thinking through readings, dialogue, and applied learning.
APPLHSCI	9004	1 term	Determinants of Mental Health & Trauma-Informed Mental Health	.5	Provides an overview of how trauma and social factors shape mental health. Students analyze the impact of poverty, violence, and culture, compare diagnostic systems, and reflect on how mental health narratives are constructed through historical and societal lenses.
HEALTSCI	TBD	1 term	Business Foundations for Health Leaders	.5	Builds practical business skills for leaders working in health and research settings. Students learn the fundamentals of budgeting, resource planning, operations, and performance management, with a focus on aligning day-to-day decisions with strategic goals. Emphasis is placed on financial literacy, decision-making, and managing complexity in dynamic, team-based environments.
GHS	9106	1 term	Global Health Systems and Policy	.5	Explores health policy processes and issues across national, regional, and global contexts. Students examine the foundations of health policy development, the impact of local and international forces on policy agendas, and key health care reforms in diverse settings. Emphasis is placed on understanding transnational health challenges such as HIV/AIDS, malaria, and maternal health, with a focus on navigating complex, interconnected

					policy environments.
NURSING	9676	1 term	Leadership and Management of Nursing and Health Services	.5	This course focuses on the application of theory and research from contemporary organization and management sciences to the understanding or organizational and care delivery structures and the management of financial and information resources. Emphasis on organizational assessment techniques and design of clinical programs across the continuum of care, work design approaches and operational support systems.
NURSING	9638	1 term	Interdisciplinary Perspectives on Global Health	.5	Analyzes global health through an interdisciplinary lens, focusing on how political, social, economic, biological, and environmental factors influence health outcomes across contexts. Addresses issues of justice in global health and examines the roles of international organizations such as the World Health Organization and the World Trade Organization. Compares Canadian and international case studies to illuminate disparities and shared challenges in global health systems.
NURSING	9701	1 term	Development of Programs to Support Clinical Education	.5	Clinical Educators use pedagogical principles and curriculum development strategies to integrate best evidence into health-care practice. Critical analysis of effective education approaches is an outcome of the course. Students will evaluate and develop clinical education programs and apply knowledge of change behaviour to improve accessibility and

					adoption across health-care sectors in this course.

Note: The above courses are anticipated to be frequently of interest to students. Students can also take other courses offered and/or approved by the program.

MILESTONES (3)	Each milestone must be completed by all students (optional)

SGPS Academic Integrity Module

Professional Development Seminar series: Participate in at least 6 offerings from centrally run or Western-related groups including but not limited to the Centre for Teaching and Learning, Health Research Ethics Board, School for Graduate and Postdoctoral Studies (i.e., Own Your Future), Western Libraries, and the Preceptor Education Program (https://www.preceptor.ca/). To qualify for the milestone, 4 of the 6 offerings must include an interactive component with the instructor and other participants. This series is designed to allow students to take offerings tailored to their academic and vocational goals.

Knowledge Translation Seminar series: Participate in 8 sessions (offered once per term; 2nd through to final semester) aimed at sharing/discussing/appraising DiPs. Will include periodic guests (i.e., community partners, Western faculty) to partake in providing presentations as well as providing feedback on DiPs. This series is designed to enhance cohort building as well as support making connections with community partners and other stakeholders.

Dissertation in Practice: Includes progression checkpoints for completion of key elements (i.e., project selection, proposal approval, completion of applied activities, completion of written report, and presentation of final report)

Progression Requirements

The DHSc program is structured over three years of full-time study. Students complete required coursework, electives, and milestones, including a DiP aligned to real-world system needs. A summary of the progression is outlined below:

Year	Focus	Coursework, DiP, and Milestones
Year 1	Applied Leadership Foundations	• Complete two required core courses. • Complete two foundational courses. • Complete first DiP course, including launching DiP with topic selection and supervisor matching (winter term). • Complete two Professional Development Seminar Series offerings. • Begin Knowledge Translation (KT) Seminar Series participation (starting in second semester; one session per term).
Year 2	Deepening System Expertise	• Complete one required core course. • Complete two electives based on interests. • Complete second DiP course to finalize DiP project planning and initiate activities (e.g., environmental scan; database searches and data extraction). • Complete two additional Professional Development Seminar Series offerings. • Continue KT Seminar Series participation (one session per term).
Year 3	Synthesis and Knowledge Translation	• Complete remaining two Professional Development Seminar Series offerings. • Complete KT Seminar Series participation (one session per term). • Complete third DiP course, deliver final DiP presentation and project deliverables (i.e., complete final required core course).

Credit for one required elective may be granted upon entry into the program by the Graduate Chair, if the following conditions are met:

- The student completed one of the required electives at Western University within the past five years, as demonstrated by their official transcript.
- The student provides evidence of successful completion of a course within the past five years deemed equivalent to one of the required electives. Evidence must include the course syllabus, detailing course topics, objectives, and evaluation methods.

Approval for elective credit is at the discretion of the Graduate Chair and will be assessed based on the relevance and rigor of the previous coursework to the DHSc program requirements.

The progression requirements include:

- maintenance of a 70% passing grade is required in all courses.
- a maximum of one paper can be rewritten in the graduate program with a maximum grade of 75% on the rewritten paper.
- one course failure will result in a student being required to withdraw from the program.
- students are expected to be prepared and participate actively in all graduate seminars.
- completion of milestones.

Faculty minimally meet annually to discuss student progress in both courses and milestones and to ensure timely intervention is available to assist students if they are not progressing in their program; additionally, Western's Pathfinder platform is used to track completion of courses and progress in and completion of milestones.

Admission Requirements

The DHSc program is committed to the principles of inclusive excellence. Admission requirements are designed to recognize both academic qualifications and diverse forms of professional, community-based, and lived experience that reflect leadership and impact in health-related fields. Admission decisions are made by a Graduate Program Admissions Committee using a holistic, equity-informed review process that considers academic qualifications, professional experience, program fit, and demonstrated leadership potential. The committee is supported by the FHS EDIDA Committee — which provides guidance on inclusive policy and practice—and is encouraged to adopt equity-driven assessment approaches aligned with Western's EDIDA framework.

- Minimum SGPS admission requirements apply and can be found at: [https://grad.uwo.ca/admissions/index.html].

Applicants must meet the following program-specific requirements:

- Completion of a master's degree in health sciences, public health, nursing, rehabilitation sciences, kinesiology, or a closely related field from a recognized institution
- A minimum GPA of 78% (B+), calculated over the last two years of full-time study or the last 10 half-credit courses of part-time study
- A minimum of three years of full-time equivalent professional experience within the past five years in health care, health leadership, public health, allied health, rehabilitation, or health policy
- Applicants may apply if an appropriate DiP project can be arranged within their current organization or through a remote placement

Applicants without a master's degree may be considered based on equivalent professional, community-based, or lived experience. Acceptable alternative qualifications may include:

- A four-year undergraduate degree in a related field and a minimum of five years of progressive, relevant work experience
- A three-year undergraduate degree in a related field and a minimum of seven years of relevant work experience, including leadership or project-based roles
- In exceptional cases, a college diploma in a relevant field and at least 10 years of senior-level or specialized experience may be considered on a case-by-case basis

An alternate admission pathway for applicants without a master's degree and who meet all other requirements is entry into the FHS Applied Health Sciences graduate diploma or master's program.

Upon successful completion of APPLHSCI9001: Critical Thinking in Health Sciences and an elective course, students may apply for transfer to the DHSc, including credit for the elective course already taken.

Applicants whose first language is not English are required to provide evidence of English proficiency prior to admission in one of the following ways:

- **TOEFL (paper-based):** minimum total score of 600 and minimum score of 5/6 on the Test of Written English (TWE)
- **TOEFL (computer-based):** minimum total score of 250 and minimum score of 5/6 on the Test of Written English;
- **TOEFL (Internet-based):** minimum score of 100, with no score less than 23 on each of the 4 skill categories
- **English Language Testing System (IELTS):** minimum score of 7 on the overall test and on each subcomponent
- **Western English Language Centre (WELC):** Successful completion of the High Advanced level of the Academic English program
    - Applicants whose current IELTS scores are 6.5 can complete the English Boost program
    - Students may contact WELC for a free assessment of English fluency and a determination of the length of any recommended program
    - Applicants are responsible for the costs of this program
- **Duolingo:** minimum score of 140

Students whose first language is not English may be exempt from providing English Proficiency test scores if they have studied academic courses on a full-time basis for at least two years in an English-speaking university located in a country whose official first language is English.

Interdisciplinary Health Sciences
Final Assessment Report & Implementation Plan
February 2026

Faculty / Affiliated University College	Faculty of Health Sciences	
Degrees Offered	Doctor of Health Sciences (DHSc) in Interdisciplinary Health Sciences	
Date of Introduction	September 1, 2026	
External Reviewers	Dr. Steven Hanna Vice-Dean, Health Sciences and Assoc Dean, Graduate Studies, McMaster University	Dr. Andrea MacLeod Vice-Dean and Assoc Dean Research, Faculty of Rehabilitation Medicine - Communication Sciences & Disorders University of Alberta
Internal Reviewers	Dr. Immaculate Namukasa Associate Dean, Faculty of Education	Anthony Cruz PhD Student, Member of SUPR-G
Date of Site Visit	Virtual: December 2, 2025	
Date Review Report Received	December 22, 2025	
Date Program/Faculty Response Received	Program – January 20, 2026 Faculty – January 28, 2026	
Evaluation	Approved to Commence	
Approval Dates	SUPR-G: February 23, 2026 ACA: March 3, 2026 Senate: March 13, 2026	
Year of Next Review	2033-2034	
Progress Report	June 2029	

Overview of Western's Cyclical Review Assessment Reporting Process

In accordance with Western's Institutional Quality Assurance Process (IQAP), the Final Assessment Report (FAR) provides a summary of the new program proposal, report prepared by external reviewers, internal responses and assessment and evaluation of the Doctor of Health Science in Interdisciplinary Health Sciences (DHSc) to be delivered by the Faculty of Health Sciences (FHS).

This FAR considers the following documents:

- the program's proposal brief;
- the external reviewers' report;
- the response(s) from the academic unit; and
- the response from the Dean, Faculty of Health Sciences

This FAR identifies the strengths of the proposed program and opportunities for program enhancement and improvement, and details the recommendations of the external reviewers – noting those recommendations to be prioritized for implementation.

The Implementation Plan details the recommendations from the FAR that have been selected for implementation, identifies who is responsible for approving and acting on the recommendations, specifies any action or follow-up that is required, and defines the timeline for completion.

The FAR (including Implementation Plan) is sent for approval through the Senate Graduate Program Review Committee (SUPR-G), ACA and Senate. Following institutional approval, it is then submitted for approval to the Ontario Universities' Council on Quality Assurance.

Executive Summary

The proposed professional Doctoral Program (Doctor of Health Sciences (DHSc) in Interdisciplinary Health Sciences) provides a response to the national need for doctoral-level training that prepares professionals to navigate and influence an increasingly complex health care landscape. Designed to meet the growing demand for advanced, career-oriented education among health professionals (e.g., audiologists, nurse practitioners, public health administrators, occupational therapists, etc.) who are leading or aspiring to lead change across Canada's health systems and organizations.

The DHSc takes a practice-oriented approach. Focusing on leadership development, critical analysis of real-world challenges, and the application of knowledge to improve health services, workforce performance, and policy implementation. The flexible, fully online format allows learners to remain active in their current roles while applying their learning in real time to professional contexts.

The proposed program can be completed over nine consecutive terms of full-time study. The program integrates coursework, milestone activities, and a Dissertation in Practice (DiP) that is scaffolded across all three years. Full-time intake is expected to be twelve students for 2026-2027. Working up to twenty-five students by 2031-2032.

Strengths and Innovative Features Identified by the Program

- The DHSc Builds on the success of the Faculty's existing graduate programs, including the Applied Health Sciences Graduate Diploma and the fully online Master of Health Science degree in the Advanced Health Care Practice Program.
- Fully online practice-based Doctoral program with synchronous components, ensures national accessibility without compromising leadership development and peer engagement.
    - No periodic in-person requirements, preventing travel-related costs and time away from work – supporting greater affordability and accessibility for mid-career professionals.
- Streamlined, focused course structure enabling completion within three years.
- Required DiP is a comprehensive, evidence-based project embedded in the learner's workplace or professional field designed to address a meaningful and applied challenge.
- Students can tailor their learning by selecting elective courses aligned with their areas of professional interest and practice.
- Curriculum incorporates reconciliation, decolonization, and equity-driven content, including courses such as Equity and Health Systems, Indigenous Health, and Trauma-Informed Mental Health.
- Integration of Knowledge Translation strategies, equipping graduates to drive evidence-informed action in organizational and system contexts.

Proposal Preparation and Review Process

To inform the development of the proposed program, an extensive consultation and research process was undertaken from March 2023 to March 2025. This process engaged potential students, alumni, industry leaders, faculty, institutional leaders and community partners. These consultations played a central role in shaping program goals, course content, delivery format, and expectations for learner outcomes. Proposal development activities included:

- Environmental Scan
- Labour Market Analysis
- Needs Assessment Survey
- Prospective Student Focus Group
- Industry Focus Groups and Interviews

A working group, termed the FHS Professional Doctorate Committee, met monthly starting in May 2024 to guide the development of the program. This committee comprised of faculty members representing the five departments within the Faculty of Health Sciences and six different health professionals. The meetings of this committee involved the development of program goals, learning outcomes, course offerings, and program structure.

Following approval to proceed with an external review, a review committee was struck comprising two external reviewers, one internal reviewer and one student reviewer. Reviewers were provided with the program proposal brief in advance of the scheduled review and then met virtually over one day with the:

- Vice-Provost, Graduate and Postdoctoral Studies
- Associate Vice-Provost, Graduate and Postdoctoral Studies
- Vice-Provost, Academic Planning, Policy & Faculty
- Director of Academic Quality and Enhancement
- Dean, Faculty of Health Sciences
- Associate Dean, Graduate and Postdoctoral Studies Faculty of Health Sciences
- Graduate Chair
- Interim Associate Chief Librarian
- Faculty members
- Graduate Program and Departmental Staff Members

Following the site visit, the external reviewers produced a comprehensive external reviewer report, with recommendations, which was sent to the academic unit and to the Dean’s Office of the Faculty of Health Sciences for review and response. These formative documents, including the program proposal document, the external reviewer report, and the Program and Faculty responses, have formed the basis of this assessment report of the proposed DHSc in Interdisciplinary Health Sciences.

Summative Assessment – External Reviewers' Report

External reviewers shared that *"[The DHSc program] aligns well the priorities, strengths, and existing suite of graduate programming of the Faculty of Health Sciences. It offers an innovative pathway to the development of career-ready and career advancing leadership skills in healthcare."*

Strengths and/or Unique Aspects of the Program

- Clear and coherent objectives that align with Western University's mission and the FHS' commitment to advancing evidence-informed leadership, equity, and system transformation.
- Curriculum is coherently designed, with core courses supporting leadership, systems transformation, health equity, and applied inquiry, while electives allow for focused specialization.
- Incorporates interdisciplinary courses that are already developed and offered, contributing to the feasibility and sustainability of the program as it reduces the need to develop a wide range of new courses and incorporates institutional expertise.
- Asynchronous delivery with periodic synchronous touchpoints ensures flexibility for working professionals, and milestone sequencing supports timely progression.
- The DiP anchors students' applied learning, requiring the design, implementation, and evaluation of an initiative embedded in their professional context.

Opportunities for Program Improvement

- While the outcomes are clear, there are specific program learning outcomes that seem difficult to achieve and evaluate given the current program structure.
- Consider being more explicit about how students will develop and demonstrate the program learning outcome's during the DiP, given that they may not be embedded in their own workplaces, are working with mentors assigned to them, and do not implement their proposals.
- Further detail would be helpful about how non-course milestones will be monitored.
- Greater transparency regarding the inclusion of equity and reconciliation learning goals in required coursework would be helpful.
- Consider formalizing the proposed advisory consultations with external stakeholders as an Advisory Board, which could include alumni.
- The discretionary use of interviews may introduce a risk of bias. If the program does not require interviews of all applicants, it is advisable to be explicit about when an applicant must be interviewed.

Summary of the Reviewers' Recommendations and Program/Faculty Responses

The following are the reviewers' recommendations in the order listed by the external reviewers.

Reviewers' Recommendation	Program/Faculty Response
Recommendation #1: Clarity around DiP Project Outcomes. We recommend that the program team: - review and reconsider the option where students don't work on DiP projects in their own workplaces or professional settings; - clarify how the PLO's can be developed and demonstrated within the current design; - ensure that the DiP is an experiential assignment at the doctoral level and that the credit weight and objectives are appropriate for a major, multi-year implementation project.	**Program:** The Program Learning Outcomes (PLOs) have been closely reviewed and edited to assure that they can be demonstrated through the completion of coursework and/or milestones, including the Dissertation in Practice (DiP). The design of the DHSc program will allow observing/evaluating the feasibility of organizational change/practice solutions as well as the development of skills needed to lead implementation of solutions. In alignment with practice at Western University, the DiP is recognized as a required program "milestone," and milestones are not assigned credit weight. The three DiP courses (one course per year; 0.5 credit weight each) focus on content and skill development that will support students' progression in designing, writing, and presenting their DiP. **Faculty:** The Dean's Office agrees that the program's revisions to the Program Learning Outcomes (PLOs) and edits to the program brief clarify and assure that each PLO can be fostered by and demonstrated through completion of the DHSc program (coursework and milestones). The program team has the expertise to assure that the Dissertation in Practice aligns with doctoral degree expectations. Additionally, the Faculty of Health Sciences (FHS) has committed additional faculty resources to support a new Teaching Scholar appointment that will align with the DHSc and our suite of professional graduate programs.
Recommendation 2: Admissions Requirements - Ensure that admissions requirements are clearly aligned with the DiP to support it, given any changes made in response to Recommendation 1; - Be explicit about the criteria used to determine whether an interview is required, or alternatively require interviews for all applicants or none.	**Program:** As recommended, the admissions procedure has been revised to make explicit that an interview is required for all applicants. Given that in many disciplines interviews of applicants to PhD programs are completed to ensure a fit of the applicant's research interests with the supervisory capacity of the program, we will use interviews for the DHSc program in a similar manner – to clarify any uncertainty regarding the fit of the interests that an applicant indicated in their Statement of Interest with the ability of the program to support the applicant. We will note on the DHSc application the need for an interview. We have removed any reference to out-of-province applicants. That is, all applicants will be asked to indicate on the application that they have support for their DiP (i.e., to develop a proposed solution to a problem of practice) within their current organization or if their DiP is appropriate for remote placement. We have further incorporated the reviewers' recommendation of the potential for a transfer from the FHS Applied Health Sciences graduate diploma or master's program as an alternative to direct entry for applicants who do not have a graduate degree.

- Clarify the requirements for out-of-province students. Consider a transfer or advanced-credit process from graduate diploma or master's programs, particularly to offer an alternative to direct entry for students without graduate degrees.	**Faculty:** The Dean's Office supports the program's revised admissions requirements and procedures. The admissions requirements and processes will be helpful in determining the fit of the applicants' interests with the program's ability to support such interests and appreciate the incorporation of an inclusive, alternative entry pathway for applicants who do not have a graduate degree.
Recommendation #3: Part-Time Enrolment - Consider the addition of a part-time option in the program to support recruitment among working professionals and to align with any changes you make to the DiP.	**Program:** A part-time option will be considered after the DHSc program has been established and if there is interest. Further, a part-time option will require developing a framework (different from full-time) to support cohort building, an important component of the DHSc. **Faculty:** The Dean's Office concurs with the program's rationale for and plan to examine the feasibility of a part-time option once the DHSc program has been established.
Recommendation #4: DiP Supervision - Clarify the dual-supervision model of the DiP and how students will receive appropriate academic mentorship in the chosen model.	**Program:** Further specification of the dual-supervision model has been added to the program brief. We have clarified that each DiP is supervised by a core academic faculty member and a field mentor/content expert. This dual-supervision model of the DiP is not unlike the requirement for supervisor/advisory committees in PhD programs or co-supervisory models in PhD programs. That is, the dual-supervision will combine supervisory support for research methods and project management (from the core academic faculty member) with context-specific mentorship from content experts. Additionally, this dual-supervision model is utilized with students within the FHS Advanced Health Care Practice (AHCP) MClSc and MHSc programs when completing their capstone projects. Given the revisions to admission process (i.e., requirement for interviews) detailed in the response to Recommendation #2, which are designed to assure a fit between an applicant's DiP interests and the program's ability to support the applicant, in concert with the dual-supervision model, we anticipate the program will be able to provide students with appropriate mentorship **Faculty**: As the program has indicated, existing FHS graduate online programs have been utilizing the dual-supervision model to support students' successful completion of evidence-based experiential projects. The Dean's Office confirms that the program will be able to apply and/or build from these existing programs' administrative and organization resources and processes to support and coordinate DiPs, including the support of administrative staff with experience relevant to DiP-related logistics. Further, as noted in the response to Recommendation #1, the Faculty is budgeting for an additional tenure-track, Teaching Scholar position; this faculty member will expand the pool of academic faculty mentors supporting DiP projects.

Recommendation #5: Student Engagement & Professional Development - Clarify strategies and opportunities for student engagement, networking, and peer-engagement, given the asynchronous online delivery of curriculum, and the geographic distribution of students.	**Program:** Further specification of the strategies and opportunities that will be incorporated into the program has been added to the proposal brief. These include virtual activities such as faculty-student meet-and-greets during synchronous program orientation activities, a program-specific virtual bulletin board for students, academic faculty, and field mentors, milestone speaker series, virtual group learning sessions, an annual virtual, synchronous "town hall" session for students to share feedback about the program and their experiences, and optional group writing sessions coordinated by the Graduate Chair. Although online coursework is asynchronous, we have further clarified that there are opportunities for engagement embedded within these courses through activities such as group assignments, group discussion forums, and optional interactive synchronous sessions to engage with the course content and with the instructor. Also, it is important to note that the Professional Development Seminar Series and Knowledge Translation Seminar Series, both of which are required milestones, involve synchronous and interactive activities. **Faculty:** The program has specified the many student engagement and networking strategies and activities built into the DHSc program. The Dean's Office confirms that the program will also have the support of the FHS DesignEd team who have expertise in on-line learning and creative instructional design.
Recommendation 6: Student Progression - Consider mechanisms for remediation of failure that will not hold a student back from progressing or require that they be withdrawn after a single instance of failure. - Make clear how progress in the non-course milestones is monitored and the impact of missing a milestone.	**Program:** Across graduate programs within FHS and across Western, it is the norm that failure of any program component in the absence of valid extenuating circumstances results in withdrawal of the student from the program. Whereas the appeal process was mentioned with respect to the final evaluation of the DiP, we have added further information regarding progression in both courses and milestones and specifying how students may seek academic relief and/or appeal and also how to access other student supports. Students will be informed of the process via a number of venues including in program orientation materials, within the program's virtual bulletin board, course syllabi, and if progression issues arise. Upon admission, students will also be provided with information regarding the services and supports available at Western to enable their success (e.g., Writing Support Centre, Accessible Education); this information is also regularly included in course syllabi. Further details regarding how student progress is monitored, including milestone completion, have been added. For monitoring DiP progression, we have specified that there will be regular supervisory team meetings, an annual spring progress review meeting, and use of Western's Pathfinder platform to track progress. **Faculty:** The program has provided further specification of how student progression in both coursework and milestones will be monitored. Importantly, these progression and academic relief/appeals policies and procedures align with Western-wide policies and procedures.

Recommendation 7: Ensure PLOs are covered in required coursework in addition to electives. - Ensure that key program learning outcomes or skills are covered in required coursework, and not only in electives. - Consider whether course requirements can be individualized based on a student's previous training at admission.	**Program:** We have reformatted the information which linked program learning outcomes with courses and milestones. This reformatting makes clear that the DHSc PLOs are being covered in required coursework and milestones. With respect to balancing foundational learning with individualized learning, the DHSc program offers students options within both foundational courses as well as electives; the DiP is also individualized. Students could take additional courses (in consultation with their mentors) to further individualize their program. **Faculty:** The program has provided additional tables in the proposal brief that clearly illustrate that PLOs are covered by required coursework and milestones. The Dean's Office agrees with the program that individualized learning has been built into multiple components of the DHSc (e.g., elective coursework, DiP).
Recommendation #8 Community Engagement - Formalize the proposed consultation with regional healthcare organizations and leaders with the creation of an advisory board that includes alumni.	**Program:** The program will work on formalizing the creation of an advisory board with the aim to have the advisory board in place upon completion of the first cohort so that alumni can be included. **Faculty:** The Dean's Office agrees with the program's plan and timeline for establishing a DHSc advisory board. The Faculty has long-standing ties with regional healthcare organizations and their leaders which will facilitate identification and recruitment of key interest holders to the advisory board. As the reviewers indicate, FHS alumni are counted among leaders in these regional healthcare organizations, facilitating their inclusion on the advisory board.
Recommendation #9 Alumni Engagement - Formalize engagement of alumni before students graduate, to focus not only on feedback but also on recruiting their ongoing participation in the program.	**Program:** Ideas for encouraging the ongoing participation of alumni in the program include creating a LinkedIn group for the DHSc program when it begins (also a method to engage community partners and field mentors). Another approach that will be implemented is to make explicit during their time in the program not only what types of ongoing participation in the program following graduation are encouraged, but also how such ongoing participation can be a means to further advance their leadership competencies, practice-based knowledge and inquiry skills, and network building and/or strengthening. **Faculty:** The Dean's Office supports the program's strategies for encouraging students to become engaged alumni upon their completion of the DHSc. Further ideas for fostering alumni engagement may come from connecting with existing FHS Schools/programs with strong alumni networks; such across-FHS program communication and collaboration is supported by FHS graduate program committees, on which the DHSc Graduate Program Chair and administrative staff will serve.

Implementation Plan

The Implementation Plan provides a summary of the recommendations that require action and/or follow-up. In each case, the Program Chair (or equivalent), and the Dean of the Faculty are responsible for enacting and monitoring the actions noted in Implementation Plan.

Recommendations 1, 2, 4, 5, 6 and 7 consisted of areas in need of clarification in the proposal brief. These have all been addressed, as articulated in the Program responses above. Therefore, these recommendations are not prioritized for follow-up in the Implementation Plan below.

Recommendation	Proposed Action and Follow-up	Responsibility	Timeline
Recommendation #3: Part-Time Enrolment Consider the addition of a part-time option in the program to support recruitment among working professionals and to align with any changes you make to the DiP.	• Consider a part-time option after the DHSc program has been established. Solicit interest from prospective and enrolled students. • If actioned, develop a framework (different from full-time) to support cohort building.	• Graduate Program Committee	By December 2028
Recommendation #8: Community Engagement Formalize the proposed consultation with regional healthcare organizations and leaders with the creation of an advisory board that includes alumni.	• Create an advisory board upon completion of the first cohort so that alumni can be included.	• Graduate program committee	Initiate formalizing during 2028-2029 academic year
Recommendation #9: Alumni Engagement Formalize engagement of alumni before students graduate, to focus not only on feedback but also on recruiting their ongoing participation in the program.	• Create a LinkedIn group for the DHSc program when it begins. • Make explicit to students what types of ongoing participation in the program following graduation are encouraged and how such ongoing participation can be a means to further advance their leadership competencies, practice-based knowledge and inquiry skills, and network building and/or strengthening. • Connect with existing FHS Schools/programs with strong alumni networks for additional ideas.	• Graduate Program Chair and core faculty members	By September 2026 and ongoing

Items Removed from the Consent Agenda

Action: ☐ Approval ☐ Information ☐ Discussion

Executive Summary:

This is a placeholder for any items removed from consent.
