



Board of Governors Meeting (Public)

Notice of Meeting

Thursday, February 5, 2026

10:00 a.m. to 12 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 (Open)- February 5, 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) Key Financial Indicators Report	Information
15 min	4.1(b) Climate and Sustainability Strategy	Approval
5 min	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	Approval
	4.2 Report of the Fund Raising and Donor Relations Committee	
5 min	4.2(a) Revisions to MAPP Policy 1.12 - Advertising and Commercial Activity	Approval
5 min	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	Approval
	4.3 Report from Senate	
15 min	4.3(a) Recommendation from Senate re: Western's Investment and Responsible Investing Policy (with MAPP 2.26)	Approval

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) Update on the 2025-26 Operating Budget as of December 31, 2025 | Information |
| 5.1(c) Update on the 2025-26 Ancillary Budgets as of December 31, 2025 | Information |
| 5.1(d) Annual Report on Trademark Licensees doing Business with the Dellelce Family Bookstore | Information |
| 5.1(e) Investment Committee Membership | Information |
| 5.1(f) Report of the Investment Committee | Information |

5.2 Item from the Audit Committee

- | | |
|--|-------------|
| 5.2(a) Annual Report of the Office of the Ombudsperson | Information |
|--|-------------|

5.3 Item from the Senior Policy and Operations Committee

- | | |
|---|----------|
| 5.3(a) Recission of Procedures for Joint Appointments within the University | Approval |
|---|----------|

5.4 Items Referred by Senate

- | | |
|---|-------------|
| 5.4(a) Academic Administrative Appointments | Information |
| 5.4(b) Report of the Academic Colleague | Information |

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

George McAuley 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

NOVEMBER 20, 2025 – OPEN SESSION

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

PRESENT: Sarah Shortreed, Chair
Amy Bryson, Secretary

Michelle Banik	Lesley Oliver
Susan Clarke	Stephen Poloz
Greg Dick	Terry Rice
Ed Goehring	Alan Shepard
Lee Greenberg	David Simmonds
Ayesha Hassan	Jane Toswell
Lori Higgs	Joel Welch
Elizabeth Maccabe	Ken Yeung
Marlene McGrath (Vice-Chair)	Noah Zabian

Regrets: Cameron Bailey, Beth MacDougall-Shackleton, George McAuley, Kelly Meighen, Josh Morgan, Geoff Pollock

By Invitation: Althea Blackburn-Evans, Ruban Chelladurai, Paul Eluchok, Lynn Logan, Jim Loupos, Eric Mallory, Penny Pexman, Florentine Strzelczyk, Caroline Whippey, Marisa Modeski

Secretariat: Bonnie Brown
Resource:

Chair S. Shortreed called the meeting to order at 10:00 a.m. She welcome Ayesha Hassan, the new undergraduate student representative, to the Board of Governors.

1.0 Land Acknowledgement

T. Rice offered a land acknowledgement.

2.0 Adoption of Agenda and Minutes

2.1 Adoption of Agenda – Open Session

Moved by L. Higgs, seconded by D. Simmonds:

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

CARRIED

2.2 **Approval of the Open Session Minutes of the June 26, 2025 and September 25, 2025 Meetings**

Moved by N. Zabian, seconded by S. Clarke:

That the open session minutes of the meeting held June 26, 2025, be approved, as circulated.

That the open session minutes of the meeting held September 25, 2025, be approved, as circulated.

CARRIED

2.3 **Business Arising from the Minutes**

None.

3.0 **Report of the President**

A. Shepard, President & Vice-Chancellor, began his report by commenting on several recent good news items including the awarding of the Nobel Prize in Economics to Peter Howitt who is a former faculty member of Western; the recently hosted Open House for prospective students; and the positive reception to the *All In* campaign.

A. Shepard continued his report by commenting on some of the investments and announcements in the federal budget for universities.

A. Shepard reported that Western's Chief AI Officer, M. Daley is presenting at the Canadian Science Policy Conference that is currently underway. He further reported on the recent U15 President's meeting with M. Joly, the Minister of Innovation, Science and Economic Development Canada. He advised she is very supportive of research and of the development of the talent pipeline that supports the strengthening of the economy.

In relation to the fall economic statement issued by the Government of Ontario, A. Shepard advised that it is anticipated that tuition rates and grants will remain frozen.

A. Shepard reported on the passing of Bill 33 which includes several amendments to the Ministry of Training, Colleges and Universities Act in relation to student applicant assessment, requirements for developing and implementing research security plans, and the governing of fees that universities may charge to students.

On invitation, F. Strzelczyk, Provost & Vice-President (Academic), provided an update on Navitas by describing the programs now accepting and receiving applications. She further described the work completed to establish new curriculum options in the Professional Master of Engineering programs to formalize the graduate pathways through Western International College. F. Strzelczyk continued her report by sharing information on the upcoming meeting with the Navitas regional managers and commenting on the collaborative efforts demonstrated between Navitas and Western's admission, recruitment, and marketing teams.

On invitation, P. Pexman, Vice-President (Research), provided an update on Horizon Europe and described the research applications now being submitted to Horizon Europe by Western researchers. P. Pexman described the current partnerships in Europe that are being leveraged to access larger networks of researchers, noting these larger networks are invaluable for establishing a foothold in Europe for future funding.

A. Shepard responded to questions of clarification pertaining to the lifting of caps on graduate students, graduate student housing, federal funding for research Chairs, and the current challenges posed by Immigration Canada for attracting international talent to Canada.

In addition, and in response to a question, A. Shepard advised that preliminary discussions regarding Western's 150-year celebration have been initiated. There was a suggestion that the installation of public art be considered for this celebration noting that it would need to be commissioned now.

4.0 **COMMITTEE AND SENATE REPORTS**

4.1 **REPORT OF THE GOVERNANCE AND BY-LAWS COMMITTEE**

4.1 (a) **Revisions to the Terms of Reference for the University Discipline Appeal Committee**

M. Banik presented for approval revisions to the Terms of Reference for the University Discipline Appeal Committee. The proposed revisions and the rationale for the changes were outlined.

Moved by M. Banik:

That, on the recommendation of the Governance and By-Laws Committee, the Board of Governors approve the revised Terms of Reference for the University Discipline Appeal Committee, as shown.

CARRIED

4.1(b) **Revisions to MAPP 3.9 – Powers, Responsibilities, and Duties of Acting Ranks**

M. Banik presented for approval the revisions to MAPP 3.9 – Powers, Responsibilities, and Duties of Acting Ranks. The proposed revisions and rationale for the changes were described.

In response to a question, A. Bryson, clarified the change to the policy.

Moved by M. Banik:

That, on the recommendation of the Governance and By-Laws Committee, the Board of Governors approve the revisions to MAPP 3.9 - Powers, Responsibilities, and Duties of Acting Ranks, as shown.

CARRIED

4.2 **REPORT OF THE AUDIT COMMITTEE**

4.2(a) **Revisions to MAPP Policy 1.43 - Safe Disclosure**

L. Higgs presented for approval the revisions to MAPP Policy 1.43 – Safe Disclosure. The proposed revisions and rationale for the changes were described. L. Higgs further reported that the Audit Committee received information on how the policy is communicated to the Western Community.

In response to a question, J. Loupos, advised that contractors and suppliers were added to the definition of the ‘Western community’ such that they be included in the list of groups that may disclose concerns about unethical behaviour or improper financial activity.

Moved by L. Higgs:

That, on the recommendation of the Audit Committee, the Board of Governors approve the revisions to MAPP Policy 1.43 – *Safe Disclosure*, as shown.

CARRIED

5.0 **UNANIMOUS CONSENT AGENDA**

Moved by G. Dick, seconded by N. Zabian:

That the items listed in the consent agenda, with the exception of item 5.4(a), 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) **Semi-Annual Ratio Report on Non-Endowed Funds**

The semi-annual report on non-endowed funds presented to the Property and Finance Committee was received for information.

5.1(c) **Annual Report on Endowments (Underwater)**

The annual report on endowments (underwater) presented to the Property and Finance Committee was received for information.

5.1(d) **Report of the Investment Committee**

A report from the Investment Committee outlining the market value of assets under management and the recent activities of the Investment Committee was received for information.

5.1(e) **Investment Committee Membership**

A report advising the Board of Governors on the reappointment of Doug Greaves to the Investment Committee for a term ending August 2026 was received for information.

5.2 **ITEMS FROM THE GOVERNANCE AND BY-LAWS COMMITTEE**

5.2(a) **Board of Governors Election Schedule for 2026**

A report on the vacancies to be filled by election and the election schedule for 2026 was received for information.

5.2(b) **Board of Governors By-Election Results**

A report on the results of the recently held by-election for an undergraduate representative on the Board of Governors was provided for information. Ayesha Hassan was elected for the term October 23, 2025 to June 30, 2026.

5.3 ITEM FROM THE SENIOR POLICY AND OPERATIONS COMMITTEE

5.3(a) University Discipline Appeal Committee (UDAC) Membership

A report advising the Board of Governors on the appointment of one undergraduate student to UDAC, by the Senior Policy and Operations Committee, for the term July 1, 2025 to June 30, 2026 was received for information.

5.4 ITEMS REFERRED BY SENATE

5.4(a) Annual Report of the McIntosh Gallery

Removed from the Consent Agenda. See item 6.1.

5.4(b) Report of the Academic Colleague

A report from the August meeting of the Academic Colleague was received for information.

6.0 ITEM(S) REMOVED FROM THE CONSENT AGENDA

6.1 Annual Report of the McIntosh Gallery

The Annual Report of the McIntosh Gallery was received for information.

In responding to questions, F. Strzelczyk advised that the advisory committee oversees the operations of the gallery, including the acquisitions and deaccession of artwork. Currently, work is underway to systematically review holdings. Should any items be identified for repatriation to First Nations communities that would be considered by the advisory committee.

The increase in student engagement in the gallery was highlighted.

7.0 QUESTIONS FROM MEMBERS - None.

8.0 OTHER BUSINESS - None.

9.0 ADJOURNMENT TO CLOSED SESSION

On motion, the meeting adjourned at 10:49 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: January 29, 2026

Re: Quarterly report for February 2026

Dear Members of the Board,

Following are some of the noteworthy developments since my last report for the Board meeting of November 20, 2025.

Canada Global Impact + Research Talent initiative: on December 9, 2025, the federal government announced \$1.7 billion in funding to attract research chairs and emerging leaders to Canada. This new funding will enable universities to drive Canada's social and economic growth by supporting innovation, discoveries, and knowledge translation. Western has launched active recruitment campaigns for the [Canada Impact + Research Chairs program](#) and the [Canada Impact + Training Awards](#).

\$2.9 million in federal funding to Schulich Dentistry: funding from Health Canada's Oral Health Access Fund will expand community-integrated dental education and deepen community partnerships to provide care to vulnerable populations. At the same time the curriculum will be redeveloped to be grounded in community experience and person-centred care. The funding will also help strengthen Schulich's dental clinics management system.

\$16.5 million to fund four new health research chairs: Four gifts from London Health Sciences Foundation totalling \$8.2 million and matched by Western, will advance groundbreaking research at Schulich Medicine & Dentistry and London Health Sciences Centre Research Institute in neurosurgery, cardiovascular care, kidney care, and orthopaedic surgery.

Enrolment: Final 2025-2026 enrolment numbers as reported to the Ministry are below:

- Western and Affiliated University Colleges total full-time enrolment: 43,330
- Constituent University full-time enrolment: 37,716
 - Undergraduate: 29,235
 - Graduate: 7,012
 - Other: Medical Residents: 1084; Concurrent Programs: 370
- International full-time enrolment Western and Affiliated University Colleges: 4,735
- International constituent university full-time enrolment: 4,076

QS Sustainability Rankings: Western moved up from 30th to 24th among 1,994 institutions worldwide and maintained its rank as 4th in Canada. The QS rankings provide a unique and detailed framework to assess how universities are taking action to tackle the world's greatest environmental, social and governance challenges.

Western tops national ranking for Academic All-Canadians: Western had the highest number of athletes competing in U SPORTS competition who maintained academic averages of 80 per cent or higher. Across all varsity sports at Western (including teams outside of U SPORTS), 559 Mustangs achieved scholar-athlete status.

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 Canada:
 - **The Hon. Rosalie Silberman Abella** (Honorary LLD'91), Companion
 - **Donald Lawrence Triggs** (MBA'68, Honorary LLD'18), Officer
 - **Ian O. Ihnatowycz** (MBA'82, Honorary LLD'13), Member
- Named to the Mayor's New Year's Honour List:
 - **Charlotte Cleland** (BA'77), distinguished Londoner
 - **Beth Hundey** (PhD'14) (Social Science), posthumous honour, environment
 - **Brenda Zadorsky** (BMus'74, BEd'75), arts
- **Tima Bansal** (Ivey) received the 2025 Panmure House Prize for her contributions to sustainability research and influence on how organizations integrate long-term thinking into strategy.
- **Cody Groat** (Social Science) recognized with the Russell K. Cooper Award for Public Programming from the *Ontario Historical Society* for the Potter's Field Project.
- **Rajiv K. Varma** (Engineering) named 2026 Fellow of the *Engineering Institute of Canada*.
- **Laura Misener** (Health Sciences) named Dr. Frank J. Hayden Endowed Research Chair in Sport and Social Impact.
- **John McGuire** (Schulich) recognized as an outstanding peer reviewer by *Canadian Institutes of Health Research* (CIHR).
- **J.M. Floryan** (Engineering) received the 2026 *Canadian Society for Mechanical Engineering's* Fluid Mechanics Medal and the prestigious C.N. Downing Award in recognition of his contributions to the field of fluid mechanics.

- **Auriane Egal** (Science) named Radio Canada's 2025 Scientist of the Year.
- **Kristin Hoffmann** named the recipient of the CAUT (*Canadian Association of University Teachers*) Academic Librarians' and Archivists' Distinguished Service Award
- **Jason Oliver** (WTS) named to the 2025 Hot Topics Global CIO Top 100 list.
- **Western Communications** received five awards from the *Council for Advancement and Support of Education* District II.
- **Ivey EdTech team** received a Learning Design Award for AIBEL (Artificial Intelligence-Boosted Experiential Learning) at the *Future of Management Education* Conference.
- **Procurement Services** received the 2025 Leadership Award from the global *Sustainable Purchasing Leadership Council*.
- **Michael Faulds** (BA'09, MA'12) named the next head coach of the Western Mustangs football team.
- **Patrick Searle** (BA'12), named President and CEO of the *Council of Canadian Innovators*.
- **Olivia Ferney** (BMOS'22), **Carly Stern** (BESc'21), and **Michelle Cheng** (HBA/BHSc'21), named to *Forbes Magazine's* Top 30 under 30.
- Named to London Top 20 Under 40: **Melina Rodrigues Bellini** (PhD'20), **Robert Bierbaum** (BMOS'18), **Cassandra DeMelo** (JD'12; LLM'19), **Emily Jones** (MD'13; Schulich), **Sandra Kostrubiec** (BMOS'11), **Euphy Xuejun Liu** (BMOS'17), **Peter Markvoort** (HBA'08; MPA'10; MSW'24), **Andy Rady** (BA'09, JD'12), **Matt Trovato** (HBA'09), **Denis Vida** (PhD'20, Science)
- **Heather Gardner** (BMus'08) named to *Billboard Canada's* 40 Under 40.
- **Liza Choi** (D.Ed'25) received the 2025 *Canadian Bureau for International Education* (CBIE) Emerging Knowledge Award.

Leadership updates:

Michael Kim announced he will conclude his service as Dean of the Don Wright Faculty of Music on June 30, 2026. Sophie Roland accepted an invitation to serve as Acting Dean for a two-year term beginning July 1, 2026.

Active academic leadership review/selection committees are underway for the Provost & Vice-President (Academic), Deputy Provost, and the Faculties of Arts & Humanities and Social Science.

Key Financial Indicators Report

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

This report summarizes the key financial indicators being used to report certain elements of the University's financial position to the various committees of the Board of Governors throughout the year. The information presented is primarily historical; unless otherwise noted the information reflects the most recent fiscal period ending April 30th.

The summarized data is presented to assist board members with their fiduciary responsibilities.

The indicators have been broken into four categories:

- Policy Compliance
- Financial Health/Sustainability
- Stewardship & Monitoring
- Performance

There are no indicators for which the historical value or the trends require immediate attention. Western has continued sound financial planning and management.

Documentation Provided:

Key Financial Indicators Report (Dashboard + Appendix 1)

KEY FINANCIAL INDICATORS - DASHBOARD

TYPE OF INDICATOR	FREQUENCY & GOVERNANCE	PERFORMANCE MEASURE	TARGET/ MAXIMUM	OUTCOME
POLICY COMPLIANCE Capital Debt Policy 2.30	Semi-Annual Report on Capital Debt (P&F - November, April)	Compliance Ratios: Net Assets-to-Debt Ratio Debt Burden Floating rate debt between 0% - 50% of total debt Monitoring Ratios: Debt per FTE Student Debt to Revenues available for repayment Sinking Fund - Target 50% Debenture repayment by 2047/2057	> 0.5X 5% 0-50%	<u>Actual at April 30/25:</u> \$6 1.6% 0% \$ 7,412 22% \$52.4M
FINANCIAL HEALTH / SUSTAINABILITY MCU University Financial Accountability Framework Primary Reserve Ratio (days) Working Capital Ratio Viability Ratio Debt Ratio Debt to Revenue Ratio Interest Burden Ratio Net Income/Loss Ratio Net Operating Revenues Ratio Credit Rating (S&P External) MCU Action Plan	Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept)	<i>Category Metric Definition</i> Liquidity Expendable Net Assets / Total Expenses * 365 Liquidity Current Assets / Current Liabilities Sustainability Expendable Net Assets / Long-term Debt Sustainability Total Liabilities - Deferred Capital Contributions / Total Assets Sustainability Long-term Debt / Total Revenue Sustainability Interest Expense / Total Expenses - Depreciation Performance Total Revenues - Total Expenses / Total Revenues Performance Cashflow from Operating Activities / Total Revenues	(Med. Threshold) >90 >1.25 >60% <35% <35% <2% >1.5% >7%	<u>Actual at April 30/25:</u> 448 3.8 619% 26% 17% 1% 12% 13% AA+ Stable: February 2025 No Action
STEWARDSHIP & MONITORING Statutory Financial Statements Audit Findings Report Operating Reserve Carryforward Analysis Report Report on Major Strategic Opportunities Fund Report on Endowments Ratio on Non-endowed Funds (also an indicator of Financial Health) Report of the Investment Committee Deferred Maintenance Employee Future Benefits	Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual (Audit Committee - Sept) Annual Budget (P&F - April) Annual (Audit Committee - January) Annual (P&F November) Annual (P&F November) Semi-Annual Report on Non-Endowed Funds (P&F - November, June) Quarterly (P&F Nov, Jan, June) Annual Budget (P&F - April) Annual Budget	Approval of Combined Financial Statements Pension Financial Statements for information External auditors report to the Audit Committee. Minimum target set by Board Carryforward Analysis - Carryforward Reserve Report on Major Strategic Opportunities Fund performance and policy compliance Endowment Performance Allocation for spending Underwater Endowments # Underwater Endowments \$ Target Ratio of Investments to Obligations Performance of investment portfolio and recent activities CAUBO report calendar year end Rank - Total Endowment per CAUBO Investment Survey Rank - Total Investment Pools per CAUBO Investment Survey Comparison annually to 2% target Reported through the annual operating budget	N/A N/A N/A \$10.0M Min \$100M 1.08 2.0% 	Unqualified Audit Opinion Unqualified Audit Opinion No recommendations \$44.0 \$253.0M \$431.9M 9.4% \$47M 25 \$2.3M 1.25 See Appendix 1 at 12/31/24 8 4 Budget 1.6% \$452.9M
PERFORMANCE Operating Budget Financial Report Statutory Financial Statements - Combined Ancillary Budget(s) Financial Report Fundraising	Semi-Annual (P&F - January, June) Annual (Audit Committee - September) Semi-Annual (P&F - January, June) Quarterly Fundraising Report (BoG)	Actual versus budget Surplus/(Deficit) - April 2025 - as presented in June 2025 Excess of revenues over expenses - April 2025 - Combined entities Actual versus budget Revenues over Expenses for Student Fee Funded units, Ancillaries, Academic Support Units and Associated Companies - April 2025 - as presented in June 2025 Performance against fundraising targets (April 30, 2025) - as reported in June 2025	Projected \$0.1M \$12.8M \$100M	Actual \$3.4M \$197.8M \$14.6M \$83.5M

Appendix 1: Key Financial Indicators

CAPITAL DEBT POLICY 2.30

The Capital Debt Policy and Capital Debt Guidelines define the responsibilities for the approval of capital debt, guide maximum limits on the amount of capital debt and outline the system of accountability.

Administration reports semi-annually through the Property & Finance Committee to the Board of Governors on:

- Current and projected debt levels
- The amount of current debt that is on a floating rate basis and on a fixed rate basis
- The term of each loan
- The notional amount of non-endowed funds that have been set aside for the purpose of principal and interest repayment
- Compliance with the debt ratios provided in Procedures related to Capital Debt

The semi-annual Report on Capital Debt informs the Property & Finance Committee about the impact that newly approved and proposed projects will have on the level of capital debt and on the debt ratios.

This Policy is also closely monitored by Standard & Poor's as part of their annual credit rating review of the University.

RATIO REPORT ON NON-ENDOWED FUNDS

Administration reports semi-annually on the ratio of total investments to total obligations for non-endowed funds. The total obligations reflect funds that are owed to University accounts and other creditors. The Board target for this ratio is an average of 1.08 over the previous 12 quarters. At April 30, 2025, the ratio of investments to obligations for non-endowed funds was 1.25. When this ratio falls below 1.08, draws from non-endowed funds cease until the target ratio is reached as part of an approved annual budget.

CREDIT RATING

Standard & Poor's measures financial health using a variety of indicators. The most recent credit rating review was issued February 20, 2025, which maintained Western's AA+ credit rating, with a stable outlook. Standard & Poor's continued to highlight Western's strong fundamentals, including our strong enterprise and financial profile.

FINANCIAL SUSTAINABILITY METRICS

MCU University Financial Accountability Framework

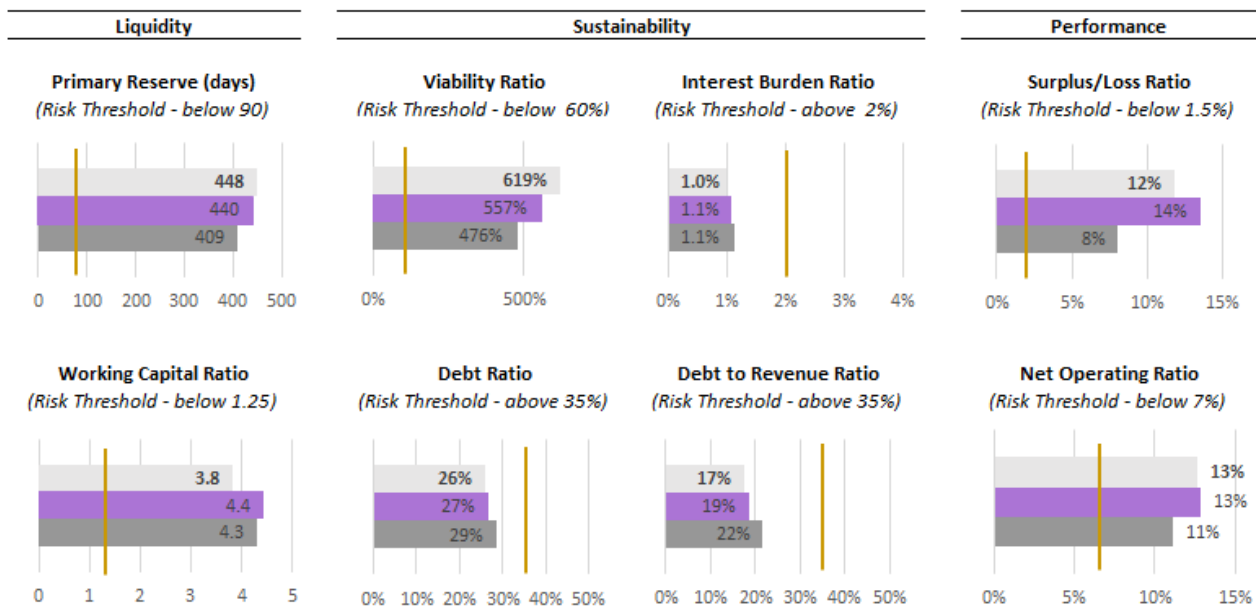
The University reports annual financial sustainability metrics to the Ministry of Colleges and Universities and Research Excellence and Security (MCURES) through the Council of Ontario Universities. Beginning in 2023, Western has reported using the Ministry's Accountability Framework, which includes eight financial health metrics and the University's credit rating. In 2025, after sector consultation with the Ministry, forward looking information was added to the reporting to complement the backwards looking ratio analysis. Additional reported information includes credit rating reports, enrolment forecasts, and operating budget forecasts (updated mid-year).

The metrics are grouped across categories of liquidity, sustainability and financial performance. Thresholds are set for each category that result in specific actions for a reporting university if thresholds are surpassed. The MCU confirmed Western's reporting of a 'No Action' result for the year ended April 30, 2024. Western has reported its April 30, 2025, results through the Council of Ontario Universities in December 2025, and expect a 'No Action' result to be confirmed for the reporting period in early 2026.

The following summarizes the current period (2025) and past two periods of ratios for the accountability framework.

WESTERN UNIVERSITY MCURES ACCOUNTABILITY FRAMEWORK 2025

Category & Summary Actions	Legend
Liquidity No Action	● 2025
Sustainability No Action	● 2024
Performance No Action	● 2023
Credit Rating - AA+ No Action	Risk threshold
Overall No Action	



While Western expects a 'No Action' result for the 2025 reporting period, a quick summary of the results from all Ontario institutions notes the following:

Rating	2025	2024	2023
No Action	8	7	8
Low Action	8	9	7
Medium Action	4	6	6
High Action	3	1	2

Factors that could impact Western's future reporting results include weakening surplus/loss, the impact of lower investment returns, and changing revenues impacting the net operating ratio.

MCU Framework Details

Category	Ratio	Definition	Weight	Medium Threshold	High Threshold
Liquidity	Primary Reserve Ratio (Days)	Expendable Net Assets / Total Expenses * 365	50%	90	30
Liquidity	Working Capital Ratio	Current Assets / Current Liabilities	50%	1.25	1
Sustainability	Viability Ratio	Expendable Net Assets / Long-term Debt	25%	60%	30%
Sustainability	Debt Ratio	Total Liabilities - DCC / Total Assets	25%	35%	55%
Sustainability	Debt to Revenue Ratio	Long-term Debt / Total Revenue	25%	35%	50%
Sustainability	Interest Burden Ratio	Interest Expense / Total Expenses - Depreciation	25%	2%	4%
Performance	Net Income\Loss Ratio	Total Revenues - Total Expenses / Total Revenues	50%	1.50%	0%
Performance	Net Operating Revenues	Cashflow from Operating Activities / Total Revenues	50%	7%	2%

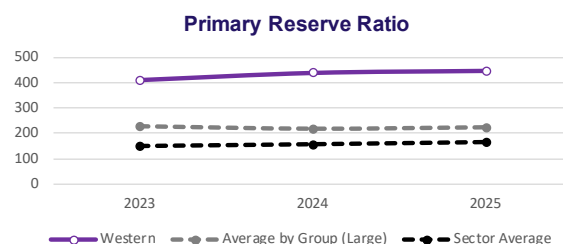
Financial indicators – Details and comparison to other Large Institutions

Note that comparable financial data for universities categorized as "large" has been provided (with identifying information removed). Based on agreement within the sector, this financial information remains strictly confidential and is not to be further distributed.

Liquidity - Primary Reserve Ratio

The Primary Reserve Ratio is a measure of financial viability that compares expendable net assets to total expenses and provides an indication of an institution's financial strength and flexibility by determining how many days an institution could function using only its financial resources that can be expended without restrictions. *Expendable Net Assets* include unrestricted surplus (deficit), internally restricted net assets and internally restricted endowments, adjusted for employee future benefits, investment in capital assets and sinking funds.

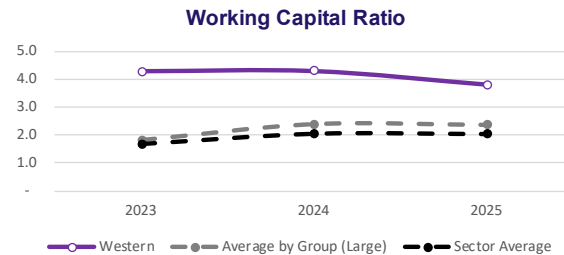
Institution	2023	2024	2025
1	257	248	274
2	129	127	139
3	319	313	320
4	50	26	28
5	236	234	223
6	191	148	135
Western	409	440	448
Average by Group (Large)	227	219	224
Sector Average	151	157	165



Liquidity - Working Capital Ratio

The *Working Capital Ratio* is a measure of liquidity that compares current assets to current liabilities and is typically used to determine whether the institution's liquid assets can fund the liabilities over the next year. This is a non-traditional measure to assess an institution's financial strength, as many institutions may carry near-liquid resources as investments, which may not be accounted for as current in the financial statements. Western's Working Capital Ratio changed because the university held more GICs that mature in over a year than it did in 2024.

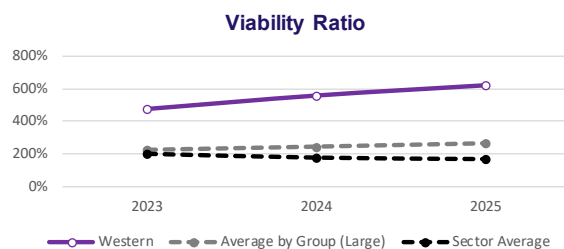
Institution	2023	2024	2025
1	2.8	4.0	3.8
2	0.7	0.6	1.3
3	0.7	3.2	1.8
4	1.6	1.8	2.7
5	1.4	1.8	1.7
6	1.4	1.1	1.6
Western	4.3	4.3	3.8
Average by Group (Large)	1.8	2.4	2.4
Sector Average	1.7	2.1	2.1



Sustainability - Viability Ratio

The *Viability Ratio* is a basic determinant of an institution's financial health, as it provides an indication of the funds on hand that can be used should an institution need to settle its long-term obligations. It is calculated as *Expendable Net Assets over Long-Term Debt*. *Expendable Net Assets* are defined above under *Primary Reserve Ratio*. *Long-Term Debt* is total external long-term debt as disclosed in the institution's financial statements without adding the current portion.

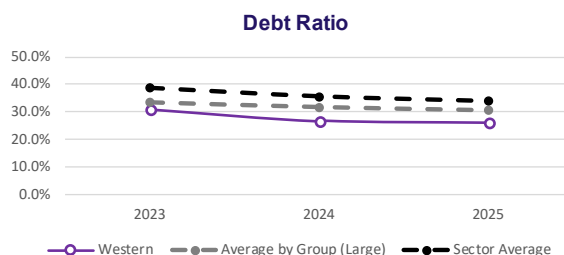
Institution	2023	2024	2025
1	211%	223%	249%
2	74%	78%	87%
3	459%	499%	520%
4	28%	16%	18%
5	N/A	N/A	N/A
6	114%	96%	88%
Western	476%	557%	619%
Average by Group (Large)	227%	245%	263%
Sector Average	199%	175%	165%



Sustainability - Debt Ratio

The *Debt Ratio* is a measure of sustainability that compares the total liabilities, less deferred capital contributions to assets. This is a measure of how much leverage has been placed on the assets of the institution and is a non-traditional measure for the university sector. Deferred capital contributions are not included in total liabilities, as they are not a true liability of the institution, they are spent and are amortized consistent with the assets they are used to purchase.

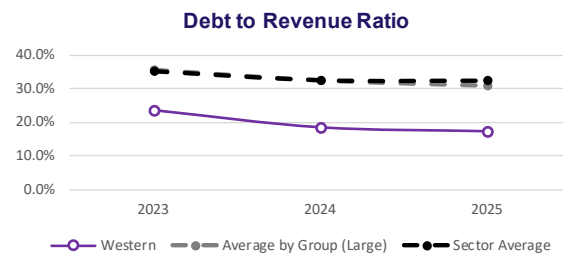
Institution	2023	2024	2025
1	38.3%	32.1%	29.6%
2	31.2%	32.6%	31.6%
3	25.1%	24.2%	23.6%
4	39.1%	35.7%	37.2%
5	32.2%	32.3%	30.6%
6	37.2%	39.2%	36.9%
Western	30.8%	26.7%	26.0%
Average by Group (Large)	33.4%	31.8%	30.8%
Sector Average	39.0%	35.6%	33.8%



Sustainability - Debt to Revenue Ratio

The *Debt to Revenue Ratio* is a measure of sustainability that compares the total long-term debt to total revenues. This is a measure of how of the institutions revenues could be used to support debt repayment. The Debt to Revenue Ratio is a non-traditional measure of sustainability, as many revenues earned are restricted for specific purposes and would not be available for debt repayment.

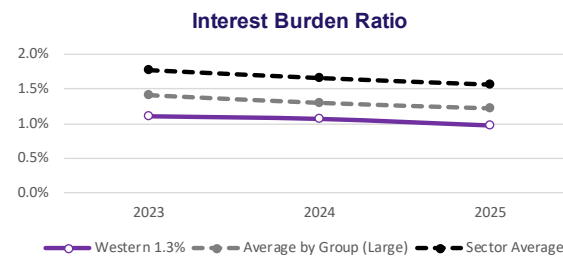
Institution	2023	2024	2025
1	29.9%	27.7%	27.0%
2	47.7%	43.5%	41.5%
3	16.6%	15.3%	15.1%
4	49.4%	44.9%	41.9%
5	N/A	N/A	N/A
6	45.3%	44.8%	42.7%
Western	23.8%	18.7%	17.5%
Average by Group (Large)	35.5%	32.5%	30.9%
Sector Average	35.2%	32.4%	32.2%



Sustainability - Interest Burden Ratio

The *Interest Burden Ratio* is a measure of debt affordability that compares the level of current debt service with the institution's total expenses. It examines the percentage of total expenses used to cover an institution's cost of servicing its debt.

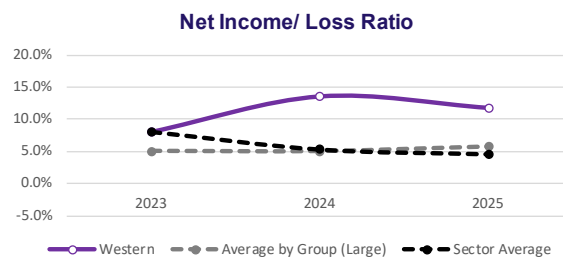
Institution	2023	2024	2025
1	1.6%	1.4%	1.4%
2	1.9%	1.7%	1.7%
3	1.1%	2.0%	0.9%
4	2.0%	1.0%	1.6%
5	0.0%	0.0%	0.0%
6	2.3%	1.9%	1.9%
Western	1.1%	1.1%	1.0%
Average by Group (Large)	1.4%	1.3%	1.2%
Sector Average	1.8%	1.7%	1.6%



Performance - Net Income/Loss Ratio

The *Net Income/Loss Ratio* is a financial performance metric that measures the percentage of an institution's revenues that contribute to its net assets. It provides insight into how well an institution can manage its expenses. The objective of this ratio is to track trends in institution's net earnings.

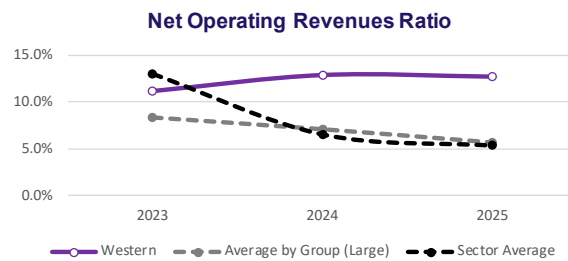
Institution	2023	2024	2025
1	10.6%	9.1%	10.4%
2	-0.4%	2.0%	5.1%
4	12.9%	0.5%	10.7%
3	-1.7%	10.9%	1.9%
5	4.2%	4.9%	1.7%
6	1.6%	-5.9%	-1.5%
Western	8.1%	13.6%	11.8%
Average by Group (Large)	5.0%	5.0%	5.7%
Sector Average	8.0%	5.3%	4.6%



Performance - Net Operating Revenues Ratio

The *Net Operating Revenues Ratio* is a financial performance metric that provides an indication of the extent to which institutions are generating positive cash flows over the long run to be financially sustainable. The ratio is calculated as *Cash Flow from Operating Activities* (from the statement of cash flows) over *Total Revenues* (from the statement of operations).

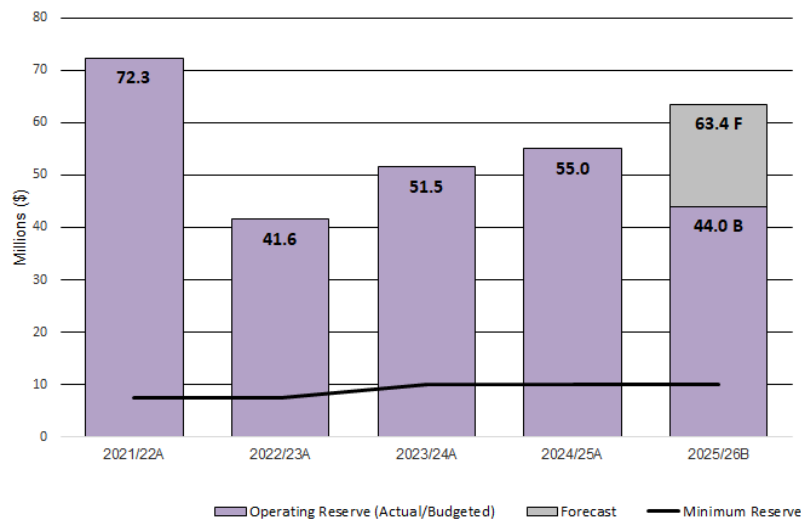
Institution	2023	2024	2025
1	20.0%	12.6%	16.6%
2	5.2%	4.2%	7.3%
3	8.9%	0.2%	2.6%
4	0.5%	10.0%	8.4%
5	7.7%	4.3%	-0.5%
6	4.9%	5.5%	-7.4%
Western	11.1%	12.8%	12.7%
Average by Group (Large)	8.3%	7.1%	5.7%
Sector Average	13.0%	6.6%	5.4%



OPERATING RESERVE

The Board of Governors has set a minimum level for the operating reserve at \$10.0 million for the current planning cycle. The 2025/26 operating reserve is forecast to be \$63.4 million compared to the budgeted reserve of \$44.0 as at April 30, 2026 (as reported in the January 2026 P&F Committee meeting).

Operating Reserve, by Budget Year



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.

A common measure for determining the overall condition of facilities is the ratio of deferred maintenance over current replacement value of the facilities. The calculation as of February 2025, as shown in the 2025-26 Capital Budget was:

Figure H
DEFERRED MAINTENANCE TO CURRENT REPLACEMENT VALUE

		Non-Residential Buildings	Combined Residences
1	Current Replacement Value (CRV)	\$3,649 million	\$1,344 million
2	Deferred Maintenance (DM)	\$348 million	\$57 million
3	DM/CRV	9.5%	4.3%

Western is a leader among Canadian university in maintaining its facilities and dealing with deferred maintenance. This is partly due to inclusion of maintenance, modernization and infrastructure (MMI) transfer that has been included in the budget since 1995, a strategic decision that has allowed Western to address portions of deferred maintenance annually.

The MMI transfer, coupled with Facilities Renewal Funds received from MCU, will allow Western to budget \$98.9 million for planned maintenance and modernization and infrastructure expenditures in 2025-26, representing 2.6% of the Current Replacement Value of our nonresidential buildings, utilities, and infrastructure.

A target for maintenance expenditures is 2% of Current Replacement Value (CRV) to sustain the condition of our aging facilities. Our ability to achieve the 2% target over the long-term is entirely dependent on Facilities Renewal Funds received from government (MCU), and the MMI transfer. In 2025-26 Western has budgeted to complete maintenance expenditures of 1.6% compared to CRV.

REPORT ON ENDOWMENTS

Annually, a report is provided to the Property & Finance Committee that details the growth of the endowment portfolio and any underwater endowments (current market value of the funds is less than the original donated amount(s)) that exist. The University's policy with respect to management of endowments permits a temporary drawdown of endowment capital on the premise that the funds will recover.

Western administers 2,507 total endowments, with market value of \$1.418 billion as at April 30, 2025. Of the total endowments, 24 representing \$2.172 million were underwater at that point in time. Three of the 24 endowments are part of a group administered outside of the Investment Payout Policy (MAPP 2.11) in accordance with their original gift terms. These three endowments represent \$1.943 million of the \$2.172 million underwater amount. Market conditions, and the timing of receipt for new endowments may impact whether an endowment is underwater at year-end.

The annual return on the Operating & Endowment Fund was 9.4%, net after fees. The allocation for spending from the endowment grew to \$47 million in 2025, as reported in the annual financial statements.

REPORT OF THE INVESTMENT COMMITTEE

This report is provided quarterly to the Property & Finance Committee and outlines the performance of the Operating & Endowment Fund as well as recent activities of the Investment Committee. The information below is from the annual CAUBO investment survey, which compares information across all Canadian universities as at December 31. The reporting timeline from CAUBO lags a year, in order to combine all information at a comparable date.

Capital Markets

The performance of Western's portfolio is a reflection of Western's investment policies, the decisions of the Investment Committee within that policy, the recommendations and implementations of these decisions by staff and the returns that are generated in the capital markets. The table below shows annualized returns as of December 31, 2024.

Annualized returns for periods ending December 31, 2024

	1-Yr	2-Yr	3-Yr	4-Yr	5-Yr	10-Yr
S&P/TSX	21.65%	16.60%	8.58%	12.49%	11.08%	8.65%
S&P 500 (in CAD)	36.36%	29.45%	13.76%	17.07%	16.92%	15.58%
MSCI EAFE (in CAD)	13.81%	14.73%	6.68%	7.70%	7.44%	8.02%
MSCI ACWI (in CAD)	28.72%	24.03%	10.62%	12.43%	12.89%	12.19%
FTSE TMX Bond Universe	4.23%	5.45%	-0.60%	-1.09%	0.79%	1.98%
FTSE TMX 91-Day T-Bills Index	4.92%	4.81%	3.81%	2.88%	2.48%	1.71%

With the positive market returns of 2024, new gifts and net of the allocation for spending, there was positive growth in our endowments.

Total Endowments

The following table compares the 10 largest Canadian university endowments at the end of 2024 and 2023. As of December 31, 2024, Western had endowments of \$1,275.7 million. Western is the 8th largest Canadian university endowment, unchanged from last year in terms of ranking but up 15% year-over-year. Over the last five years (not displayed in the table), Western endowments have grown by 8.6% compounded annually, which puts the University in 11th place among all Canadian universities in terms five-year endowment growth rates.

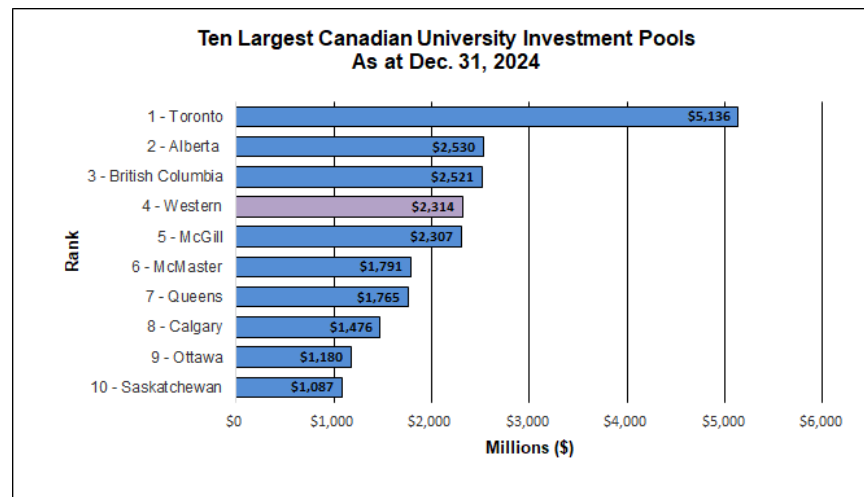
Ten Largest Canadian University Investment Pools As of December 31, 2024

	University	Endowment Value (millions)		% Change
		2024	2023	
1	Toronto	\$4,049	\$3,536	15%
2	British Columbia	\$2,521	\$2,161	17%
3	McGill	\$2,307	\$2,009	15%
4	Alberta	\$1,891	\$1,731	9%
5	Queen's	\$1,762	\$1,537	15%
6	Calgary	\$1,476	\$1,240	19%
7	McMaster	\$1,382	\$1,219	13%
8	WesternU	\$1,276	\$1,105	15%
9	Manitoba	\$1,081	\$988	9%
10	Victoria (UT)	\$1,048	\$1,009	4%
		Average change:		13.1%

The change in the value of endowments is the result of investment returns and new donations to endowments, offset by allocations for spending and administrative costs.

Total Investment Pool

As of December 31, 2024, Western had a total investment pool of \$2,314 million, the 4th largest of Canadian Universities (up from 5th in 2023). Western's investment pool for comparison to other Canadian universities includes the Operating & Endowment Fund only. The following chart displays the 10 largest Canadian University total investment pools at the end of 2024.



Investment Returns

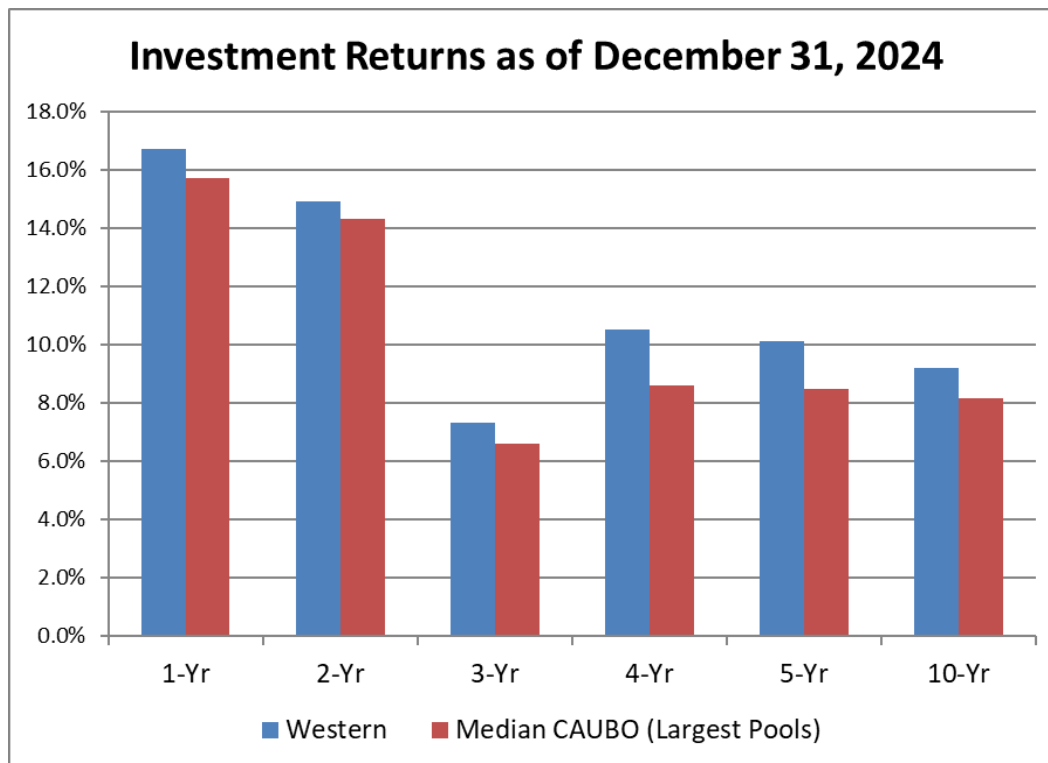
Starting with the 2016 survey, CAUBO now classifies endowments in four groups, based on asset levels. Western is in the group with the largest asset levels, along with 17 other universities. The threshold to be in that group in 2024 was \$618 million in total assets (including both endowment and operating assets). The table below compares Western returns with those of the universities in the same group. Western's performance was in the second quartile in 2024, with a 16.7% return, compared to 15.7% for the median return. Longer-term, performance was in the first quartile for all periods. Compared to the entire universe of university endowments (second table below), Western's returns were in the first quartile over all investment horizons.

**CAUBO Universe of the Largest University Investment Pools
Annualized Return as of December 31, 2024**

	1-Yr	2-Yr	3-Yr	4-Yr	5-Yr	10-Yr
95 th Percentile	18.7%	15.9%	9.7%	11.1%	10.4%	9.7%
75 th Percentile	17.0%	14.8%	7.1%	9.1%	9.1%	8.7%
Median	15.7%	14.3%	6.6%	8.6%	8.5%	8.2%
25 th Percentile	14.1%	11.4%	5.6%	7.7%	7.9%	7.7%
5 th Percentile	7.7%	7.0%	3.7%	5.3%	7.0%	6.9%
Western	16.7%	14.9%	7.3%	10.5%	10.1%	9.2%

CAUBO Total Universe of University Investment Pools
Annualized Return as of December 31, 2024

	1-Yr	2-Yr	3-Yr	4-Yr	5-Yr	10-Yr
95 th Percentile	18.6%	16.0%	8.4%	10.5%	10.3%	9.1%
75 th Percentile	16.5%	13.8%	7.0%	8.8%	8.9%	8.1%
Median	14.2%	12.3%	6.2%	8.0%	7.9%	7.7%
25 th Percentile	11.8%	10.6%	5.1%	6.4%	7.0%	6.9%
5 th Percentile	8.1%	7.0%	3.5%	4.5%	4.6%	5.2%
Western	16.7%	14.9%	7.3%	10.5%	10.1%	9.2%



MAJOR STRATEGIC OPPORTUNITIES FUND

The Major Strategic Opportunities Fund (MSOF) was established in July 2019, with an initial allocation of \$250 million from undistributed investment returns, to support the strategic objectives of Western. The Fund is subject to a minimum reserve requirement of \$100 million and annual allocations are limited to a minimum of \$10 million and a maximum of \$50 million.

The MSOF value will appreciate or decline over time, as it receives a pro-rata share of the annual investment returns/(losses) from the investment of non-endowed funds in the Operating & Endowment Fund. The value of the MSOF will decline as funds are allocated to strategic initiatives.

A report presenting the value of the MSOF, as well as policy compliance, is provided to the Property & Finance Committee annually. As at April 30, 2025, the value of the MSOF was \$431.9 million.

EMPLOYEE FUTURE BENEFITS

The obligation for 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. The most recent actuarial valuation was undertaken as at April 30, 2023, with an extrapolation of benefit obligations prepared for 2024 and 2025.

Employee future benefits are reported in the annual financial statements, which are presented to the Audit Committee annually in September. In addition, employee future benefits form part of the Long-Term Financial Trends analysis of the annual Operating and Capital Budgets, presented to the Property & Finance Committee annually in April. The obligation is sensitive to market discount rates and assumptions on medical and dental trend rates.

EMPLOYEE FUTURE BENEFITS (EFB) AS A % OF TOTAL EXPENSES

	Obligation (\$M)	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%

OPERATING BUDGET FINANCIAL REPORT

This report is provided to the Property & Finance Committee on a semi-annual basis and tracks budget versus actual revenues, expenses, and operating reserve.

ANCILLARY BUDGET(S) FINANCIAL REPORT

This report is provided to the Property & Finance Committee on a semi-annual basis and tracks budget versus actual revenues and expenses for Student Fee Funded units, Ancillaries, Academic Support Units and Associated Companies.

FUNDRAISING

This report is presented to the Board of Governors and outlines fundraising and engagement data as it relates to fundraising objectives.

Climate and Sustainability Strategy

Action: ☒ Approval ☐ Information ☐ Discussion

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

Executive Summary:

L. Logan, Vice-President (Operations & Finance), H. Hyde, Director (Office of Sustainability), and J. Cordes, Manager - Sustainability Engagement (Office of Sustainability), will present the Climate and Sustainability Strategy.

Documentation Provided:

Climate and Sustainability Strategy (2025)
Slide Deck Presentation



Climate and Sustainability Strategy

2025

Western
UNIVERSITY • CANADA





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Land Acknowledgment

We acknowledge that Western is located on the traditional lands of the Anishinaabek, Haudenosaunee, and Lunaapéewak Nations, on lands connected with the London Township and Sombra Treaties of 1796 and the Dish with One Spoon Covenant Wampum. In addition to a local urban Indigenous community, three local Indigenous communities which are located 30-45 minutes southwest of Western include: Chippewas of the Thames First Nation, Oneida Nation of the Thames and Munsee Delaware First Nation. Each community is distinct in its culture, history, ceremonies, stories and languages.

We acknowledge and respect the enduring relationship Indigenous Peoples have to this beautiful land, recognizing them as stewards of the land for generations and being at the forefront of environmental conservation and climate change mitigation.

As we launch our new [Climate and Sustainability Strategy](#), we appreciate that we have much to learn from Indigenous knowledges. We must reflect critically on the past and accept truth before moving towards reconciliation with Indigenous Peoples. With this mindset, we look to create a regenerative future together where everyone can thrive.



Medway Creek



Welcome

Message from the President

As we embark on this new Climate and Sustainability Strategy, I'm excited to introduce a new chapter for sustainability at Western. Each of you cares deeply about our community and our planet. You have fantastic ideas, and because of that, collectively, we can make a big impact.

This work has never been more important. The problem of climate change is enormously complex. It's not just about the environment – it affects health, economics, social justice, public policy, geo-politics, and a host of other issues.

The complexity is well represented in the Sustainable Development Goals – or SDGs – launched in 2015. The SDGs continue to be an urgent call to action for our global community, and they serve as our guidepost for sustainability at Western.

We are proud of the progress we've made in the past decade. From deep energy retrofits to building low-carbon infrastructure to creating a living lab on campus, we've seen our vision of a more sustainable Western come to life. These advancements have been made through the dedication of our campus community and the ongoing innovation and research within our faculties.

The Western Strategic Plan, *Towards Western at 150*, captures our community's collective commitment, energy, and aspirations, recognizing sustainability as an imperative. This new Climate and Sustainability Strategy will shape the university and our campus for generations. It will allow Western to move beyond sustainability and embrace a regenerative approach – one where we not only sustain life but actively enhance and restore it. We need your energy, ideas, and collaboration to reimagine the future and make it happen.

Finally, I want to thank the members of the President's Advisory Committee on the Environment and Sustainability (PACES) and the leaders across campus for the work you've already done and the work that is to come as we continue our journey towards a regenerative future.

Alan Shepard

President & Vice-Chancellor

Message from the Co-Chairs of PACES

Western plays a crucial role within a broader ecosystem. Therefore, we have a responsibility to exemplify promising practices in campus operations, education, and research innovation.

Our community recognizes the profound connection between the health of our planet and our society. We understand we are all catalysts for change, empowered in our individual and collective efforts to support all forms of life.

With the introduction of our new Climate and Sustainability Strategy, we are proud to share how our community — students, faculty, and staff — has collaboratively engaged in a thorough process to redefine and enhance our vision to nurture the next generation of changemakers.

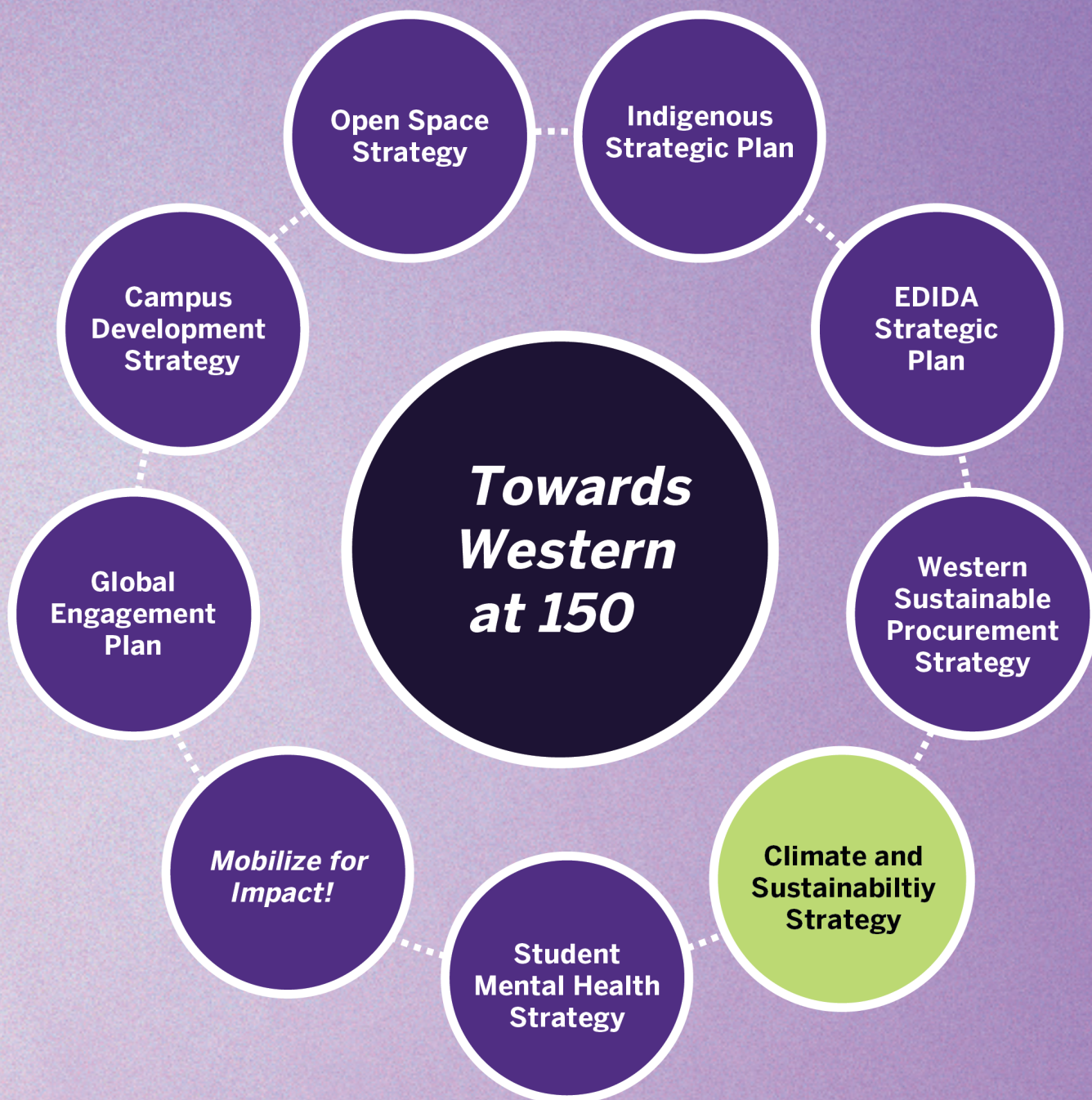
This strategy is anchored by six guiding principles that reflect our shared commitments and core beliefs. These principles emphasize the importance of learning from historical contexts, protecting the environment, fostering thriving ecosystems, and empowering individuals and communities to work together in pursuit of transformative change. Together, they provide a foundation for aligning our actions with the university's strategic vision and shaping a healthy, just, and regenerative future.

Building upon Towards Western at 150 and other supporting strategies at Western, our Climate and Sustainability Strategy defines key priorities and ambitions for collaborative problem-solving, equipping future leaders with the essential skills and knowledge to address the climate and sustainability challenges of our time, and advancing our operational initiatives to enhance ecological systems, decarbonize campus operations, and promote a circular economy. The strategy underpins our teaching, research, and the student experience, as well as our connection with London and our region. It will guide our partnerships around the world.

With a renewed commitment to planetary health and contributing to a regenerative future, this transformation calls for a behavioural shift within our community that will permeate our educational, research, and operational practices. We invite you to join us in activating this strategy and becoming agents of positive change.

Lynn Logan
Vice-President
Operations & Finance

Florentine Strzelczyk
Provost & Vice-President
Academic





Sustainability at Western

Western's Commitment to Sustainability

Western upholds a steadfast commitment to addressing sustainability challenges, both on campus and on a broader scale.

We recognize climate change and biodiversity loss are among the most pressing crises of our time, and the health of all living things and the planet are deeply interconnected.

There is much to be proud of at Western, and our achievements are the result of hard work and interdisciplinary collaboration across Western's entire community — faculty, staff, students, and partners.

As a leading Canadian university, we have a crucial role in fostering a regenerative future and empowering the next generation of thought leaders and problem solvers. Our efforts are aligned with the 17 Sustainable Development Goals (SDGs), which provide a globally shared blueprint for peace, prosperity, and environmental stewardship. Through our teaching, research, campus operations, and community partnerships, we are advancing progress on these goals. Collaborating with peer organizations, industry partners, and our communities is essential to scaling our impact and ensuring our contributions extend well beyond campus.

Our campus itself is a living example of ecological diversity and is situated just south of the merging of the Thames River and Medway Creek, surrounded by the Thames River Watershed and naturalized riparian corridor. It spans over 450 hectares, encompasses old-growth Carolinian forest, the Medway Valley Heritage Forest, as well as numerous gardens and expansive open spaces. We have a responsibility to protect and enhance



these vital ecosystems, and through this new strategy we seek to build a regenerative campus that not only preserves, but enhances, the natural world around us.

Central to the work ahead is our recognition of the longstanding stewardship and knowledges of Indigenous Peoples, whose deep connections to the land, waters, and sky offer essential guidance for caring for the natural environment.

We also know connecting with nature can strengthen everyone's well-being, cultivate belonging, and reinforce our shared responsibility to care for each other and the environment. By enhancing access to high-quality natural spaces, supporting experiential learning and research through initiatives like Campus as a Living Lab, and creating opportunities to learn from both non-Indigenous and Indigenous knowledges, we aim to nurture a community of environmental stewards and changemakers.

Sustainability by the Numbers (2025)

32%

GHG Emissions Reduction

Between 2005 and 2024, Western has reduced greenhouse gas emissions by 32% while campus grew in size by 39% during the same period.

13

**LEED
Certified
Buildings**

1,900⁺

**Research Projects
Related to SDGs**

40%



**of Western's residence
menus are plant based**

11



Years

For the past 11 years Western has maintained a Gold STARS rating, and in 2025 became the second Canadian university to achieve a STARS Gold rating under the new, more stringent version of STARS.

39%

**Waste Diverted
from Landfill**

1,694 MT
of waste
diverted from
landfill in 2024.



85%

Future Ready

In 2023/24, over 85% of undergraduate degrees included sustainability-focused learning requirements.

2,700⁺

Sustainability Courses

Western offers more than 2,700 undergraduate courses that relate to the SDGs.



25⁺

Projects

Western's Campus as a Living Lab program has supported more than 25 unique projects across 6 different faculties.

61

Projects

Over the last two years, Western's \$1M Sustainable Impact Fund supported 61 student, faculty, and staff led projects advancing sustainability on campus.

14TH

In the World

In 2025, ranked 14th globally in *Times Higher Education* Impact Rankings, tied for third in Canada.

33

Student Groups & Clubs form the Western Environment and Sustainability Network and are advancing sustainability on campus.

Western by the Numbers

106**Buildings****40,968****FTE Students****460****Hectares of Land****\$1.7****Billion in Revenue****894,900 m²****Built Space**

While we've made significant investments in our physical infrastructure to improve energy efficiency, decarbonize our assets, regenerate biodiversity, and reduce our environmental impact, we find ourselves at a pivotal moment and there is much more to be done.

Feedback from our community tells us that advancing climate action, promoting circularity, regenerating ecosystems, and supporting the health and well-being of our lands and communities is paramount.

In response, our new Climate and Sustainability Strategy provides the foundation for bold action — enabling us to take courageous steps, foster innovative interdisciplinary approaches, and equip students with the knowledge and skills needed to address our most urgent sustainability challenges, accelerate progress, and foster positive change both on campus and in the broader community.

“Through our collective efforts and personal commitments, we can bring our highest aspirations to life.”

Heather Hyde

Director of Sustainability

Get Involved & Learn More!

Sustainable Commitments

- [Academic Health Institutions' Declaration on Planetary Health, Schulich School of Medicine & Dentistry](#)
- [COU Pledge - Ontario Universities Committed to a Greener World](#)
- [Forward Food Pledge](#)
- [Investing to Address Climate Change: A Charter for Canadian Universities](#)
- [Paris Pledge for Action](#)
- [Talloires Declaration](#)
- [United Nations Institute for Training and Research \(UNITAR\) agreement to support sustainable development through education and research](#)

Courses & Research

- [Certificate in Climate Change & Society](#)
- [Connecting for Climate Change Action](#)
- [Ecological Justice and Climate Certificate](#)
- [Experiential Learning](#)
- [Master's in Environment and Sustainability](#)
- [Masters and PhD theses](#)
- [Research Projects](#)
- [Sustainability Courses](#)

Related Strategies

- [Campus Development Strategy](#)
- [EDIDA Strategic Plan](#)
- [Global Engagement Plan](#)
- [Indigenous Strategic Plan](#)
- [*Mobilize for Impact!*](#)
- [Open Space Strategy](#)
- [Responsible Investing](#)
- [Student Mental Health Strategy](#)
- [*Towards Western at 150*](#)
- [Western Sustainable Procurement Strategy](#)

Sustainability Reports & Initiatives

- [Campus as a Living Lab](#)
- [Free Store](#)
- [GHG Emissions](#)
- [Gold STARS Ratings](#)
- [Green Buildings](#)
- [Riverfest](#)
- [Student Network Groups](#)
- [The SDGs at Western](#)
- [Waste Reduction & Diversion](#)
- [Western Sustainability](#)
- [Western Sustainable Impact Fund](#)



Engagement



Shaping the Strategy Together

During the 2024 – 2025 academic year, nearly 4,000 students, staff, and faculty from all areas of campus participated in consultations on a new Climate and Sustainability Strategy. Over 3,200 individuals responded to the campus input survey, representing all faculties at Western.

PACES has demonstrated leadership by actively shaping this strategy and setting priorities, guiding a meaningful cross-campus consultation that included a survey, keynote, and panel event, and six targeted workshops engaging students, staff, and faculty in each session.

“I would like to see more opportunities for students across all programs to learn more about sustainability and gain skills that can be applied in our careers.”

— **Ethan Milroy**
Student



“It’s important to emphasize that sustainability is an interdisciplinary issue. You don’t need a degree in environmental science to make a big impact because there are so many ways to get involved. You can take your passion for the environment and turn it into a career.”

— **Paul Mensink**
Assistant Professor

Student leaders through the Western Environment and Sustainability Network hosted weekly booths in Weldon and Taylor Libraries during the survey period, encouraging student participation in the survey and consultations.

Faculty, staff, and students from all areas of campus have participated in complex conversations, providing valuable and diverse perspectives.

All consultations highlighted important aspirations and opportunities for embedding climate action and sustainability within all that we do.

In the Fall of 2025, we hosted two town halls to share the draft strategy and gather more feedback. This was followed by reviews with PACES and presentations to Senate and the Board of Governors in early 2026.

“To be a part of the Western community is to care about strategic plans like this one, and starting education and awareness early is key to that mindset.”

— **Emilie Kalaydjian**

University Students' Council (USC) President - 2024-2025

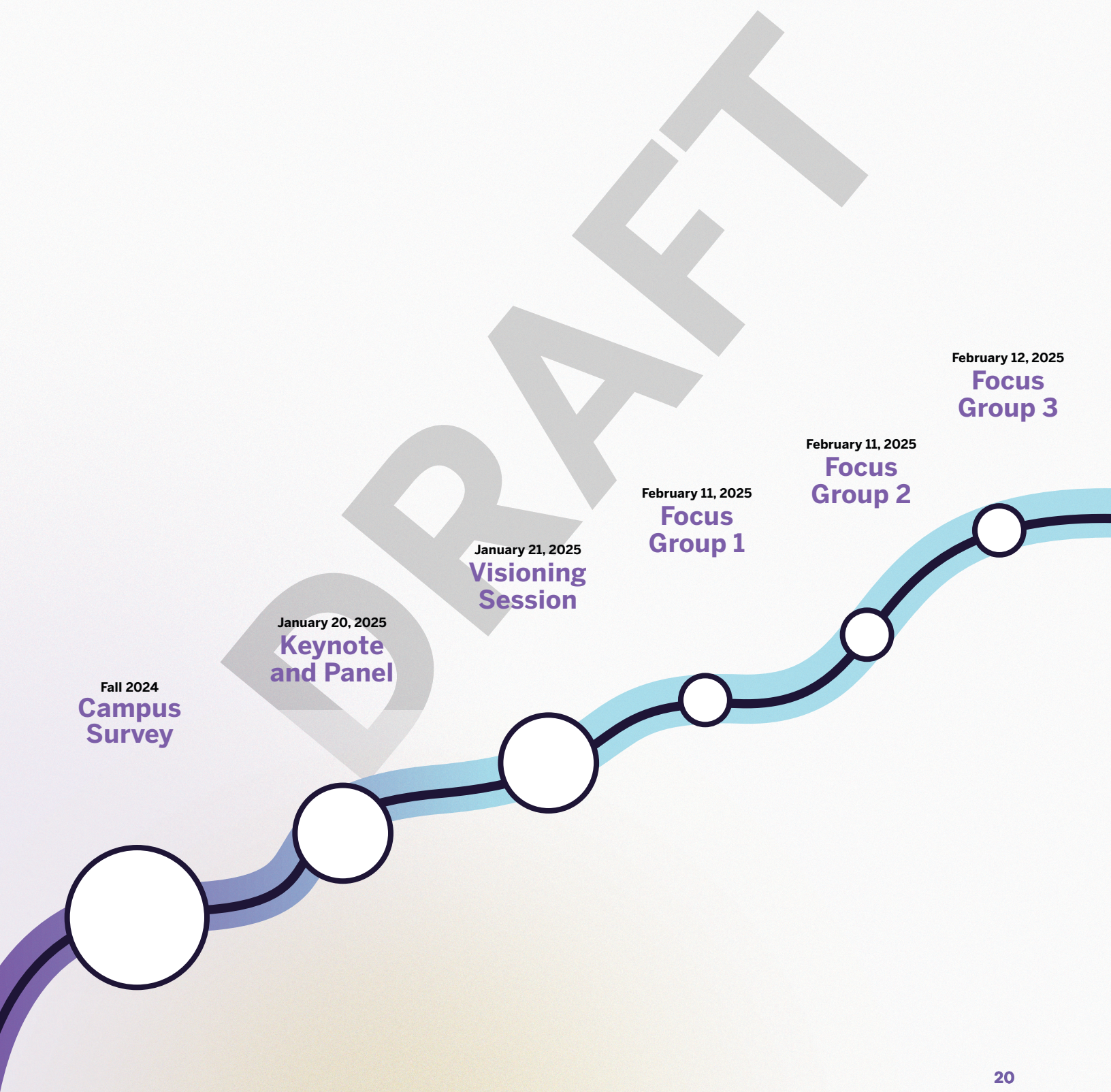
“Wisdom from heart is integral. If you're making solutions from a place of fear and anxiety, what kinds of solutions will those be, compared to solutions created from a place of love, understanding, of land, and nature.”

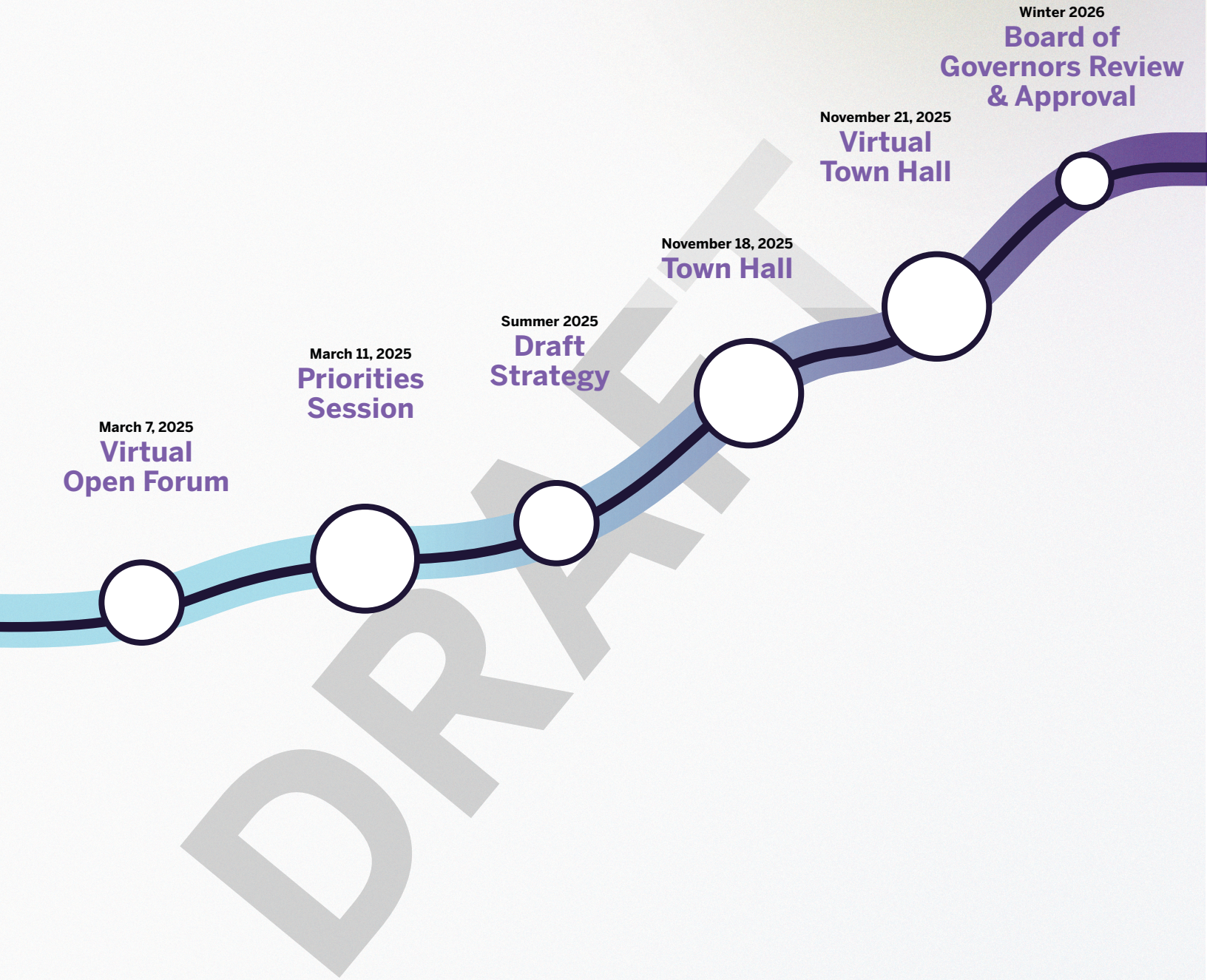
— **Nicole Redvers**

Associate Professor



Engagement Timeline





Vision

Rooted in our culture of curiosity and innovation,
we strive for a regenerative future that supports
the health and well-being of the planet, its natural
systems, and our community.

We will equip the next generation of
changemakers with the knowledge and tools
to address the most pressing climate and
sustainability challenges of our time.





Guiding Principles

Guiding Principles

Planetary Health

Recognize the health of natural systems and humans is intrinsically linked. Thus, safeguarding the environment and supporting thriving ecosystems is our collective responsibility.

Stewardship

Honour reciprocal relationships with the natural world by behaving in ways that enhance ecosystems, advance reconciliation with Indigenous Peoples, and respect future generations.

Courage

Lead with heart, respect, empathy, and humility. Individually and collectively, uplift curiosity, take risks, and support transformative ideas and actions to influence all areas of university life.

Purpose

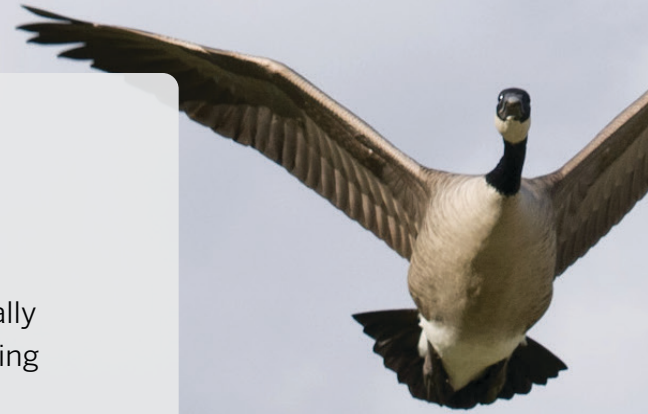
Choose deliberate action, set clear targets, and align with Western strategies to advance and measure progress on our climate and sustainability ambitions.

Interdisciplinarity

Strengthen connections across the university to embed sustainability as an imperative in all that we do.

Collaboration

Build and deepen relationships with local and global partners as they are vital to achieving greater societal impact.



Priorities

Priorities

Western's new Climate and Sustainability Strategy is organized around three priorities that reflect our greatest opportunities towards a regenerative future — one that supports the health and well-being of the planet, its natural systems, and our community.

Education & Research



Regenerative Campus



Healthy & Connected Community





WinDEEE

The Wind Engineering, Energy and Environment Research Institute (WinDEEE RI) was established in 2011 as a clear recognition of novel opportunities in wind research at Western related to the emergence of the world's first three-dimensional testing chamber, the WinDEEE Research Facility, and the potential to promote innovative research and extensive collaborations nationally and internationally.

Education & Research

Western will advance research and knowledge that drives societal progress toward a more regenerative future, while equipping students across all disciplines with the knowledge, experience, skills, and expertise to lead in climate and sustainability.

This priority builds on Western's Strategic Plan, *Towards Western at 150*, and the Research Strategic Plan, *Mobilize for Impact!*

Bringing greater focus on fostering stronger collaboration, advancing sustainability knowledge, and cultivating the conditions necessary for developing interdisciplinary solutions to address climate change.

Ambitions

- Increase student access to sustainability education and enhance course offerings.
- Secure experiential learning opportunities in sustainability that empower students to drive meaningful climate action.
- Catalyze thought leadership in sustainability research and innovation, building towards a Western Institute for Sustainability.

Big Moves

CAMPUS AS A LIVING LAB

expanded and leveraged to apply faculty and student expertise in shaping sustainable outcomes for Western

COMMUNITY IMPACT

opportunities are cultivated for all students to lead climate and sustainability action

INSTITUTE FOR SUSTAINABILITY

established over the long term to advance interdisciplinary knowledge on complex climate and sustainability challenges

Increase student access to sustainability education and expand course and program offerings

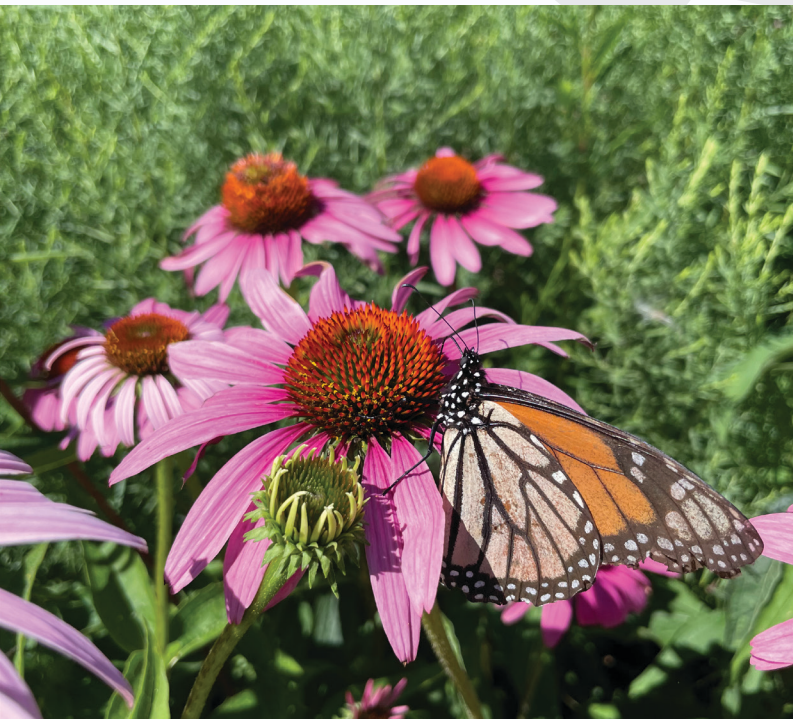
At Western, we are determined to advance sustainability education and prepare students to create a regenerative future.

Over time, we will continue to grow a generation of climate and sustainability changemakers, ready to tackle the complex challenges ahead.

With over 2,700 courses and 2,000 masters and PhD theses linked to the SDGs across our campus, our commitment is clear. The education and opportunities encountered at Western will equip students with the skills and knowledge to make a lasting, positive impact on society, positioning them to enter a competitive job market with specialized skills and up-to-date knowledge on sustainability and climate issues.

Building on this robust foundation, we will:

- Continue to enhance existing programs and develop new ones related to climate and sustainability that are innovative, interdisciplinary, and closely aligned with industry and community needs, such as the Certificate in Climate Change & Society and the Ecological Justice and Climate Ethics Certificate.
- Work with industry and community partners to identify key skills in demand and integrate these insights into sustainability curricula when designing new programs and innovating existing ones.
- Collaborate with the Office of Indigenous Initiatives and the Centre for Teaching and Learning to introduce a sustainability theme, expand scholarship opportunities, and update curricula to embed climate and sustainability topics.



Secure experiential learning opportunities in sustainability that empower students to drive meaningful climate action

We will continue to foster hands-on, interdisciplinary experiences that encourage students and researchers to apply knowledge, strengthen local and global partnerships, and accelerate progress toward a more sustainable future.

In Western's strategic plan, *Towards Western at 150*, we pledged to offer every undergraduate student intensive experiential learning opportunities, such as the Master's in Environment and Sustainability program — an accelerated, interdisciplinary course-based Master's degree program with a co-operative work placement term.

In recent years, Western researchers have participated in over 1,900 projects aligned with the SDGs. By making this work more visible and interconnected, we will empower students and researchers to break down silos, build on each other's insights, and accelerate progress in the climate and sustainability arena.

To enrich the student experience and broaden opportunities, we will:

- Expand land-based, experiential, and work-integrated learning opportunities that inspire environmental stewardship and strengthen the connection between communities and the natural environment.
- Seek partnerships with sustainability-focused industries, businesses, and organizations to offer internships, co-ops and work-integrated learning opportunities for undergraduate and graduate students.
- Engage industry and community partners in student-led research projects addressing climate and sustainability challenges.



Catalyze thought leadership in sustainability research and innovation, building towards a Western Institute for Sustainability

We aspire to position Western as a go-to destination for sustainability research, innovation, funding, and partnerships by strengthening collaboration across all disciplines and building upon current programs and clusters of excellence. These platforms will serve as a stepping stone for our long-term ambition of establishing a Western Institute for Sustainability.

As a founding member of the U15 — Canada's leading research universities — Western recognizes the critical role of research and innovation in addressing the challenges of climate change and sustainability.

Clusters for transformative, interdisciplinary research have emerged at Western — such as the Canadian Severe Storms Laboratory (CSSL), the Wind Engineering, Energy and Environment Research Institute (WinEEE RI), the Centre for Sustainable Curating, and others — uniting scholars, students, and external partners to spark innovation, drive knowledge exchange, and accelerate real-world solutions.

By building on this work, Western will:

- Cultivate a culture of sustainability research across disciplines, encouraging scholars to set ambitious goals that address climate and sustainability challenges, using sustainable methods.
- Continue to catalog and publicize research activity to enhance visibility, promote collaboration, and break down disciplinary silos.
- Support and connect researchers through internal funding, dedicated Undergraduate Summer Research Internships, and convening events (e.g., think tanks, symposia, working groups) focused on sustainability themes.
- Advance research capacity in sustainability through strategic selection of Canada Research Chairs, collaborative faculty appointments, and support for postdoctoral fellows and graduate students.
- Align sustainability research efforts with institutional goals, identifying areas for improvement and setting measurable targets that elevate Western's visibility and impact.





Sustainable Resource Management Living Lab

Photo credit: Danielle Petti

The Sustainable Resource Management (SRM) Living Lab is a community garden area with its own hydrological catchment so that environmental parameters such as nutrient losses via runoff, erosion, and leaching can be monitored. Monitoring will happen year-round to document how phosphorus and nitrogen cycle seasonally under a changing climate. The site will help bridge scientific research, artistic inquiry, and real-world gardening practices to advance evidence-based approaches for urban sustainability.

Canadian Severe Storms Laboratory

The Canadian Severe Storms Laboratory (CSSL) was founded in 2024 as a partnership between Western and social impact fund ImpactWX, beginning a new era in severe storms research and strengthening Canada's reputation globally as a leader in the field.





Regenerative Campus

Western aspires to operate and maintain a campus that has a positive impact each day.

Our actions have impact. We recognize that alongside climate change, biodiversity loss is one of the most pressing crises of our time. The health of our world depends on the protection of nature. Considering nature in daily decisions on how we build, operate, and maintain our campus means we can start to regenerate natural systems, adapt to a changing climate, and restore habitats for living and non-living species.

For our daily operations and interactions to contribute to a vibrant and resilient environment, we will:

Ambitions

- Strengthen long-term climate resilience across campus.
- Enhance ecosystem health and biodiversity across campus.
- Decarbonize campus infrastructure and built assets.
- Measure and curtail Scope 3 greenhouse gas emissions through more sustainable operations.
- Foster a culture of material circularity, ensuring waste generation decreases faster than campus growth.

Big Moves

ECOLOGICAL ASSESSMENT

completed for priority areas such as along Medway Creek, Thames River, and Medway Valley Heritage Forest

NET ZERO EMISSIONS

from campus operations by 2050 and 45% reduction by 2030, compared to 2005 levels aligned with *Towards Western at 150* (2021)

60% WASTE DIVERSION

by 2035 through adoption of circular practices and collaborative waste management initiatives

SCOPE 3 EMISSIONS

baseline and reduction plan established

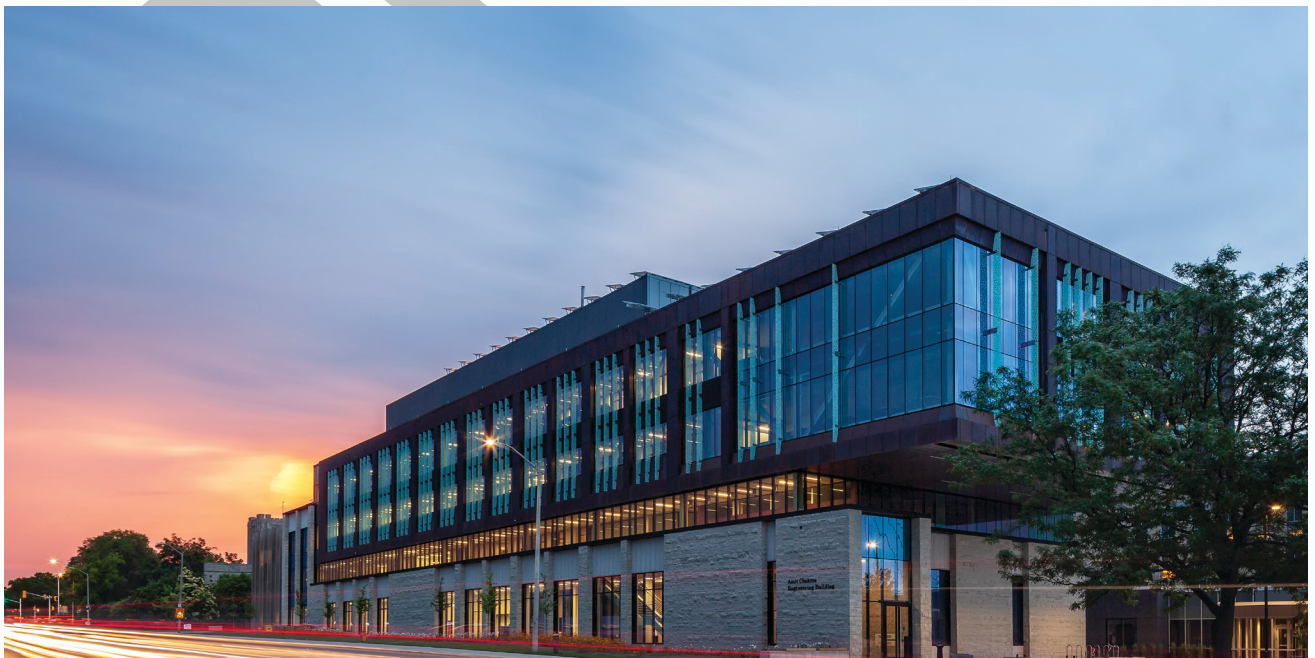
Strengthen long-term climate resilience across campus

Our objective is to identify and assess climate risks, chart adaptation pathways, and strengthen campus resilience to ensure long-term operational continuity.

Globally, nations, organizations, communities, and individuals are facing the impacts of climate change, which are projected to intensify in both gravity and scale over the coming decades. We have already observed a rise in annual temperatures, an increase in the severity and consequences of storms, and a heightened vulnerability of local energy infrastructure.

As critical next steps to improve Western's climate resilience, we aspire to:

- Define resilience and desired outcomes in the context of Western and determine the climate scenario used for resilience risk assessments.
- Assess the resilience of key campus infrastructure and built assets against unpredictable climate changes, flooding, and fluctuations in energy sources.
- Incorporate resilience requirements into planning and [Sustainable Design Guidelines](#) for new construction projects, major renovations, and existing building upgrades.
- Identify student and other campus populations most vulnerable to acute shocks, particularly those affected by socioeconomic, health, housing, and demographic disparities, and integrate their needs into resilience planning and support systems.



Enhance ecosystem health and biodiversity across campus

We will encourage ecological regeneration and enhanced function of priority habitats on campus over time.

A holistic approach to ecosystem health gives us a clearer picture of how campus landscapes function and creates opportunities for research, teaching, and engagement. It aligns with our academic mission and focuses on indicators we can responsibly influence, while collaborating on broader watershed health through partnerships with the City of London, the Upper Thames River Conservation Authority, and other organizations.

Ecological health supports the overall resilience and functionality of natural systems. It includes biodiversity as a key indicator, but also considers habitat quality, soil and water health, ecological processes like carbon sequestration and pollination, and reducing stressors such as invasive species and pollution.

Our campus contains natural areas which hold significant ecological and cultural value. It is important that we work to strengthen their integrity and health, so they continue to function as resilient ecosystems that support biodiversity and provide opportunities for learning and connection. As such, we will:

- Complete an ecological assessment of priority areas such as along Medway Creek, Thames River, and Medway Valley Heritage Forest.
- Collaborate with faculty, students, and staff across campus to enhance the ecological functions of priority habitats through programs like Campus as a Living Lab.
- Incorporate ecological health and biodiversity into overall campus planning, in alignment with the [Open Space Strategy](#), [Campus Development Strategy](#), and other planning guidelines.
- Connect the existing natural areas on campus by introducing smaller natural features such as pollinator gardens and bird-friendly windows.



Decarbonize campus infrastructure and built assets

We are dedicated to achieving net-zero emissions for campus operations by 2050 and at least 45% reduction (over 2005) by 2030.

In 2025 we achieved a 32% reduction in GHG emissions compared to 2005 levels, putting us on track to meet our 2030 target.

With the unwavering commitment and dedication of our capital planning and facilities management teams, we continue to do our part to reduce global emissions and mitigate climate change effects. Our commitment to a net-zero transition involves transforming our campus energy system, designing low-carbon buildings, and extending the life of our existing buildings.

To meet our 2030 and 2050 targets, we will:

- Continue the deep energy retrofit program to enhance the long-term performance of existing building assets, making them more energy-efficient and resilient.
- Advance the decarbonization of campus energy infrastructure by transitioning to cleaner, more efficient fuel sources and incorporating renewable energy solutions.
- Update Sustainable Design Guidelines for new construction projects and existing building upgrades, optimizing space utilization, and set performance limits for energy use, operational carbon, and embodied carbon emissions.
- Educate building users on green building principles and the performance outcomes of sustainable buildings on campus.



Measure and curtail Scope 3 greenhouse gas emissions through more sustainable operations

We aim to measure and benchmark our Scope 3 emissions. With this knowledge, we can inform and empower our community to make better decisions that reduce our emissions.

Working towards decarbonizing daily operations is a priority for Western. We recognize that we can influence the supply chain through our procurement practices and acknowledge our responsibility to continually improve these practices to reach more sustainable outcomes.

To understand and curb our Scope 3 emissions related to commuting, business travel, the goods and services we purchase, waste disposal, and investments, we strive to:

- Identify sources of Scope 3 emissions to understand the greatest opportunities for reductions.
- Enhance campus infrastructure to support adoption of active and sustainable transportation in alignment with the Campus Development Strategy (formerly Campus Master Plan) and Open Space Strategy.
- Encourage the reduction of single-occupancy vehicle use on campus by promoting sustainable commuting and active transportation options.
- Develop, implement, and monitor programs, tools and resources aimed at reducing emissions from business travel.
- Continue to strengthen sustainable procurement by integrating carbon and environmental metrics alongside qualitative factors into cost analyses and decision-making for major goods and services, prioritizing environmentally friendly products with lower carbon footprints.
- Continue to integrate responsible investing practices throughout our investment processes and decision making, committing to reducing the carbon intensity of our Operating & Endowment Fund by at least 45% by 2030.



Foster a culture of material circularity, ensuring waste generation decreases even as campus grows

We are committed to achieving 60% waste diversion by 2035 and fostering a culture of material circularity, reuse, and resource sharing on campus.

In 2024, our waste minimization and diversion initiatives led to a 39% diversion rate and we remain committed to improving our diversion rate and transparency around waste and circularity data. Key efforts included standardized signage at waste stations, provision of green bins at all campus eateries, enhancements to waste collection and storage systems, and the Choose2Reuse (C2R) program in residence dining halls.

Our ongoing efforts to reduce waste and eliminate single-use plastics in eateries will be strengthened through effective communication and heightened awareness of our initiatives and their outcomes.

While these programs mark important progress, we recognize more work is needed. Waste reduction and material reuse continue to be top priorities for our students, faculty, and staff.

To build on this progress, we will:

- Increase community awareness and participation in waste reduction, reuse, recycling and diversion through a sustained campaign promoting best practices.
- Create a mechanism for academic resource sharing and reuse to eliminate redundant purchases and wasted materials, as part of a comprehensive resource circularity plan.
- Promote student awareness, participation, and access to reuse and waste diversion programs on campus.
- Phase out single-use plastics and other disposable items through expanded programming and engagement with partners and service providers.
- Expand organics collection and composting across campus and food services to increase participation and reduce landfill waste.





Agrovoltaics

The purpose of the Agrovoltaics project, in partnership with Food Security Structures Canada (FSSC), Green Magic Homes, Adragone Aeroponics, Vertical Green, and SolarCities is to develop and demonstrate an integrated, solar-powered agrivoltaic-agrotunnel hybrid system that provides zero carbon and zero waste sustainable nutritious food all year, anywhere in Canada.



Talbot Green Roof

The Talbot College Green Roof was originally installed in 2013 for a multi-faculty project examining the impacts of green roofs on storm water management and urban climate.

The roof also hosts instrumentation from Physics & Astronomy used to measure aerosols in the atmosphere from forest fires and other sources to study their transport and impact on ozone and fog and cloud formation. The roof continues to be used by faculty in Social Sciences and Science to support undergraduate and graduate learning and for research related to evaluating the performance of numerical models that can represent the impacts of green roofs at the urban scale.



Healthy & Connected Community

Guided by both non-Indigenous and Indigenous knowledges, Western is committed to fostering a healthy and connected community where individuals have a meaningful connection to nature and feel a sense of belonging and shared responsibility for the environment.

We recognize a sense of belonging motivates people to take care of themselves and each other, engage with sustainability efforts, and build community through shared experiences.

Opportunities to connect with the natural environment – both on and off campus — deepen our understanding of ecosystems and the interdependence of all living things. These experiences enhance mental, emotional, and physical well-being, while strengthening the bonds within our community.

To support a healthy, vibrant, and thriving community, we aim to:

Ambitions

- Integrate Indigenous land-based learning by working with Elders and Knowledge Keepers to deepen understanding and connection to place.
- Promote mental, emotional, and physical well-being through meaningful experiences in nature.
- Help people find relief from, and cope with, eco-distress and climate anxiety.
- Broaden awareness of Western's climate and sustainability initiatives, programming, and networks to encourage greater engagement and participation.

Big Moves

NATURAL SPACES

celebrate biodiversity and ecosystem functions through signage, education, and stewardship, and connect the community to nature

LAND-BASED LEARNING & EXPERIENCES

advanced through collaborative partnerships with Indigenous leaders and others in support of mental health, well-being, and planetary health

STUDENT ENGAGEMENT WORKING GROUP

is established to collaborate with PACES

Integrate Indigenous land-based learning by working with Elders and Knowledge Keepers to deepen understanding and connection to place

We aim to cultivate meaningful and reciprocal relationships with local Indigenous communities, Elders, and Knowledge Keepers to share traditional ecological knowledge, guide preservation and restoration of natural environments, and deepen connections to the natural world.

Western's Indigenous Strategic Plan sets out the priority to nurture an inclusive campus culture that values Indigenous Peoples, perspectives and ways of knowing. Embracing aspects of longstanding practices in Indigenous communities, such as land-based learning, connects us to place and offers healing and comfort.

In collaboration with the Office of Indigenous Initiatives, we will:

- Further land-based learning opportunities, resources, and awareness to integrate cultural teachings, and advance intergenerational knowledge transfer.
- Amplify the visibility of sustainability-related activities and events organized by the Office of Sustainability and the Office of Indigenous Initiatives.
- Increase reach and evolve courses like Connecting for Climate Change Action, a course that uses a storytelling approach to bring western and Indigenous Sciences together to educate and motivate action on climate change.



Promote mental, emotional, and physical well-being through meaningful experiences in nature

We will encourage our community to spend time in nature, in the hopes these experiences build stronger community connections and deepen our appreciation of how closely our lives are intertwined with the natural world.

High-quality natural environments — prominent, interconnected, and accessible year-round across campus — offer significant benefits for mental, emotional, and physical well-being. Time spent in nature can reduce stress, improve mood, enhance cognitive function, and encourage physical activity, which in turn supports healthier lifestyle choices.

Western will continue to promote engaging with nature in ways that encourage learning from and caring for the land we are situated on.

To improve health outcomes and support holistic well-being across our community — and in alignment with Western's Open Space Strategy — we will:

- Enhance access to natural environments across campus in all seasons, and expand outdoor spaces for work, study, relaxation, and recreation.
- Promote nature-based programming through formal and informal activities that encourage enjoyment, experiential learning, and research, such as the Campus as a Living Lab,
- Strengthen health education and support services beyond the classroom to encourage lifelong healthy habits and holistic well-being.
- Continue to provide sustainable food options and raise awareness about the connections between food, human health, and environmental health.



● Help people find relief from, and cope with, eco-distress and climate anxiety

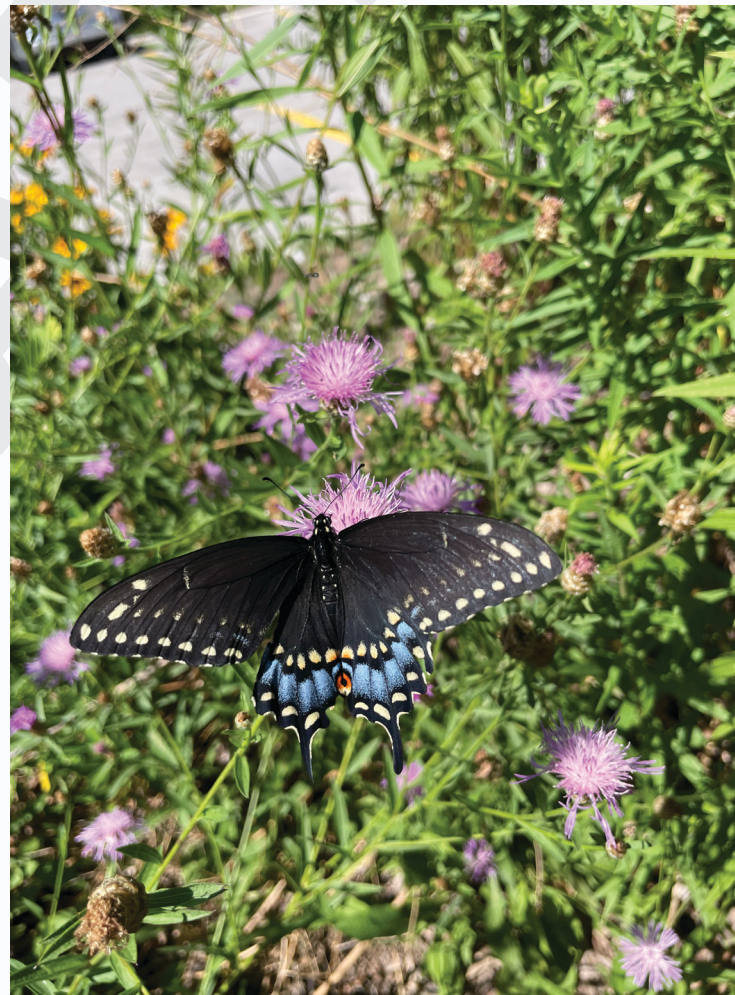
Building on the efforts of the [Student Mental Health Strategy](#), we will continue to support students, faculty, and staff through a community of care, including counselling and mental health services.

We will work to develop, update, and share resources designed to support those experiencing eco-distress and climate anxiety.

There is growing awareness that individuals can feel overwhelmed and powerless in the face of environmental challenges such as forest fires, extreme weather events, habitat loss, pollution, and other events. We recognize the impact of eco-distress and climate anxiety on the academic, professional, and personal well-being of Western's community, and the barriers these challenges can pose to success.

To help people find relief and build personal resilience, we will:

- Work with mental health professionals to understand training, resources, and outreach needed to address climate-related mental health challenges.
- Offer the wider Western community accessible, self-directed resources and peer-to-peer support to help manage climate-related mental health concerns.



Broaden awareness of Western's climate and sustainability

● initiatives, programming, and networks to encourage greater engagement and participation

To support this ambition, Western will launch a comprehensive campaign to raise greater awareness about our long-standing climate and sustainability initiatives and invite active involvement.

From the moment new students, staff, and faculty join Western, they will be introduced to our sustainability goals and encouraged to take part in shaping a more regenerative future. This ongoing campaign will ensure sustainability remains a core value throughout their journey at Western, fostering a culture of environmental stewardship and collective agency.

To increase awareness, interaction, and participation in Western's sustainability efforts, we will:

- Develop and implement a comprehensive communication strategy aimed at increasing reach, engaging with the community, promoting sustainability initiatives, and encouraging adoption of sustainable practices.
- Embed sustainability priorities into orientation and onboarding processes to reach every new community member at Western.
- Collaborate with faculty to highlight and integrate Western's sustainability initiatives, groups, and events into classroom discussions and learning experiences.
- Engage the broader community in sustainability education, training, events, activities, and peer-to-peer support outside the classroom to reinforce a common understanding and commitment to sustainability, climate action, regeneration, and planetary health.





Big Moves

To ensure communication, transparency, and accountability, the Office of Sustainability will publish annual reports that measure progress, highlight milestones, report on key metrics in alignment with the strategy.

Education & Research

CAMPUS AS A LIVING LAB

expanded and leveraged to apply faculty and student expertise in shaping sustainable outcomes for Western

COMMUNITY IMPACT

opportunities are cultivated for all students to lead climate and sustainability action

INSTITUTE FOR SUSTAINABILITY

established over the long term to advance interdisciplinary knowledge on complex climate and sustainability challenges

Regenerative Campus

ECOLOGICAL ASSESSMENT

completed for priority areas such as along Medway Creek, Thames River, and Medway Valley Heritage Forest

NET ZERO EMISSIONS

from campus operations by 2050 and 45% reduction by 2030, compared to 2005 levels aligned with Towards Western at 150 (2021)

60% WASTE DIVERSION

by 2035 through adoption of circular practices and collaborative waste management initiatives

SCOPE 3 EMISSIONS

baseline and reduction plan established

Healthy & Connected Community

NATURAL SPACES

celebrate biodiversity and ecosystem functions through signage, education, and stewardship, and connect the community to nature

LAND-BASED LEARNING & EXPERIENCES

advanced through collaborative partnerships with Indigenous leaders and others in support of mental health, well-being, and planetary health

STUDENT ENGAGEMENT WORKING GROUP

is established to collaborate with PACES



Delivering the Strategy



Dynamic By Design

Western's Climate and Sustainability Strategy reflects our commitment to practical, collaborative action to advance sustainability both on campus and beyond.

Rooted in academic excellence and community engagement, our Climate and Sustainability Strategy supports efforts to deepen our understanding of environmental challenges and develop impactful, long-term solutions.

We are dedicated to managing our campus in ways that enhance ecological health, reduce our environmental footprint, and promote well-being for all who study, work, and live at Western.

This strategy will continue to evolve as we refine our priorities, set measurable goals, and respond to emerging knowledge, technologies, and challenges.

The Climate and Sustainability Strategy will be supported by a framework that outlines responsibilities, expands on Big Moves to achieve each ambition, and defines intended outcomes across short-, medium-, and long-term horizons.

Governance and Accountability

The President's Advisory Committee on Environment and Sustainability (PACES) plays a key role in guiding the university's sustainability direction. It advises on the implementation of the Climate and Sustainability Strategy and Action Plan. With representation from students, faculty and staff from across the university, PACES helps ensure sustainability is thoughtfully integrated into research, teaching, campus operations, and partnerships. Co-chaired by the Provost & Vice-President (Academic) and the Vice-President (Operations & Finance), and supported by the Office of Sustainability, PACES enables cross-campus collaboration and accountability.

The Office of Sustainability leads the day-to-day coordination and advancement of Western's sustainability efforts. It works closely with academic and operational units to embed environmental responsibility into core practices, support innovation, and guide the implementation of the Climate and Sustainability Strategy. The Office also manages sustainability reporting, and supports long-term improvement through education, engagement, and strategic planning.

The success of this strategy depends on leadership that is shared across the university — empowering faculties, departments, student groups, and administrative units to contribute to sustainability in ways aligned with their roles and expertise.

Strong governance and open communication support this model, ensuring sustainability remains a central part of decision-making.

Students at Western are active contributors to the university's sustainability journey. A new Student Engagement Working Group, facilitated by the Office of Sustainability, will bring together student voices from diverse disciplines and programs to inform initiatives, strengthen engagement, and amplify campus-wide momentum on key issues such as waste reduction, energy conservation, and sustainable transportation.

Positioning Western as a destination of choice for sustainability-related funding, partnerships, and innovation will be key to advancing research, strengthening collaboration, and supporting interdisciplinary dialogue on the most pressing environmental challenges.

We will also continue to collaborate with Indigenous leaders, the City of London, and other organizations to realize the vision set in this strategy.

Through a dynamic and collaborative research ecosystem, we will bridge academic knowledge with actionable solutions, driving impact both locally and globally.



VISION

Rooted in our culture of curiosity and innovation, we strive for a regenerative future that supports the health and well-being of the planet, its natural systems, and our community.
We will equip the next generation of changemakers with the knowledge and tools to address the most pressing climate and sustainability challenges of our time

GUIDING PRINCIPLES

Planetary
Health

Stewardship

Courage

Purpose

Interdisciplinarity

Collaboration

PRIORITIES

Education and Research

Western will advance research and knowledge that drives societal progress toward a more regenerative future, while equipping students across all disciplines with the knowledge, experience, skills, and expertise to lead in climate and sustainability

Regenerative Campus

Western aspires to operate and maintain a campus that has a positive impact each day

Healthy and Connected Community

Guided by both non-Indigenous and Indigenous knowledges, Western is committed to fostering a healthy and connected community where individuals have a meaningful connection to nature and feel a sense of belonging and shared responsibility for the environment

Increase student access to sustainability education and enhance course offerings

Secure experiential learning opportunities in sustainability that empower students to drive meaningful climate action

Catalyze thought leadership in sustainability research and innovation, building towards a Western Institute for Sustainability

Strengthen long-term climate resilience across campus

Enhance ecosystem health and biodiversity across campus

Decarbonize campus infrastructure and built assets

Measure and curtail Scope 3 greenhouse gas emissions through more sustainable operations

Foster a culture of material circularity, ensuring waste generation decreases even as campus grows

Integrate Indigenous land-based learning by working with Elders and Knowledge Keepers to deepen understanding and connection to place

Promote mental, emotional, and physical well-being through meaningful experiences in nature

Help people find relief from, and cope with, eco-distress and climate anxiety

Broaden awareness of Western's climate and sustainability initiatives, programming, and networks to encourage greater engagement and participation

ACTION PLAN & ANNUAL REPORTING

Acknowledgements

Contributors to the Climate and Sustainability Strategy

We would like to thank everyone who participated in consultations on the Climate and Sustainability Strategy. Thank you to those who engaged through the campus input survey, the keynote and panel discussion, and the virtual open forum. The contributions shared through these engagements have helped shape this strategy.

Thank you to the President's Advisory Committee on the Environment and Sustainability for their leadership through this process, and to all the students, staff and faculty who committed their time and energy in focus groups and other workshops.

President's Advisory Committee on the Environment and Sustainability

- Emilie Kalaydjian (USC Delegate)
- Wade Masse (USC Delegate)
- Kathleena Henricus (USC Delegate)
- Jenna Ijam (USC Delegate)
- Javier Ponce de Leon Eyl (SOGS Designate)
- Floyd Mautle (SOGS Designate)
- Ehsan Ur Rahman Mohammed (SOGS Designate)
- Alessia Romani (Postdoctoral Scholar Designate)
- Chris Alleyne (AVP, Housing & Ancillary Services)
- Andrew Konowalchuk (AVP, Facilities Management)
- Jacquie Burkell (AVP, Research)
- John Doerksen (Vice-Provost, Students)
- Stephanie Hayne Beatty (Acting Vice-Provost, Students)
- Jane O'Brien (AVP, Human Resources)
- Christy Bressette (Vice Provost & AVP, Indigenous Initiatives)
- Opiyo Oloya (AVP, Equity, Diversity and Inclusion)
- Marcia Steyaert (Executive Director, Editorial Strategy and Media Relations)
- Paul Mensink (Director, Centre for Environment & Sustainability)
- Katrina Eyvindson (President's Faculty Representative)
- Lesley Gittings (President's Faculty Representative)
- Kristen McGill (President's Staff Representative)

President's Advisory Committee on the Environment and Sustainability (Cont.)

- Rachel Halaney (President's Staff Representative)
- Kenneth Coley (President's Decanal Representative)
- Siobhan Doherty (University Advancement Representative)
- Heather Hyde (Director, Sustainability)
- Joan Ang (Manager, Energy & Carbon)
- Jessica Cordes (Manager, Sustainability Engagement)
- Mary-Lee Townsend (Manager, Sustainability & Compliance)
- Laura Mantz (Engagement Coordinator, Sustainability)
- Danielle Ward (Executive Specialist, Operations & Finance)
- Jeff Hutter (Acting Deputy Provost)
- Lynn Logan (Vice-President, Operations & Finance) Co-Chair
- Florentine Strzelczyk (Provost & Vice-President, Academic) Co-Chair

Other Contributors

- Aaron Guravich (Gallery Operations Specialist, McIntosh Gallery)
- Aisha Haque (Director, Centre for Teaching and Learning)
- Alex Levine (EDID in Research Specialist, Research Services)
- Alexe Scholtes (Graduate Student)
- Allison Pert (Graduate Student)
- Anna Gunz (Associate Professor, Schulich School of Medicine & Dentistry)
- Ashley Kewayosh Samuel (Student Opportunities Coordinator, Indigenous Student Centre)
- Ayan Sadhu (Associate Professor, Civil & Environmental Engineering)
- Bailey Holmes (Residence Life Coordinator, Housing & Ancillary Services)
- Beth Hundey (eLearning and Curriculum Specialist, Centre for Teaching and Learning)
- Blair Kingdon (Graduate Student)
- Bregette Hill-Smith (Building Manager, Facilities Management)
- Brendon Samuels (Graduate Student)
- Chandlee Dickey (Clinical Director, Student Mental Health, Student Experience)
- Chris Bumbacco (Director, Housing Facilities)
- Colin Couchman (Chief Data Officer, Institutional Planning & Budgeting)
- Colin Evans (Assistant Professor, Schulich School of Medicine & Dentistry)
- Desmond Moser (Professor, Earth Sciences)

- Diljot Badesha (Graduate Student)
- Douglas Keddy (Associate Director, Research Promotion & Profile, Western Research)
- Elizabeth Basiita (Undergraduate Student)
- Eric Mallory (AVP, Financial Services)
- Ethan Milroy (Undergraduate Student)
- Felix Cai (Undergraduate Student)
- Fred Janzen (Director, Capital Projects, Facilities Management)
- Geneviève Metson (Associate Professor, Geography and Environment)
- Hamid Mustafa (Graduate Student)
- Isaac Luginaah (Professor, Geography and Environment)
- Isabella DiMenna (Undergraduate Student)
- Jahaan Thawer (Undergraduate Student)
- Jamie Voogt (Professor, Geography and Environment)
- Jason McIntosh (Director, Space Planning & Management, Institutional Planning & Budgeting)
- Jennifer Teal (Health & Well-being Consultant, Human Resources)
- Jenny Richmond-Bravo (Doctoral Professional Development Coordinator, SGPS)
- John Reed (Lecturer, FIMS)
- Julia Beltrano (Senior Facilitator, Talent, Learning & Engagement, Human Resources)
- Junyu Ke (Graduate Student)
- Kashish Dhanoa (Undergraduate Student)
- Katarina Grolinger (Assistant Professor, Electrical & Computer Engineering)
- Katie Big-Canoe (Indigenous Research Specialist, Research Services)
- Katrina McIntosh (Program Manager, Continuing Studies)
- Kelly Hollingshead (Acting Associate Director, Careers & Experience, Student Experience)
- Kelsey Adams (Gender-Based & Sexual Violence Prevention Education Coordinator, Student Experience)
- Kendra Coulter (Professor, Huron University College)
- Kylee Griffiths (Undergraduate Student)
- Lisa Cechetto (Executive Director, Western Research)
- Lise Laporte (Senior Director, Western International)
- Liza Eurich (Artlab Gallery Manager, Visual Arts)
- Luis Patricio (Graduate Student)
- Madeleine Zajdlik (Undergraduate Student)
- Madhumita Ray (Professor, Chemical & Biochemical Engineering)
- Mariana Batista (Undergraduate Student)
- Marie Tsai (Graduate Student)
- Marisa Modeski (University Registrar)
- Melanie Katsivo (Equity, Diversity and Inclusion Specialist, Schulich School of Medicine & Dentistry)
- Melissa Steadman (Associate Director, Off-Campus Housing & Apartments, Housing & Ancillary Services)

- Mike Lunau (Manager, Landscape Services, Facilities Management)
 - Nadine de Gannes (Assistant Professor, Ivey Business School)
 - Nicole Redvers (Associate Professor, Schulich School of Medicine & Dentistry)
 - Nina Zitani (Curator, Zoological Collections, Biology)
 - Nouri Najjar (Associate Professor, Ivey Business School)
 - Nusha Keyghobadi (Professor, Biology)
 - Oana Branzei (Professor, Ivey Business School)
 - Paige Ferguson (Graduate Student)
 - Paleesa Kapoor (Undergraduate Student)
 - Rob Buchkowski (Assistant Professor, Biology)
 - Rob Klassen (Professor, Ivey Business School)
 - Rodrigo Baldoceda (Undergraduate Student)
 - Russell Duvernoy (Associate Professor, King's University College)
 - Ryan Martell (Undergraduate Student)
 - Saanvi Kapoor (Undergraduate Student)
 - Sandra Pehilj (International Student Advisor, Western International)
 - Sandra Smeltzer (Associate Professor, FIMS)
 - Sara Mai Chitty (Curriculum and Pedagogy Advisor, Office of Indigenous Initiatives)
 - Shawn Finkbeiner (Director, Housing & Ancillary Services)
 - Steve Barry (Director, Recreation & Active Well-being, Student Experience)
 - Steve MacDonald (Associate Director, Facilities Development & Engineering, Facilities Management)
 - Tom Cull (Faculty, Writing Studies)
 - Tristyn Snow (Programming Coordinator, Residence Life & Education, Housing & Ancillary Services)
- Climate & Sustainability Strategy Consultant**
- Perkins&Will



Glossary

Ecological Health

Describes the overall condition of an ecosystem, reflecting its functionality, resilience, and integrity of natural processes such as nutrient cycling, energy flow, and species interactions.

Greenhouse Gas Emissions (GHG)

Gases released into the Earth's atmosphere that trap heat, contributing to the greenhouse effect and global warming. The primary greenhouse gases include carbon dioxide (CO₂), methane (CH₄), and nitrous oxide (N₂O), which are largely produced by human activities such as burning fossil fuels.

Holistic Health

An approach to well-being that considers the whole person — including their physical, mental, emotional, spiritual, and social health.

PACES

President's Advisory Committee on the Environment and Sustainability.

Planetary Health

An approach that emphasizes the interdependence between human health and the health of the planet. It recognizes that environmental degradation impacts the lives and health of marginalized and underserved populations globally. This approach calls for health-care professionals and systems to be prepared to address these challenges by integrating the health of the planet into their practice and research.

Regeneration

The process of renewal, restoration, and growth, making ecosystems, communities, or organisms more resilient and sustainable. In a broader context, it can refer to the revitalization of urban areas, the recovery of ecosystems, or the healing of biological tissues.

Scope 1, 2, and 3 Greenhouse Gas Emissions

Scope 1: Direct GHG emissions from sources owned or controlled by the university.

Scope 2: Indirect GHG emissions from the generation of purchased electricity, steam, heating, and cooling consumed by the university.

Scope 3: All other indirect GHG emissions that occur in the university's supply chain.

SDGs

The 17 Sustainable Development Goals (SDGs) are a universal call to action adopted by all United Nations Member States in 2015 as part of the 2030 Agenda for Sustainable Development. They aim to end poverty, protect the planet, and ensure peace and prosperity for all. Each goal addresses a broad range of interconnected global challenges, including economic inequality, climate change, environmental degradation, peace, and justice.

STARS Rating

The Sustainability Tracking, Assessment & Rating System (STARS®) is a transparent, self-reporting framework developed by the Association for the Advancement of Sustainability in Higher Education (AASHE). It is designed for colleges and universities to measure and report their sustainability performance across a broad range of areas, including academics, engagement, operations, planning, administration, and innovation.



Office of Sustainability
Support Services Building, Room 2301
London, Ontario, Canada N6G 1G9
Email: sustainability@uwo.ca
www.sustainability.uwo.ca

February 5, 2026

Board of Governors: Climate and Sustainability Strategy

Agenda

Sustainability at Western

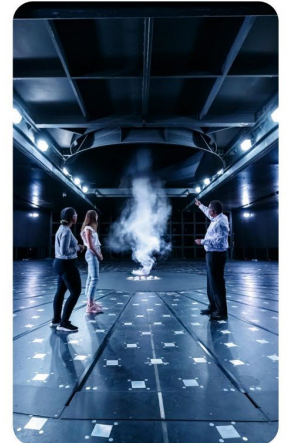
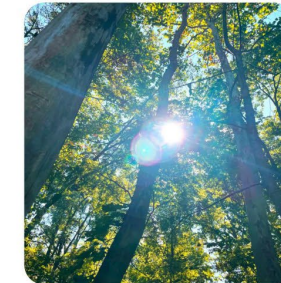
Climate & Sustainability Strategy

Overview of Engagement

Community Feedback & Response

Delivering the Strategy

Q&A

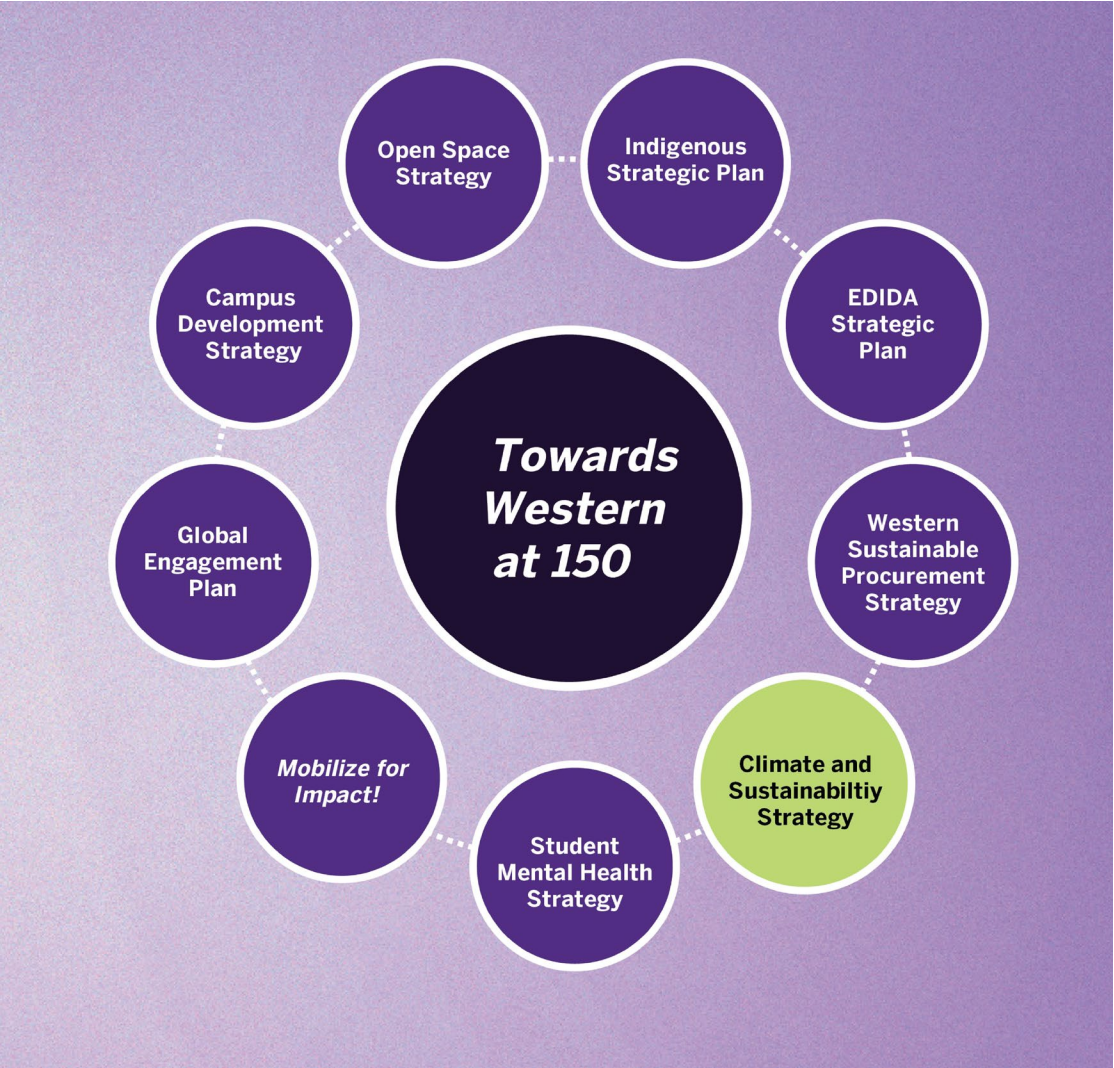


Climate and Sustainability Strategy

2025

Western
UNIVERSITY • CANADA

Sustainability at Western



Sustainability by the Numbers (2025)

32%

GHG Emissions Reduction

Between 2005 and 2024, Western has reduced greenhouse gas emissions by 32% while campus grew in size by 39% during the same period.

13 **LEED Certified Buildings**

1,900+ **Research Projects Related to SDGs**

40% 

of Western's residence menus are plant based

11 

Years

For the past 11 years Western has maintained a Gold STARS rating, and in 2025 became the second Canadian university to achieve a STARS Gold rating under the new, more stringent version of STARS.

39%

Waste Diverted from Landfill

1,694 MT of waste diverted from landfill in 2024. 

85%

Future Ready


In 2023/24, over 85% of undergraduate degrees included sustainability-focused learning requirements.

25+ **Projects**

Western's Campus as a Living Lab program has supported more than 25 unique projects across 6 different faculties.

2,700+

Sustainability Courses

Western offers more than 2,700 undergraduate courses that relate to the SDGs. 

61

Projects

Over the last two years, Western's \$1M Sustainable Impact Fund supported 61 student, faculty, and staff led projects advancing sustainability on campus.

14TH

In the World

In 2025, ranked 14th globally in *Times Higher Education* Impact Rankings, tied for third in Canada.

33

Student Groups & Clubs form the Western Environment and Sustainability Network and are advancing sustainability on campus.

Vision

Rooted in our culture of curiosity and innovation, we strive for a regenerative future that supports the health and well-being of the planet, its natural systems, and our community.

We will equip the next generation of changemakers with the knowledge and tools to address the most pressing climate and sustainability challenges of our time.



Guiding Principles

Planetary Health

Recognize the health of natural systems and humans is intrinsically linked. Thus, safeguarding the environment and supporting thriving ecosystems is our collective responsibility.

Stewardship

Honour reciprocal relationships with the natural world by behaving in ways that enhance ecosystems, advance reconciliation with Indigenous Peoples, and respect future generations.

Courage

Lead with heart, respect, empathy, and humility. Individually and collectively, uplift curiosity, take risks, and support transformative ideas and actions to influence all areas of university life.

Purpose

Choose deliberate action, set clear targets, and align with Western strategies to advance and measure progress on our climate and sustainability ambitions.

Interdisciplinarity

Strengthen connections across the university to embed sustainability as an imperative in all that we do.

Collaboration

Build and deepen relationships with local and global partners as they are vital to achieving greater societal impact.

Priorities

Education & Research

Western will advance research and knowledge that drives societal progress toward a more regenerative future, while equipping students across all disciplines with the knowledge, experience, skills, and expertise to lead in climate and sustainability.

This priority builds on Western's Strategic Plan, *Towards Western at 150*, and the Research Strategic Plan, *Mobilize for Impact!*

Bringing greater focus on fostering stronger collaboration, advancing sustainability knowledge, and cultivating the conditions necessary for developing interdisciplinary solutions to address climate change.

Ambitions

- Increase student access to sustainability education and enhance course offerings.
- Secure experiential learning opportunities in sustainability that empower students to drive meaningful climate action.
- Catalyze thought leadership in sustainability research and innovation, building towards a Western Institute for Sustainability.

Big Moves

CAMPUS AS A LIVING LAB
expanded and leveraged to apply faculty and student expertise in shaping sustainable outcomes for Western

COMMUNITY IMPACT
opportunities are cultivated for all students to lead climate and sustainability action

INSTITUTE FOR SUSTAINABILITY
established over the long term to advance interdisciplinary knowledge on complex climate and sustainability challenges

Regenerative Campus

Western aspires to operate and maintain a campus that has a positive impact each day.

Our actions have impact. We recognize that alongside climate change, biodiversity loss is one of the most pressing crises of our time. The health of our world depends on the protection of nature. Considering nature in daily decisions on how we build, operate, and maintain our campus means we can start to regenerate natural systems, adapt to a changing climate, and restore habitats for living and non-living species.

For our daily operations and interactions to contribute to a vibrant and resilient environment, we will:

Ambitions

- Strengthen long-term climate resilience across campus.
- Enhance ecosystem health and biodiversity across campus.
- Decarbonize campus infrastructure and built assets.
- Measure and curtail Scope 3 greenhouse gas emissions through more sustainable operations.
- Foster a culture of material circularity, ensuring waste generation decreases faster than campus growth.

Big Moves

ECOLOGICAL ASSESSMENT
completed for priority areas such as along Medway Creek, Thames River, and Medway Valley Heritage Forest

NET ZERO EMISSIONS
from campus operations by 2050 and 45% reduction by 2030, compared to 2005 levels aligned with *Towards Western at 150* (2021)

60% WASTE DIVERSION
by 2035 through adoption of circular practices and collaborative waste management initiatives

SCOPE 3 EMISSIONS
baseline and reduction plan established

Healthy & Connected Community

Guided by both non-Indigenous and Indigenous knowledges, Western is committed to fostering a healthy and connected community where individuals have a meaningful connection to nature and feel a sense of belonging and shared responsibility for the environment.

We recognize a sense of belonging motivates people to take care of themselves and each other, engage with sustainability efforts, and build community through shared experiences.

Opportunities to connect with the natural environment – both on and off campus – deepen our understanding of ecosystems and the interdependence of all living things. These experiences enhance mental, emotional, and physical well-being, while strengthening the bonds within our community.

To support a healthy, vibrant, and thriving community, we aim to:

Ambitions

- Integrate Indigenous land-based learning by working with Elders and Knowledge Keepers to deepen understanding and connection to place.
- Promote mental, emotional, and physical well-being through meaningful experiences in nature.
- Help people find relief from, and cope with, eco-distress and climate anxiety.
- Broaden awareness of Western's climate and sustainability initiatives, programming, and networks to encourage greater engagement and participation.

Big Moves

NATURAL SPACES
celebrate biodiversity and ecosystem functions through signage, education, and stewardship, and connect the community to nature

LAND-BASED LEARNING & EXPERIENCES
advanced through collaborative partnerships with Indigenous leaders and others in support of mental health, well-being, and planetary health

STUDENT ENGAGEMENT WORKING GROUP
is established to collaborate with PACES

Big Moves

To ensure communication, transparency, and accountability, the Office of Sustainability will publish annual reports that measure progress, highlight milestones, report on key metrics in alignment with the strategy.

Education & Research

CAMPUS AS A LIVING LAB

expanded and leveraged to apply faculty and student expertise in shaping sustainable outcomes for Western

COMMUNITY IMPACT

opportunities are cultivated for all students to lead climate and sustainability action

INSTITUTE FOR SUSTAINABILITY

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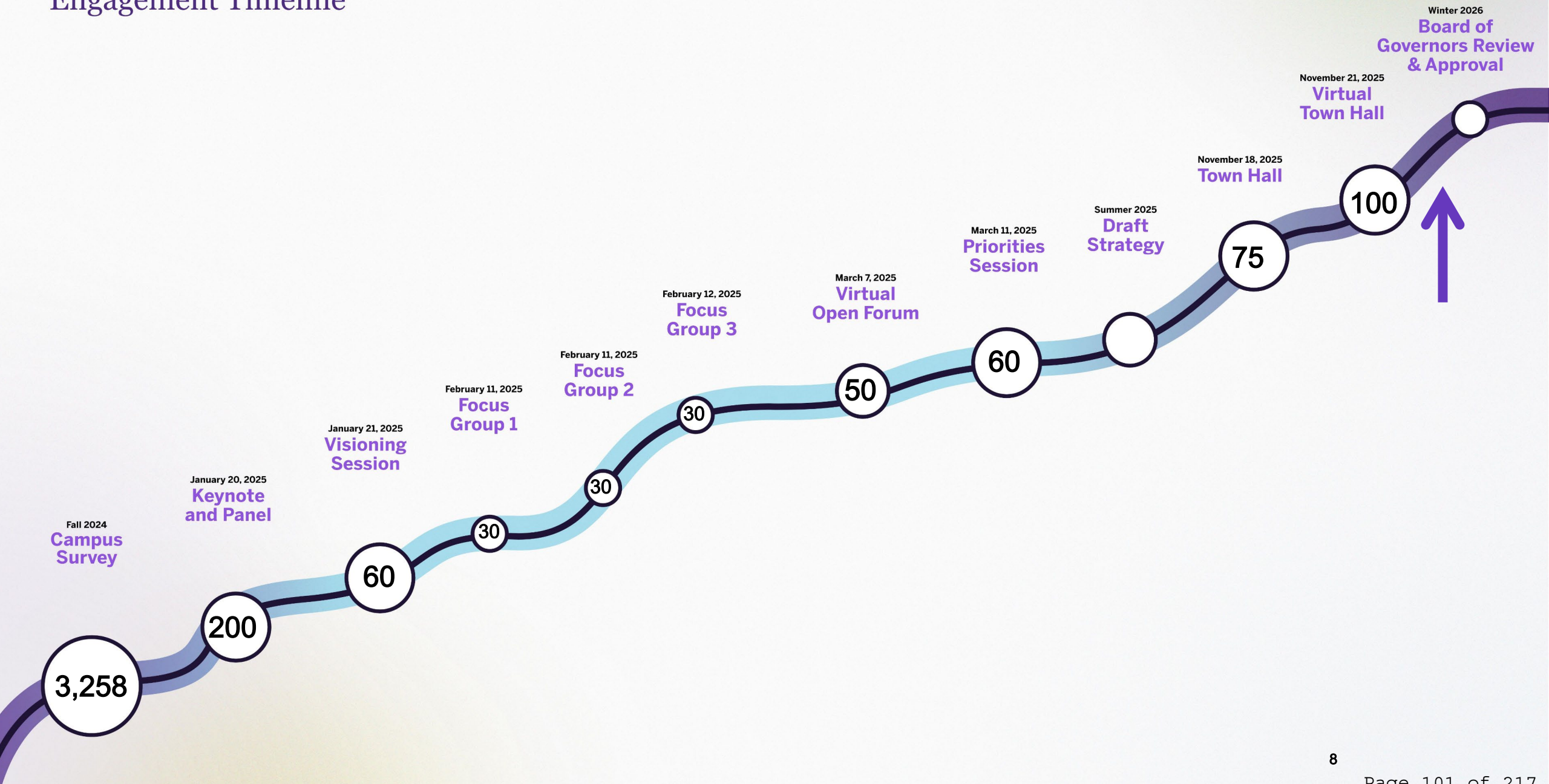
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STUDENT ENGAGEMENT WORKING GROUP

is established to collaborate with PACES

Engagement Timeline



In the 6 weeks the survey was open...

3,258

people took the survey

2,195

are students

230

are faculty

767

are staff

8%

of the Western community

6%

of the student body

16%

of faculty

28%

of staff

Town halls November 2025

- Need for more specific targets and performance indicators
- Measurement and mitigation of Scope 3 emissions
- Biodiversity and natural environment
- Waste Management – set diversion target, organics, single use items
- Importance of involving community groups, faculty and other campus groups to activate strategy



Action Plan & Reporting

- Share draft Action Plan with PACES in early 2026
- Release Annual Report – targeting Fall 2026

Western University: Climate and Sustainability Action Plan									
Education and Research									
Western will advance research and knowledge that drives societal progress toward a more regenerative future, while equipping students across all disciplines with the experiences, skills, and expertise to lead in climate and sustainability.									
Ambition	Big Move	Actions		Champion	Collaborator	Type of Action	Outcome Timeframe		
							Short term (1-2 years)	Medium term (3-5 years)	Long term (5+ years)
Increase student access to sustainability education and expand course and program offerings	SUSTAINABILITY EDUCATION All students have access to sustainability education at Western	ER1	Continue to enhance existing programs and create new programs related to climate and sustainability that are innovative, interdisciplinary, and thoroughly aligned with industry and community needs.	Provost & VP Academics	Provost & VP Academics	Programming	X	X	X
		ER2	Work with the Centre for Teaching and Learning to introduce a sustainability theme, expand scholarships, and update curriculum to embed climate and sustainability topics.	Provost & VP Academics	Centre for Teaching & Learning	Programming	X	X	X
		ER3	Increase land based and experiential learning opportunities that connect students to the land, inspire stewardship of the environment, and strengthen the bond between communities and the ecosystems we rely on.	Provost & VP Academics	Centre for Teaching & Learning	Programming	X		
		ER4	Work with industry to understand key skills needed in the job market and provide opportunities for students in any discipline to gain expertise in sustainability and climate issues.	Provost & VP Academics	Office of Sustainability	Assessment	X		X
Secure experiential learning opportunities in sustainability that empower students to drive meaningful climate action	CAMPUS AS A LIVING LAB Expanded and leveraged to apply faculty and student expertise in shaping sustainable outcomes for Western	ER5	Create and promote a micro-credential program that equips students with targeted, practical skills and knowledge applicable to current environmental challenges.	Provost & VP Academics	Centre for Teaching & Learning	Programming	X		X
		ER6	Continue to catalog, categorize, and publicize Western's sustainability research more intentionally, so that more connections are made and more silos are broken.	Provost & VP Academics	Office of Sustainability	Execution	X	X	X
		ER6	Support student-lead research on climate and sustainability, with a focus on local and regional partnerships.	VP Research	Principal Research Investigator	Internal Engagement & Outreach	X	X	X
		ER7	Connect and collaborate with Western's research institutes, centres, and groups, to advance interdisciplinary and transdisciplinary knowledge on climate and sustainability.	VP Research	Principal Research Investigator	Internal Engagement & Outreach	X		X
Catalyze thought leadership in sustainability research and innovation, building towards a Western Institute for Sustainability	INSTITUTE FOR SUSTAINABILITY Established over the long term to advance interdisciplinary knowledge on complex climate and sustainability challenges	ER8	Co-create the vision and mission of the Western Institute for Sustainability, identifying the Institute's strategic priorities, financial requirements, and expected benefits.	VP Research	Principal Research Investigator	Assessment	X		
		ER9	Collaborate with university advancement to create compelling pathways for donor support to fund the Institute and sustain its growth.	VP Research	Advancement Team	External Engagement & Outreach	X	X	X
		ER10	Form a leadership team responsible for advancing the Institute's strategic priorities, research projects, and partnerships.	VP Research	VP Finance & Operations	Execution	X	X	X

Thank you!

**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**

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: 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; and

the revised MAPP 7.7 – Overhead on Contract Research, as shown; and

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

Executive Summary:

It is proposed that MAPP 7.1 – Sundry Donations for Research be rescinded, as items are sufficiently covered under [MAPP 2.1 – Gift Acceptance](#) and the [Procedures for Policy 2.1 – Gift Acceptance](#).

Proposed revisions to MAPP 7.7 – Overhead on Contract Research and MAPP 7.11 – Over-Expenditure of Research Accounts are summarized as follows.

MAPP 7.7 – Overhead on Contract Research

The policy is to be revised as follows:

- 1) Update title to reflect current terminology
- 2) Add purpose
- 3) Add definitions
- 4) Include how indirect costs are applied beyond contract research
- 5) Include both the breakdown and distribution of funds
- 6) Further clarity regarding any changes to rate and distribution
- 7) Update to the current MAPP template

MAPP 7.11 – Over-Expenditure of Research Accounts

The policy is to be revised as follows:

- 1) Update title to better reflect contents of policy
- 2) Add purpose
- 3) Update and expand definitions
- 4) Update terminology and unit names
- 5) Clarify responsibilities in an escalating fashion
- 6) Remove procedural aspects
- 7) Update to the current MAPP template

Consultation:

Consultations were completed with the following:

University Research Board
Financial Services
Western Advancement
Institutional Budgeting & Planning
Deans
Associate Deans (Research)
Research Officers

Documentation Provided:

MAPP Policy 7.1 – Sundry Donations
MAPP Policy 7.7 – Overhead on Contract Research (*with track changes*)
MAPP Policy 7.11 – Over-Expenditure of Research Accounts (*with track changes*)



POLICY 7.1 – Sundry Donations for Research

Policy Category: Research

Effective Date: May 26, 1988

Supersedes: (NEW)

POLICY

Definition

- 1.00 A donation for research purposes is generally one which was not solicited and is absolutely unconditional, i.e., there are neither deliverables nor financial reporting requirements to the donor. As such, the funds are free to be utilized for any research deemed appropriate by the recipient faculty members and/or department.

Income Tax Considerations

- 2.00 An income tax receipt may be issued to the donor if the donation meets the criteria of Revenue Canada. The Income Tax Act defines a donation as tax deductible when no rights, privileges, material benefits or advantages accrue to the donor or the donor's representative.
- 3.00 A personal donation by an individual faculty member directed to the credit of a research account under the control of that faculty member does not qualify for an income tax receipt. However, if such funds are directed to the credit of a general departmental research account not under the control of the donor, an income tax receipt will be issued.

Allowable Expenses

- 4.00 All expenses must be research related. In addition, University policies and procedures must be adhered to, for example: travel policy, purchasing of goods, payment of salaries, etc. Expenses not covered by current policy and procedures are not allowable.

POLICY 7.1 – Sundry Donations for Research**PROCEDURE**

- 5.00 When a NEW donation account for research is requested, a "Request for Research Account"* form must be completed in full and forwarded to the Research Accounting Office.
- 6.00 For each remittance of funds into an established account, a "Research Donation Transmittal Slip"* must be completed and forwarded to the Research Accounting Office.
- 7.00 Income tax receipts, if appropriate, will be issued promptly to the donor by the Development Office.

* Available from the Research Accounting Office, Rm 6100, Support Services Building

POLICY 7.7 – ~~Overhead on Contract Research~~ Indirect Cost of Research

Policy Category: Research

Subject: Application and Distribution of Indirect Costs

Approving Authority: Board of Governors

Responsible Officer: Vice-President (Research)

Responsible Office: Western Research

Related University Policies: [Policy 2.1 – Gift Acceptance](#)

Effective Date: February 5, 2026 ~~August 1, 2003~~

Supersedes: ~~August 1, 2003~~, November 13, 1997

POLICY

~~1.00—The standard overhead rate on contract research shall be 40%, distributed as follows:~~

Dean of Faculty	12%
Contracting department or unit	5%
Contracting laboratory	5%
Corporate UWO	9%
Research Promotion Fund	9%
Total	40% of direct costs

~~2.00—Exceptions to the standard rate of 40% may be made as required by negotiated agreements with government or through negotiations with Research Development Services.~~

POLICY 7.7 – Overhead on Contract Research Indirect Cost of Research**I. PURPOSE**

The total cost of doing research includes both direct (e.g. research equipment, research assistance salaries, travel, consumables, etc.) and indirect (e.g. facility and equipment maintenance, administrative salaries, knowledge resources, etc.) costs. It is the collective responsibility of the University and its members to ensure that the total cost of research is recovered wherever possible. The purpose of this Policy is to outline the indirect cost rate and distribution thereof for Open Research Call and Private Funding opportunities.

II. DEFINITIONS

Open Research Call means a sponsored research funding opportunity that is typically, but not exclusively, publicly announced by a government funding agency and generally awarded on a competitive basis. Open Research Call opportunities do not include sponsored research funding opportunities that fall under the research support fund allocation of indirect costs. The research support fund is an annual grant from the Tri-agency (Social Sciences and Humanities Research Council, the Natural Sciences and Engineering Research Council and the Canadian Institutes of Health Research) that provides funds to cover some of the indirect costs of research.

Private Funding means a sponsored research funding opportunity that is not broadly offered in an open public call (e.g., funding offered by an industry partner to a specific principal investigator for a specific project, including matching programs). Private Funding opportunities do not include Gifts as outlined in [Policy 2.1 – Gift Acceptance](#).

III. POLICY

1. For Open Research Call sponsored research funding opportunities, the sponsor's maximum allowable rate will be followed. The sponsor's allowable rate is as included in their funding guidelines. In situations where there is no indirect rate guidance in writing by a sponsor or funding agency, an indirect cost rate of 40% of direct costs will be applied.
2. For Private Funding sponsored research funding opportunities, an indirect cost rate of 40% of direct costs will be applied.
3. For the majority of projects, the breakdown of the funds for indirect costs with 40% as an example, are as follows:

POLICY 7.7 – Overhead on Contract Research Indirect Cost of Research

Faculty	12%
Department	5%
Principal Investigator	5%
Vice-President (Research)	9%
Central University	9%
Total	40%

4. For the majority of projects, the distribution of funds for indirect costs collected are as follows:

Faculty	30.0%
Department	12.5%
Principal Investigator	12.5%
Vice-President (Research)	22.5%
Central University	22.5%
Total	100%

5. To ensure proper distribution, the researcher must choose the appropriate location where the research is to be performed in their ROLA (Research On-Line Administration) proposal.
6. Exceptions to lowering the indirect cost rate in (1) and (2) above are at the discretion of the Vice-President (Research).
7. Exceptions to the proportional distribution in (3) and (4) above are at the discretion of the Vice-President (Research) except for reallocation of the distribution for Faculty, Department and Principal Investigator portions, which is at the discretion of the Faculty Dean. Any exceptions related to distribution differences between Vice-President (Research) and Central University that exceed \$100,000 will be at the discretion of both the Vice-President (Research) and the Provost.
8. Any applicable collective agreement between the University and its faculty researchers shall take priority over this Policy in the event of any conflict in terms and conditions or definitions.

Last Reviewed: November 2025

POLICY 7.11 – Over-Expenditure of and Ineligible Expenses on Research Accounts

Policy Category: Research

Subject: Over-expenditures and ineligible expenses in research accounts

Approving Authority: Board of Governors

Responsible Officer: Vice-President (Research) and Vice-President (Operations and Finance)

Responsible Office: Western Research

Related University Policies: [Policy – 2.8 Procurement of Materials & Services](#)
[Policy – 2.16 Travel & Expense Reimbursement](#)
[Policy – 2.29 Investigator-Vendor Conflict of Interest](#)
[Policy – 7.0 Responsible Conduct of Research](#)

Effective Date: February 5, 2026 ~~August 1, 2003~~

Supersedes: ~~August 1, 2003~~, November 22, 2001

POLICY

Definition

~~1.00—An over-expenditure occurs when actual expenditures and commitments exceed the budget available.~~

~~2.00—Over-expenditures in contract and grant funded research accounts are not permitted unless:~~

~~(a)—the funding agreement allows over-expenditures (e.g., some multi-year awards), and~~

~~(b)—the Dean or departmental designate approves the over-expenditure in writing—~~

~~3.00—The grant or contract holder is accountable to reimburse the university for any~~

POLICY 7.11 – Over-expenditure of **and Ineligible Expenses on Research Accounts**

~~deficit in a research account unless the over expenditure has been approved in writing by the Faculty.~~

~~4.00 If the over expenditure of a research account has been approved in writing by the Faculty then the Faculty is accountable to reimburse the deficit in the research account from either operating or other appropriate funds.~~

Accountability

~~5.00 Grant or contract holders are accountable to:~~

- ~~(a) maintain their research accounts in good standing~~
- ~~(b) review monthly grant or contract financial statements. Delegation of the account review does not release the grant or contract holder from responsibility of over-expenditures~~
- ~~(c) reimburse over expenditures not approved in writing by the Faculty~~
- ~~(d) reimburse inappropriate or disallowed expenditures as determined by Research Accounting per funding agency guidelines~~
- ~~(e) where permitted by this policy, provide written approval from the Faculty to Research Accounting in order to run a deficit account balance~~

~~6.00 Department Administrators are responsible to:~~

- ~~(a) promptly distribute monthly grant or contract financial statements to the designated grant or contract holder.~~
- ~~(b) review the “Departmental” copy of the monthly statements and initiate appropriate action as required e.g., discuss situation/resolution with grant or contract holder, advise Chair and Dean, freeze account.~~

Authority to Freeze Research Accounts

~~7.00 Research Accounting has the authority to freeze grants or contracts due to failure on the part of the grant or contract holder to exercise accountabilities and/or lack of funds and/or over expenditures.~~

~~8.00 Departments may freeze access to a grant or contract by:~~

- ~~(a) sending a written request with a brief explanation to Research Accounting~~
- ~~(b) notifying the grant or contract holder of the situation~~

~~9.00 Research Development Services has the authority to freeze grants or contracts in the case of noncompliance with contract conditions.~~

POLICY 7.11 – Over-expenditure of and Ineligible Expenses on Research Accounts

I. PURPOSE

The purpose of this policy is to outline the responsible individual(s) and Western unit(s) for the financial management of research funds as it relates to Over-expenditures and Ineligible Expenses.

II. DEFINITIONS

Account Holder means the individual under whose name or title the research project is held and who accepts financial responsibility for the research project. The Account Holder is most often the Principal Investigator; however, there are instances where a Chair, Dean or other administrative leader is the Account Holder.

Administering Unit means the department, faculty or unit in which the Account Holder has an academic appointment, that accepted administrative and financial responsibility for the research project.

Budget On Hold is a status that prevents new expenses or encumbrances from being incurred on the research project.

Ineligible Expense means an expenditure that is not compliant with Western policy, or the requirements of the research sponsor. An Ineligible Expense may stem from any aspect of the purchase including, but not limited to, the category of expense, the mode of procurement used, the amount spent or the date the expense was incurred.

Non-payment By Sponsor means situations where a sponsor does not comply with the funding responsibilities they committed to in an agreement, contract or notice of award.

Over-expenditure means any instance when actual expenditures and commitments exceed the budget available for a fiscal period. This includes instances of Non-payment by Sponsor or overages due to currency fluctuations.

III. POLICY

1. The Account Holder, followed by their Administrative Unit, and then followed by their Faculty, are responsible to reimburse the University for any Over-expenditure or Ineligible Expense in a research account.
2. Account Holders are responsible to:
 - (a) maintain their research accounts in good standing,
 - (b) review monthly financial statements for each research account. The

POLICY 7.11 – Over-expenditure of and Ineligible Expenses on Research Accounts

delegation of account review does not release the Account Holder from responsibility for Over- expenditures and Ineligible Expenses,

- (c) reimburse or otherwise resolve Over-expenditures and Ineligible Expenses which have not been approved in writing in advance by the responsible Administering Unit,
- (d) connect in with their Administering Unit if unable to fully reimburse/resolve an Over-expenditure or Ineligible Expense, and
- (e) notify Research Finance of any situation that may result in Sponsor Non-payment or termination of the project by a sponsor.

3. Administering Units are responsible to:

- (a) promptly distribute monthly financial statements to the designated Account Holders,
- (b) review the monthly statements and initiate appropriate action with the Account Holder to resolve/reimburse Over-expenditures and Ineligible Expenses, and
- (c) resolve/reimburse Over-expenditures and Ineligible Expenses that are not resolved/reimbursed by the Account Holder.

4. The following units have authority to put a research account Budget on Hold due to an Over-expenditure, Ineligible Expense, Non-payment by Sponsor or failure on the part of the Account Holder or Administering Units to exercise accountabilities and compliance with Sponsor terms and conditions:

- Research Finance
- Administering Units
- Western Research

5. Any applicable collective agreement between the University and its faculty researchers shall take priority over this Policy in the event of any conflict in terms and conditions or definitions.

Last Reviewed: November 2025

Revisions to MAPP Policy 1.12 - Advertising and Commercial Activity

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: 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.

Executive Summary:

The provided briefing note summarizes the policy review process that was completed and outlines the proposed revisions.

Documentation Provided:

FRDRC: Briefing Note - Advertising and Commercial Activity Policy Review
MAPP Policy 1.12 – Advertising and Commercial Activity (*current with track changes*)
MAPP Policy 1.12 – Advertising, Sponsorship and Promotional Activity (*for approval*)
Procedure for Policy 1.12 - Advertising, Sponsorship and Promotional Activity (*for information*)

FRDRC: Briefing Note

Advertising and Commercial Activity Policy Review

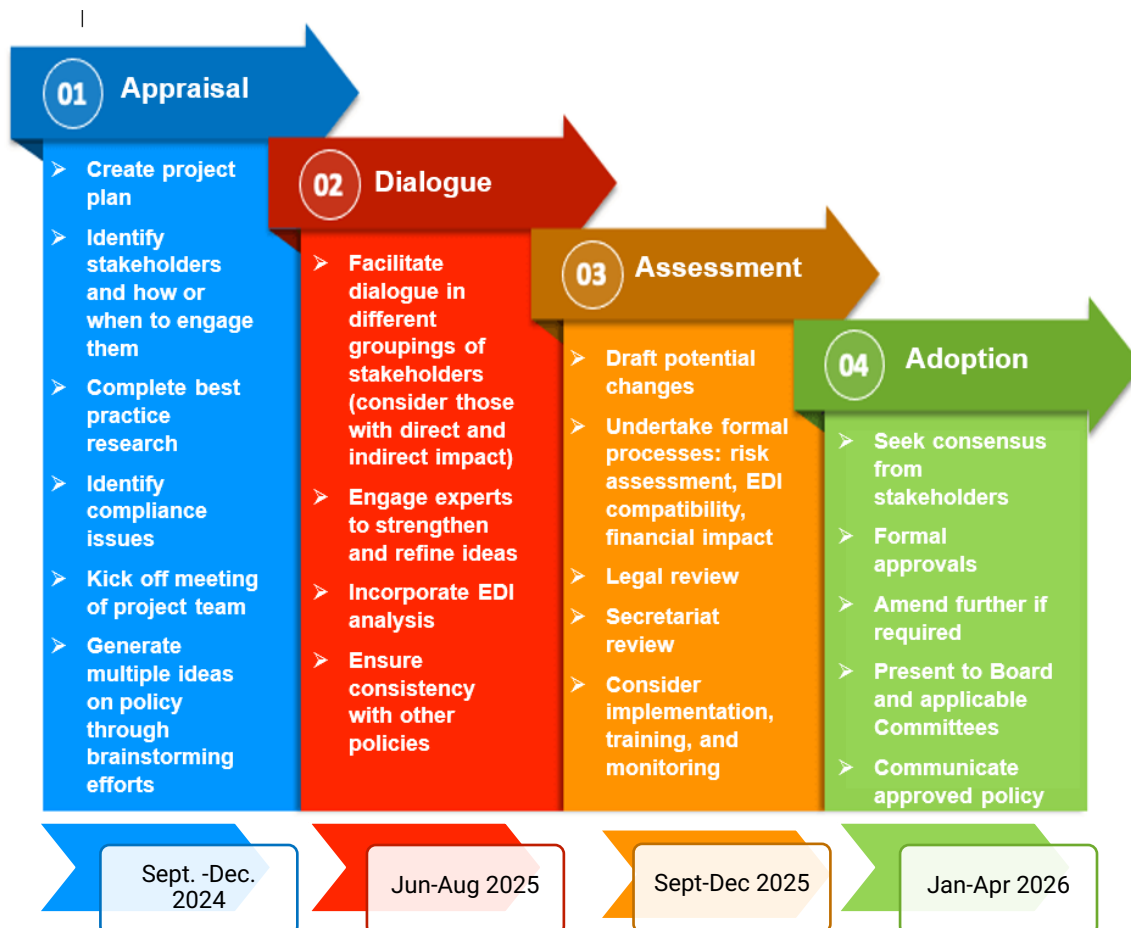
Introduction

Western Advancement is the Responsible Office for the university's general fundraising policies, as delegated by the Board of Governors.

Following the recent review of [MAPP 2.1 Gift Acceptance](#), [MAPP 2.28 Gift Valuation](#), [MAPP 1.44 Naming](#), and [MAPP 1.9 Naming of Campus Buildings, Physical Structures and Space](#), and consultation on [MAPP 2.2 Fund Raising and Canvassing](#) and [MAPP 2.27 Issuing Charitable Receipts to Fund Raising Events](#), Western Advancement will also focus on reviewing [MAPP 1.12 Advertising and Commercial Activity](#). This policy was last reviewed in 2003.

Timelines

The following are the timelines and milestones involved with this review. We are currently within the Adoption phase of the review.



Inputs

In 2020, a review was started but not completed on the current version of the policy.

Western Advancement reviewed each section of the proposed changes in 2020, alongside industry comparators, to formulate further proposed changes for review and consultation. Western Advancement also considered recommendations to align these policies with the recently updated gift acceptance, naming, and fundraising and canvassing policies.

Western Advancement also engaged the following groups in consultations on a draft of the updated policy:

- Campaign Co-Chairs
- Financial Services
- Housing & Ancillary Services
- Ivey Advancement
- Legal Services
- Office of Equity, Diversity and Inclusion
- Office of Indigenous Initiatives
- President's Group
- Provost's Leadership Team, including faculty Deans
- Sports & Recreation
- University Student's Council (USC)
- University Secretariat
- Western Communications

High-Level Recommendations

The following are the key recommendations for MAPP 1.12 Advertising and Commercial Activity made to date:

- Change the name of the policy to include sponsorship and other promotional activities – MAPP 1.12 Advertising, Sponsorship and Promotional Activity.
- Add Western Communications as a Responsible Office and the Chief Communications Officer as a joint Responsible Officer.
- Identify circumstances when the Policy does not apply (i.e. Gifts or Grants, government grant programs, research partnerships, events and activities led by the Division of Housing & Ancillary Services and activities approved by the University Students' Council (USC) occurring within its leased space inside the University Community Centre).
- Clearly identify that the policy covers non-philanthropic revenue and re-direct the reader to MAPP 2.1 Gift Acceptance when philanthropic revenue is at play.

- Add clearer definitions for advertising, sponsorship, and promotional activity.
- Add Principles that will help recognize the benefits of these opportunities while balancing the protection of the University's reputation and image.
- Clearly state who approves all advertising, sponsorship and promotional activity and identify procedures for obtaining this approval.
- Ensure that all advertising, sponsorship and promotional activity have written agreements that identify what is being approved and the communication vehicle approved (i.e. publications, media, signage, facility).
- Reference and provide clarity on alcohol, smoking (including cannabis), vaping, and tobacco use.
- Identify how revenue generated from these activities is appropriately recorded and processed.

Next Steps

A review and proposed approval of the updated policy will occur at the Fundraising and Donor Relations Committee of the Board (FRDRC) in January. We hope to bring the updated policy to the Board for final consideration during the February meeting.

POLICY 1.12 – Advertising and Commercial Activity
Sponsorship and Promotional Activity

Policy Category: General

Subject: Advertising, Sponsorship and Promotional Activity

Subsections: Purpose, Definitions, Policy

Approving Authority: Board of Governors

Responsible Officer: Vice-President (Western Advancement) and Chief Communications Officer

Responsible Office: Western Advancement and Western Communications

Related Procedures: Procedure for Policy 1.12 – Advertising, Sponsorship and Promotional Activity

Related University Policies: 1.1 Use of University Facilities
1.15 Corporate Use of University Name or Trademarks
1.16 Policy on Smoking, Vaping and Tobacco Use
1.33 Campus Alcohol Policy
1.44 Naming
2.1 Gift Acceptance
2.2 Fundraising

Supersedes:

Effective Date: [TBD] ~~June 24, 2008~~

Supersedes: ~~September 25, 2003~~

I. PURPOSE

The purpose of this Policy is to guide the University on business relationships between the University and an Entity wishing to contribute, financially or in-kind, to the University in return for specified Acknowledgement or other promotional considerations.

The University recognizes that many of its activities provide potential resources or other non-financial benefits through legitimate opportunities for Advertising, Sponsorship and other Promotional Activity. This revenue and in-kind support can be beneficial to the University, its programs, and its community. It is also necessary to recognize that the University is a public institution, and that its reputation and image must be protected.

This Policy shall apply to Advertising, Sponsorship and Promotional Activity:

- a) on University property, whether owned or leased, in or outside physical structures;
- b) in University digital property;
- c) at University events or other activities, whether on or off University property;
- d) of University programs or groups, including, but not limited to, student groups, sporting events, conferences, meetings, athletic teams, and employee groups.

This Policy shall not apply to the following circumstances:

- a) Funding obtained from a government through formal grant programs;
- b) Gifts or Grants;
- c) Research contract and partnerships;
- d) Events and activities requested by third parties and initiated, organized, or led by the Division of Housing & Ancillary Services;
- e) Activities approved by the University Students' Council (USC) in its digital property and/or occurring within its leased space inside the University Community Centre, as outlined in the Western/USC Occupancy Agreement; and
- f) Advertising, sponsorship or promotional activity related to alcohol.

II. DEFINITIONS

Acknowledgement: Recognition of sponsorship support. A typical acknowledgement of sponsorship is the placement of the Entity's trademark, and/or certain information about an Entity, in the promotional material for a University event or activity. This might include, but is not limited to, signage, websites, or marketing and promotional material for an event. An Acknowledgement on a University website may contain a link to the Entity's website or other digital property.

Advertising: The purchasing or leasing of space in University materials (printed or electronic) or signage in order to promote such Entity's goods or services. It is most often associated with a corporation or its products.

Affinity Partnership: A corporation with which the University has a contractual relationship to offer benefits to University alumni who use their products.

Business Receipt: As defined in MAPP 2.1 Gift Acceptance

Endorsement: Any statements or depictions which can reasonably be construed to contain or imply a preference by the University, or by any of its faculties, departments, units, or employees who are speaking or acting as representatives of the University.

Entity: An individual, corporation, non-governmental organization, partnership, joint venture, trust, or other legal entity.

Policy:	This Advertising, Sponsorship and Promotional Activity Policy may be amended from time to time.
Procedures:	The procedures to this Policy as may be amended from time to time.
Promotional Activity:	Any activity conducted by an Entity on University property, or associated with a University program or activity off University property, that is intended to increase awareness, visibility, or engagement with an Entity's brand, products, or services, excluding Fundraising activities. Examples may include, but are not limited to, product sampling, branded giveaways, account/service sign-ups, interactive displays, tabling, demonstrations, or other experiential marketing efforts.
Sponsor:	An Entity who provides funds and/or an in-kind contribution of goods and/or services in support of a University program or activity and, in exchange, receives an Acknowledgement by the University.
Sponsorship:	A provision of funds and/or an in-kind contribution of goods and/or services by a Sponsor in support of a University program or activity, where in return, the University provides an Acknowledgement to the Sponsor. Sponsorships are not Gifts or Grants as defined by <u>MAPP 2.1 Gift Acceptance</u> .
Tax Receipt:	As defined in <u>MAPP 2.1 Gift Acceptance</u> .
Third Party:	Any individual not employed by the University, but excluding agents, contractors and subcontractors hired by the University to perform a service.
University:	The University of Western Ontario operating as Western University.

DEFINITIONS

~~This policy covers university facilities and all university sponsored media, including the World Wide Web. For the purpose of implementing this policy, the following definitions may be useful:~~

~~An **advertisement** is a message created and displayed for the sole purpose of promoting a corporation or its product.~~

~~**Sponsorship recognition** acknowledges corporate support for a project, program or event. Material containing such acknowledgments will focus primarily on the project, program or event being supported.~~

~~**Commercial activity** refers to any revenue making or fundraising activity on campus by an outside business or organization or unit within the University.~~

III. POLICY

1. PRINCIPLES

1.1. All Advertising, Sponsorship and Promotional Activity shall be conducted in accordance with the following principles:

1.1.1. Advertising, Sponsorship and Promotional Activity must not jeopardize the University's registered charitable status.

1.1.2. The University values and will protect its integrity, autonomy, and academic freedom. It will not approve Advertising, Sponsorship or Promotional Activity that would compromise these fundamental values.

- 1.1.3. The University will not approve Advertising, Sponsorship or Promotional Activity that will compromise its reputation, its commitment to the academic mission, or its essential values, as articulated in its strategic documents. These include values respecting Indigeneity, equity, diversity, inclusion, accessibility, and anti-racism.
- 1.1.4. The University reserves the right to refuse Advertising, Sponsorship and Promotional Activity that requires conditions or restrictions that the University deems unacceptable.
- 1.1.5. The University solicits and accepts Advertising and Sponsorship revenue or in-kind support for priorities that are approved in accordance with established procedures for University planning and University initiatives.
- 1.1.6. Advertising and Sponsorship must comply with procurement processes applicable to the University.
- 1.1.7. Advertising, Sponsorship and Promotional Activity shall generally be non-exclusive; however, limited forms of exclusivity may be granted on a case-by-case basis.
- 1.1.8. Acknowledgements, Advertising and Promotional Activity will not occur in classrooms, libraries, or laboratories, or any other space specifically devoted to academic purposes.
- 1.1.9. Acknowledgements, Advertising and Promotional Activity must not materially impede ordinary pedestrian or vehicular traffic flow and should comply with Universal Access principles.
- 1.1.10. Acknowledgements, Advertising and Promotional Activity will not alter or detract from the normal architectural appearance, visual beauty, or environment of University property.
- 1.1.11. The request for Advertising, Sponsorship or Promotional Activity is made with the full knowledge and support of the Dean and/or Department Chair, Vice-Provost (Students), Associate Vice-President, or Director of the University unit that will benefit from the proceeds of the revenue, if applicable.
- 1.1.12. Advertising, Sponsorship and Promotional Activity will comply with the University's Manual of Policy & Procedures and applicable laws.
- 1.1.13. Advertising, Sponsorship or a Promotional Activity must not expose the University to unacceptable risk or liability. This means that:
- Advertising, Sponsorship and Promotional Activity should not be difficult or costly to administer;
 - Advertising, Sponsorship and Promotional Activity should not be funded by illegal or unethical activities.
- 1.1.14. It may be advisable to decline Advertising and Sponsorship revenue or in-kind support from a particular Entity. The following are specifically prohibited:
- anything promoting illegal activity;
 - anything that is inconsistent with University policies including but not limited to those dealing with discrimination and harassment, or contrary to provincial human rights legislation;
 - all political or advocacy advertisements, except those whose sole purpose is to promote education;
 - any Acknowledgement or Advertising promoting smoking (includes

cannabis), vaping, and tobacco products as defined in MAPP 1.16 Policy on Smoking, Vaping & Tobacco Use;

- any Acknowledgement or Advertising promoting the sale of sexual services;
- any Acknowledgement or Advertising promoting gambling.

1.1.15. Acknowledgement or Advertising of an Entity is not an endorsement of that Entity, or the goods it produces, or services it provides.

1.2. Approval of any Advertising, Sponsorship or Promotional Activity may be reviewed, changed, or revoked by the University at any time to ensure adherence to these principles.

POLICY

~~1.00 — From time to time The University of Western Ontario is engaged in, or approached about, advertising, sponsorships or commercial activity.~~

~~The practice of the University has been to review all applications to determine if they are justified and in keeping with the needs of students, faculty and staff.~~

~~The University is sensitive to the impact advertising will have on the beauty of Western's campus and the commercialization of the institution.~~

DEFINITIONS

~~2.00 — This policy covers university facilities and all university sponsored media, including the World Wide Web. For the purpose of implementing this policy, the following definitions may be useful:~~

~~(a) — An **advertisement** is a message created and displayed for the sole purpose of promoting a corporation or its product.~~

~~(b)(a) **Sponsorship recognition** acknowledges corporate support for a project, program or event. Material containing such acknowledgments will focus primarily on the project, program or event being supported.~~

~~(c)(a) **Commercial activity** refers to any revenue making or fundraising activity on campus by an outside business or organization or unit within the University.~~

2. APPROVAL AND DOCUMENTATION

The Divisions of Western Advancement and Western Communications, under the direction of the Vice-President (Western Advancement) and Chief Communications Officer, have the authority and responsibility to develop operational guidelines and Procedures to support the approval and acceptance process for Advertising, Sponsorship and Promotional Activity in compliance with this Policy.

2.1 The authority to approve Promotional Activity and/or accept Advertising or Sponsorship rests with the Board or its delegate(s).

2.1.1 The Chief Communications Officer, or their designate, is authorized to approve or revoke Advertising in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on or off University property, where funds are being raised to benefit the University.

2.1.2 The Vice-President (Western Advancement), or their designate, is authorized to approve or revoke Sponsorship in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on or off University property, where funds are being raised to benefit the University.

2.1.3 The Chief Communications Officer, or their designate, is authorized to approve or revoke Promotional Activity in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on University property.

2.2 Subject to Section 2.1, the Vice-President (Western Advancement) and/or Chief Communications Officer can grant limited forms of exclusivity on a case-by-case and time limited basis.

2.3 Subject to Section 2.1, Western Advancement, Western Communications and other units or individuals designated by the Vice-President (Western Advancement) and Chief Communications Officer are authorized by the Board to negotiate and finalize Agreements for Advertising, Sponsorship and Promotional Activity with prospective Entities.

APPROVAL PROCESS

~~3.00 — The University, its Faculties and Departments may seek opportunities for advertising, sponsorships or commercial activities.~~

~~4.00 — To protect the University's interest in potential cross-promotional programs and to prevent potential conflicts between units, the Vice-President (Western Advancement) must be informed in advance of any efforts being made to arrange advertising, sponsorship or commercial activities.~~

~~5.00 — Draft advertising contracts must be approved by the directors of non-academic departments and academic deans and then by the Vice-President (Western Advancement).~~

~~6.00 — The responsibility for reviewing all advertising, sponsorship or commercial activity as outlined in section 2.00 (c) has been delegated to the Vice-President (Western Advancement) to ensure this approach is consistent with the University's advancement and external activities.~~

~~All requests or proposals for advertising, sponsorship or commercial activity should be forwarded through the appropriate channels to the Vice-President (Western Advancement), Suite 2107 Stevenson Hall.~~

~~6.01 — The Vice-President (Western Advancement), or designate, will consult with interested parties, including the President and Vice-Presidents for information and advice, and will determine the viability of the proposal.~~

~~6.02 — Each decision will be communicated in writing to the affected parties in a timely manner.~~

~~7.00 — Contracts with a value of \$50,000 or more must also be approved by the President.~~

REVENUE

~~8.00 — To ensure that any **advertising programs or commercial activities** at The University of Western Ontario support the academic mission of the University, 50 per cent of net revenue from any advertising or commercial activity contract must be directed to student awards, with the balance directed to a specific University, Faculty or Departmental program.~~

~~8.01 — Signage must be in place at the site of the advertisement or commercial activity stating the program or programs receiving the revenue.~~

~~8.02 — Fundraising activities by registered charitable organizations are exempted from this provision. Other exemptions from this provision may be granted by the President.~~

3. ACKNOWLEDGEMENT

3.1 Tax Receipts are not issued for Advertising or Sponsorship; however, Business Receipts may be issued.

3.2 Acknowledgement will be commensurate with the level of financial and/or in-kind support received by the University.

4. PHYSICAL SIGNAGE

4.1 All physical signage or displays that include Advertising, Sponsorship or Promotional Activity shall be consistent with University Policy 1.50 Signage and Election Posters and related procedures.

4.2 Distribution of non-university Advertising, Sponsorship or Promotional Activity materials through the campus mail or email system is prohibited, with the exception of communication related to Affinity Partnerships, University publications that may contain Advertising, and communication concerning a charitable cause promoted by the University.

PUBLICATIONS

~~9.00 — Revenue from advertisements placed in University publications shall be used to support those publications.~~

~~9.01 — Routine advertisements need not be presented to the Vice-President (Western~~

~~Advancement) prior to publication.~~

ANCILLARY SERVICES

~~10.00—Ancillary services are delegated responsibility for managing commercial activities and advertising programs relating to their core business activities but other ventures and those with potential for wider application must be brought to the Vice President (Western Advancement) [see Sections 4.00–6.00]. Approval of such advertising will include a revenue-sharing agreement to be negotiated on a case-by-case basis.~~

~~10.01—In the case of campus-wide advertising programs, revenue will be split, calculated on a case-by-case basis.~~

UNIVERSITY COMMUNITY CENTRE

~~11.00 — The University Students' Council is responsible for managing commercial activities and advertising in parts of the UCC as specified in existing Occupancy and Operating Agreements with the University, but ventures with potential for wider application must be brought to the Vice President (Western Advancement).~~

~~11.01 — In the case of campus-wide programs that include UCC locations covered by such agreements, revenue will be split, calculated on a case-by-case basis.~~

RESTRICTIONS

~~12.00 — Advertising and any other commercial activity will not be permitted in classrooms or laboratories or any other space specifically devoted to academic purposes.~~

~~13.00 — Advertising and commercial activity must not impede ordinary pedestrian or vehicular traffic flow and must not alter or detract from the normal architectural appearance, visual beauty or environment of the campus.~~

~~14.00 — Good taste and sound judgment shall govern all advertising, sponsorship and commercial activities on campus. The following are specifically prohibited:~~

- ~~• anything promoting illegal activity~~
- ~~• anything that is inconsistent with University policies dealing with discrimination and harassment or contrary to provincial human rights legislation~~
- ~~• all advocacy advertisements, except those whose sole purpose is to promote education~~
- ~~• any advertisements involving tobacco or alcohol products~~
- ~~• anything promoting the sale of sexual services~~

REPORTING

~~15.00 — The Vice President (Western Advancement) will report annually to the Property and Finance Committee on the decisions taken under this policy.~~

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

Policy Category:	General
Subject:	Advertising, Sponsorship and Promotional Activity
Subsections:	Purpose, Definitions, Policy
Approving Authority:	Board of Governors
Responsible Officer:	Vice-President (Western Advancement) and Chief Communications Officer
Responsible Office:	Western Advancement and Western Communications
Related Procedures:	Procedure for MAPP 1.12 - Advertising, Sponsorship and Promotional Activity
Related University Policies:	1.1 Use of University Facilities 1.15 Corporate Use of University Name or Trademarks 1.16 Policy on Smoking, Vaping and Tobacco Use 1.33 Campus Alcohol Policy 1.44 Naming 2.1 Gift Acceptance 2.2 Fundraising
Effective Date:	[TBD]
Supersedes:	June 24, 2008; September 25, 2003

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

I. PURPOSE

The purpose of this Policy is to guide the University on business relationships between the University and an Entity wishing to contribute, financially or in-kind, to the University in return for specified Acknowledgement or other promotional considerations.

The University recognizes that many of its activities provide potential resources or other non-financial benefits through legitimate opportunities for Advertising, Sponsorship and other Promotional Activity. This revenue and in-kind support can be beneficial to the University, its programs, and its community. It is also necessary to recognize that the University is a public institution, and that its reputation and image must be protected.

This Policy shall apply to Advertising, Sponsorship and Promotional Activity:

- a) on University property, whether owned or leased, in or outside physical structures;
- b) in University digital property;
- c) at University events or other activities, whether on or off University property;
- d) of University programs or groups, including, but not limited to, student groups, sporting events, conferences, meetings, athletic teams, and employee groups.

This Policy shall not apply to the following circumstances:

- a) Funding obtained from a government through formal grant programs;
- b) Gifts or Grants;
- c) Research contract and partnerships;
- d) Events and activities requested by third parties and initiated, organized, or led by the Division of Housing & Ancillary Services;
- e) Activities approved by the University Students' Council (USC) in its digital property and/or occurring within its leased space inside the University Community Centre, as outlined in the Western/USC Occupancy Agreement; and
- f) Advertising, sponsorship or promotional activity related to alcohol.

II. DEFINITIONS

Acknowledgement:	Recognition of sponsorship support. A typical acknowledgement of sponsorship is the placement of the Entity's trademark, and/or certain information about an Entity, in the promotional material for a University event or activity. This might include, but is not limited to, signage, websites, or marketing and promotional material for an event. An Acknowledgement on a University website may contain a link to the Entity's website or other digital property.
Advertising:	The purchasing or leasing of space in University materials (printed or electronic) or signage in order to promote such Entity's goods or services. It is most often associated with a corporation or its products.
Affinity Partnership:	A corporation with which the University has a contractual relationship to offer benefits to University alumni who use their products.
Business Receipt:	<u>As defined in MAPP 2.1 Gift Acceptance</u>
Endorsement:	Any statements or depictions which can reasonably be construed to contain or imply a preference by the University, or by any of its faculties, departments, units, or employees who are speaking or acting as representatives of the University.

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

Entity:	An individual, corporation, non-governmental organization, partnership, joint venture, trust, or other legal entity.
Policy:	This Advertising, Sponsorship and Promotional Activity Policy may be amended from time to time.
Procedures:	The procedures to this Policy as may be amended from time to time.
Promotional Activity:	Any activity conducted by an Entity on University property, or associated with a University program or activity off University property, that is intended to increase awareness, visibility, or engagement with an Entity's brand, products, or services, excluding Fundraising activities. Examples may include, but are not limited to, product sampling, branded giveaways, account/service sign-ups, interactive displays, tabling, demonstrations, or other experiential marketing efforts.
Sponsor:	An Entity who provides funds and/or an in-kind contribution of goods and/or services in support of a University program or activity and, in exchange, receives an Acknowledgement by the University.
Sponsorship:	A provision of funds and/or an in-kind contribution of goods and/or services by a Sponsor in support of a University program or activity, where in return, the University provides an Acknowledgement to the Sponsor. Sponsorships are not Gifts or Grants as defined by MAPP 2.1 Gift Acceptance .
Tax Receipt:	As defined in MAPP 2.1 Gift Acceptance .
Third Party:	Any individual not employed by the University, but excluding agents, contractors and subcontractors hired by the University to perform a service.
University:	The University of Western Ontario operating as Western University.

III. POLICY**1. PRINCIPLES**

- 1.1. All Advertising, Sponsorship and Promotional Activity shall be conducted in accordance with the following principles:
 - 1.1.1. Advertising, Sponsorship and Promotional Activity must not jeopardize the University's registered charitable status.
 - 1.1.2. The University values and will protect its integrity, autonomy, and academic freedom. It will not approve Advertising, Sponsorship or Promotional Activity that would compromise these fundamental values.
 - 1.1.3. The University will not approve Advertising, Sponsorship or Promotional Activity that will compromise its reputation, its commitment to the academic mission, or its essential values, as articulated in its strategic documents. These include values respecting Indigeneity, equity, diversity, inclusion, accessibility, and anti-racism.
 - 1.1.4. The University reserves the right to refuse Advertising, Sponsorship and Promotional Activity that requires conditions or restrictions that the University deems unacceptable.
 - 1.1.5. The University solicits and accepts Advertising and Sponsorship revenue or in-kind

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

support for priorities that are approved in accordance with established procedures for University planning and University initiatives.

- 1.1.6. Advertising and Sponsorship must comply with procurement processes applicable to the University.
- 1.1.7. Advertising, Sponsorship and Promotional Activity shall generally be non-exclusive; however, limited forms of exclusivity may be granted on a case-by-case basis.
- 1.1.8. Acknowledgements, Advertising and Promotional Activity will not occur in classrooms, libraries, or laboratories, or any other space specifically devoted to academic purposes.
- 1.1.9. Acknowledgements, Advertising and Promotional Activity must not materially impede ordinary pedestrian or vehicular traffic flow and should comply with Universal Access principles.
- 1.1.10. Acknowledgements, Advertising and Promotional Activity will not alter or detract from the normal architectural appearance, visual beauty, or environment of University property.
- 1.1.11. The request for Advertising, Sponsorship or Promotional Activity is made with the full knowledge and support of the Dean and/or Department Chair, Vice-Provost (Students), Associate Vice-President, or Director of the University unit that will benefit from the proceeds of the revenue, if applicable.
- 1.1.12. Advertising, Sponsorship and Promotional Activity will comply with the University's Manual of Policy & Procedures and applicable laws.
- 1.1.13. Advertising, Sponsorship or a Promotional Activity must not expose the University to unacceptable risk or liability. This means that:
 - Advertising, Sponsorship and Promotional Activity should not be difficult or costly to administer;
 - Advertising, Sponsorship and Promotional Activity should not be funded by illegal or unethical activities.
- 1.1.14. It may be advisable to decline Advertising and Sponsorship revenue or in-kind support from a particular Entity. The following are specifically prohibited:
 - anything promoting illegal activity;
 - anything that is inconsistent with University policies including but not limited to those dealing with discrimination and harassment, or contrary to provincial human rights legislation;
 - all political or advocacy advertisements, except those whose sole purpose is to promote education;
 - any Acknowledgement or Advertising promoting smoking (includes cannabis), vaping, and tobacco products as defined in [MAPP 1.16 Policy on Smoking, Vaping & Tobacco Use](#);
 - any Acknowledgement or Advertising promoting the sale of sexual services;

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

- any Acknowledgement or Advertising promoting gambling.

1.1.15. Acknowledgement or Advertising of an Entity is not an endorsement of that Entity, or the goods it produces, or services it provides.

1.2. Approval of any Advertising, Sponsorship or Promotional Activity may be reviewed, changed, or revoked by the University at any time to ensure adherence to these principles.

2. APPROVAL AND DOCUMENTATION

The Divisions of Western Advancement and Western Communications, under the direction of the Vice-President (Western Advancement) and Chief Communications Officer, have the authority and responsibility to develop operational guidelines and Procedures to support the approval and acceptance process for Advertising, Sponsorship and Promotional Activity in compliance with this Policy.

2.1. The authority to approve Promotional Activity and/or accept Advertising or Sponsorship rests with the Board or its delegate(s).

2.1.1. The Chief Communications Officer, or their designate, is authorized to approve or revoke Advertising in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on or off University property, where funds are being raised to benefit the University.

2.1.2. The Vice-President (Western Advancement), or their designate, is authorized to approve or revoke Sponsorship in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on or off University property, where funds are being raised to benefit the University.

2.1.3. The Chief Communications Officer, or their designate, is authorized to approve or revoke Promotional Activity in University publications (including electronic publications or digital property), in other University media, and in/on signage, property, material, or facilities on University property.

2.2. Subject to Section 2.1, the Vice-President (Western Advancement) and/or Chief Communications Officer can grant limited forms of exclusivity on a case-by-case and time limited basis.

2.3. Subject to Section 2.1, Western Advancement, Western Communications and other units or individuals designated by the Vice-President (Western Advancement) and Chief Communications Officer are authorized by the Board to negotiate and finalize Agreements for Advertising, Sponsorship and Promotional Activity with prospective Entities.

3. ACKNOWLEDGEMENT

3.1. Tax Receipts are not issued for Advertising or Sponsorship; however, Business Receipts may be issued.

3.2. Acknowledgement will be commensurate with the level of financial and/or in-kind support received by the University.

POLICY 1.12 – Advertising, Sponsorship and Promotional Activity**4. PHYSICAL SIGNAGE**

4.1. All physical signage or displays that include Advertising, Sponsorship or Promotional Activity shall be consistent with University Policy [1.50 Signage and Election Posters](#) and related procedures.

4.2. Distribution of non-university Advertising, Sponsorship or Promotional Activity materials through the campus mail or email system is prohibited, with the exception of communication related to Affinity Partnerships, University publications that may contain Advertising, and communication concerning a charitable cause promoted by the University.

PROCEDURE FOR POLICY 1.12 - ADVERTISING, SPONSORSHIP AND PROMOTIONAL ACTIVITY

Governing Policy:	Policy 1.12 - Advertising, Sponsorship and Promotional Activity
Subsections:	Overview, Definitions, Scope, Procedure
Officer(s) Responsible for Procedures:	Vice-President (Western Advancement) and Chief Communications Officer
Effective Date:	(TBD)
Supersedes:	*

OVERVIEW

The purpose of this Procedure is to provide clear instruction on business relationships between the University and an Entity wishing to contribute financially and/or in-kind to the University in return for specified Acknowledgement or Advertisement. It also provides clear instruction between the University and an Entity wishing to provide a Promotional Activity where revenue or in-kind support is not contributed.

DEFINITIONS

The defined terms in this Procedure have the same meaning as in the [MAPP 1.12 Advertising, Sponsorship and Promotional Activity](#).

SCOPE

This Procedure applies to business relationships between the University and an Entity wishing to contribute, financially or in-kind, to the University in return for specified Acknowledgement or other promotional consideration.

PROCEDURE

1. All Approvals

- 1.1. Anyone wishing to host a conference, event, sporting event, and/or similar activities on University property, where Advertisements, Acknowledgements, or other Promotional Activity is being promised and where this Policy applies must follow this Procedure.
- 1.2. The [Advertising, Sponsorship and Promotional Activity Approval Form](#) appended to this Procedure must be completed and submitted. This includes a description of the Advertisement, details related to the Acknowledgement, and/or a description of the Promotional Activity. Please submit the completed form:
 - 1.2.1. For Advertising and Promotional Activity to: Western Communications at adpromo@uwo.ca.

PROCEDURE FOR POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

- 1.2.2. For Sponsorship to: Advancement Operations within the Division of Western Advancement at sponsorships@uwo.ca.
- 1.3. All requests to solicit or approve Advertising or Promotional Activity will be forwarded to the Chief Communications Officer or their designate(s) for approval.
- 1.4. All requests to solicit or approve Sponsorship will be forwarded to the Vice-President (Western Advancement) or their designate(s) for approval.
- 1.5. Should the Chief Communications Officer or their designate(s) determine fundraising for the University could be compromised through solicitation or approval of Advertising or Promotional Activity, they will consult with the Vice-President (Western Advancement) or designate(s).
- 1.6. Should the Vice-President (Western Advancement) or their designate(s) determine University reputation could be compromised through solicitation or approval of the Sponsorship, they will consult with the Chief Communications Officer or designate(s).
- 1.7. Should the Vice-President (Western Advancement) or Chief Communications Officer or their designate(s) determine that business endeavours for Western's Housing department, Hospitality Services, and Retail Services could be compromised through solicitation or approval of Advertising, Sponsorship or Promotional Activity, they will consult with the Associate Vice-President, Housing & Ancillary Services or designate(s).
- 1.8. Should the Associate Vice-President, Housing & Ancillary Services, or their designate(s), determine that fundraising or University reputation could be compromised through business endeavours in Western's Housing department, Hospitality Services, and Retail Services, they will consult with the Vice-President (Western Advancement) and/or Chief Communications Officer, or their designate(s).
- 1.9. Advertising and Sponsorship activity must be approved prior to solicitation of revenue or in-kind support.
- 1.10. The University and its faculties, departments, and units may determine rates for Advertising and Sponsorship, as appropriate, to generate revenue and cover costs associated with Advertising and Sponsorship.
- 1.11. Rates for Advertising and Sponsorship should reflect the fair market value of the exposure being provided as determined by Western Advancement or Western Communications.
- 1.12. The Vice-President (Western Advancement) or Chief Communications Officer will report annually to the Property and Finance Committee on the approvals given under this Policy.

2. Documentation

- 2.1. All approvals for Advertising, Sponsorship and Promotional Activity will be in the form of an authorized signature on the [Advertising, Sponsorship and Promotional Activity Approval Form](#).
- 2.2. Western Communications maintains records on all Advertising and Promotional Activity.

PROCEDURE FOR POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

- 2.3. Western Advancement maintains records on all Sponsorships received by the University.
- 2.4. Documentation is saved as per [MAPP 1.30 University Records and Archives](#). Electronic records documentation is also kept in an electronic document management system.

3. Business Receipts

- 3.1. The University's charitable number or status cannot be used on any promotional items.
- 3.2. The decision to offer Business Receipts and the value of those Business Receipts will follow with [MAPP 2.1 Gift Acceptance](#) and its associated Procedures.

4. Harmonized Sales Tax (HST)

- 4.1. Advertising and Sponsorship can be subject to HST.
- 4.2. Prior to solicitation, Western Financial Services will review all intended Advertisements and Acknowledgements related to soliciting revenue for Advertising and Sponsorship to identify whether the Advertising and/or Sponsorship is subject to HST.
- 4.3. Continuing Education is defined as University non-credit courses, community services programs, conferences, workshops, seminars, fundraising events, and day camps. These events and activities contribute in an important way to the University's role within the community and are financed primarily by participant fee revenue, Sponsorship, and grants awarded by governments, external agencies, foundations, and corporations. Continuing Education can be subject to HST and overhead charges since there is an incremental cost of these initiatives to the University. More information about [Continuing Education](#) can be found on the University's website.

5. Promotional Activity

- 5.1. Students are not required to scan QR codes, download apps, and/or click on links prior to participating in a Promotional Activity (i.e. before they receive a sample).
- 5.2. Video and/or photos from Promotional Activity cannot be used by organizers unless permission is provided by each individual in the video or photos.

6. Alcohol, Smoking, Vaping & Tobacco Use

- 6.1. University Policy [1.33 Campus Alcohol](#), governs Advertising and Sponsorship related to alcohol.
- 6.2. Any Acknowledgement or Advertising promoting smoking (including cannabis), vaping, and tobacco products, as defined in University policy [1.16 Smoking, Vaping & Tobacco Use](#), is prohibited.

7. Conflicts of Interest

- 7.1. A Sponsor shall disclose any conflict or potential conflict of interest with the University. This arises where the Sponsor has, or could be seen to have, the opportunity to use the Sponsorship proceeds, or influence derived from the Sponsorship to improperly benefit themselves, their family, or direct relatives, or could result in undue Sponsor influence or control of University spending.

PROCEDURE FOR POLICY 1.12 – Advertising, Sponsorship and Promotional Activity

- 7.2. Failure to disclose any conflict or potential conflict of interest may result in withdrawal of approval of the Sponsorship. More about conflicts of interest can be found in [MAPP 3.4 Conflicts of Interest](#) and [MAPP 2.1 Gift Acceptance](#) and their associated Procedures.

8. Issuing Invoices and Depositing Funds for the University

- 8.1. Western Units are responsible for the preparation and issuance of invoices for Advertising and Sponsorship using [Western Financials \(Billing Module\)](#).
- 8.2. Advancement Operations can also provide invoices for Sponsorships.
- 8.3. When revenue is deposited for Sponsorship, the following will apply:
- 8.3.1. Cheques for Sponsorship are sent to Advancement Operations including the Sponsor's primary address, phone number, email, and confirmation of amount contributed.
 - 8.3.2. Credit card numbers for Sponsorship are shared by mobile phone through Advancement Operations to ensure Payment Card Industry (PCI) compliance. Cardholder data transactions must be conducted in accordance with the [Financial Services Code of Procedure](#). Payments are accompanied by a list of Sponsors, including their primary address, phone number, email, and confirmation of the amount contributed.
- 8.4. The University will deposit payments into the appropriate account for University expenditure.

9. Solicitation Lists

- 9.1. The University will not provide solicitation lists for Advertising or Sponsorship.
- 9.2. The University endeavours to protect the personal information of all individuals who come into contact with it—be they students, alumni, faculty, staff, donors, potential donors, or members of the general public. For more information, please visit [Protection of Privacy](#) on the University website.

Advertising, Sponsorship, and Promotional Activity Approval Form

Submission Information:

Name: _____

Title/Position: _____

Department/Group: _____

Primary Address: _____

City: _____ Province: _____

Postal Code: _____

Primary Phone: _____ Email: _____

Are you requesting approval for Advertising ☐ , Sponsorship ☐ Promotional Activity ☐ ?

Please provide a description of the Advertisement, Sponsorship, or Promotional Activity you will be undertaking:

Please answer questions 1-7. Fill out the comments box on page 2 (if needed):

1. Have you received approval to Advertise in the past? Yes ☐ No ☐ N/A ☐

If yes, please describe: _____

2. Have you solicited sponsorship in the past for this activity? Yes ☐ No ☐ N/A ☐

If yes, please describe: _____

3. Have you done this Promotional Activity in the past? Yes ☐ No ☐ N/A ☐

If yes, please describe: _____

Advertising, Sponsorship, and Promotional Activity Approval Form

4. Do you have a letter or a Sponsorship package that outlines acknowledgements and recognition based on levels of support (i.e. Sponsorship levels and benefits)? Yes No

If you selected yes, please attach the documentation to the email generated when you submit.

5. If there is no additional documentation provided, please describe the benefits and forms of recognition you plan to offer (i.e. logos on banners or t-shirts, giveaways, signage)?

6. For Sponsorship and Advertising, who do you plan to ask and how do you plan to approach them?

7. Have you reviewed the advertiser, sponsor, or company promoting products or services to ensure they align with Western's values? Yes No

8. Do you have a Continuing Education account? Yes No Unsure N/A

If yes, what is the Project Number or Speed Code? _____

(Continuing Education is defined as University non-credit courses, community services programs, conferences, workshops, seminars, fundraising events, and day camps. These events and activities contribute in an important way to the University's role within the community and are financed primarily by participant fee revenue, sponsorships, and grants awarded by governments, external agencies, foundations, and corporations.)

Additional Comments or Information:

Please email this document, along with any supporting documentation, to:

If Sponsorship: sponsorships@uwo.ca

If Advertising or Promotional Activity: XXXX

Advertising, Sponsorship, and Promotional Activity Approval Form

For Western Advancement and Western Communications Use Only

1. Has the Advertising, Sponsorship, or Promotional Activity been reviewed? Yes No

If yes, have any changes been made? Yes No

Describe change: _____

2. Is this Western Sponsorship Funding? Yes No

3. Questions to determine if DRS needs to be involved:

a. Will it establish a new endowment?

b. Will it establish a new named expendable project?

c. Will it require a matching fund commitment from the University?

d. Will it offer a new naming opportunity (excluding renewals)?

e. Will it require additional University approvals, prescribed recognition, and/or reporting?

4. Has clearance been obtained for the prospects being solicited for the Advertising, Sponsorship, or Promotional Activity? Yes No

Comments:

5. Does Western Communications need to be consulted? Yes No

6. Does Western Advancement need to be consulted? Yes No

7. Does Housing & Ancillary Services need to be consulted? Yes No

For Western Financial Services Use Only

1. Are there HST implications? Yes No

Comments:

Signature: _____

Advertising, Sponsorship, and Promotional Activity Approval Form

Final Approvals

The final Advertising, Sponsorship, or Promotional Activity documentation (package or letter) has been reviewed and approved by:

Chief Communications
Officer or delegate

Approver: _____ Date: _____

Vice-President (Western
Advancement) or delegate

Approver: _____ Date: _____

**Revisions to MAPP Policy 2.2 - Fund Raising and Canvassing and
Rescission of MAPP Policy 2.27 - Issuing Receipts for Charitable Events**

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: 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.

Executive Summary:

The provided briefing note summarizes the policy review process that was completed and outlines the proposed revisions to MAPP Policy 2.2 – Fund Raising and Canvassing and the rationale for rescinding MAPP Policy 2.27 – Issuing Receipts for Charitable Events.

Documentation Provided:

FRDRC: Briefing Note - Fund Raising & Canvassing Policy Review
MAPP Policy 2.2 – Fund Raising and Canvassing (*current with track changes*)
MAPP Policy 2.2 – Fundraising (*for approval*)
Procedure for Fundraising Approval (*for information*)

FRDRC: Briefing Note

Fund Raising & Canvassing Policy Review

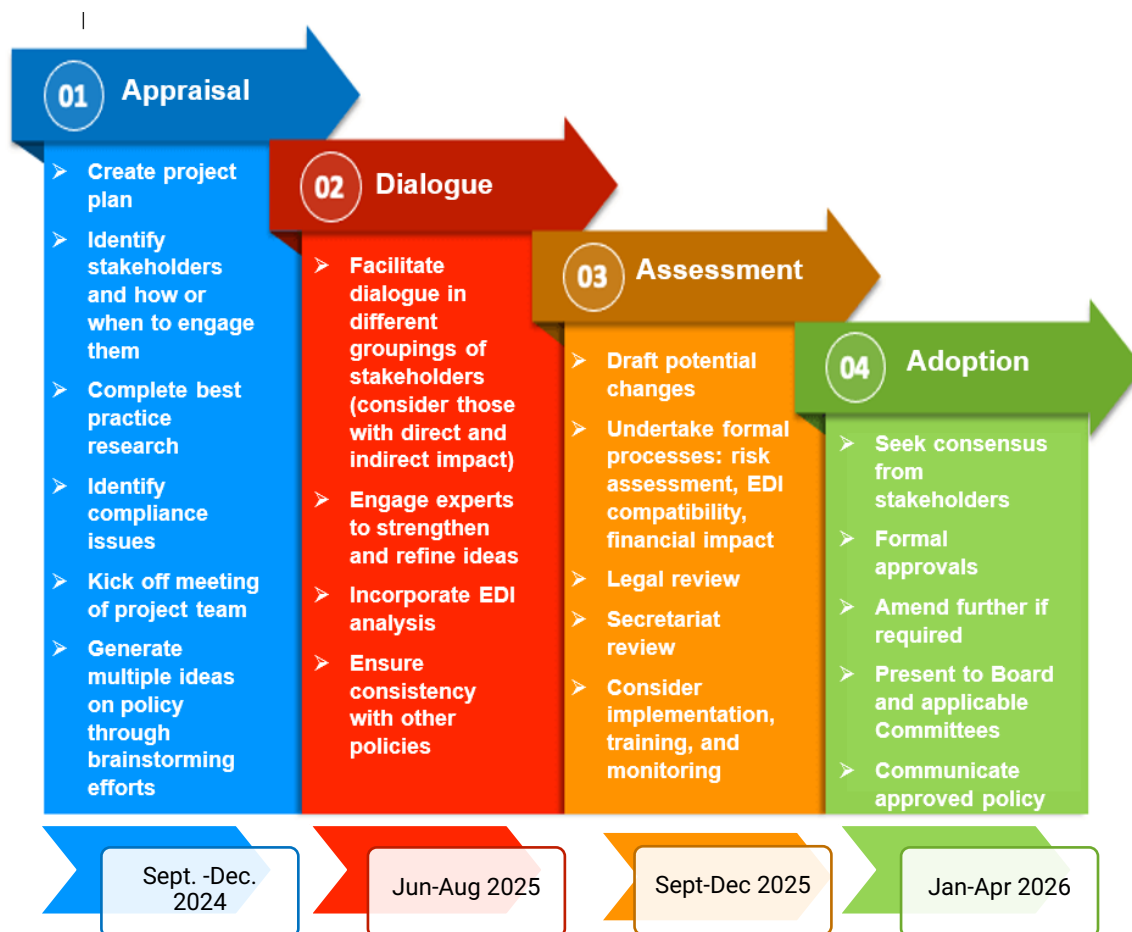
Introduction

Western Advancement is the Responsible Office for the university's general fundraising policies, as delegated by the Board of Governors.

Following recent review of [MAPP 2.1 Gift Acceptance](#), MAPP 2.28 Gift Valuation, [MAPP 1.44 Naming](#), and MAPP 1.9 Naming of Campus Buildings, Physical Structures and Space, Western Advancement is now focused on reviewing [MAPP 2.2 Fund Raising and Canvassing](#) and [MAPP 2.27 Issuing Charitable Receipts to Fund Raising Events](#). Both were last reviewed in 1997 and 2008, respectively.

Timelines

The following are the timelines and milestones involved with this review. We are currently within the Adoption phase of the review.



Inputs

An independent contractor assessed our current policies and provided an industry comparison with key peers, including McGill University, McMaster University, Queen's University, the University of Alberta, the University of Calgary, and the University of Toronto.

Western Advancement reviewed each section of the policies alongside these industry comparators to formulate proposed changes for further review and consultation. Western Advancement also considered recommendations to align these policies with the recently updated gift acceptance and naming policies.

Western Advancement also engaged the following groups in consultations on a draft of the updated policy:

- Campaign Co-Chairs
- Financial Services
- Government Relations
- Housing & Ancillary Services
- Ivey Advancement
- Legal Services
- Office of Equity, Diversity and Inclusion
- Office of Indigenous Initiatives
- President's Group
- Provost's Leadership Team, including faculty Deans
- Society of Graduate Students (SOGS)
- Sports & Recreation
- University Student's Council (USC)
- University Secretariat
- Western Communications
- Western Research
- Western University Alumni Association

High-Level Recommendations

The following are the key recommendations for MAPP 2.2 Fund Raising and Canvassing and MAPP 2.27 Issuing Charitable Receipts to Fund Raising Events made to date:

- Remove clauses associated to canvassing unrelated to fundraising. Components of the policy related to canvassing unrelated to fundraising will be considered for a separate policy.
- Change name of policy to MAPP 2.2 Fundraising

- Dissolve MAPP 2.27 Issuing Charitable Receipts to Fund Raising Events. Any components of the policy related to receipting have already been added to MAPP 2.1 Gift Acceptance and/or will be added to MAPP 2.2 Fundraising policy and procedures.
- Add clearer definition for fundraising.
- Provide clarity and definition around student groups.
- Dissolve the guidelines in the policy and add to principles of fundraising initiatives along with principles around fundraising in accordance with the university's mission and priorities.
- Create clearer procedures for a) raising funds for Western, and b) raising funds for other charities.
- Create clearer procedures for virtual, on-campus, and off-campus initiatives.
- Create clearer procedures related to: Western Advancement supported initiatives, Western staff and faculty supported initiatives, and third-party initiatives.
- Remove Western's ability to apply for and coordinate lottery licenses.
- Include links to Bank Card policy and Technology Risk Assessment Committee (TRAC) process.
- Incorporate the Third-Party Event Guidelines document and application form, and expand to include all fundraising initiatives, not just events.

Next Steps

A review and proposed approval of the updated policy will occur at the Fundraising and Donor Relations Committee of the Board (FRDRC) in January. We hope to bring the updated policy to the Board for final consideration during the February meeting.

POLICY 2.2 – ~~Fund-Raising and Canvassing~~ Fundraising

Policy Category: Financial

Subject: Fundraising

Subsections: Purpose, Definitions, Principles, Fundraising for the University, Fundraising for other Charities or Non-Profit Organizations, Approval, Revocation

Approving Authority: Board of Governors

Responsible Officer: Vice-President (Western Advancement)

Responsible Office: Western Advancement

Related Procedures: Procedure for Policy 2.2 – Fundraising Approval

Related University Policies: 1.1 Use of University Facilities
1.3 Political Candidacy of Students
1.5 Picketing, Distribution of Literature and Related Activities
1.12 Advertising and Commercial Activity
1.15 Corporate Use of University Name and Trademarks
1.16 Policy on Smoking, Vaping & Tobacco Use
1.17 Licensed Commercial Use of University Name and Trademarks
1.33 Campus Alcohol Policy
1.38 Rights and Responsibilities of Academic Freedom
1.50 Signage and Election Posters
2.1 Gift Acceptance

Effective Date: [TBD] ~~June 1, 1997~~

Supersedes: January 24, 2008 ~~May 1, 1994~~

I. PURPOSE

The purpose of this Policy is to guide Organizers of any Fundraising activity, whether or not Tax Receipts are involved.

This Policy sets out the considerations and processes for:

- (i) Fundraising for the University on or off University property, or virtually; and
- (ii) Considerations and approval requirements for Fundraising for or by other charitable organizations and non-profits on University property.

II. DEFINITIONS

Agreement: A written agreement between an Organizer and the University regarding Fundraising.

Board: The Board of Governors of the University.

Business Receipt: As defined in MAPP 2.1 Gift Acceptance.

Donor: An Entity making a Gift or Grant.

Entity: An individual, corporation, partnership, joint venture, trust, or other legal entity.

Fundraising: The process of collecting money or other resources. It involves engaging potential Donors or Sponsors through outreach. Examples include, but are not limited to, personal solicitation; solicitation of sponsorships; or events (e.g. golf tournaments).

FRDRC: The Fundraising and Donor Relations Committee established by the Board.

Gift: As defined in MAPP 2.1 Gift Acceptance.

Grant: As defined in MAPP 2.1 Gift Acceptance.

Organizer: An Entity that arranges, coordinates or manages an event, task or solicitation in a structured way. This could include, but is not limited to faculty, librarians, archivists, staff, students, student groups and associations, alumni, Volunteers, employee groups, and other Third Parties.

Policy: This Fundraising Policy, as may be amended from time to time.

Procedures: The procedures to this Policy as may be amended from time to time.

Sponsor: As defined in MAPP 1.12 Advertising and Commercial Activity.

Sponsorship: As defined in MAPP 1.12 Advertising and Commercial Activity.

Tax Receipt: As defined in MAPP 2.1 Gift Acceptance.

Third Party: Any individual not employed by the University, but excluding agents, contractors, and subcontractors hired by the University to perform a service.

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

Volunteer: A person who offers their time, skills or services freely and without pay.

III. POLICY

1. PRINCIPLES

1.1. All Fundraising shall be approved and conducted in accordance with the following principles:

1.1.1. Fundraising must not jeopardize the University's registered charitable status.

1.1.2. The University values and will protect its integrity, autonomy, and academic freedom. It will not approve Fundraising that would compromise these fundamental values.

1.1.3. The University will not approve Fundraising that will compromise its reputation, its commitment to its academic mission or its essential values, as articulated in its strategic documents. These include values respecting Indigeneity, equity, diversity, inclusion, accessibility, and anti-racism.

1.1.4. Fundraising will be coordinated to employ strategies that reflect the complex values, connections, and multiple areas of interests that students, alumni, donors, or potential donors might have, providing tailored outreach that aligns with University priorities.

1.1.5. The University reserves the right to refuse Fundraising that requires conditions, restrictions, or expenditures that the University deems unacceptable.

1.1.6. The request for Fundraising is made with the full knowledge and support of the Dean, and/or Department Chair, Vice-Provost (Students), Associate Vice-President, or Director of the University unit that will benefit from the proceeds of the activity, if applicable.

1.1.7. Organizers of any Fundraising will conduct themselves in accordance with professional standards of accuracy, truth, and integrity.

1.1.8. Fundraising will comply with Western's Manual of Policy & Procedure and applicable laws.

1.1.9. Fundraising must not expose the University to unacceptable risk or liability. This means that:

- Fundraising should not be difficult or costly to administer or hold;**
- Fundraising shall not be funded through illegal or unethical activities; and**
- The legal or moral authority of the Organizer should not be in question.**

2. FUNDRAISING FOR THE UNIVERSITY

2.1. All requests to Fundraise for the University should be forwarded to the Vice-President (Western Advancement) or their designate(s).

2.2. Fundraising activity must be approved prior to implementation. Approval will be in the form of a signed Agreement with the Organizer.

2.3. All monies collected, receipted, or acknowledged by the University must be under the University's control. The University must also retain control over the spending of funds raised.

2.4. The University's charitable number can only be used if prior approval has been obtained from the division of Western Advancement.

2.5. All requests for Tax Receipts or Business Receipts must adhere to MAPP 2.1 Gift Acceptance.

2.6. Any data stored by the University is kept strictly confidential and secure and will not be shared with Third Parties for any Fundraising activity without explicit consent from Western Advancement and/or in compliance with the law.

2.7. The University will not use its charitable number or status for applications for charitable gaming licenses.

2.8. Prizes of chance for Fundraising purposes that have "no purchase necessary" and a skill-testing question, where a charitable gaming license is not required, will be limited and must be approved.

3. FUNDRAISING FOR OTHER CHARITIES OR NON-PROFIT ORGANIZATIONS

3.1. Fundraising for or by other charitable or non-profit organizations on University property requires approval.

FUND RAISING POLICY

- ~~1.00 — The University frequently has need for resources for special purposes and may undertake to solicit the necessary funds.~~
- ~~2.00 — It is important that all University fund raising be coordinated so as not to embarrass, annoy or offend the donor or potential donor. For this reason, prior approval of the Vice President (University Advancement) is required in each case for the solicitation of funds in the name of the University, except in the case of major fund raising drives, in which case approval of the President and the Board of Governors is required.~~
- ~~3.00 — On the death of a member of the University community, colleagues and friends may wish to initiate a memorial fund with the aim of establishing a scholarship or prize, or a similar suitable memorial in the name of the deceased, with contributions being on a personal basis. In instances where referring the matter to the Board of Governors would be impractical, the Board has delegated authority to the Vice President (University Advancement), in consultation with the President, to approve such proposals for memorial funds and the solicitation of contributions thereto in the name of the University.~~
- ~~4.00 — All fund raising activities will be expected to conform to the general ethical standards prevailing at the University.~~

CANVASSING POLICY

- ~~5.00 — The Board of Governors has delegated to the Vice President (University Advancement) authority to approve the canvassing or solicitation of subscriptions or funds on University property, and no such activity will be undertaken until such prior approval has been obtained.~~

PROCEDURE

- ~~6.00 — With the exception of requests from student groups or external charitable or non-profit groups, all requests or proposals for fund raising or canvassing will be forwarded through the appropriate channels to the Vice President (University Advancement).~~

~~7.00 — All requests or proposals for fund raising or canvassing from student groups and charitable or non-profit groups must be submitted to the Vice-President (University Advancement), Room 2107, Stevenson Hall~~

~~7.01 — The Vice-President (University Advancement) will consider each application based on this policy and the guidelines set out below.~~

~~7.02 — Some requests or approvals require special approvals [see 8.00, 9.00 and 10.00 below]. Detailed information on special approvals may be obtained from the Vice-President (University Advancement).~~

~~8.00 — Any fund raising activity involving use of the University's marks must be approved by the Vice-President (University Advancement). [See [Policy 1.17](#)]~~

~~9.00 — Any fund raising activity resulting in the issuance of a University of Western Ontario receipt must be approved by the Development Office.~~

~~10.00 — Canvassing during municipal, provincial and federal elections will not be permitted on a door-to-door basis in the University residences or apartments without the prior approval of the building manager and the appropriate student group (i.e., residents' council).~~

~~11.00 — Any fund raising activity requiring a lottery licence must be approved first by the Vice-President (University Advancement) and subsequently by the City of London, City Clerk's Office.~~

GUIDELINES

~~12.00 — The number of activities permitted each term will be limited. All organizations must apply on the appropriate application form by the specified deadline.~~

~~13.00 — Priority will be given to fund raising requests or proposals in the following order:~~

~~(a) — Recognized campus organizations (i.e., an organization which has been approved by the University or by a group such as the University Students' Council or the Society of Graduate Students) that are raising funds to support an appropriate University program or organization, including their own. For purposes of definition, fraternities and sororities using the name of The University of Western Ontario will be considered in this category.~~

~~(b) — Recognized campus organizations that are raising funds to support an off-campus, non-university, program or organization.~~

~~(c) — Organizations with no direct connection to the University that are raising funds to support their own organization. These organizations must have a Revenue Canada charitable number.~~

~~14.00 — All fund raising activities requiring outlets will be allowed no more than two locations on campus, one in the designated University Community Centre location and/or one at another appropriate campus site. For purposes of interpreting this section, University residences and apartments may be viewed as a single site.~~

4. APPROVAL

4.1. The authority to approve Fundraising rests with the Board or its delegate(s).

4.1.1. The Vice-President (Western Advancement) has been delegated the authority to approve or revoke approval of Fundraising on or off University property where funds are being raised to benefit the University.

4.1.2. The Vice-President (Western Advancement) has been delegated the authority to approve or revoke approval of Fundraising on University property where funds are being raised for or by another charitable or non-profit organization.

4.2. Fundraising requests will be reviewed and prioritized in the following order:

4.2.1. Fundraising that supports a University funding priority.

4.2.2.Fundraising that supports a student group created for academic purposes.

4.2.3.Fundraising that supports a student group affiliated with the University.

4.2.4.Fundraising that supports another charitable or non-profit organization executed by Western staff, faculty, or students.

4.2.5.Fundraising that supports another charitable or non-profit organization executed by a Third Party.

5. REVOCATION

5.1. Approval may be revoked effective immediately and without written notice where continuation of Fundraising would, in the opinion of the Board or its delegate(s), be contrary to the principles articulated in this Policy.

5.2. In addition to the right of revocation set forth in Section 5.1 above, the Board or its delegate(s) may revoke Fundraising if there is a shortfall in the promised payment(s) outlined in the Agreement, following reasonable notice to the Organizer and an opportunity to address the shortfall.

5.3. Consistent with the *Income Tax Act*, if Fundraising is revoked, the University shall not return any portion of the funds already received except where legally permitted.

POLICY 2.2 – Fundraising

Policy Category:	Financial
Subject:	Fundraising
Subsections:	Purpose, Definitions, Principles, Fundraising for the University, Fundraising for other Charities or Non-Profit Organizations, Approval, Revocation
Approving Authority:	Board of Governors
Responsible Officer:	Vice-President (Western Advancement)
Responsible Office:	Western Advancement
Related Procedures:	Procedure for Policy 2.2 - Fundraising Approval
Related University Policies:	1.1 Use of University Facilities 1.3 Political Candidacy of Students 1.5 Picketing, Distribution of Literature and Related Activities 1.12 Advertising and Commercial Activity 1.15 Corporate Use of University Name and Trademarks 1.16 Policy on Smoking, Vaping & Tobacco Use 1.17 Licensed Commercial Use of University Name and Trademarks 1.33 Campus Alcohol Policy 1.38 Rights and Responsibilities of Academic Freedom 1.50 Signage and Election Posters 2.1 Gift Acceptance
Effective Date:	[TBD]
Supersedes:	January 24, 2008

I. PURPOSE

The purpose of this Policy is to guide Organizers of any Fundraising activity, whether or not Tax Receipts are involved.

This Policy sets out the considerations and processes for:

- (i) Fundraising for the University on or off University property, or virtually; and
- (ii) Considerations and approval requirements for Fundraising for or by other charitable organizations and non-profits on University property.

II. DEFINITIONS

Agreement:	A written agreement between an Organizer and the University regarding Fundraising.
Board:	The Board of Governors of the University.
Business Receipt:	As defined in MAPP 2.1 Gift Acceptance .
Donor:	An Entity making a Gift or Grant.
Entity:	An individual, corporation, partnership, joint venture, trust, or other legal entity.
Fundraising:	The process of collecting money or other resources. It involves engaging potential Donors or Sponsors through outreach. Examples include, but are not limited to, personal solicitation; solicitation of sponsorships; or events (e.g. golf tournaments).
FRDRC:	The Fundraising and Donor Relations Committee established by the Board.
Gift:	As defined in MAPP 2.1 Gift Acceptance .
Grant:	As defined in MAPP 2.1 Gift Acceptance .
Organizer:	An Entity that arranges, coordinates or manages an event, task or solicitation in a structured way. This could include, but is not limited to faculty, librarians, archivists, staff, students, student groups and associations, alumni, Volunteers, employee groups, and other Third Parties.
Policy:	This Fundraising Policy, as may be amended from time to time.
Procedures:	The procedures to this Policy as may be amended from time to time.
Sponsor:	As defined in MAPP 1.12 Advertising and Commercial Activity .
Sponsorship:	As defined in MAPP 1.12 Advertising and Commercial Activity .
Tax Receipt:	As defined in MAPP 2.1 Gift Acceptance .
Third Party:	Any individual not employed by the University, but excluding agents, contractors, and subcontractors hired by the University to perform a service.
University:	The University of Western Ontario operating as Western University.
Volunteer:	A person who offers their time, skills or services freely and without pay.

III. POLICY

1. PRINCIPLES

1.1. All Fundraising shall be approved and conducted in accordance with the following principles:

- 1.1.1. Fundraising must not jeopardize the University's registered charitable status.
- 1.1.2. The University values and will protect its integrity, autonomy, and academic freedom. It will not approve Fundraising that would compromise these fundamental values.
- 1.1.3. The University will not approve Fundraising that will compromise its reputation, its commitment to its academic mission or its essential values, as articulated in its strategic documents. These include values respecting Indigeneity, equity, diversity, inclusion, accessibility, and anti-racism.
- 1.1.4. Fundraising will be coordinated to employ strategies that reflect the complex values, connections, and multiple areas of interests that students, alumni, donors, or potential donors might have, providing tailored outreach that aligns with University priorities.
- 1.1.5. The University reserves the right to refuse Fundraising that requires conditions, restrictions, or expenditures that the University deems unacceptable.
- 1.1.6. The request for Fundraising is made with the full knowledge and support of the Dean, and/or Department Chair, Vice-Provost (Students), Associate Vice-President, or Director of the University unit that will benefit from the proceeds of the activity, if applicable.
- 1.1.7. Organizers of any Fundraising will conduct themselves in accordance with professional standards of accuracy, truth, and integrity.
- 1.1.8. Fundraising will comply with Western's Manual of Policy & Procedure and applicable laws.
- 1.1.9. Fundraising must not expose the University to unacceptable risk or liability. This means that:
 - Fundraising should not be difficult or costly to administer or hold;
 - Fundraising shall not be funded through illegal or unethical activities; and
 - The legal or moral authority of the Organizer should not be in question.

2. FUNDRAISING FOR THE UNIVERSITY

- 2.1. All requests to Fundraise for the University should be forwarded to the Vice-President (Western Advancement) or their designate(s).
- 2.2. Fundraising activity must be approved prior to implementation. Approval will be in the form of a signed Agreement with the Organizer.
- 2.3. All monies collected, receipted, or acknowledged by the University must be under the University's control. The University must also retain control over the spending of funds raised.
- 2.4. The University's charitable number can only be used if prior approval has been obtained from the division of Western Advancement.

- 2.5. All requests for Tax Receipts or Business Receipts must adhere to [MAPP 2.1 Gift Acceptance](#).
- 2.6. Any data stored by the University is kept strictly confidential and secure and will not be shared with Third Parties for any Fundraising activity without explicit consent from Western Advancement and/or in compliance with the law.
- 2.7. The University will not use its charitable number or status for applications for charitable gaming licenses.
- 2.8. Prizes of chance for Fundraising purposes that have “no purchase necessary” and a skill-testing question, where a charitable gaming license is not required, will be limited and must be approved.

3. FUNDRAISING FOR OTHER CHARITIES OR NON-PROFIT ORGANIZATIONS

- 3.1. Fundraising for or by other charitable or non-profit organizations on University property requires approval.

4. APPROVAL

- 4.1. The authority to approve Fundraising rests with the Board or its delegate(s).
 - 4.1.1. The Vice-President (Western Advancement) has been delegated the authority to approve or revoke approval of Fundraising on or off University property where funds are being raised to benefit the University.
 - 4.1.2. The Vice-President (Western Advancement) has been delegated the authority to approve or revoke approval of Fundraising on University property where funds are being raised for or by another charitable or non-profit organization.
- 4.2. Fundraising requests will be reviewed and prioritized in the following order:
 - 4.2.1. Fundraising that supports a University funding priority.
 - 4.2.2. Fundraising that supports a student group created for academic purposes.
 - 4.2.3. Fundraising that supports a student group affiliated with the University.
 - 4.2.4. Fundraising that supports another charitable or non-profit organization executed by Western staff, faculty, or students.
 - 4.2.5. Fundraising that supports another charitable or non-profit organization executed by a Third Party.

POLICY 2.2 – FUNDRAISING**5. REVOCATION**

- 5.1. Approval may be revoked effective immediately and without written notice where continuation of Fundraising would, in the opinion of the Board or its delegate(s), be contrary to the principles articulated in this Policy.
- 5.2. In addition to the right of revocation set forth in Section 5.1 above, the Board or its delegate(s) may revoke Fundraising if there is a shortfall in the promised payment(s) outlined in the Agreement, following reasonable notice to the Organizer and an opportunity to address the shortfall.
- 5.3. Consistent with the *Income Tax Act*, if Fundraising is revoked, the University shall not return any portion of the funds already received except where legally permitted.

PROCEDURE FOR POLICY 2.2 - FUNDRAISING APPROVAL

Governing Policy:	Policy 2.2 - Fundraising
Subsections:	Overview, Definitions, Types of Fundraising, Scope, Procedure
Officer(s) Responsible for Procedures:	Vice-President (Western Advancement)
Effective Date:	(TBD)
Supersedes:	*

OVERVIEW

The purpose of this Procedure is to provide clear instruction on how to obtain approval for Fundraising that complies with MAPP 2.2 - Fundraising Policy (the "Policy").

DEFINITIONS

The defined terms in this Procedure have the same meaning as in the [MAPP 2.2 – Fundraising Policy](#).

TYPES OF FUNDRAISING

1. Individual Solicitation: Approaching an Entity directly to support a cause, project, or activity. This may involve in-person meetings, telephone calls, email, digital communications, or other personalized forms of communication.
2. Events: Galas, golf tournaments, walk-a-thons, concerts, shows, and other events designed to gather financial support for a cause, project, or activity. In most cases, the registration fee or ticket price includes both the costs associated with the event and a donation toward the cause, project, or activity.
3. Auctions: Silent, live, and online auctions.
4. Charitable Gaming: In Canada, this refers to licensed gambling activities conducted by charitable organizations to raise funds for their causes, projects, or activities. These gaming activities are permitted under Section 207 of the *Criminal Code*, provided the charity obtains a license from the provincial and municipal governments. Common types of charitable gaming include, but are not limited to, lotteries, raffles, 50/50 draws, break-open tickets, casino-style games, and bingos. Charitable Gaming is a type of Fundraising activity under this policy; however, Western's charitable number and status will not be used to obtain these government licenses.
5. Prizes of Chance: This includes, but is not limited to, draws to win prizes, door prizes, and sweepstakes. Prizes of chance are not legally permitted without a lottery license, as noted above, unless there is "no purchase necessary" and a skill-testing question is required to win the prize. This type of Fundraising activity requires legal review through

PROCEDURE FOR POLICY 2.2 – Fundraising Approval

the Office of University Legal Counsel.

6. Community Sales/Drives: Bake sales, Loonie drives, and other activities designed to gather financial support for a cause, project, or activity. Proceeds from these Fundraising activities must be submitted to and processed by Advancement Operations.
7. Commemorative Giving: Gifts made in tribute, honour, or memory of someone. This is a Fundraising activity; however, a Fundraising Activity Request for Approval Form is not required. Those interested in Commemorative Giving should contact the Development team within the division of Western Advancement at 519-661-4200 or 1-800-423-9631 (toll-free) or at annual.giving@uwo.ca.

SCOPE

This Procedure applies to the authority to undertake Fundraising for the University, on or off University property, or for other charitable organizations and non-profits on University property. It applies to Organizers of any Fundraising activity.

PROCEDURE**1. All Approvals**

- 1.1. Any Organizer wishing to implement a Fundraising activity that raises monies for the University on University property, off University property, or virtually—must follow this Procedure.
- 1.2. Any Organizer wishing to implement a Fundraising activity that raises monies for another charity or non-profit organization on University property must follow this Procedure.
- 1.3. The Organizer must complete the [Fundraising Request for Approval Form](#) appended to this Procedure, including budget, promotional materials, and signatures and submit to: Development Department within the division of Western Advancement at 519-661-4200 or 1-800-423-9631 (toll-free) or at annual.giving@uwo.ca, regardless of whether a Tax Receipt or Business Receipt is expected.
- 1.4. All requests will be forwarded to the Vice-President (Western Advancement) or their designate(s) for approval.
- 1.5. Should the Vice-President (Western Advancement) or their designate(s) determine University reputation could be compromised through approval of a Fundraising activity, they will consult with the University's Chief Communications Officer or designate(s).
- 1.6. Organizers must agree to maintain proper accounting records if the Fundraising Activity raises monies for the University, and as defined by the University, and to provide financial and participant/donor information from the Fundraising activity in a timely manner.
- 1.7. Whether University facilities can be used for this activity is set out in [MAPP 1.1 Use of University Facilities](#).
- 1.8. Factors, including but not limited to size and nature of the activity, location, and timing, will be taken into consideration when approving requests.

PROCEDURE FOR POLICY 2.2 – Fundraising Approval

1.9. All Fundraising requiring locations on University property will be allowed up to two locations on campus: one in the designated University Community Centre and/or one at another appropriate campus site. University residences and apartments may be viewed as a single site.

1.10. All approvals for Fundraising will be in the form of an authorized signature on the Fundraising Request for Approval Form.

2. Support Provided for a Fundraising Activity

2.1. Organizers may request additional support for consideration from the division of Western Advancement for their activity, if the funds being solicited benefit the University. This may include, but is not limited to, expenditure support, administrative details, logistics, printed materials, advertising and promotion, webpage, e-commerce site, e-vites, and faculty, or division attendance.

2.2. Organizers may be Volunteers who wish to host an event for the purpose of raising funds for the University. In these cases, a Volunteer Reimbursement Form can be completed if the University department has agreed to cover the costs of the event.

2.3. The Fundraising activity must raise funds for priority causes, projects, and activities at the University and have a substantial return on investment to receive additional support.

2.4. The approval of additional support will consider whether Western Advancement or the University can provide support commensurate with resource availability and the alignment of the scope and impact of the Fundraising activity.

3. Tax Receipts and Business Receipts

3.1. Tax Receipts and Business Receipts can only be issued when funds are donated to the University.

3.2. Tax Receipts and Business Receipts cannot be promised in advance of the Fundraising activity.

3.3. The University's charitable number or status cannot be used on any promotional items without advance approval of the Fundraising activity.

3.4. The decision to offer Tax Receipts and the value of those Tax Receipts must follow [MAPP 2.1 Gift Acceptance](#) and its associated Procedures. Advancement Operations in the division of Western Advancement can provide consultation on whether the Fundraising activity might be eligible for a Tax Receipt and its valuation.

3.5. Organizers who are Volunteers of the University may also complete a Volunteer Form stating that the Organizer is donating back the costs of the event without a physical cheque exchange.

4. Corporate Sponsorship

4.1. University Policy [1.12 Advertising and Commercial Activity](#), governs the acceptance of corporate sponsorships. All approved Fundraising activities for the University must follow this Policy and its associated Procedures.

PROCEDURE FOR POLICY 2.2 – Fundraising Approval

5. Alcohol, Smoking, Vaping & Tobacco Use

- 5.1. University Policy [1.33 Campus Alcohol](#), governs the purchase and consumption of alcohol on University property and off University property for Fundraising activities for the University.
- 5.2. University Policy [1.16 Smoking, Vaping & Tobacco Use](#) governs the restrictions related to smoking (including cannabis), vaping, and tobacco use on University property.
- 5.3. The same policies will govern Fundraising activities for other charitable and other non-profit organizations occurring on University property.

6. Conflicts of Interest and the University's Responsibility to Donors

- 6.1. An Organizer will disclose any conflict or potential conflict of interest between the Organizer and the University at the time of the request for approval. This arises where the Organizer has, or could be seen to have, the opportunity to use the Fundraising proceeds or influence derived from the Fundraising proceeds to improperly benefit themselves, family members, or direct relatives. Failure to disclose any conflict or potential conflict of interest may result in withdrawal of approval of the Fundraising activity. More about conflicts of interest can be found in [MAPP 3.4 Conflicts of Interest](#) and its associated Procedures.
- 6.2. A donor to the Fundraising activity could also have a conflict of interest between themselves and the University that could result in undue donor influence or control of University spending. Such conflicts of interest or potential conflicts of interest are addressed in [MAPP 2.1 Gift Acceptance](#) and its associated Procedures.

7. Continuing Education Accounts at the University

Continuing Education is defined as University non-credit courses, community services programs, conferences, workshops, seminars, fundraising events, and day camps. These events and activities contribute in an important way to the University's role within the community and are financed primarily by participant fee revenue, sponsorships, and grants awarded by governments, external agencies, foundations, and corporations. Continuing Education can be subject to Harmonized Sales Tax (HST) and overhead charges since there is an incremental cost of these initiatives to the University (i.e. ticket sales).

More information about [Continuing Education](#) can be found on the University's website.

- 7.1. A Fundraising activity could itself fall under the definition of Continuing Education and, therefore, be subject to HST, deficits procedures, interest, and overhead charges.
- 7.2. A Fundraising activity could be raising funds for Continuing Education and, therefore, proceeds from the Fundraising activity could be subject to HST and overhead charges.
- 7.3. Organizers of a Fundraising activity will be notified at the time of approval whether monies raised by the activity or the activity itself is deemed Continuing Education.

PROCEDURE FOR POLICY 2.2 – Fundraising Approval

8. Depositing Funds Raised for the University

- 8.1. Gifts can be made directly to the University through webpage and e-commerce sites in scenarios where the Western Advancement team is supporting the Fundraising activity with additional resources.
- 8.2. Contributions can be made to the Organizer of the Fundraising activity. In such circumstances, the Organizer will collect and ensure all payments are delivered and deposited by the University. In these instances, the Organizer will ensure the following:
 - 8.2.1. Collection of contributions from supporters to the Fundraising activity follows [MAPP 1.29 Bank Card Policy](#) and its associated Procedures. More information can be found at www.commerce.uwo.ca.
 - 8.2.2. If new applications or software are being installed on University property for these purposes, the application or software must have been reviewed by the University's [Technology Risk Assessment Committee \(TRAC\)](#).
 - 8.2.3. [Point of Sale \(POS\) terminals](#) are available for processing card-present contributions. The Organizer must be a Western staff or faculty member to be eligible to order a POS terminal for processing transactions through Western's merchant accounts.
 - 8.2.4. Credit card numbers for net proceeds are shared by mobile phone through Advancement Operations to ensure Payment Card Industry (PCI) compliance. Cardholder data transactions must be conducted in accordance with the [Financial Services Code of Procedure](#). This is accompanied by a list of donors, their primary address, phone number, email, and confirmation of the amount contributed. This will be in conjunction with the accounting records of the Fundraising activity.
 - 8.2.5. Cheques representing net proceeds are sent to Advancement Operations with a list of donors, including their primary address, phone number, email, and confirmation of the amount contributed. This will be in conjunction with the accounting records of the Fundraising activity.
 - 8.2.6. In instances where a list of donors is not possible, net proceeds will be processed under the Organizer's constituent record in the University database. No Tax Receipts or Business Receipts will be issued, and the value of proceeds will not count toward lifetime giving amounts.
- 8.3. When funds are being raised for the University, Western Advancement will deposit them into the appropriate designation and account, for expenditure by the University.

9. Mailing and Invitation Lists

- 9.1. Unless special permission is obtained, the University does not provide mailing or invite lists for Fundraising activities.
- 9.2. The University endeavours to protect the personal information of all individuals who come into contact with it—be they students, alumni, faculty, staff, donors, potential donors, or members of the general public. For more information, please visit [Protection of Privacy](#) on the University website.
- 9.3. In those scenarios where a mailing or invite list is provided by the University, an

PROCEDURE FOR POLICY 2.2 – Fundraising Approval

Organizer must agree to and sign a non-disclosure form prepared by Western Advancement.

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

Action: ☐ Approval ☐ Information ☒ Discussion

Executive Summary:

Under section 30(f) of *The University of Western Ontario 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 this Act.”

At its meeting on December 5, 2025, Senate approved the following recommendation:

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 sustainable manner.

The substance of this recommendation is not an existing matter on the Board's agenda, although the Investment Committee's report includes reference to the development of a Responsible Investing Policy and related consultation process currently underway.

Typically, matters within the Board's mandate are brought to the Board following a review and recommendation from the relevant Board committee.

In this instance, the matter relates to the University's investment policy which is within the mandate of the Property and Finance Committee and its subcommittee, the Investment Committee, per their respective terms of reference. It is recommended that this matter be referred for their review and consideration.

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

Athletics

Marion and Dale Creighton Football 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 Mustangs Football 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 academic year

This award was established with a generous gift from Marion Creighton to support Western students.

Faculty of Education

Bill Bettger Memorial Award in Education

Awarded to a full-time undergraduate student in the Faculty of Education based on academic achievement, excellence in music education in practice teaching and their

involvement in Faculty of Education music education activities. The Faculty of Education will select the recipients.

Value: 1 at \$1,000 awarded annually

Effective Date: 2026-2027 academic year

This award was established by friends and family in memory of Bill Bettger (BA 1967). Bill was an organist, teacher, mentor and leader to many in London, Ontario and beyond. Bill always believed that everyone at any level of experience should be involved in music. This award supports students with the potential to make a difference in people's lives through music.

Cruickshank Award in Early Education

Awarded to full-time undergraduate students enrolled in the Primary/Junior program in the Faculty of Education based on academic achievement and excellence in practice teaching. The Faculty of Education will select the recipients.

Value: 1 at \$4,000, awarded annually

Effective Date: 2026-2027 academic year

This award was established by Lynn Pritchard to honour her mother, Ella (Cruickshank) Norton, who was a dedicated Kindergarten teacher and passionate about teaching.

Usha Tripathi Award for Studies in Ending Violence Against Women and Children

Awarded to graduate students in the Faculty of Education whose research is affiliated with the Centre for Research and Education on Violence Against Women and Children and is focused on Family, Domestic and Close Partner Violence. Preference will be given to candidates working with vulnerable persons and newcomer communities. Selection is based on academic achievement and community involvement. A committee in the Centre for Research and Education on Violence Against Women and Children 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 by Usha Tripathi who devoted her life to overcoming societal obstacles, higher education, community volunteerism, and supporting women's initiatives.

Faculty of Information and Media Studies

Graeme Campbell Scholarship in Library and Information Science

Awarded to a full-time graduate student entering the Master of Library and Information Science program, based on academic achievement. The recipient will be selected in accordance with the FIMS Awards and Scholarships Policy.

Value: 1 at \$1,200 awarded annually
Effective Date: May 2026

This scholarship was established with a generous gift from Graeme Campbell, an alumnus of the MLIS Class of 2008.

Faculty of Law

Cayla and Lenny Hochberg Faculty of Law Bursary

Awarded to full-time undergraduate students in in the Faculty of Law based on financial need. Preference will be given to candidates in Year 2 or Year 3. 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 \$1,000 awarded annually
Effective Date: 2026-2027 academic year

This bursary was made possible by the generous support of Lenny and Cayla Hochberg. Lenny (LLB '92) is deeply grateful for the exceptional education and formative experience he received at Western Law, which laid the foundation for his career and lifelong commitment to the legal profession. This bursary is a reflection of that gratitude and a desire to give back to the next generation of Western Law students.

Fasken Entrance Scholarship

Awarded to full-time students in the Faculty of Law entering Year 1 of the JD/HBA or JD/MBA program based on academic achievement. The Faculty of Law will select the recipients.

Value: 1 at \$2,000 awarded annually
Effective Date: 2026-2027 to 2030-2031 academic years inclusive

This scholarship is made possible by a generous donation from Fasken.

Faculty of Science

Dr. Michelle Wheatley Field Studies Award

Awarded to full-time undergraduate students in the Department of Biology, Faculty of Science who are participating in a field course through the Ontario Universities Program in Field Biology, based on academic achievement. The Faculty of Science will select the recipients.

Value: 1 at \$1,000 awarded annually
Effective Date: 2026-2027 academic year

This award was established by Dr. Michelle Wheatley (BSc Hons Ecology and Evolution, 1986), to encourage students to take field courses such as the Ontario University Program in Field Biology (OUPFB). Michelle participated in the OUPFB in

1985 and later did field-based graduate degrees at the University of Manitoba. Michelle's work with Co-management Boards in the NWT and Nunavut and Fisheries and Oceans Canada showed her the ongoing need for researchers to be in the field observing nature to support meaningful recommendations and management decisions. This award supports participation in a field course, to light a passion for field work.

John Sholdice Memorial Bursary

Awarded to full-time undergraduate students in the Faculty of Science based on financial need. Preference will be given to candidates from London, Ontario. 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 \$1,000 awarded annually
Effective: 2026-2027 academic year

This bursary was created by the family and friends of John Sholdice (BA, General Science, '67, and MSc, Zoology, '79), who lived a life committed to science, both for its own sake and its practical application to aid human flourishing.

Faculty of Social Science

John Hastings Scholarship

Awarded to graduate students in the Department of Political Science, Faculty of Social Science, based on academic achievement. Preference will be given to candidates in the Local Government Program. A committee in the Department of Political Science, in consultation with the Local Government Program, will select recipients. At least one representative of the committee must hold membership in the School of Graduate and Postdoctoral Studies.

Value: 1 at \$2,100 awarded annually
Effective Date: May 2026

This scholarship was established by a donation from John Hastings (BA 1963).

Ivey Business School

CIBC Black Excellence HBA Scholarship

Awarded to a student entering the HBA Program at the Ivey Business School who self-identify as Black, based on academic achievement. Scholarships will continue in HBA2 if recipients maintain full-time status and achieve a minimum 80% academic average. Only one student will hold this scholarship at any given time. The HBA Scholarship Committee will make the final selection of the recipient.

Value: 1 at \$20,000 continuing
Effective Date: 2026-2027 to 2033-2034 academic years inclusive

This award was established through a generous gift from CIBC.

Schulich School of Medicine & Dentistry

Frank Beier Graduate Opportunity Scholarship

Awarded to full-time graduate students in the Department of Physiology and Pharmacology based on academic achievement and research excellence. Preference will be given to candidates who self-identify as Black, are Indigenous (First Nations, Inuit, and Métis), self-identify as 2SLGBTQIA+, or have a disability. A committee in the Department of Physiology and Pharmacology will select recipients. 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 was established to honour the legacy of Frank Beier, PhD. Frank was an award-winning researcher, educator, mentor, and a remarkable colleague. He was recruited to Western University in 2001 and built an internationally celebrated research program in cartilage development and osteoarthritis that helped shape the research landscape at Western and beyond. Frank served as Chair of the Department of Physiology and Pharmacology for close to a decade. The goal of the Frank Beier Graduate Opportunity Scholarship is to attract Canada's most promising and diverse graduate students.

Update on the 2025-26 Operating Budget as of December 31, 2025

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

An update on the University's 2025-26 Operating Budget, based on the best available information as of December 31, 2025 is provided. Updated figures are compared to the budget, as approved by the Board of Governors May 1, 2025.

Documentation Provided:

2025-26 Operating Budget Update as at December 31, 2025

2025-26 Operating Budget Update
As at December 31, 2025

The attached table provides an update on the University's 2025-26 Operating Budget – based on the best available information as of December 31, 2025 – and compares the updated figures to the budget as approved by the Board of Governors in May 2025. Major changes are as follows:

Revenues (lines 7 to 10)

1. In total, full-time undergraduate enrolment in the fall of 2025 was higher-than-projected by about 500 students – mostly domestic students. On the international side, our first-year class was lower than plan by about 150 students – however, due to higher retention rates into upper years, the overall international number was close to plan. The net result is that undergraduate tuition is projected to be \$6.0 million higher than budget (line 7).
2. After development of the University's budget in the spring of 2025, the Province announced two targeted funding programs: \$18 million in support of STEM Education (announced as time-limited for 3 years) and a Teacher Education expansion funding program which is expected to provide us with \$1.2 million (announced as time-limited for 2 years). These can be seen in lines 8 and 9 respectively.
3. The net result is that total operating revenue is estimated to be \$25.2 million higher than the original budget (line 10).

Expenditures (lines 11 to 14)

1. We flowed 40% (or \$7.2 million) of the STEM Funding to the Faculties who enrolled and/or taught STEM students (line 11).
2. Based on costing information provided by the Faculty of Education, we are flowing \$595,000 in support of the Teacher Education enrolment expansion (line 12).
3. In early June 2025, in order to recruit outstanding international post-doctoral fellows and doctoral students, we initiated new programs of funding aimed at recruiting these scholars/students. In total, we have confirmed 5 doctoral students and 21 post-doctoral fellows – and the total cost in 2025-26 is estimated to be \$1.3 million (line 13).
4. The net result is that total operating expenditures are projected to be \$9.1 million higher than the original budget (line 14).

Operating Reserve (line 6)

5. As a result of the above changes in revenue and expenditures, the Operating Reserve is projected to be at \$63.4 million – which is \$19.4 million higher than the initial budget. *Note that this projected change in the Operating Reserve includes the difference in the prior-year final reserve amount (which was \$3.3 million higher – as shown in line 4).*

CONSENT AGENDA - ITEM 5.1(b)

Western University
2025-26 Operating Budget Update
as at December 31, 2025
(\$000)

<a> Summary

		As Approved by Board	Revised Forecast	Increase/Decrease	
				\$	%
1	Revenues 	935,353	960,563	25,210	2.70%
2	Expenditures <c>	943,061	952,179	9,118	0.97%
3	Surplus / (Deficit)	-7,708	8,384	16,092	
4	Operating Reserve -- Beginning of Year	51,689	55,035	3,346	
5	Surplus / (Deficit)	-7,708	8,384	16,092	
6	Operating Reserve -- End of Year	43,981	63,419	19,438	

 Revenue Changes

7	Tuition Revenue: Undergraduate			5,973	
8	Targetted Government Grants: STEM			18,047	
9	Targetted Government Grants: Teacher Education			1,190	
10	Total Revenue Changes			25,210	

<c> Expenditure Changes

11	Sharing of STEM Funding with Faculties			7,219	
12	Sharing of Teacher Education Funding with Education			595	
13	Post-Doctoral and Doctoral Excellence Programs			1,304	
14	Total Expenditure Changes			9,118	

Update on the 2025-26 Ancillary Budgets as of December 31, 2025

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The report provides an update on the projected fiscal 2025-26 financial results and year-end reserve positions for the ancillary budgets.

Documentation Provided:

Student Fee-Funded Units, Ancillaries, Academic Support Units, and Associated Companies Financial Update



**Student Fee-Funded Units, Ancillaries, Academic
Support Units, and Associated Companies Financial
Update**

2025-26 Approved Budgets and Updated Projections

(At December 31, 2025)

January 27, 2026

Student Fee Funded Units, Ancillaries, Academic Support Units, and Associated Companies

**Fiscal 2025-26 Updated Projections
(Compared to Fiscal 2025-26 Approved Budgets)**

For Information

The attached table updates the projected fiscal 2025-26 financial results and year-end reserve positions for Student Fee-Funded Units, Ancillaries, Academic Support Units, and Associated Companies. Brief commentary is provided below for major variances (*note: line references correspond to the line numbers appearing on the attached table*).

Student Experience – Health & Wellness (line 8)

Expenses are projected to be lower than planned due primarily to lower salary and benefits costs resulting from delays in filling staff vacancies. The net year-end position is better than budget.

Housing Services (line 23)

Revenues are substantially higher due to greater-than-projected occupancy rates. Therefore, the net year-end position is better than budget.

Retail and Hospitality Services (line 24)

The net position is projected to exceed plan due to stronger-than-expected hospitality sales arising from extended operating hours as well as successful cost management initiatives.

Ivey Spencer Leadership Centre (line 25)

The net position is projected to fall below plan due to lower-than-expected operating revenues and higher expenses associated with maintaining an ageing facility.

Western Continuing Studies (line 34)

The net position is projected to exceed plan due to higher-than-anticipated revenues in post-degree programs, as well as lower salary expenses resulting from staff vacancies. The overall deficit is a planned deficit – and due to a one-time capital investment in WCS's new space in the West Campus.

Ivey Business School Foundation (line 38)

The deficit was planned – and is due to a one-time allocation of \$13M to support the Donald K. Johnson capital project in downtown Toronto.

Student Fee-Funded Units, Ancillary Units, Academic Support Units, and Associated Companies
2025-26 Budget and Projected (\$ 000)

		2025-26 Budget			2025-26 Projected			% Change		Projected April 30/26 Reserves	
		Revenues	Expenses	Rev-Exp	Revenues	Expenses	Rev-Exp	Revenues	Expenses	Operating	Capital
1	A - Student Fee-Funded Units										
2	<i>Student Experience - Sport & Recreation Pillar:</i>										
3	Recreation	6,086.4	6,097.3	-10.9	6,258.1	6,200.8	57.3	2.82%	1.70%	472.0	1,323.4
4	Sport	8,211.6	8,239.8	-28.2	8,467.9	8,393.3	74.6	3.12%	1.86%	224.8	150.8
5	Spirit & Connection (Thompson Recreation & Athletic	1,372.3	1,373.9	-1.6	1,407.1	1,407.0	0.1	2.54%	2.41%	99.0	1,018.2
6	Spirit & Connection (Spirited Activities & Events)	1,855.7	1,845.4	10.3	1,727.9	1,753.4	-25.5	-6.89%	-4.99%	77.7	
7	<i>Student Experience - Wellness & Well-being Pillar:</i>										
8	Health & Wellness	7,551.3	8,174.6	-623.3	7,490.3	7,480.3	10.0	-0.81%	-8.49%	1,443.5	650.3
9	Wellness & Equity Education	766.8	763.7	3.1	779.9	817.8	-37.9	1.71%	7.08%	384.4	200.0
10	Student Support and Case Management	551.3	650.0	-98.7	560.8	523.6	37.2	1.72%	-19.45%	404.4	82.6
11	<i>Student Experience - Leadership & Learning Pillar:</i>										
12	Academic Support & Engagement	2,089.7	2,211.0	-121.3	2,128.7	2,171.4	-42.7	1.87%	-1.79%	455.3	
13	Careers & Experience	1,851.1	1,963.8	-112.7	1,853.7	1,691.2	162.5	0.14%	-13.88%	655.2	
14	<i>All Other Fee-Funded Ancillary Units:</i>										
15	Financial Aid Office	1,531.9	1,535.0	-3.1	1,550.7	1,548.9	1.8	1.23%	0.91%	412.3	
16	International Student Services	618.4	617.7	0.7	612.9	606.9	6.0	-0.89%	-1.75%	0.6	
17	Indigenous Student Centre	954.2	952.7	1.5	965.0	965.7	-0.7	1.13%	1.36%	627.1	
18	Off-Campus Housing & Housing Mediation Services	507.9	624.5	-116.6	626.0	600.4	25.5	23.25%	-3.85%	835.2	
19	Western Foot Patrol	236.5	235.6	0.9	240.9	240.2	0.7	1.86%	1.95%	64.6	76.3
20	Sub-Total	34,185.1	35,285.0	-1,099.9	34,669.8	34,400.9	268.9	1.42%	-2.51%	6,156.0	3,501.5
21	B - Ancillary Units										
22	Employee & Family Health Clinic	655.0	628.9	26.1	684.4	687.5	-3.1	4.49%	9.32%	38.2	
23	Housing Services	108,469.6	107,950.8	518.8	114,399.6	109,484.9	4,914.7	5.47%	1.42%	88,996.7	
24	Retail & Hospitality Services	27,692.1	30,998.1	-3,306.0	28,748.3	31,574.8	-2,826.5	3.81%	1.86%	-9,042.1	
25	Spencer Leadership Centre	10,427.4	9,382.3	1,045.1	9,659.9	9,065.2	594.7	-7.36%	-3.38%	1,994.3	
26	Parking Services	7,005.4	6,978.2	27.2	7,422.7	7,450.7	-28.0	5.96%	6.77%	4,895.0	
27	Sub-Total	154,249.5	155,938.3	-1,688.8	160,914.9	158,263.1	2,651.8	4.32%	1.49%	86,882.0	0.0
28	C - Academic Support Units										
29	Animal Care & Veterinary Services	8,759.6	8,834.3	-74.7	8,307.4	8,499.2	-191.8	-5.16%	-3.79%	1,899.0	194.5
30	Boundary Layer Wind Tunnel	2,487.2	2,351.0	136.2	2,368.0	2,296.1	71.9	-4.79%	-2.34%	771.9	650.0
31	University Machine Services	1,850.8	1,849.2	1.6	1,331.2	1,467.8	-136.6	-28.07%	-20.63%	0.0	0.0
32	Fraunhofer Innovation Platform	1,282.5	1,235.6	46.9	1,191.1	1,191.1	0.0	-7.13%	-3.60%	0.0	117.7
33	Surface Science Western	2,543.9	2,543.7	0.2	2,330.2	2,329.0	1.2	-8.40%	-8.44%	177.0	724.2
34	Western Continuing Studies	5,168.7	6,415.6	-1,246.9	5,394.0	6,153.6	-759.6	4.36%	-4.08%	2,466.9	0.0
35	Sub-Total	22,092.7	23,229.4	-1,136.7	20,921.9	21,936.8	-1,014.9	-5.30%	-5.56%	5,314.8	1,686.4
36	D - Associated Companies										
37	Western Research Parks (incl. ADEISS & AMP)	4,794.3	5,337.2	-542.9	4,578.9	5,456.6	-877.7	-4.49%	2.24%	5,323.8	0.0
38	Ivey Business School Foundation	39,448.6	46,797.7	-7,349.1	38,645.1	46,349.7	-7,704.6	-2.04%	-0.96%	19,004.5	
39	Ivey Business School Asia Limited	2,415.6	2,402.0	13.6	2,349.2	2,408.1	-58.9	-2.75%	0.25%	-2,647.4	
40	Sub-Total	46,658.5	54,536.9	-7,878.4	45,573.2	54,214.4	-8,641.2	-2.33%	-0.59%	21,680.9	0.0
41	Grand Total	257,185.8	268,989.6	-11,803.8	262,079.8	268,815.2	-6,735.4	1.90%	-0.06%	120,033.8	5,187.9

**Annual Report on Trademark Licensees doing Business with
the Dellelce Family Bookstore**

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

As set forth in the Board of Governor's By-Law No. 1 (Section 67), the use of the University name and/or marks for other than official purposes requires the authority of the Board.

Under MAPP 1.17 – *Licensed Commercial Use of University Name and Trademarks*, the Director of the bookstore is authorized by the Board of Governors to sign licensing contracts with companies or individuals wanting to use the University's trademarks commercially.

The report on *Trademark Licensees doing business with the Dellelce Family Bookstore* (formerly the Western Bookstore) is provided annually to the Board of Governors through the Property and Finance Committee for information.

Documentation Provided:

Report on Trademark Licensees Doing Business with Dellelce Family Bookstore,
January 2026

Report on Trademark Licensees doing Business with Dellelce Family Bookstore

January 2026

The Dellelce Family Bookstore continues to maintain full compliance of the code of conduct for all clothing vendors.

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.

The global garment industry continues to face a number of challenges in 2025. The instability caused by the trade policies of the United States has put pressure on brands to not pass the costs of tariffs further down the line and but is inevitably driving up costs for Canadian brands relying on overseas production and disrupting supply chains. Domestic initiatives like Buy Canadian procurement policies will increasingly influence future demand and costs for locally made garments.

As a result, supply chain disruption and the push for near-shoring is widely considered the most urgent issue for Canada's garment industry in 2025 and into 2026. Overseas production is volatile due to geopolitical tensions and lingering pandemic issues. Canadian brands now face higher costs and delays, forcing them to rethink their sourcing model or rely on price increases and high minimum orders. As well, building domestic or regional capacity is difficult and expensive.

This issue leads to problems with costs, technology, and sustainability because companies must redesign operations to stay competitive.

Other issues continue to remain in the spotlight such as sustainability, labor rights, technological disruptions and changing consumer demands. 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 global apparel industry is worth about \$1.8 trillion annually and projected to reach \$2.26 trillion by 2030. According to watchdog groups, an estimated \$161 billion worth of apparel and textile goods are at risk of being produced with forced labor. An estimated 27 million are trapped in forced labor across the globe. In 2025, the bookstore continued to work closely with central procurement in introducing a new Supplier Code of Conduct. We will continue to collaborate with vendors, advocacy groups and other universities to keep monitoring all industry issues. All vendors used by the bookstore are provided a copy of the current The University of Western Ontario Code of Conduct for Trademark Licensees doing business with The University of Western Ontario Bookstore: [code_of_conduct.pdf \(uwo.ca\)](#).

In addition, the bookstore has posted its commitment to environmental sustainability located at: [Environmental Sustainability Policy](#).

Investment Committee Membership

Action: ☐ Approval ☒ Information ☐ Discussion

On the recommendation of the Investment Committee, the Property and Finance Committee approved the reappoint David Stenason to the Investment Committee for a two-year term ending December 2027; and the reappoint Doug Porter to the Investment Committee for a two-year term ending February 2028.

Executive Summary:

The Investment Committee is a subcommittee of the Property and Finance Committee. The membership is made up of Administration, current or former Board members, and individuals with investment expertise as recommended by the Investment Committee and approved by the Property and Finance Committee.

The Investment Committee has recommended the proposed reappointments.

Including the above reappointments, the Committee voting members and terms will be as follows:

Appointed by the Property and Finance Committee

Doug Greaves	(August 2026)
Lee Sienna	(March 2026)
Jeff Parr	(September 2028)
Doug Porter	(February 2028)
David Stenason	(December 2027)
Sarah Takaki	(May 2028)
Greg Dick (<i>current or former Board member</i>)	(November 2026)

Ex-Officio

Lynn Logan - Vice-President (Operations & Finance)
Eric Mallory - Associate Vice-President (Financial Services)
Martin Bélanger - Director, Investments

Background

David Stenason

David Stenason is currently the Managing Director and co-owner of Rempart Asset Management in Montréal, Québec. Founded in 2003 under a predecessor name, Rempart offers investment portfolio management services to both private clients and charitable organizations. The firm currently manages about \$525 million.

David received his formal education at Western University (BA – Economics '78) and McGill University (MBA – Accounting & Finance '80) and obtained his Chartered Financial Analyst (CFA) designation in 1989.

David's career began at Gulf Canada Ltd., where he worked in several financial areas throughout the company's operations. In late 1985, he became a "sell side" institutional equities analyst covering the Canadian energy and pipelines industries. He worked as an analyst at Levesque Beaubien (now National Bank Financial), CIBC World Markets, Gordon Capital and Scotia Capital. He left the equities research world in 2002 and initiated plans to develop what is now Rempart Asset Management.

Mr. Stenason has served on the Committee since December 2013. He has agreed to a 2-year renewal, extending his membership to December 2027.

Doug Porter

Doug Porter is a high-profile Economist with over 25 years' experience analyzing global economies and financial markets. He excels in interpreting and communicating the impact of key economic and financial data for businesses and was identified as the best economic forecaster by Bloomberg.

In his role as Chief Economist and Managing Director, BMO Financial Group, he oversees the macroeconomic and financial market forecasts and is co-author of the firm's weekly flagship publication, Focus. Doug manages the team that won the prestigious 2010 Lawrence Klein award for forecast accuracy of the U.S. economy during the tumultuous 2006 to 2009 period.

As a respected commentator on economic and financial trends, Doug often is quoted in the national press and is interviewed regularly on radio and television.

Mr. Porter has served on the Committee since February 2013, and has agreed to a 2-year renewal, extending his membership to February 2028.

Report of the Investment Committee

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Investment Committee is a subcommittee of the Property and Finance Committee, responsible for establishing the investment policy, objectives and strategy, appointing managers and investment consultants, and periodically reviewing the portfolio performance. This report is provided three times annually.

As at September 30, 2025, the University had \$3.59 billion (2024 - \$3.28 billion) in assets under management (“AUM”) across the short-term portfolio, mid-term portfolio (“MTP”), and the operating and endowment fund (the “Fund”). The Fund comprises approximately 69.8% of the AUM.

The Fund is managed for long-term performance with 5, 10 and 20 year returns of 11.9%, 9.8% and 8.2%, respectively, and has met its objectives over these periods.

Documentation Provided:

Report of the Investment Committee (with Appendix 1)

Report of the Investment Committee

This report outlines the market value of the assets under management and the recent activities of the Investment Committee. In addition, the performance of the Mid-Term Portfolio and Operating & Endowment Fund (the 'Fund') are provided.

Total Investments:

The following chart summarizes the total market value of investments held at September 30, 2025:

Asset Portfolio	Market Value (\$M)
Short-Term Portfolio	843.3
Mid-Term Portfolio	239.2
Operating Portfolio:	
Obligations	758.4
Surplus	250.0
Total Operating Portfolio	1,008.4
Endowment Portfolio	1,499.7
Total Operating & Endowment Fund	2,508.1
Jarislowsky Fraser Seg. Investment	3.5
Total Investments	3,594.1

Update on Investment Committee Activities:

- The Investment Committee is finalizing its asset mix review for the Operating & Endowment Fund and the Mid-Term Portfolio. Changes to the asset mix will take into account the impact of the new mix on the portfolios' carbon footprint. The new asset mix will be integrated into a revised Investment Policy. The previous Statement of Investment Objectives, Policies and Governance (SIOPG) will be split into three documents: 1) an Investment Policy, 2) a Responsible Investment Policy and 3) an Investment Policy Procedure document for specific guidance on investment topics. Approvals for the updated policies will come to the P&F Committee and Board of Governors in April.
- In January 2026, the University made a US\$30 million commitment to the Longpoint Fund IV , L.P., a real estate fund focusing on infill industrial warehouses, to manage a mandate for the Operating & Endowment Fund.
- In January 2026, the University made a US\$20 million commitment to the Bregal Sagemount Fund V, a mid-market private equity fund focusing on software and tech-enabled services, to manage a mandate for the Operating & Endowment Fund.

The following engagement, risk management, monitoring, and reporting activities have been completed or are underway in relation to our **Responsible Investing Strategy and Pathway**:

- Commitments to sustainable investment strategies have been US\$175 million to date. Total investments and uncalled commitments now represent approximately 10.2% of the O&E Fund, above the 10% target allocation for sustainable opportunities (based on pro forma figures as of September 30, 2025).
- Management released the [2025 Responsible Investing Annual Report](#) in December 2025.
- Management received the results of this year's PRI reporting process. The University scored above median compared to peers in every category, with four out of five-star ratings for every module.
- Western received the results of the 2025 ESG Questionnaire that was sent to all Western external investment managers in July 2025. Key findings include evidence of progression of ESG integration among managers, progress in integrating climate risks and opportunities. Based on the survey results, Western will continue to monitor climate commitments, DEI and indigenous engagement and social issues.
- Results of the measurement of the portfolios' carbon footprint for the year ending December 31, 2024 were released in December 2025. The O&E Fund weighted average carbon intensity (WACI) declined by 38% from the 2020 baseline. Western is on track to achieve its interim objective of a 45% reduction in WACI by 2030, relative to the 2020 baseline measurements.
- In January 2026, members of the University Community will be invited to provide feedback to the Investment Committee on the revised Responsible Investing Policy.

Financial Performance Metrics

Mid-Term Portfolio:

Performance

The performance related to the Mid-Term Portfolio at September 30, 2025 is as follows:

Account/Group	Ending Market Value CAD	Ending Weight	Policy Weight	% Rate of Return							Inception to Date	Inception Date
				One Month	Three Months	One Year	Three Years	Five Years	Ten Years			
University of Western Ontario	239,228,729	100.00		1.59	2.88	6.66	8.26	5.26	-	5.25	08/08/2019	
Policy Index UWO				2.34	4.29	9.70	10.85	5.79	-	6.03	08/08/2019	
Excess Return				-0.76	-1.41	-3.05	-2.59	-0.53	-	-0.78	08/08/2019	
FTSE 91-Day T-Bills + 300 bps				0.51	1.45	6.39	7.40	5.83	-	5.54	08/08/2019	
Excess Return				1.07	1.42	0.27	0.86	-0.57	-	-0.29	08/08/2019	

Source: Northern Trust Monthly Financial Reporting

Objectives

The main objective of the Mid-Term Portfolio is to outperform the FTSE 91-Day T-Bill Index by 300 basis points over a 3 to 5 year period.

As at September 30, 2025 the Mid-Term portfolio met its objective over the 3 year

period but not the 5 year period. The very strong equity and corporate bond returns of the past three years have enabled the portfolio to outperform its benchmark, despite most fixed income mandates not meeting the return objective. The portfolio fell short of the return objective over five years as equity and corporate bond returns were slightly lower.

The original contribution to the Mid-Term Portfolio was \$175 million in 2019.

Operating & Endowment Fund:

Performance

The annualized performance of the Operating & Endowment Fund (the “Fund”) was as follows:

Asset Class	1 Year September 2025	5 Year September 2025	Since Inception
Fixed Income	6.2%	4.6%	7.1%
Equities:			
Canadian	22.2	16.0	9.5
US	18.6	20.3	11.4
International	13.3	12.7	7.3
Global	15.2	-	7.2
Private Equity	16.8	19.0	18.9
Real Estate	6.7	10.1	8.9
Infrastructure	9.1	12.7	11.3
Absolute Return	-2.2	3.5	6.5
Money Market & Cash	4.3	2.4	2.0
Total Fund Return	12.9%	11.9%	8.9%
Benchmark Return	15.3%	11.3%	8.5%
Total Fund Real Return	10.5%	8.1%	6.8%

Additional Operating & Endowment Fund performance detail can be found in Appendix 1 to this report.

Objectives

The objectives of the Operating & Endowment Fund are as follows:

Real return

One of the Fund objectives is to maintain the purchasing power of the Fund after pay out over the long-term. (i.e., to earn an amount after pay out, over the rate of inflation, as measured by the Consumer Price Index). Inflation has averaged 3.8% per year for

the five-year period.

For the five years ending September 30, 2025, the annualized real return was 8.1%.

Value added

A second Fund objective is to earn the return produced by the asset mix policy based on the return of the market indices plus a premium to reflect active portfolio Management.

Over the five years ending September 30, 2025, the actual annualized return for the Fund was 11.9% and the return generated by the market indices for the portfolio was 11.3% (benchmark return).

The Fund is managed for long-term performance with 5, 10 and 20 year returns of 11.9%, 9.8% and 8.2% respectively, and has met its objectives over these periods.

Asset Mix

The table below provides the classification and market value of the assets held in the Operating & Endowment Fund at September 30, 2025:

	Market	Target Asset Mix			Actual Asset
	Value	Minimum	Target	Maximum	Mix
Equities					
<i>Canadian</i>	287,687,967	7.5%	12.5%	17.5%	11.5%
<i>US</i>	224,925,751	2.5%	7.5%	12.5%	8.9%
<i>EAFE</i>	193,075,417	2.5%	7.5%	12.5%	7.7%
<i>Global</i>	511,137,943	15.0%	20.0%	25.0%	20.4%
<i>Private</i>	250,682,388	7.5%	12.5%	17.5%	10.0%
Total Equities	1,467,509,466	52.5%	60.0%	67.5%	58.5%
Fixed Income					
<i>Core Fixed Income</i>	165,947,903	0.0%	5.0%	10.0%	6.6%
<i>Commercial Mortgages</i>	114,034,581	0.0%	5.0%	10.0%	4.6%
<i>Private Debt</i>	158,472,040	0.0%	5.0%	10.0%	6.3%
Total Fixed Income	438,454,524	7.5%	15.0%	22.5%	17.5%
Real Assets					
<i>Real Estate</i>	152,314,303	5.0%	10.0%	15.0%	6.1%
<i>Infrastructure</i>	236,096,953	5.0%	10.0%	15.0%	9.4%
Total Real Assets	388,411,256	12.5%	20.0%	27.5%	15.5%
Diversifiers					
<i>Cash & Money Market</i>	164,322,999	0.0%	0.0%	10.0%	6.5%
<i>Absolute Return Strategies, Market Neutral Strategies</i>	49,411,745	0.0%	5.0%	10.0%	2.0%
Total Diversifiers	213,734,744	2.5%	5.0%	12.5%	8.5%
Grand Total	2,508,109,990				100.0%

Appendix 1

The tables below provide performance data on the Operating & Endowment Fund at September 30, 2025

Total Fund Value Added - For Rolling Periods Ending September 30, 2025

	1 Yr (%)	2 Yrs (%)	3 Yrs (%)	4 Yrs (%)	5 Yrs (%)	6 Yrs (%)	7 Yrs (%)	8 Yrs (%)	9 Yrs (%)	10 Yrs (%)	20 Yrs (%)
Total Fund	12.9	15.5	14.7	9.4	11.9	10.6	9.7	9.7	9.8	9.8	8.2
Total Fund Benchmark	15.3	18.2	16.4	10.3	11.3	10.4	9.7	9.5	9.5	9.5	7.6
Excess Return	-2.4	-2.7	-1.7	-0.9	0.6	0.2	0.0	0.2	0.3	0.3	0.6

	2025 (%)	2024 (%)	2023 (%)	2022 (%)	2021 (%)	2020 (%)	2019 (%)	2018 (%)	2017 (%)	2016 (%)	2015 (%)
Total Fund	12.9	18.2	13.0	-5.1	22.7	4.0	4.8	9.2	11.2	9.6	6.2
Total Fund Benchmark	15.3	21.1	12.9	-6.0	15.4	5.7	5.7	8.6	9.1	9.4	2.8
Excess Return	-2.4	-2.9	0.1	0.9	7.3	-1.7	-0.9	0.6	2.1	0.2	3.4

Total Fund Real Returns - For Rolling Periods Ending September 30, 2025

	1 Yr (%)	2 Yrs (%)	3 Yrs (%)	4 Yrs (%)	5 Yrs (%)	6 Yrs (%)	7 Yrs (%)	8 Yrs (%)	9 Yrs (%)	10 Yrs (%)	20 Yrs (%)
Total Fund	12.9	15.5	14.7	9.4	11.9	10.6	9.7	9.7	9.8	9.8	8.2
CPI	2.4	2.0	2.6	3.6	3.8	3.2	3.0	2.9	2.8	2.6	2.1
Real Return	10.5	13.5	12.1	5.8	8.1	7.4	6.7	6.8	7.0	7.2	6.1

	2025 (%)	2024 (%)	2023 (%)	2022 (%)	2021 (%)	2020 (%)	2019 (%)	2018 (%)	2017 (%)	2016 (%)	2015 (%)
Total Fund	12.9	18.2	13.0	-5.1	22.7	4.0	4.8	9.2	11.2	9.6	6.2
CPI	2.4	1.6	3.8	6.9	4.4	0.5	1.9	2.2	1.6	1.3	1.0
Real Return	10.5	16.6	9.2	-12.0	18.3	3.5	2.9	7.0	9.6	8.3	5.2

Source: Mercer Investment Monitoring Review

K:\Investments\IP&F Reports\Rpt of Inv Comm @ Sept 2025 (Jan 2026 P&F meeting).docx

Annual Report of the Office of the Ombudsperson

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The memorandum of understanding governing Western's Office of the Ombudsperson states that the Ombudsperson shall make an annual report to the campus community. For reporting purposes, the year begins August 1 and ends July 31. The annual report will normally be published by January 1 of the following year. The report provides a statistical summary of the caseload and summary account of cases.

The Annual Report of the Office of the Ombudsperson is provided to the Board of Governors through the Audit Committee for information.

Documentation Provided:

Office of the Ombudsperson 2024-2025

An aerial photograph of a university campus, featuring a large, historic stone building with a prominent tower and a tall flagpole. The campus is surrounded by greenery and other university buildings. The image has a purple tint.

2024 - 2025

OFFICE OF THE OMBUDSPERSON

PREPARING STUDENTS TO PREVENT,
MANAGE AND RESOLVE DIFFICULT
SITUATIONS.

Table Of Contents

 01	Ombudsperson's Message
 02	About Us
 03	Advisory Group
 04	Community Engagement
 05	Stats at a Glance
 06	Emerging Issues
 07	Observations and Recommendations
 08	What's Next

Land Acknowledgement

We 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.

With this, we respect the longstanding relationships that Indigenous Nations have to this land, as they are the original caretakers. We acknowledge historical and ongoing injustices that Indigenous Peoples (First Nations, Métis and Inuit) endure in Canada, and we accept responsibility as a public institution to contribute toward revealing and correcting miseducation as well as renewing respectful relationships with Indigenous communities through our teaching, research and community service.

A MESSAGE FROM THE OMBUDSPERSON

I am honored to introduce myself as the University Ombudsperson and to express my enthusiasm for assuming this important role. Since beginning my tenure on June 16, 2025, I have had the privilege of engaging with many members of the Western community and observing firsthand both the impact and the continued importance of the services offered by the Ombudsperson's Office.

It is with great pride that I present the 2024–2025 Annual Report of the Ombudsperson's Office, covering the period from August 1, 2024, through July 31, 2025. This report includes statistical summaries, student testimonials, and case studies that provide greater context and depth to the data presented.

I extend my sincere gratitude to Stephanie Bolingbroke for her dedicated service as Acting Associate Ombudsperson during the 2024–2025 reporting year. This year represented a significant period of transition for the office, with Whitney Barrett concluding her term as Acting Ombudsperson in December 2024, followed by Joan Finegan's service as Acting Ombudsperson from January through June 2025. In June, both Stephanie and I were pleased to assume our permanent roles, marking the beginning of a new chapter for the office.

Finally, I wish to thank you, the reader, for your interest in the work of the Ombudsperson's Office.

Respectfully submitted,
Melanie Molnar

| Who We Are



Melanie Molnar, Ed.D.
Ombudsperson



Stephanie Bolingbroke
Associate Ombudsperson

Our office operates as an independent, impartial, and confidential resource for students who are uncertain about how to navigate academic or non-academic challenges at Western. We provide a safe and supportive environment where students can seek advice and explore options for resolving their concerns. Students often consult our office regarding interpersonal conflicts, complex decision-making, allegations of scholastic offences or Code of Conduct infractions.

| Advisory Committee

The Office of the Ombudsperson Advisory Committee serves as a consultative body, providing advice and guidance to the Office on matters including the budget, annual report, and community outreach initiatives. The composition and mandate of the Advisory Committee are outlined in the Memorandum of Agreement.

A special thank you to the 2024/2025 Advisory Committee:

Dr. Bonnie Simpson

Associate Professor,
DAN Management

Dr. Ken Meadows

Educational Developer,
Centre for Teaching and Learning

Claire Hass

King's University College,
Staff/Faculty

Mariana Batista

VP University Affairs, USC

Mohit Gupta

President, MBA Association

Kevin Moore

Peer Advisor, SOGS

Carl Lubano

President, Huron University College
Students' Council



Community Engagement

Over the past year, the Office of the Ombudsperson actively participated in a range of internal outreach events and initiatives, strengthening visibility and connections within the Western community. In addition, the Office maintained membership in both the Association of Canadian College and University Ombudspersons (ACCUO) and the Forum of Canadian Ombudsman (FCO). These memberships provide valuable opportunities for professional development and national engagement, including monthly “water cooler” discussions with colleagues across the country to share insights, best practices, and emerging trends.

Student Testimonial

“

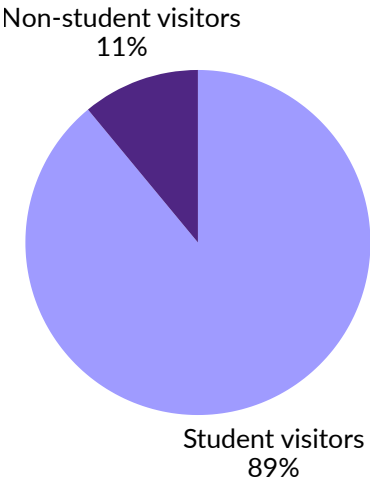
*I would like to
sincerely thank you
once again for all
of your guidance
and support
throughout this
process.*

”

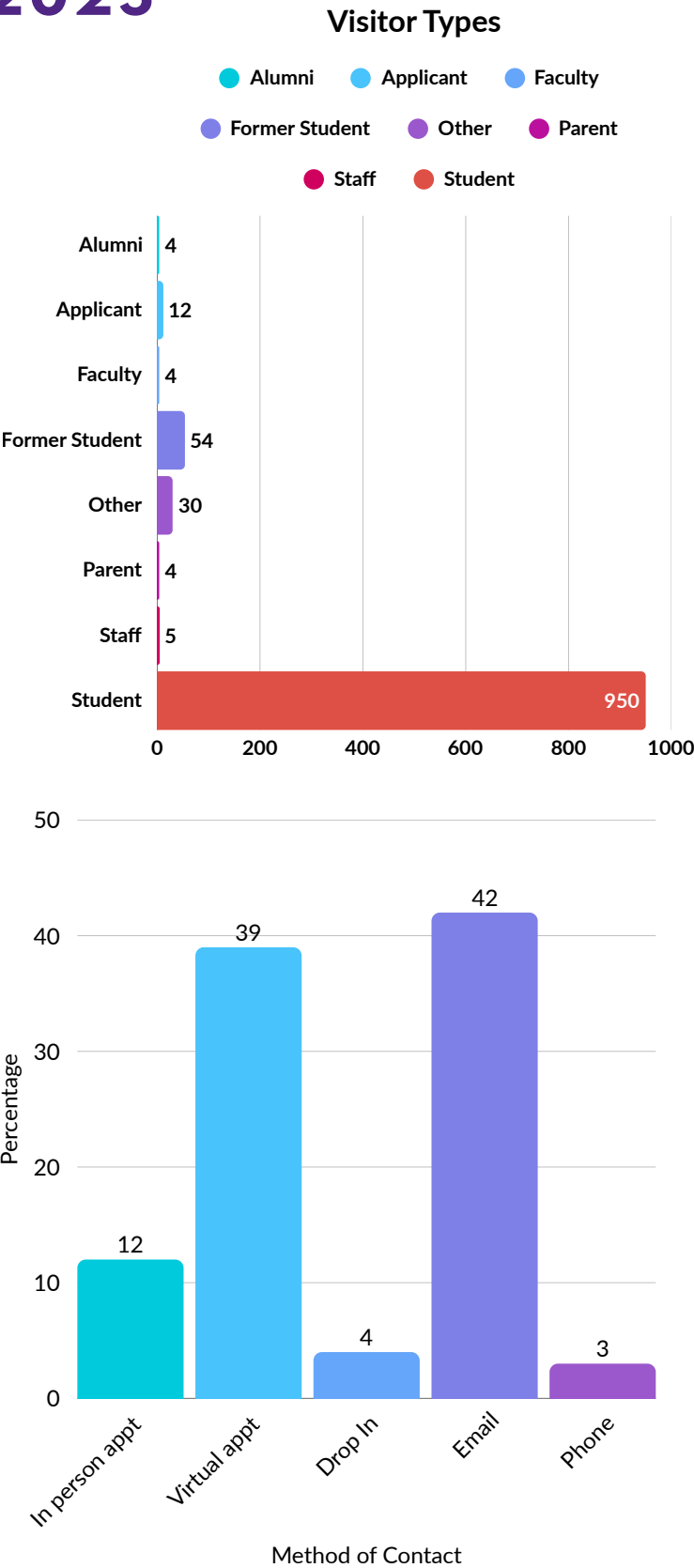
STATS AT A GLANCE

VISITORS FOR 2024-2025

THIS YEAR, THE OFFICE
INTERACTED WITH



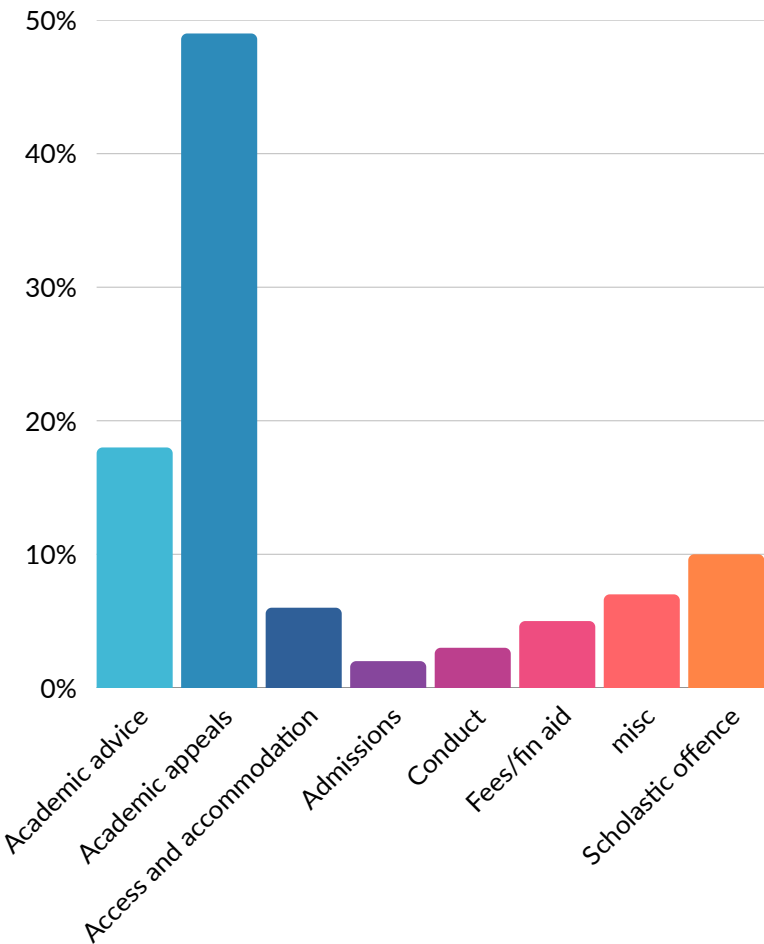
METHOD OF INITIAL CONTACT



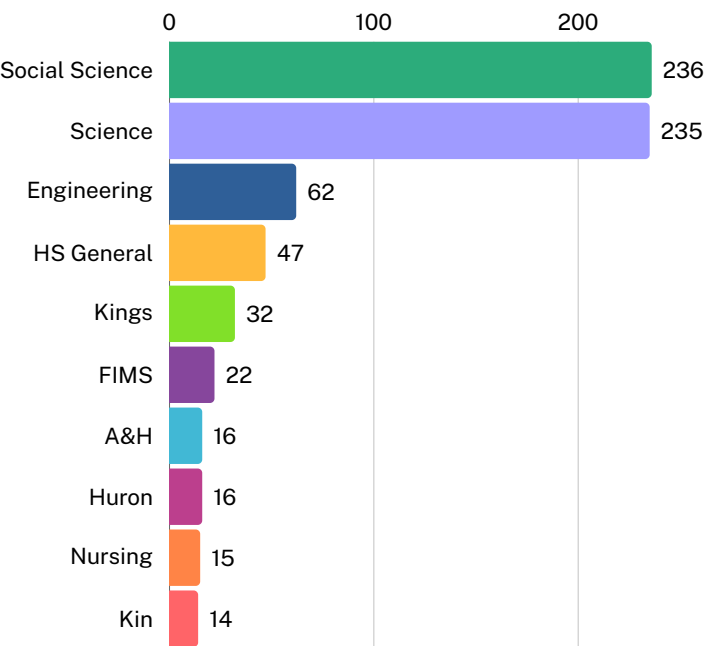
STATS AT A GLANCE

15% of students visiting the Office between August 1, 2024 and July 31, 2025 identified as being an international student.

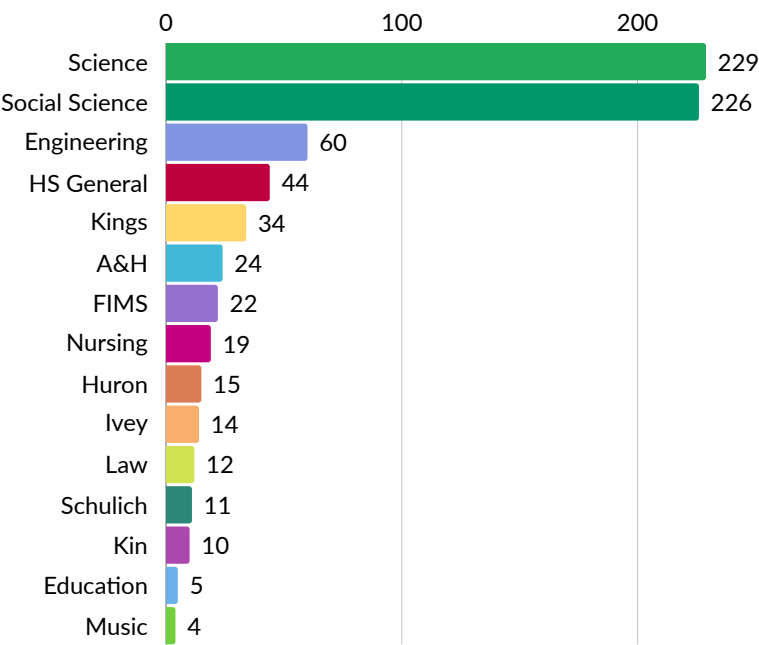
Issues Raised by Students



Undergraduate-Visitors by Home Program



Undergraduate-Issues by Faculty



Student Testimonial

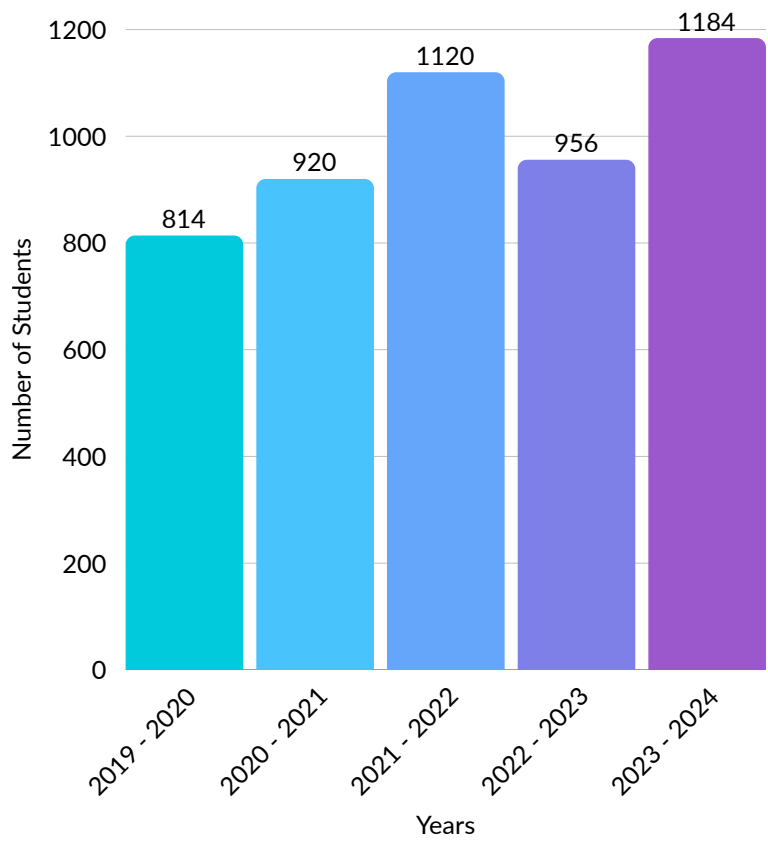
“

Thank you so much for your support, I truly can't express how much this means to me. I sincerely wish you the very best. Your support has had a meaningful impact on my wellbeing, and I will not take it for granted.

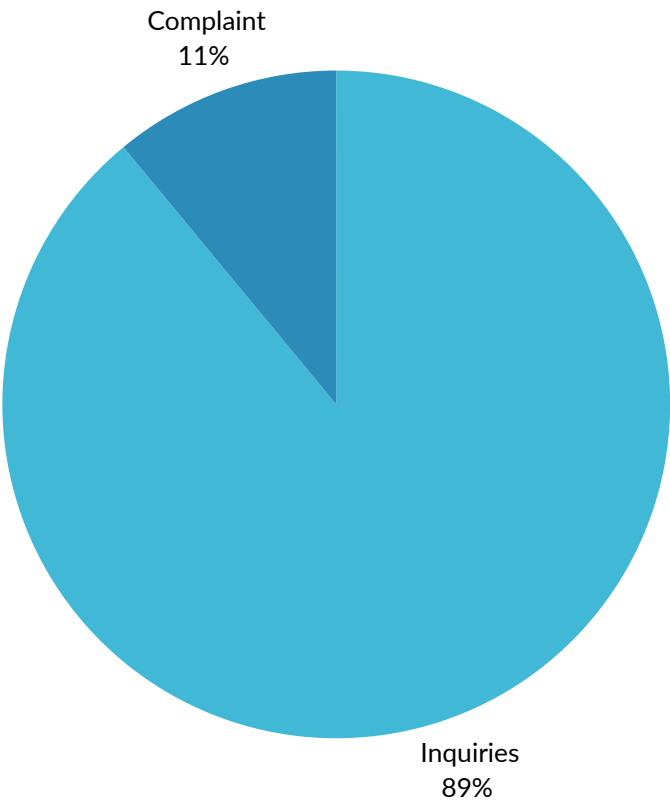
”

STATS AT A GLANCE

Previous Years' Annual Student Visitors



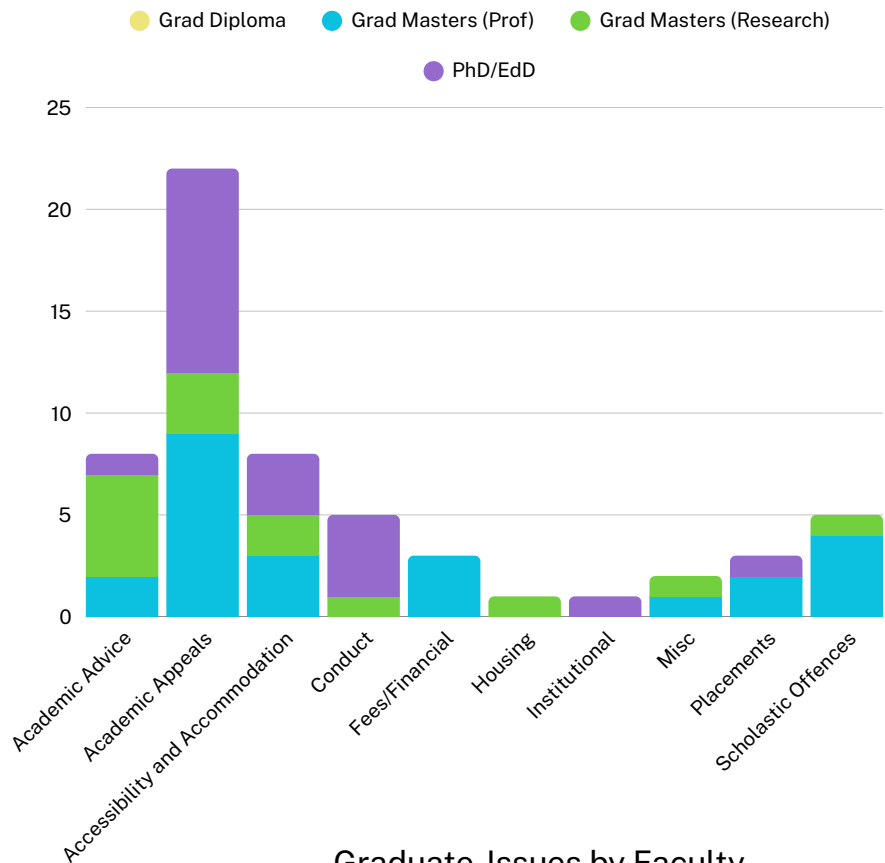
Reasons Visitors Approached Our Office



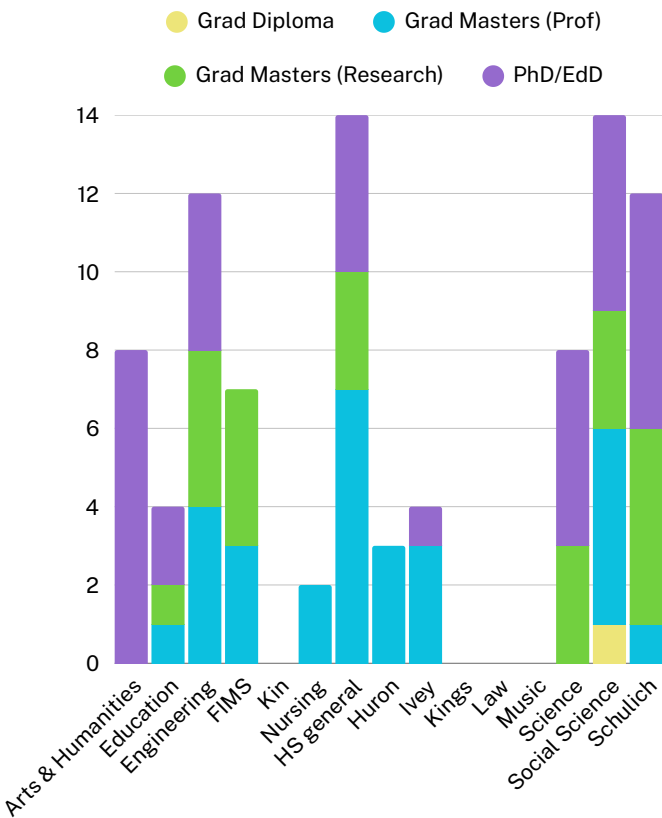
STATS AT A GLANCE

ISSUES RAISED BY STUDENTS

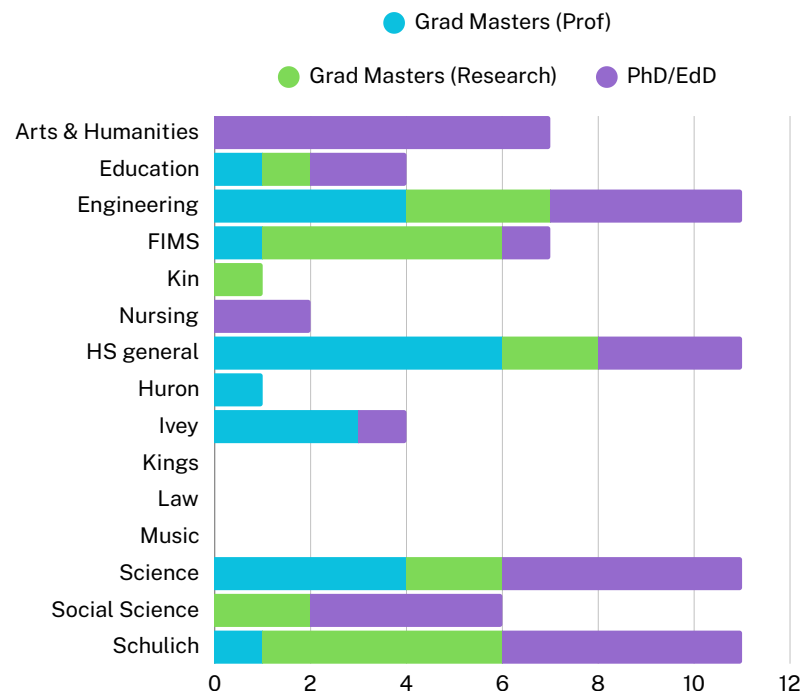
Issues Raised by Graduate Students



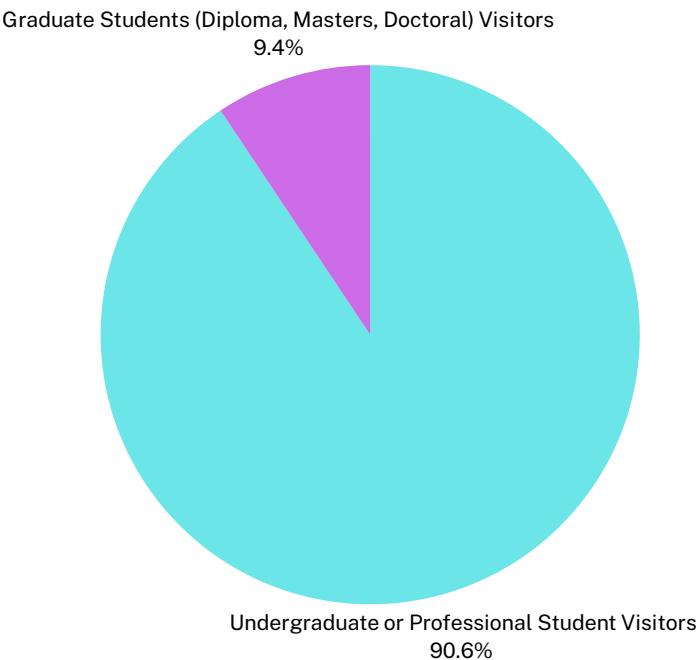
Graduate-Visitors by Home Program



Graduate-Issues by Faculty



Undergraduate vs Graduate Visitors



Student Testimonial

“

*Thanks again for
your guidance, it's
been really
reassuring to have
your support
through this
process.*

”

How We Approach Our Work:

Trauma Informed

According to the Centre for Addiction and Mental Health (CAMH):

“Trauma is the lasting emotional response that often results from living through a distressing event. Experiencing a traumatic event can harm a person’s sense of safety, sense of self, and ability to regulate emotions and navigate relationships.”

Trauma may result from a single recent event, a series of incidents, or prolonged exposure to distressing circumstances. It may also stem from historical or intergenerational experiences.

The effects of trauma on an individual’s coping skills can manifest as decreased tolerance for frustration, difficulty adapting to change, and challenges with problem-solving (Warren, R. [2025, September 23]. Trauma-Informed Ombuds Practice).

Within the Ombudsperson’s Office, we have observed an increase in appeal cases in which students are hesitant or unable to fully disclose the details of their situations—information often necessary to appropriately consider the extenuating circumstances affecting them.

To address this, the Office has adopted a universal precaution approach, presuming that any individual seeking our services may have experienced trauma. This approach emphasizes clarity, empathy, and empowerment in all interactions. Specifically, our trauma-informed practice includes:

- Using simple, clear, and strength-based communication.
- Demonstrating empathy and active listening throughout interactions.
- Ensuring transparency in our processes and providing regular updates.
- Seeking consent and maintaining cultural sensitivity at all stages.
- Clearly explaining our role and limitations.
- Removing barriers to access wherever possible.
- Encouraging visitors to bring support persons or Elders, if desired.
- Providing choices and involving visitors in decision-making.
- Maintaining a physically and emotionally safe environment.
- Practicing self-awareness and self-regulation to model emotional intelligence.

By integrating these principles into our daily practice, we aim to foster an environment of trust, respect, and compassion. This trauma-informed approach benefits all members of our community and reinforces the fundamentally humanistic nature of our work (Hodas, G. [2006]. Responding to Childhood Trauma: The Promise and Practice of Trauma-Informed Care).

Student Testimonial

“

Your support during the readmission process was truly invaluable. You went above and beyond with insightful feedback, check-ins and genuine care, which helped me to navigate the process with clarity and confidence. I am sincerely grateful for the support and encouragement you offered throughout my journey back to Western.

”

Scholastic Offences and AI

Following up on a Case Study from the 2022-2023 Annual Report of the Ombudsperson's Office, Artificial Intelligence (AI) continues to be an important area where there seems to be a lack of understanding on what is acceptable for students and in which disciplines. Taken from the AI at Western website, the guidance for students is as follows:

You have an obligation to act with honesty and integrity and abide by the rules of the syllabus for each course. You also have an obligation to yourself to learn more about a technology that may have a significant impact on your life. Check your course outline for a statement on permitted and forbidden uses of AI; it will change by course. Where you are uncertain, ask your instructor for guidance.

During the 2024–2025 reporting year, our office observed several cases involving students from one faculty who sought to fulfill their breadth requirements by enrolling in courses offered by other faculties. In these instances, the guidelines governing the use of AI varied significantly between faculties. These inconsistencies regarding what is deemed permissible have, in some cases, resulted in students being sanctioned for scholastic offences. Although course syllabi outline expectations around AI usage, many students continue to rely heavily on AI tools in their academic work, often without fully understanding the differing standards and restrictions that apply across academic units.

According to a report by the Canadian Alliance for Student Associations “Nearly two-thirds of students (23% consistently and 46% occasionally) misrepresented AI-generated content as their own work. Furthermore, a majority of students (63%) are unaware of institutional guidelines governing GenAI use” (Canadian Alliance of Student Associations. (2025, February 7). Digital transformation: Integrating artificial intelligence in Canadian post-secondary education. https://www.casa-acae.com/ai_casa_publication_2025).

Although the growth of scholastic offence concerns seen by the Ombudsperson's Office has not grown significantly from 2023-2024 where it was 8% to 2024-2025 at 10%, the statistics shared above are concerning.

While several campus initiatives, such as those offered through the PAL Centre (Student Experience) and the School of Graduate and Postdoctoral Studies Academic Integrity module, promote the responsible use of AI, the growing accessibility of AI technologies suggests that further education for the student community on the appropriate parameters and limitations of AI use may be beneficial.

Academic Considerations and Fraudulent Notes

Over the past year, the Office has observed an increase in cases involving students being sanctioned for submitting fraudulent medical documentation in support of requests for academic consideration. This upward trend may be attributed to several factors, including but not limited to:

- Increased awareness of the Ombudsperson's Office and its processes among students in such situations;
- A rise in the number of students engaging in this type of misconduct; and/or
- Enhanced verification and auditing practices related to medical documentation.

According to University policy, "Students must request academic consideration as soon as possible and no later than 48 hours after the missed assessment."

Our office has observed several cases where dates had been altered on the Student Medical Certificate (SMC) to fall in line with the requirement of the 48-hour Academic Consideration Policy. Although the SMC's were provided legitimately by a licensed medical provider, because the students had tampered with them by making these alterations, they were now considered to be fraudulent, and the students were facing sanctions because of that action.

As highlighted in the 2024–2025 Report on Academic Considerations presented at Western's October 17, 2025 Senate meeting, 1% of the 9273 academic considerations received for the 2024–2025 academic year were denied due to suspected fraudulent documentation.

The consequences of committing this offence are significant, potentially resulting in severe academic sanctions, including expulsion from the University. In addition, the submission of fraudulent documentation may be a criminal offence, which can have long-term implications for a student's future career, particularly in professions governed by regulatory or licensing bodies.

Observations and Recommendations

The Ombudsperson's Office staff engage in shuttle diplomacy, collaborating with senior administration throughout the year to address and resolve systemic issues as they arise. As a result, formal recommendations are rarely required in the Office of the Ombudsperson's Annual Report.

While this report does not include formal recommendations, it aims to highlight areas of challenge that present opportunities for dialogue, improvement, and positive change, ultimately enhancing the overall student experience across the University.

What's next



The central mandate of the Ombudsperson's Office is to promote and safeguard procedural fairness in university decision-making. This commitment is reflected in the day-to-day support provided to the students who have experienced or perceived unfairness.

Looking ahead, I am eager to advance broader initiatives and systemic priorities identified in last year's annual report. In the coming year, the Ombudsperson's Office will:

- Continue to support the development and revision of university policies to ensure that principles of procedural fairness are embedded throughout.
- Collaborate with Ombuds offices across Canada and internationally to remain aligned with best practices in the field.
- Engage in ongoing professional development and training opportunities.
- Expand outreach initiatives throughout the academic year to meet students where they are and foster greater awareness of the Office's role and services.

The image features a high-angle view of a Gothic Revival church tower with a prominent green copper spire, set against a clear blue sky with light clouds. The tower is part of a larger stone building with many windows. In the background, a cityscape with various buildings and trees is visible. The entire image is overlaid with several thin, white, concentric circular lines that create a sense of depth and focus on the central tower.

Western

UNIVERSITY • CANADA

Rescission of Procedures for Joint Appointments within the University

Action: ☒ Approval ☐ Information ☐ Discussion

Recommended: That, on the recommendation of the Senior Policy and Operations Committee, the Board of Governors approve the rescission of the Procedures for Joint Appointments within the University.

Background Information:

This rescission is a housekeeping item.

The [Procedures for Joint Appointments within the University](#) were approved by the Board of Governors in 1997, on the recommendation of Senate.

The Procedures for Joint Appointments within the University were introduced to provide additional guidance on the administration of joint appointments, beyond what was specified in the Conditions of Appointment.

The Conditions of Appointment were rescinded in 2003. The rationale for the rescission was that the document was superseded by the UWOFA Collective Agreement (the first agreement being ratified in 2000). The Board of Governors rescinded the Conditions of Appointment in January 2003, on the recommendation of Senate.

There was an oversight in that the Procedures for Joint Appointments within the University were not rescinded at the same time.

Academic Administrative Appointments

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

Faculty Relations advised of the following academic administrative appointments as of December 5, 2025.

Start Date	End Date	Name	Department	Admin. Appointment
11/1/2025	12/31/2025	Gurmukh, Sunil	Law - Office of the Dean	Assistant Dean
11/15/2025	4/30/2026	Mills, Melanie	Office of the Chief Librarian	Acting Associate Chief Librarian

Report of the Academic Colleague

Action: ☐ Approval ☒ Information ☐ Discussion

Executive Summary:

The Academic Colleagues met on October 22–23, 2025, for a two-part session that included an evening presentation and discussion, followed by the regular morning meeting of Colleagues. The following report summarizes key discussions and forthcoming initiatives.

Evening Session: Civil Discourse and Academic Freedom

The principal item of the evening was an extensive presentation by Dr. Randy Boyagoda, Professor of English and Provostial Advisor on Civil Discourse at the University of Toronto. Dr. Boyagoda drew upon the work of the University of Toronto’s Working Group on Civil Discourse, providing a substantive examination of the current state and emerging challenges related to civil discourse within Ontario’s postsecondary sector.

Dr. Boyagoda emphasized that although the Working Group did not arrive at a single definition of civil discourse, it may usefully be conceived as a practice of “thinking out loud together” with the aim of broadening understanding and advancing the public good. He underscored the critical importance of safeguarding spaces for civil discourse on Ontario campuses, particularly in light of global events that have exposed the fragility of productive dialogue and disagreement within academic communities.

The Working Group identified several impediments to sustaining civil discourse, including:

- Existence of a low trust environment;
- Perceptions of who holds power;
- Technological advances and the complexities they present (e.g. social media);
- A range of views on institutional neutrality; and
- The importance of context and environment in identifying appropriate solutions.

Dr. Boyagoda outlined the Working Group’s recommendations, which focus on building capacity both inside and outside the classroom. Implementation efforts at the University of Toronto will center initially on supporting faculty as they navigate difficult conversations in pedagogical and supervisory contexts. As part of his ongoing mandate, Dr. Boyagoda is continuing to engage with institutions across the province to share emerging insights.

A robust discussion followed, during which Colleagues highlighted institutional initiatives related to community healing, freedom of expression, and strategies to support students in developing the competencies necessary for constructive civil discourse.

Colleagues Meeting: October 23, 2025

Drawing on the previous evening's presentation, Colleagues refined their upcoming presentation to Members of the Council of Ontario Universities, identifying key themes:

- Recommendations for universities
- Skills required to promote civil discourse
- Cultivating these skills and building capacity for teaching them

Colleagues provided updates regarding institutional priorities, emerging issues, and ongoing initiatives at their respective campuses. These exchanges continue to offer a valuable cross-institutional perspective on challenges and opportunities across Ontario universities.

Items Removed from the Consent Agenda

Action: ☐ Approval ☐ Information ☐ Discussion

Executive Summary:

This is a placeholder for any items removed from consent.
