



Board of Trustees

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

Topic: EAF Progress Update

Date of Meeting: March 4, 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 EAF Steering Committee.
- Where necessary, working groups, reporting to the Steering Committee, have been established to review, recommend, and implement projects and initiatives.

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 5)

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 (Feb 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. Vendor selection underway. Business case development ongoing.
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 struck. Working through implementation of the new Strategic Enrolment Management (SEM) plan. Registrar designated lead for all enrolment matters.
4	< 6 months	Governance, administrative and student services	Student Recruitment	Centralize marketing efforts (FTE)	Planning	VPE/Provost	Review underway
5	< 6 months	Governance, administrative and student services	Co-op	Career Co-Op and Experiential Education services review	Planning	Provost	Review underway
6	< 6 months	Governance, administrative and student services	Research Accounting	Leverage automated processes to remove processes and intake form elimination	Planning	VPR	Anticipated date of completion May 2026
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. Vendor selection underway. Business case development ongoing .
9	< 6 months	Governance, administrative and student services	Administrative services	Implement organizational administrative assistant review recommendations	Implementation	VPA&S	Anticipated completion March 2026.
10	< 6 months	Governance, administrative and student services	Internal Audit	Internal audit review- outsourcing	Planning	VPA&S	Options to move to a hybrid model are being explored to determine possible cost savings. Next step is an organizational review being planned for Spring/Summer 2026.
11	< 6 months	Governance, administrative and student services	Procurement	Update procurement guidance related to flexibility in policy for vendors of record	Completed	CFO	Procurement Procedures updated for indicate the minimum number of second stage
12	< 6 months	Governance, administrative and student services	Procurement	Implement expense review process efficiencies	Completed	CFO	Expense Reports between \$50 and - \$50 no longer route to Accounts Payable for approval and training provided to faculty and ORS financial reviewers.
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.
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 completed. 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	Focus and strategic action towards fundraising efforts continues to gain momentum with year-to-date philanthropic impact totals steadily increasing, signaling strong progress toward optimizing Brock's fund development capacity.
19	< 6 months	Revenue generating activities	Student Recruitment	Centralize marketing efforts to align and improve strategies for domestic recruitment	Planning	VPE/Provost	Review underway Enrolment Working Group, Director, Marketing is a key member to coordinate marketing efforts on campus.
20	< 6 months	Revenue generating activities	Student Recruitment	Centralize marketing efforts to align and improve strategies for international recruitment	Planning	VPE/Provost	Review underway. Enrolment Working Group, Director, Marketing is a key member to coordinate marketing efforts on campus.
21	6 months to 1 year	Governance, administrative and student services	IT	Optimize licenses across campus	Planning	VPA&S	A comprehensive review of existing licenses will occur in Winter 2026. Process being created to address requests for new licenses related to CoPilot and other AI tools.
22	6 months to 1 year	Governance, administrative and student services	IT	Establish Level 0 support	Implementation	VPA&S	Review underway
23	6 months to 1 year	Governance, administrative and student services	IT	Explore additional centralization of ITS across campus	Implementation	VPA&S	Review underway
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	ITS leadership is scheduling consultations with Deans to discuss costs and service level agreements.
25	6 months to 1 year	Governance, administrative and student services	IT	Implement Information Service Management system	Implementation	VPA&S	Formal project kickoff has begun with external Project Manager engaged. Product procurement is underway.
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 likely contingent on a new SIS.
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 Registrar's Office Brock Central through SAFA supporting OSAP student needs. Solution developed in conjunction with Registrar's Office - 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	Review underway
29	6 months to 1 year	Governance, administrative and student services	Co-op	Review level of personalization & support to students	Implementation	Provost	Review underway
30	6 months to 1 year	Governance, administrative and student services	Research Accounting	Role unclarity due to lack of standard operating procedures	Planning	VPR	In progress anticipated completion date April 2026
31	6 months to 1 year	Governance, administrative and student services	Research Accounting	Reduce manual reminders through Workday of upcoming deliverables	Planning	VPR	In progress anticipated completion date April 2026
32	6 months to 1 year	Governance, administrative and student services	Research Accounting	Create central repository of templates / guides for researchers	Planning	VPR	In progress anticipated completion date April 2026
33	6 months to 1 year	Governance, administrative and student services	Recruiting & Onboarding	Elimination of manual Position Approval Form (PAF)	Planning	VPA&S	Currently in project planning phase. Completion targeted for Spring 2026.
34	6 months to 1 year	Governance, administrative and student services	Recruiting & Onboarding	Remove Workday approval fatigue/duplication	Planning	VPA&S	Currently in project planning phase. Completion targeted for Spring 2026.
35	6 months to 1 year	Governance, administrative and student services	Admin	Implementation of a performance management process	Planning	VPA&S	Built into Workday subscription, securing funding for implementation and activation of module. RFP underway to determine detailed costing of the project.

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.	Planning	VPA&S	Enhancing the capital plan prioritization categories by incorporating quantitative assessments. New working group established to determine priorities aligning with the University Action Plan.
38	6 months to 1 year	Physical assets and facilities	Facilities	Formalize the capital planning and resource allocation workflow to create rigour and transparency	Planning	VPA&S	Enhancing the capital plan prioritization categories by incorporating quantitative assessments. New working group established to determine priorities aligning with the University Action Plan.
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 in partnership with the Canadian Infrastructure Bank (CIB) and Enbridge Sustain.
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	Anticipated date of completion TBD 2026
43	1 year +	Governance, administrative and student services	IT	Renew SIS - Reduce inhouse capability needs	Barriers Identified	VPA&S	RFP Process completed. Vendor selection underway. Business case development ongoing.
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
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
46	1 year +	Governance, administrative and student services	Co-op	Renew SIS- Improve co-op course code management	Barriers Identified	Provost	SIS Working Group underway. Currently at RFP stage.
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. Vendor selection underway. Business case development ongoing.
48	1 year +	Governance, administrative and student services	Admissions	Renew SIS- reduce manual application adjudication outside of OUAC	Barriers Identified	Provost	SIS Working Group underway. Currently at RFP stage.
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 Registrar's Office Brock Central through SAFA supporting OSAP student needs. Solution developed in conjunction with Registrar's Office - 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	SIS Working Group underway. Currently at RFP stage.
51	1 year +	Governance, administrative and student services	Library	Conduct a review of the Library	Implementation	Provost	Review underway
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. Connected to the omnibus agreement renewal. Service levels have been adjusted accordingly as a part of the budget process.
53	1 year +	Governance, administrative and student services	Facilities	Custodial services review- outsourcing	Planning	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	Planning	VPA&S	Currently in project planning phase. Completion targeted for Spring 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	Barriers Identified	CFO	Underway - Software cost has been added to 2026-27 draft budget proposal for Procurement Services
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.
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	Recommendations from Learning Spaces Advisory Group (LSAG) to Brock University Space Advisory Committee (BUSAC) are being implemented. 8 existing spaces have been identified to be merged to create 4 larger classrooms. A further 11 spaces have been identified as category 1 classroom spaces to be actively managed centrally.
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.	Planning	VPA&S	Enhancing the capital plan prioritization categories by incorporating quantitative assessments. New working group established to determine priorities aligning with the University Action Plan.
63	1 year +	Physical assets and facilities	Facilities	Advance the exploration of the development of peripheral and other lands	Barriers Identified	VPA&S	Exploring development options of the Lockhart property.
64	1 year +	Physical assets and facilities	Facilities	Reexamine space commitments to ensure optimization of space on campus	Planning	VPA&S	Brock University Space Advisory Committee (BUSAC) space optimization subgroup struck. Working group mandate and scope being drafted.
65	1 year +	Physical assets and facilities	Facilities	Revisit lease strategy	Planning	VPA&S	An existing lease at 3401 Schmon Parkway has been extended along with exploring options to lease the remaining space. Continue to work with Brock community to explore 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 SPARK's Building Automation System. Currently in the 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	Barriers Identified	CFO	Ongoing - Currently in negotiations with Workday for early contract renewal, but early renewal discounts are subject to new modules being added. (Grants module is still TBD). Workday year end is January 31st, but any early renewal at this point would require us to begin the renewal now which would impact this year's budget.
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. 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. Vendor selection underway. Business case development ongoing.
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.