



Board of Trustees

**Report to the Financial Planning and Investment Committee
Information**

Topic: EAF Progress Update

Date of Meeting: June 24, 2026

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Services**

Executive Summary

1. Purpose of the Report

- To provide an update on the progress of Brock's EAF Implementation Plan

2. Key Background

- The Provincial government mandated Brock to engage in a third-party sustainability review through the EAF which was designed to identify actions Brock could take to increase long-term sustainability.
- The KPMG report included 72 recommendations, that were included in Brock's EAF Implementation Plan, approved by the Board of Trustees on June 26, 2025.
- To provide oversight and strategic guidance for the Brock EAF Implementation Plan the President established an Executive Steering Committee.
- Where necessary, working groups, reporting to the Steering Committee, have been established to review, recommend, and implement projects and initiatives.

- A progress report was presented in Cycle 3 following the progress report submitted to MCURES on January 30, 2026.
- A required final report specific to the EAF funding was submitted to MCURES on April 30, 2026. As part of additional MCURES reporting, annual progress reporting as part of Brock's broader financial recovery plan progress reporting is required.
- Brock remains committed to the implementation of the EAF recommendations along with the many initiatives underway to achieve the goals set out in the Strategic Plan and University Action Plan, to support the long-term sustainability of the institution.

3. Next Steps

- Continue progress on the review of the recommendations and evaluation of the implementation at Brock University.

4. Background Materials

- Appendix 1: Brock's EAF Implementation Plan Dashboard (pages 6)

APPENDIX 1: Brock's EAF Implementation Plan Dashboard

Progress Colour Coding	
Completed	
Implementation	
Planning	
Barriers identified	
Not actioned yet	

#	Timeline	Scope	Area	Recommendation	Phase	Lead	Status Snapshot (June 2026)
1	< 6 months	Governance, administrative and student services	Enrolment	Renew SIS-identified SIS inefficiencies in registration	Barriers identified	VPA&S/ Provost	RFP Process completed. A SIS project report is being prepared for Cycle 5
2	< 6 months	Governance, administrative and student services	Enrolment	Enforce internal deadlines for submission of course grades	Completed	Provost	New process rolled out that results in discipline for instructors who did not submit course grades by the deadline.
3	< 6 months	Governance, administrative and student services	Student Recruitment	Coordinate student recruitment across units	Implementation	Provost	Enrolment Working Group mobilized to implement the Strategic Enrolment Management (SEM) plan.
4	< 6 months	Governance, administrative and student services	Student Recruitment	Centralize marketing efforts (FTE)	Planning	VPE/Provost	Functional review completed. Implementation through Fall 2026.
5	< 6 months	Governance, administrative and student services	Co-op	Career Co-Op and Experiential Education services review	Implementation	Provost	A formal review of co-op operational efficiency has begun in November 2025 to be completed by May 2026
6	< 6 months	Governance, administrative and student services	Research Accounting	Leverage automated processes to remove processes and intake form elimination	Planning	VPR	A new Research Management System (RMS) has been soft launched. Faculty training and support to full integration is in progress.
7	< 6 months	Governance, administrative and student services	Recruiting & Onboarding	Review contract expiry review process	Completed	VPA&S	Completed
8	< 6 months	Governance, administrative and student services	Admissions	Renew SIS- Explore options for upgrade to a new SIS with functionalities to address existing limitations and manual workarounds	Barriers identified	VPA&S/Provost	RFP Process completed. A SIS project report is being prepared for Cycle 5.
9	< 6 months	Governance, administrative and student services	Administrative services	Implement organizational administrative assistant review recommendations	Completed	VPA&S	Completed
10	< 6 months	Governance, administrative and student services	Internal Audit	Internal audit review- outsourcing	Planning	VPA&S	After completing a market review, outsourcing will not result in cost savings. An organizational review is assessing whether a hybrid model would achieve possible cost savings while also addressing the Board of Trustees' mandate for Internal Audit.
11	< 6 months	Governance, administrative and student services	Procurement	Update procurement guidance related to flexibility in policy for vendors of record	Completed	CFO	Completed
12	< 6 months	Governance, administrative and student services	Procurement	Implement expense review process efficiencies	Completed	CFO	Underway - Configurations in preview and currently in testing phase
13	< 6 months	Governance, administrative and student services	Procurement	Standardize vendor management process	Implementation	CFO	Vendor Performance Management Program is almost complete, but implementation is delayed due to ITS/Workday support needed to automate processes. ETA is unknown. System improvements for expiring contracts are complete.
14	< 6 months	Academic programming	Academic programming	Optimize section offerings- consolidate sections	Completed	Provost	Regular activity as a part of the budget process. Approximately 450 courses/sections have been closed, eliminated, or consolidated over the last 3 years. Tracking for ~150/year given ongoing budget pressures.

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15	< 6 months	Academic programming	Academic programming	Optimize section offerings- cancel sections with low enrolment	Completed	Provost	Have established a minimum threshold of 25 students or more, with flexibility depending on level, type, and other characteristics (e.g., elective or required).
16	< 6 months	Revenue generating activities	Revenue Generation	Continue to remove bottlenecks to internal admission timelines - Domestic	Implementation	Provost	Undergraduate is done. Enrolment Working Group is active to monitor and enforce. Grad timelines being examined.
17	< 6 months	Revenue generating activities	Revenue Generation	Continue to remove bottlenecks to internal admission timelines - International	Implementation	Provost	Enrolment Working Group (with the AVP, International) are active and working on streamlining the admission process for international students.
18	< 6 months	Revenue generating activities	Fund development	More focus, investment and strategic action should be placed on optimizing Brock's fund development capacity	Implementation	VPE	Fully complimented development and alumni team. Strategic donor engagement activity actioned. Year-to-date total impact of philanthropy in fiscal year steadily increasing and surpassing previous fiscal year totals, signaling enhanced donor confidence, deeper relationships, expanded donor base, and increased institutional credibility.
19	< 6 months	Revenue generating activities	Student Recruitment	Centralize marketing efforts to align and improve strategies for domestic recruitment	Planning	VPE/Provost	Functional review completed. Implementation through Fall 2026.
20	< 6 months	Revenue generating activities	Student Recruitment	Centralize marketing efforts to align and improve strategies for international recruitment	Planning	VPE/Provost	Functional review completed. Implementation through Fall 2026.
21	6 months to 1 year	Governance, administrative and student services	IT	Optimize licenses across campus	Planning	VPA&S	As licenses renew, ITS is reviewing current practice with respect to budgeting (central vs. distributed). ITS is also exploring opportunities to centralize where possible to simplify license administration and to ensure appropriate licensing quantities.
22	6 months to 1 year	Governance, administrative and student services	IT	Establish Level 0 support	Implementation	VPA&S	ITS Structural Review underway. Implementation of the new model planned for December 2026.
23	6 months to 1 year	Governance, administrative and student services	IT	Explore additional centralization of ITS across campus	Implementation	VPA&S	ITS Structural Review underway. Implementation of the new model planned for December 2026.
24	6 months to 1 year	Governance, administrative and student services	IT	IT Governance - ITS should continue and further enhance the practice of informing faculties and departments about the IT costs	Planning	VPA&S	Meetings with Deans ongoing to confirm the type of IT support required for existing (e.g. Computer Science) and future (e.g. AI) academic and research needs.
25	6 months to 1 year	Governance, administrative and student services	IT	Implement Information Service Management system	Implementation	VPA&S	External Project Manager is engaged. Product procurement is underway. Discussions have begun with CPI and other stakeholder groups. An RFP for final product selection has concluded. Implementation will begin in early summer with a soft launch targeted for Fall 2026.
26	6 months to 1 year	Governance, administrative and student services	Admissions	Review admissions process	Implementation	Provost	Enrolment Working Group is active and reviewing the admissions process. Some changes contingent on a new SIS.

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27	6 months to 1 year	Governance, administrative and student services	Student Support	Review Student Awards and Financial Aid (SAFA) and Brock Central composition	Implementation	Provost/CFO	1 New FTE staff resource added to 2026-27 Budget to work directly in RO Brock Central through SAFA supporting OSAP student needs. Solution developed in conjunction with RO - Additional resource subject to budget approval
28	6 months to 1 year	Governance, administrative and student services	Student Support	Centralization of academic advising	Planning	Provost	Administrative Org review to roll out in 2026. Phase 1 focused on administrative assistants. Phase 2 will focus on academic advising. Targeted completion date by Fall 2026.
29	6 months to 1 year	Governance, administrative and student services	Co-op	Review level of personalization & support to students	Implementation	Provost	Co-op review initiated Nov 2025 to include level of personal support to students. Report due May 2026.
30	6 months to 1 year	Governance, administrative and student services	Research Accounting	Role unclarity due to lack of standard operating procedures	Planning	VPR	Completed
31	6 months to 1 year	Governance, administrative and student services	Research Accounting	Reduce manual reminders through Workday of upcoming deliverables	Planning	VPR	Completed
32	6 months to 1 year	Governance, administrative and student services	Research Accounting	Create central repository of templates / guides for researchers	Planning	VPR	Completed
33	6 months to 1 year	Governance, administrative and student services	Recruiting & Onboarding	Elimination of manual Position Approval Form (PAF)	Completed	VPA&S	Completed
34	6 months to 1 year	Governance, administrative and student services	Recruiting & Onboarding	Remove Workday approval fatigue/ duplication	Completed	VPA&S	Completed
35	6 months to 1 year	Governance, administrative and student services	Admin	Implementation of a performance management process	Planning	VPA&S	Draft project budget prepared and reviewed with AVP ITS. Next step is to work with procurement to prepare RFP. Competing staffing priorities has delayed this work until Fall/Winter 2026/27.
36	6 months to 1 year	Governance, administrative and student services	Procurement	Enhance Workday processes to reduce user error on payment processes	Completed	CFO	Completed and continual monitoring. System validations have been added to address pain points and will be continually monitored to identify new opportunities for improvement.
37	6 months to 1 year	Physical assets and facilities	Facilities	Align assets with objectives. Define relationships between assets and the strategic, business, and program outcomes they support.	Implementation	VPA&S	The Capital Planning process has been documented. In order to add robustness to the prioritization process, a quantitative assessment tool has been developed. A working group including Deans, FM, ITS, and Ancillary Services will meet to review, discuss and prioritize the list of projects. This will increase transparency, consistency and assist in ensuring alignment across the institution.
38	6 months to 1 year	Physical assets and facilities	Facilities	Formalize the capital planning and resource allocation workflow to create rigour and transparency	Implementation	VPA&S	The Capital Planning process has been documented. In order to add robustness to the prioritization process, a quantitative assessment tool has been developed. A working group including Deans, FM, ITS, and Ancillary Services will meet to review, discuss and prioritize the list of projects. This will increase transparency, consistency and assist in ensuring alignment across the institution.

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39	6 months to 1 year	Physical assets and facilities	Facilities	Explore innovative energy financing models	Completed	VPA&S	Energy-as-a-Service was identified and is being deployed (SPARK) as a feasible solution for an alternative financing model. Conversion of lighting to LED in progress, in the design stage for air handling unit (AHU) replacements and in various planning stages on other infrastructure renewal measures including replacement of chilled water piping, upgraded fumehoods and removal of pneumatic controls.
40	6 months to 1 year	Collaborative procurement opportunities	Procurement	Investigate opportunity to consolidate suppliers across categories	Planning	CFO	Underway and ongoing. Procurement Services is working to identify opportunities and engage in competitive processes as resources allow.
41	6 months to 1 year	Collaborative procurement opportunities	Procurement	Reduce maverick spend. Explore opportunities to take advantage of negotiated pricing and early bird payments.	Planning	CFO	Underway and ongoing. Procurement Services is working to identify opportunities and engage in competitive processes as resources allow.
42	6 months to 1 year	Revenue generating activities	Revenue Generation	Manage research overhead centrally	Planning	VPR	Requires an update to the Indirect Costs of Research This update is on track to be complete in Fall 2026.
43	1 year +	Governance, administrative and student services	IT	Renew SIS - Reduce inhouse capability needs	Barriers Identified	VPA&S	RFP Process completed. A SIS project report is being prepared for Cycle 5.
44	1 year +	Governance, administrative and student services	Co-op	Continued review and monitoring of student support and engagement levels	Implementation	Provost	Part of planned co-op review. Initiated November 2025. Report due May 2026.
45	1 year +	Governance, administrative and student services	Co-op	Review Co-op adjudication process	Implementation	Provost	Part of planned co-op review. Initiated November 2025. Report due May 2026.
46	1 year +	Governance, administrative and student services	Co-op	Renew SIS- Improve co-op course code management	Barriers Identified	Provost	RFP Process completed. A SIS project report is being prepared for Cycle 5
47	1 year +	Governance, administrative and student services	IT	Renew SIS - Process efficiencies related to manual work arounds	Barriers Identified	VPA&S	RFP Process completed. A SIS project report is being prepared for Cycle 5
48	1 year +	Governance, administrative and student services	Admissions	Renew SIS- reduce manual application adjudication outside of OUAC	Barriers Identified	Provost	RFP Process completed. A SIS project report is being prepared for Cycle 5
49	1 year +	Governance, administrative and student services	Student Support	Opportunity to triage of student requests- linked to Review Student Awards and Financial Aid (SAFA) and Brock Central composition review	Implementation	Provost/CFO	1 New FTE staff resource added to 2026-27 Budget to work directly in RO Brock Central through SAFA supporting OSAP student needs. Solution developed in conjunction with RO - Additional resource subject to budget approval
50	1 year +	Governance, administrative and student services	Enrolment	Renew SIS- Course code conflicts and no pre-enrolment	Barriers Identified	Provost	RFP Process completed. A SIS project report is being prepared for Cycle 5
51	1 year +	Governance, administrative and student services	Library	Conduct a review of the Library	Implementation	Provost	Review underway, report due by Fall 2026.

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52	1 year +	Governance, administrative and student services	Student Life & Success	Opportunity for Student Life & Success and BUSU Event Collaboration	Implementation	Provost	Discussions underway with BUSU around the ancillary fee protocol (i.e., to allow for increases to fees, allocation to initiatives/needs, etc.). Connected to the omnibus agreement renewal. Service levels have been adjusted accordingly as a part of the budget process. Recommendation for charge-backs to BUSU for university services to get to breakeven not viable.
53	1 year +	Governance, administrative and student services	Facilities	Custodial services review- outsourcing	Implementation	VPA&S	Assessing the quantitative and qualitative benefits from outsourcing Custodial Services.
54	1 year +	Governance, administrative and student services	Recruiting & Onboarding	Review Workday configuration to support enhanced efficiencies in the recruitment process	Implementation	VPA&S	Project is currently underway with changes being made to offer letter templates and the closing of unfilled job requisitions in Workday that are no longer required. Project completion is targeted for July 2026.
55	1 year +	Governance, administrative and student services	Research Accounting	Explore an option for an effective grant management tool- Workday module	Barriers Identified	VPR	Exploration in progress. Implementation anticipated date of completion April 2028
56	1 year +	Governance, administrative and student services	Procurement	Explore an option of an automated bid evaluation tool	Planning	CFO	Underway - Software cost has been added to 2026-27 approved budget for Procurement Services and project will be implemented in 2026-27
57	1 year +	Governance, administrative and student services	Procurement	Review opportunity to streamline procurement processes in Workday to reduce approval delays	Planning	CFO	Subject to funding and Workday/ITS support.
58	1 year +	Academic programming	Academic programming	Optimize program offerings	Implementation	Provost	Ongoing as part of the budget planning process. Programs with low enrolment have been flagged. Over the last 3 years, 8 programs have been discontinued, 4 programs have been paused, and 2 programs have been merged/consolidated. April 2026 update: 4 programs have been identified for viability reviews at Senate due to low enrolment (Biophysics, Canadian Studies, Hispanic and Latin American Studies, Italian Studies).
59	1 year +	Academic programming	Academic programming	Establish program minimum intake forecast	Complete	Provost	Established as a part of the new budget / 4-year planning process.
60	1 year +	Academic programming	Academic programming	Monitoring of program revenue and expenses	Implementation	Provost	Established as a part of the annual budget and forecasting process.
61	1 year +	Academic programming	Academic programming	Classroom re-configuration-space optimization	Implementation	Provost/VPA&S	Standing agenda item at BUSAC meeting.
62	1 year +	Physical assets and facilities	Facilities	Integrate Investment Priorities- create integrated view of facility and infrastructure investment needs and priorities across the University.	Implementation	VPA&S	The Capital Planning process has been documented. In order to add robustness to the prioritization process, a quantitative assessment tool has been developed. A working group including Deans, FM, ITS, and Ancillary Services will meet to review, discuss and prioritize the list of projects. This will increase transparency, consistency and assist in ensuring alignment across the institution.

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63	1 year +	Physical assets and facilities	Facilities	Advance the exploration of the development of peripheral and other lands	Barriers Identified	VPA&S	Meeting with developers to explore development options for Lockhart and South campus areas. Meetings with the Niagara Escarpment Commission ongoing to explore the size of development permissible on the Lockhart site.
64	1 year +	Physical assets and facilities	Facilities	Reexamine space commitments to ensure optimization of space on campus	Planning	VPA&S	A Space Subgroup has been created, which will look at space optimization across campus. This group will work with BUSAC and its interest-holders.
65	1 year +	Physical assets and facilities	Facilities	Revisit lease strategy	Planning	VPA&S	An improved template completed for 3rd party retail leases. Extension of an existing lease on 3401 Schmon Parkway and creating a proposal for a significant second tenant in the remainder of that space. Work continues with Brock community to determine optimal uses of Brock lease spaces.
66	1 year +	Physical assets and facilities	Facilities	Enhance automation and AI to optimize energy use	Planning	VPA&S	An AI solution will be deployed on the Building Automation System as part of SPARK. Currently in investigation and data collection stage.
67	1 year +	Collaborative procurement opportunities	Procurement	Engage in early payment negotiations	Planning	CFO	Underway and ongoing. Procurement Services has prioritized Visa Payables, rebates and early payment discounts to our contract negotiation checklists. Efforts will be prioritized during new contracts or at the time of contract renewal.
68	1 year +	Collaborative procurement opportunities	Procurement	Optimize Enterprise Resource Planning software/ technology spend	Planning	CFO	Collaborate with new AVP, ITS on strategy
69	1 year +	Revenue generating activities	Revenue Generation	Optimization (summer) of co-op timing	Complete	Provost	Revised spring/summer dates put in place for 2026-27.
70	1 year +	Revenue generating activities	Revenue Generation	Brock Sports and Recreation funding model review	Implementation	Provost	Discussions underway with BUSU around the ancillary fee protocol (i.e., to allow for increases to fees, allocation to initiatives/needs, etc.). Connected to the omnibus agreement renewal. Service levels have been adjusted accordingly as a part of the budget process. Many sports teams have moved to self-funded models.
71	1 year +	Revenue generating activities	Revenue Generation	Investment in CRM and SIS	Barriers Identified	VPA&S	RFP Process completed. A SIS project report is being prepared for Cycle 5
72	1 year +	Revenue generating activities	Revenue Generation	Course offering and timing-opportunity for a trimester model	Implementation	Provost	Work underway as a part of the Spring/Summer initiatives. 2027-28 annual planning process will put an emphasis on planning for a robust third semester in the academic year by offering more courses, better aligning them to student interests/needs, and having more individuals on campus. Targeting Spring/Summer 2027 to hit critical mass to allow for campus ancillary services to be open and generate revenue.