



UWOFA Meeting of Members Agenda

Friday, March 28, 2025
10:00 a.m. to 12:00 p.m.
Via Zoom

To connect to the meeting: <https://westernuniversity.zoom.us/j/95566662544>

Meeting ID: 955 6666 2544

Passcode: 705754

OR Dial: 1-647-558-0588

Press pound (#) when prompted for the participant ID

AGENDA

1. Approval of the Agenda
2. CAUT Report: *Peter McInnis* (CAUT President)
3. Approval of Minutes of the Meeting of Members November 14, 2024 – **EXHIBIT I**
4. Business Arising:
5. President's Report: *J. Weststar* – **EXHIBIT II**
6. Audited Financial Statements: *C. Maco*
Motion: That the membership approve the audited financial statements for the fiscal year ended October 31, 2024 as presented in **EXHIBIT III**.
7. Appointment of the Public Accountant: *C. Maco*
Motion: That the membership approve appointing MNP LLP (London) as the Public Accountant
8. Nominations of Directors and Speakers – **EXHIBIT IV**: *R. Heydon and S. Hendriks*
9. Chairs of UWOFA Committees 2025-2026: *J. Weststar* – **EXHIBIT V**
10. Preparation for Faculty Negotiations: *J. Weststar*
11. Presentation of the Dan Belliveau Memorial Service Award: *J. Weststar*
The recipient for 2025 is Vaughan Radcliffe - biography in **EXHIBIT VI**
12. Presentation of the CAUT Dedicated Service Award: *J. Weststar*
The recipient for 2025 is Nigmendra Narain - biography in **EXHIBIT VII**

13. Annual Committee and Representative Reports

Questions are welcome on any of the annual reports presented in **EXHIBIT VIII**.

14. New Business

15. Adjournment

Minutes
UWOFA Meeting of Members
Thursday, November 14, 2024

Speaker: Phil King

President: Johanna Weststar

The meeting was held remotely by conference call and was called to order at 2:32 p.m. Attendance was recorded (and quorum established) based on Members participating in Zoom video conference. The Speaker reminded attendees that only members of the Faculty Association were permitted to vote on motions.

J. Ingrey provided a Land Acknowledgement statement.

1. Approval of the Agenda

MOVED: K. Korycki/J. Tennant
That the agenda be adopted.

The motion carried unanimously.

2. OCUFA Report: *Nigmendra Narain* (OCUFA President) and Jenny Ahn (OCUFA Executive Director)

On behalf of the Ontario Confederation of University Faculty Associations (OCUFA), Nigmendra Narain and Jenny Ahn presented a report on provincial challenges and OCUFA's efforts.

3. Approval of Minutes of the Annual Meeting of Members May 1, 2024 – EXHIBIT I

MOVED: C. Maco/D. Heap
That the minutes from the May 1, 2024 Annual Meeting of Members be approved.

The motion carried unanimously.

4. Business Arising. There was no business arising from the May 1, 2024 Annual Meeting of Members.

5. President's Report: *J. Weststar*

Donations: UWOFA made the following donations:

- London and District Labour Council (LDLC) for Labour Day Picnic: \$500
- Association of McGill Professors of Law (AMPL/AMPD) strike support: \$1,500
- CUPE Local 2361 strike support: \$600
- Workers' Arts and Heritage Centre (WAHC): \$600
- Forest City Film Festival Sponsorship: \$250

J. Weststar reported on key activities for UWOFA since May:

- Increased communication to members through UWOFA Weekly emails, which are now being sent with MailChimp.
- Actively participating in Senate meetings and building connections with student and faculty Senators.
- Showing solidarity with CUPE local 2361 during their strike action.
- Filing policy grievances related to researcher profiles and Microsoft online storage.
- Building representation within units by strengthening the Stewards Committees.

University Budget: J. Weststar highlighted the challenges that universities face with the Ontario government funding model. Members are encouraged to resist the Administration's narrative regarding the budget and Western's financial health.

6. Treasurer's Report: C. Maco

C. Maco reviewed UWOFA's budget for the new fiscal year, November 1, 2024 to October 31, 2025 presented in **EXHIBIT III**. She highlighted the following:

- Interest Revenue is lower due to transferring maturing funds into the business account and interest rates dropping.
- Release time is lower since there are no negotiations this year and additional release time was paid for by Western through the Brescia Integration MOA.
- Legal fees are higher as there are few large ongoing cases.
- Consulting costs are for bookkeeping support, since this work must be completed outside the staff CUPE bargaining unit.
- Contract Faculty Fund for Research and Professional Development is higher because the Board of Directors approved a one-time increase to \$20,000 due to increased applications.
- Insurance is higher in anticipation of cyber security insurance.
- New line for training, previously Staff Development, for staff and committee development.
- UWOFA has a projected deficit of \$34,645.

7. UWOFA Taskforce on MAPP Consultations: J. Weststar – EXHIBIT II

The Employer introduced Policy 1.1.1 (Prohibition of Camping on University Property) and Procedure 1.1 (Obtaining Authorization to Hold a Demonstration) without consultation. UWOFA filed two grievances that the Employer has violated the Management Rights articles of our collective agreements. Three consultations will be conducted regarding the MAPP policy: one with Senators, one with Campus Council, and one with UWOFA. The first consultation took place with Senators following the Senate meeting on November 8, 2024. To prepare for the consultations, calls were made for members to join a UWOFA Taskforce on MAPP Consultations. J. Weststar presented UWOFA's position as developed by the taskforce. If the policies are revised, they will be presented to Joint Committee.

8. Committee Reports

a) Grievance Committee: S. Laviolette

S. Laviolette extended gratitude to the Member Services Officers and the Grievance Committee for their efforts. There are 27 open grievances in addition to several cases that are not yet grievances. Four are at the Step 1 stage, eight are in the Step 2 stage, and three grievances may move to arbitration. S. Laviolette highlighted recently filed grievances related to PER and the Microsoft Storage reduction.

b) Librarians & Archivists Stewards Committee: E. Marshall

E. Marshall reported that the LASC meets monthly and approved notes are posted to the UWOFA website. Three new Stewards have joined for this academic year. On September 25, LASC organized a rally to support the CUPE 2361 strike. A Lunch and Learn Workshop series was developed to address timely topics to the membership, based on a survey of member needs. The first workshop, held in October, focused on the Biennial Report and Review process, with a second workshop on the LOU - Job Descriptions scheduled for November. E. Marshall thanked UWOFA office staff for their support.

c) Faculty Stewards Council: R. Heydon

Y. Hakooz reported on behalf of R. Heydon. This is the first year of the Faculty Stewards Council, which replaces the previous Faculty Representatives Council. The

UWOFA office now administers elections, a responsibility that was previously managed by individual units. Stewards are now appointed for a renewable two-year term. Training sessions for Stewards are under way. The first training session was held on October 21. The next training session is scheduled for December 17, and will focus on Performance Evaluation and workload issues. The Grievance Committee has also been invited to participate in this session. UWOFA's Past President is currently leading the Stewards Council. Elections to appoint a Chief Steward and Deputy Chief Steward are planned for early in the new year. Stewards are still needed for these units: FIMS, Kinesiology, Epidemiology & Biostatistics, Pathology, and Biology.

- d) **Communications, Mobilizing, and Organizing Committee:** *D. Heap, J. Seijts*
J. Seijts reported that UWOFA began using MailChimp to distribute the UWOFA Weekly newsletter. The first email produced an 86% open rate. A communication strategy is being drafted that will include a stakeholder analysis, core messaging framework, communication channels, crisis communication plan, analysis of feedback and engagement mechanisms, and measurement and metrics of communication indicators.

D. Heap expressed gratitude to members who showed solidarity during the CUPE 2361 strike by solidarity picketing and sending letters. The CMOC is looking to host educational events for the broader community.

9. **New Business:**

UWOFA-F Bargaining

To prepare for upcoming negotiations, UWOFA will hold Demystifying Bargaining events for the membership and encourage members to take part in bargaining.

Zoom Chat

J. Weststar explained that the meeting Zoom chat settings only allowed participants to send messages to the host and co-hosts, because enabling the functionality for members to chat with everyone in the meeting would conflict with the meeting's practice of requiring individuals to be recognized before speaking.

10. **Adjournment**

MOVED: D. Fiander/J. Seijts.

That the meeting adjourn. In the absence of any objection, motion carried (4:09 p.m.)

The motion carried unanimously.

Meeting of Members: President's Report

We face a very challenging landscape, there is no doubt. The higher education sector in Ontario may be in the worst financial crisis in its history and that crisis is an existential threat to many of us. The government is allowing universities to fail - Laurentian was forced into bankruptcy, Brescia was closed and now many universities are posting deficits and slashing core activities.

Here at Western it feels like we live in an austerity normalization zone, with the office of Institutional Planning and Budgeting (IPB) enforcing 3% budget cuts on Units every year even when the University is posting surpluses. We have been doing more with less for years, yet even though we are in a stronger financial position than virtually all of our peers in Ontario, we see it getting worse. Full-time positions are not being granted nor replaced, course enrolment minimums are being stringently implemented, units are being told to cut courses and programs causing job loss among our colleagues on LT and part-time contracts and poorer offerings for our students, our Workload documents are under massive pressure from Deans, cuts to graduate student funding and increased neoliberal practices of managerialism, accountability, and surveillance, including the creation of new administrative positions at Western. This while we receive exhortations to raise our research profile and increase our grant success while also adapting our teaching to changes in technology, larger class sizes and student accommodation needs with inadequate support. On top of this, the administration charges forward on actions without proper consultation and collegial governance creating undue stress and workload and distracting us from our core responsibilities. Here are a few things we've been dealing with:

- Trampling on our collective agreement to acquire Brescia and leaving the work of integration to faculty and staff.
- Brightspace.
- The budget.
- Crack downs on campus expression.
- Exploitation by Microsoft through quota reductions.
- Bill 166.
- Strikes by the IUOE, PSAC and CUPE.
- Rising concerns about equity and discrimination across many faculties.
- Rising interpersonal and intra-Unit conflict.
- Workload pressures.
- Burnout.
- Navitas, back from the dead.

It is a lot. And I know that all of us want to focus on our teaching and research and professional activities. But I also know that no one can care more about preserving our work than we can. No one will care more than we will. We are this university and we must claim it through our department meetings, our faculty councils, our Senate and our union.

When we stand up and come together, we make a difference. I see it every day that I do union work. We don't always win, but we create spaces of hope, we create spaces of support, we develop new and better ideas for our own futures, and we build capacity for next time.

So I call on each of you today to put protecting your work first. We need each and every one of us to take part in the action of sustaining the value of an academic career and protecting the spaces that allow us to do our scholarly work in teaching, research, and professional and clinical practice. It might be taking on a UWOFA role, asking a question, signing a petition, coming to a meeting, learning a part of the collective agreement, or having a conversation. Each and every act that we do in service to each other and in service to our collective agreement contributes in a real way to the working experiences of the 1,700 faculty, librarians and archivists who have come together in our union.

UWOFA work is good work. I ask you to join me in it.

In Solidarity,

A handwritten signature in cursive script that reads "Johanna Weststar". The signature is written in black ink and includes a stylized flourish at the end.

Johanna Weststar
UWOFA, President

**The University of Western Ontario
Faculty Association
Financial Statements**
Year ended October 31, 2024

Draft for Management Only

The University of Western Ontario Faculty Association

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For the year ended October 31, 2024

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Draft for Management Only

Independent Auditor's Report

To the Members of The University of Western Ontario Faculty Association:

Report on the Audit of the Financial Statements

Opinion

We have audited the financial statements of The University of Western Ontario Faculty Association (the "Association"), which comprise the statement of financial position as at October 31, 2024, and the statement of operations, changes in net assets, and cash flows for the year then ended, and notes to the financial statements, including a summary of significant accounting policies.

In our opinion, the accompanying financial statements present fairly, in all material respects, the financial position of the Association as at October 31, 2024, and the results of its operations and its cash flows for the year then ended in accordance with Canadian accounting standards for not-for-profit organizations.

Basis for Opinion

We conducted our audit in accordance with Canadian generally accepted auditing standards. Our responsibilities under those standards are further described in the Auditor's Responsibilities for the Audit of the Financial Statements section of our report. We are independent of the Corporation in accordance with the ethical requirements that are relevant to our audit of the financial statements in Canada, and we have fulfilled our other ethical responsibilities in accordance with these requirements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our opinion.

Responsibilities of Management and Those Charged with Governance for the Financial Statements

Management is responsible for the preparation and fair presentation of the financial statements in accordance with Canadian accounting standards for not-for-profit organizations, and for such internal control as management determines is necessary to enable the preparation of financial statements that are free from material misstatement, whether due to fraud or error.

In preparing the financial statements, management is responsible for assessing the Corporation's ability to continue as a going concern, disclosing, as applicable, matters related to going concern and using the going concern basis of accounting unless management either intends to liquidate the Corporation or to cease operations, or has no realistic alternative but to do so.

Those charged with governance are responsible for overseeing the Corporation's financial reporting process.

Auditor's Responsibilities for the Audit of the Financial Statements

Our objectives are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditor's report that includes our opinion. Reasonable assurance is a high level of assurance, but is not a guarantee that an audit conducted in accordance with Canadian generally accepted auditing standards will always detect a material misstatement when it exists. Misstatements can arise from fraud or error and are considered material if, individually or in the aggregate, they could reasonably be expected to influence the economic decisions of users taken on the basis of these financial statements.

As part of an audit in accordance with Canadian generally accepted auditing standards, we exercise professional judgment and maintain professional skepticism throughout the audit. We also:

- Identify and assess the risks of material misstatement of the financial statements, whether due to fraud or error, design and perform audit procedures responsive to those risks, and obtain audit evidence that is sufficient and appropriate to provide a basis for our opinion. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the Corporation's internal control.

- Evaluate the appropriateness of accounting policies used and the reasonableness of accounting estimates and related disclosures made by management.
- Conclude on the appropriateness of management's use of the going concern basis of accounting and, based on the audit evidence obtained, whether a material uncertainty exists related to events or conditions that may cast significant doubt on the Corporation's ability to continue as a going concern. If we conclude that a material uncertainty exists, we are required to draw attention in our auditor's report to the related disclosures in the financial statements or, if such disclosures are inadequate, to modify our opinion. Our conclusions are based on the audit evidence obtained up to the date of our auditor's report. However, future events or conditions may cause the Corporation to cease to continue as a going concern.
- Evaluate the overall presentation, structure and content of the financial statements, including the disclosures, and whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation.

We communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit and significant audit findings, including any significant deficiencies in internal control that we identify during our audit.

Report on Other Legal and Regulatory Requirements

As required by the Corporations Act of Canada, we report that, in our opinion, the accounting principles in Canadian accounting standards for not-for-profit organizations have been applied on a basis consistent with that of the preceding period.

London, Ontario

Chartered Professional Accountants

Licensed Public Accountants

The University of Western Ontario Faculty Association
Statement of Financial Position

As at October 31, 2024

	Operating Fund	Grievances & Collective Bargaining Fund	Reserve Fund	Total 2024	Total 2023
Assets					
Current					
Cash	\$ 533,598	\$ 1,112,587	\$ 284,054	\$ 1,930,239	\$ 2,461,822
Internally restricted funds (Note 3)	106,311	-	-	106,311	103,818
GIC investments (Note 4)	-	1,708,405	-	1,708,405	1,701,184
Interest receivable	-	178,924	-	178,924	179,090
Prepaid expenses	22,511	-	-	22,511	30,244
	662,420	2,999,916	284,054	3,946,390	4,476,158
Long term assets					
GIC investments (Note 4)	-	3,219,459	-	3,219,459	3,000,000
Capital assets (Note 5)	17,073	-	-	17,073	22,134
	\$ 679,493	\$ 6,219,375	\$ 284,054	\$ 7,182,922	\$ 7,498,292
Liabilities					
Current					
Accounts payable and accrued liabilities (Note 8)	\$ 380,096	\$ -	\$ -	\$ 380,096	\$ 310,740
Long-term liabilities					
Post retirement benefit obligation (Note 6)	-	-	93,100	93,100	199,700
	380,096	-	93,100	473,196	510,440
Contingent liability (Note 9)					
Fund balances					
Operating Fund	299,397	-	-	299,397	969,488
Grievances & Collective Bargaining Fund	-	6,219,375	-	6,219,375	5,940,672
Reserve Fund	-	-	190,954	190,954	77,692
	299,397	6,219,375	190,954	6,709,726	6,987,852
	\$ 679,493	\$ 6,219,375	\$ 284,054	\$ 7,182,922	\$ 7,498,292

Approved on behalf of the Board

Director

Director

The accompanying notes are an integral part of these financial statements

For the year ended October 31, 2024

	Operating Fund	Grievances & Collective Bargaining Fund	Reserve Fund	Total 2024	Total 2023
Revenue					
Membership dues	\$ 2,349,967	\$ -	\$ -	\$ 2,349,967	\$ 2,243,376
Dues for Canadian and Ontario Associations	(742,165)	-	-	(742,165)	(677,294)
Net membership dues	1,607,802	-	-	1,607,802	1,566,082
Interest income	13,037	278,703	6,662	298,402	285,574
Post retirement benefit gain (Note 6)	-	-	106,600	106,600	45,900
Total Revenue	1,620,839	278,703	113,262	2,012,804	1,897,556
Expenses					
Professional fees	1,153,797	-	-	1,153,797	321,121
Employee wages	675,108	-	-	675,108	719,615
Release time	211,165	-	-	211,165	227,095
Administration and general	86,379	-	-	86,379	74,207
Scholarships paid (Note 8)	54,000	-	-	54,000	110,500
Grad club membership dues	22,374	-	-	22,374	21,456
Travel	17,800	-	-	17,800	10,827
Amortization	14,942	-	-	14,942	20,899
Occupancy costs	14,355	-	-	14,355	15,211
Negotiations and strike preparations	13,864	-	-	13,864	59,608
SAR Program Donation	10,000	-	-	10,000	10,000
Donations	9,879	-	-	9,879	19,013
Research and professional fund	7,267	-	-	7,267	6,468
Post retirement benefit expense (Note 6)	-	-	-	-	31,497
Loss on disposal of capital assets	-	-	-	-	1,451
Total Expenses	2,290,930	-	-	2,290,930	1,648,968
Excess of revenue over expenses for the year	\$ (670,091)	\$ 278,703	\$ 113,262	\$ (278,126)	\$ 248,588

The accompanying notes are an integral part of these financial statements

The University of Western Ontario Faculty Association
Statement of Changes in Net Assets

Year ended October 31, 2024

	<i>Grievances & Collective</i>				
	<i>Operating Fund</i>	<i>Bargaining Fund</i>	<i>Reserve Fund</i>	<i>2024</i>	<i>2023</i>
Fund Balances, beginning of year	\$ 969,488	\$ 5,940,672	\$ 77,692	\$ 6,987,852	\$ 6,739,264
Excess of revenues over expenses	(670,091)	278,703	113,262	(278,126)	248,588
Fund Balances, end of year	\$ 299,397	\$ 6,219,375	\$ 190,954	\$ 6,709,726	\$ 6,987,852

Draft for Management Only

The accompanying notes are an integral part of these financial statements

The University of Western Ontario Faculty Association

Statement of Cash Flows

For the year ended October 31, 2024

	2024	2023
Cash provided by the following activities		
Operating		
Excess of revenues over expenses for the year	\$ (278,126)	\$ 248,588
Adjustments for		
Amortization	14,942	20,899
Loss on disposal of capital assets	-	1,451
	(263,184)	270,938
Changes in working capital accounts		
Prepaid expenses	7,733	54,301
Interest receivable	166	(155,429)
Accounts payable and accrued liabilities	69,357	155,127
Post retirement benefit obligation	(106,600)	(45,900)
	(292,528)	279,037
Investing		
Purchase of capital assets	(9,882)	(7,165)
Change in GIC investments	(226,680)	(3,168,043)
	(236,562)	(3,175,208)
Decrease in cash resources	(529,090)	(2,896,171)
Cash resources, beginning of year	2,565,640	5,461,811
Cash resources, end of year	\$ 2,036,550	\$ 2,565,640
Cash resources are comprised of:		
Cash - operating fund	\$ 533,598	\$ 1,124,032
Cash - internally restricted funds	106,311	103,818
Cash - grievances and collective bargaining fund	1,112,587	1,060,398
Cash - reserve fund	284,054	277,392
	\$ 2,036,550	\$ 2,565,640

The accompanying notes are an integral part of these financial statements

The University of Western Ontario Faculty Association
Notes to the Financial Statements
For the year ended October 31, 2024

1. Purpose of the organization

The University of Western Ontario Faculty Association ("the Association") is the certified bargaining agent for faculty teaching at least a half University degree credit course in each of two of the last three fiscal years and for librarians and archivists at The University of Western Ontario ("the University"). As a non-profit organization, the Association is not subject to income taxes on any earned income.

2. Significant accounting policies

These financial statements are prepared in accordance with Canadian accounting standards for not-for-profit organizations and include the following significant accounting policies:

Fund accounting

The Association has the following funds:

(i) Operating Fund - Unrestricted

The operating fund accounts for the day to day operating activities of the Association.

(ii) Grievance & Collective Bargaining Fund - Internally Restricted

This amount is internally restricted by the Membership of the Association for contingencies, for the payment of expenses associated with legal advice and arbitration arising from grievances and rights cases and/or expenses associated with collective bargaining in excess of budget and as a means of providing funds in the event of a strike.

(iii) Reserve Fund – Internally Restricted

The reserve fund accounts for funding for specific purposes such as the post-retirement benefits for employees of the Association, as approved by the Board of Directors.

Capital assets

Capital assets are recorded at cost. The company provides for amortization using the following methods at rates designed to amortize the cost of the capital assets over their useful lives. The annual amortization rates and methods are as follows:

Furniture and fixtures	Declining balance	20%
Computer equipment	Straight-line	3 years
Computer software	Straight-line	3 years
Website development costs	Straight-line	3 years

Capital assets are amortized using the half-year rule in the year of addition.

Revenue recognition

The Association follows the deferral method of accounting for contributions and operating revenues. All membership fee revenue is recorded as revenue in the period to which it relates. Where a portion of revenue is related to a future period, it is deferred and recognized in the subsequent period.

Interest income is recognized as revenue when earned.

Use of estimates

The preparation of financial statements in conformity with Canadian accounting standards for not-for-profit organizations requires directors and management to make estimates and assumptions that affect the amounts reported in the financial statements and accompanying notes. By their nature, these estimates are subject to measurement uncertainty. These estimates are reviewed periodically, and adjustments are made to income in the year which they become known. The accounts specifically affected by estimates in these financial statements are the useful life of capital assets and employee future benefits. Actual results may vary from these estimates.

The University of Western Ontario Faculty Association
Notes to the Financial Statements
For the year ended October 31, 2024

2. Significant accounting policies (continued from previous page)

Employee future benefits

The Association provides medical, dental and life insurance benefits to eligible employees. This plan is managed by The University of Western Ontario. The Association accrues post retirement benefits for the eligible administrative staff, with the cost of these benefits being actuarially determined using the projected benefit method. Differences arising from plan amendments, changes in assumptions and actuarial gains and losses are recognized in income as they are incurred.

The Association sponsors pension plans for its administrative staff. The benefits provided under the plans are defined contribution.

Cash and cash equivalents

Included in cash is savings account investments, as well as the Associations credit union shares.

Financial instruments

The Association recognizes its financial instruments when the Association becomes party to the contractual provisions of the financial instrument.

Arm's length financial instruments

Financial instruments originated/acquired or issued/assumed in an arm's length transaction ("arm's length financial instruments") are initially recorded at their fair value.

At initial recognition, the Association may irrevocably elect to subsequently measure any arm's length financial instrument at fair value. The Association has not made such an election during the year.

The Association subsequently measures investments in equity instruments quoted in an active market and all derivative instruments, except those designated in a qualifying hedging relationship or that are linked to, and must be settled by delivery of, unquoted equity instruments of another entity, at fair value. Fair value is determined by published price quotations. Investments in equity instruments not quoted in an active market and derivatives that are linked to, and must be settled by delivery of, unquoted equity instruments of another entity, are subsequently measured at cost less impairment. With the exception of financial liabilities indexed to a measure of the Association's performance or value of its equity and those instruments designated at fair value, all other financial assets and liabilities are subsequently measured at amortized cost.

Transaction costs and financing fees directly attributable to the origination, acquisition, issuance or assumption of financial instruments subsequently measured at fair value are immediately recognized in net income. Conversely, transaction costs and financing fees are added to the carrying amount for those financial instruments subsequently measured at cost or amortized cost.

Related party financial instruments

The Company initially measures the following financial instruments originated/acquired or issued/assumed in a related party transaction ("related party financial instruments") at fair value:

- Investments in equity instruments quoted in an active market
- Debt instruments quoted in an active market
- Debt instruments when the inputs significant to the determination of its fair value are observable (directly or indirectly)
- Derivative contracts.

The University of Western Ontario Faculty Association
Notes to the Financial Statements
For the year ended October 31, 2024

2. Significant accounting policies (continued from previous page)

All other related party financial instruments are measured at cost on initial recognition. When the financial instrument has repayment terms, cost is determined using the undiscounted cash flows, excluding interest, dividend, variable and contingent payments, less any impairment losses previously recognized by the transferor. When the financial instrument does not have repayment terms, but the consideration transferred has repayment terms, cost is determined based on the repayment terms of the consideration transferred. When the financial instrument and the consideration transferred both do not have repayment terms, the cost is equal to the carrying or exchange amount of the consideration transferred or received.

At initial recognition, the Association may elect to subsequently measure related party debt instruments that are quoted in active market, or that have observable inputs significant to the determination of fair value, at fair value.

The Association subsequently measures investments in equity instruments quoted in an active market and all derivative instruments, except those designated in a qualifying hedging relationship or that are linked to, and must be settled by delivery of, unquoted equity instruments of another entity, at fair value. Fair value is determined by published price quotations. Financial instruments that were initially measured at cost and derivatives that are linked to, and must be settled by, delivery of unquoted equity instruments of another entity, are subsequently measured using the cost method less any reduction for impairment.

Transaction costs and financing fees directly attributable to the origination, acquisition, issuance or assumption of related party financial instruments are immediately recognized in excess of revenue over expenses.

Financial asset impairment

The Association assesses impairment of all its financial assets measured at cost or amortized cost. The Association groups assets for impairment testing when available information is not sufficient to permit identification of each individually impaired financial asset in the group; there are numerous assets affected by the same factors; no asset is individually significant. Management considers whether the issuer is having significant financial difficulty; whether there has been a breach in contract, such as a default or delinquency in interest or principal payments in determining whether objective evidence of impairment exists. When there is an indication of impairment, the Association determines whether it has resulted in a significant adverse change in the expected timing or amount of future cash flows during the year.

With the exception of related party debt instruments and related party equity instruments initially measured at cost, the Association reduces the carrying amount of any impaired financial assets to the highest of: the present value of cash flows expected to be generated by holding the assets; the amount that could be realized by selling the assets at the statement of financial position date; and the amount expected to be realized by exercising any rights to collateral held against those assets.

For related party debt instruments initially measured at cost, the Association reduces the carrying amount of the asset (or group of assets), to the highest of: the undiscounted cash flows expected to be generated by holding the asset, or group of similar assets, excluding the interest and dividend payments of the instrument; the present value of cash flows expected to be generated by holding the assets; the amount that could be realized by selling the assets at the balance sheet date; and the amount expected to be realized by exercising any rights to collateral held against those assets.

For related party equity instruments initially measured at cost, the Association reduces the carrying amount of the asset (or group of assets), to the amount that could be realized by selling the assets at the statement of financial position date.

Any impairment, which is not considered temporary, is included in current year excess of revenue over expenses.

The Association reverses impairment losses on financial assets when there is a decrease in impairment and the decrease can be objectively related to an event occurring after the impairment loss was recognized. The amount of the reversal is recognized in excess of revenue over expenses in the year the reversal occurs.

The University of Western Ontario Faculty Association
Notes to the Financial Statements
For the year ended October 31, 2024

3. Internally restricted funds

The Association has set aside \$106,311 (2023 - \$103,818) as an internally restricted fund. These funds are in a cash savings account and were set aside to assist Members. No criteria have been set and no decision has been made as to how the funds will be disbursed.

4. GIC investments

The grievance and collective bargaining fund held the following investment portfolios at year end:

	<u>2024</u>	<u>2023</u>
BMO Nesbitt Burns - GICs of multiple institutions	1,500,000	1,500,000
Libro GICs	208,405	201,184
<u>Total short term investments</u>	<u>1,708,405</u>	<u>1,701,184</u>
BMO Nesbitt Burns - GICs of multiple institutions	3,219,459	3,000,000
<u>Total short and long term investments</u>	<u>4,927,864</u>	<u>4,701,184</u>

Short-term GIC investments represent amounts with maturity dates due within a year of the year-end date. Interest rates on the short-term GICs range from 2.50% to 4.85% (2023 – 3.00% to 5.15%) with maturity dates between November 13, 2024 and January 10, 2025. Long-term GIC investments represent amounts with maturity dates beyond one year of the year-end date. Interest rates on the long-term GICs range from 4.55% to 4.70% (2023 – 4.60% to 4.85%) with maturity dates between January 9, 2026 and January 15, 2027.

5. Capital assets

	<u>Cost</u>	<u>Accumulated amortization</u>	<u>2024</u>	<u>2023</u>
Furniture and fixtures	50,387	43,647	6,740	8,427
Computer equipment	43,414	35,717	7,697	6,021
Website development costs	74,082	71,446	2,636	7,686
	<u>167,883</u>	<u>150,810</u>	<u>17,073</u>	<u>22,134</u>

The amortization for 2024 was \$14,942 (2023 - \$20,899).

6. Employee future benefits

The Association has a defined contribution pension plan for the administrative staff. During the year the Association's contributions to the pension plan were \$49,648 (2023 - \$37,409). The fair value of plan assets for the year was \$Nil (2023 - \$Nil).

The accrued benefit liability relating to the post-retirement benefits is \$93,100 (2023 - \$199,700). This liability has been recorded in the financial statements.

The most recent actuarial valuation was completed as of April 30, 2024.

The University of Western Ontario Faculty Association
Notes to the Financial Statements
For the year ended October 31, 2024

6. Employee future benefits (continued from previous page)

	2024	2023
Current service costs	5,000	5,700
Interest costs	9,600	11,600
Actuarial gain	(121,200)	(63,200)
Net benefit plan expense/loss	(106,600)	(45,900)

The significant actuarial assumptions adopted in measuring the Association's accrued benefit obligation expense are as follows:

	2024	2023
Discount rate - post-retirement	4.70%	4.60%
Medical trend rate	5.54%	5.54%
Dental trend rate	5.00%	5.00%

7. Financial instruments

Unless otherwise noted it is management's opinion that the Association is not exposed to significant risks from financial instruments. There have been no changes in the Association's risk exposures from the prior year.

Credit risk

The financial instruments that potentially subject the Association to a significant concentration of credit risk consist primarily of cash. The Association mitigates its exposure to credit loss by placing its cash with major financial institutions.

Market risk

The Association is exposed to market rate risk through possible future changes in market rates for current marketable securities. The Association does not use financial instruments to reduce its risk exposure.

Liquidity risk

Liquidity risk is the risk that the Association will not be able to meet its obligations as they become due. The Association manages this risk by establishing budgets and funding plans and by levying sufficient membership dues to fund its expenses. Cash is held in an interest bearing account which provides a rate of return as well as liquidity.

8. Commitments

The Association made an expendable pledged to the University of Western Ontario (Western) in the amount of \$162,000 to be paid in three instalments in fiscal 2022 through 2024 of \$54,000. The Association may terminate funding for the scholarships, provided they inform Western prior to June 1 for the upcoming academic year. The donation will be administered as a scholarship provided by Western based on the award criteria stipulated within the agreement. As of the year-ended October 31, 2024, the full amount committed was paid.

Subsequent to year end, the agreement was renewed for another 3 years, 2025 through 2027, with the same terms as the original agreement.

The University of Western Ontario Faculty Association
Notes to the Financial Statements

For the year ended October 31, 2024

9. Contingent liability

The Association is party to legal action arising in the ordinary course of operations. While it is not feasible to predict the outcome of all actions at the end of the fiscal period, it is the opinion of management that the resolution of these matters will not have a material adverse effect on the operations of the Association. An accrual related to known settlement amounts has been recorded in the October 31, 2024 financial statements; the remaining settlements are not determinable at this time.

Draft for Management Only

2025-26 UWOFA ELECTIONS

Slate of Nominees

Officers

Vice-President	Kimberly Verwaayen
Secretary	Ben Rubin
Treasurer	Joanna Andrejkow

Designated Faculty Seats (two-year terms: July 1, 2025 to June 30, 2027)

Arts & Humanities	Kim Solga
FIMS	Paulette Rothbauer
Health Sciences	Shauna Burke
Science	N/A
Social Science	Tania Granadillo

Designated Membership Seats (two year terms: July 1, 2025 to June 30, 2027)

Librarian or Archivist Member	Courtney Waugh
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At-Large Seats (two year terms: July 1, 2025 to June 30, 2027)

Full-Time Member	Alexander Timoshenko
Full-Time Member	Zheng Zhang
Part-Time Member	Kelly-Ann MacAlpine
Librarian or Archivist Member (one-year term)	Meagan Stanley

Speaker for UWOFA (one year term)

Phil King

Speaker for UWOFA-LA (one year term)

Erin Johnson

Secretary for UWOFA-LA (one year term)

N/A

Senate Observers (one year term)

Limited-Term Membership	Jack Scott
Limited-Term Membership – alternate	Ruth Ann Strickland
Librarian or Archivist Member	Elizabeth Marshall
	Roxanne Isard
Librarian or Archivist Member – alternate	Courtney Waugh

For Information: Continuing Officers and Directors in 2025-26

Officers

President
Past President

Shawn Hendrikx
Johanna Weststar

Designated Faculty Seats

Education
Engineering
Ivey
Law
Music
Schulich School of Med. & Dent.

Jennifer Ingrey
Michael Naish
Jana Seijts
Gillian Demeryere
Jonathan De Souza
Gildo Santos

Designated Membership Seats

Limited-Term Member
Part-Time Member

Bobbi Thompson
Lucia Cedeira Serantes

At-large Seats

Full-Time Member

John Paul Minda

Proposed Chairs of UWOFA Committees 2025-2026

Committee	Chair
Committee for Contract Faculty	Duane Jacques (Part-Time Member) (Co-Chair) Katie Korycki (Limited-Term Member) (Co-Chair)
Communications, Mobilization and Organizing (CMO) Committee	Jana Sejts (Communications Chair) David Heap (Mobilization and Organizing Chair)
Dependents' Tuition Scholarship Plan	Vaughan Radcliffe
Equity, Diversity, Inclusion, and Accessibility Committee	TBA (Co-Chair) TBA (Co-Chair)
Grievance Committee	VACANT (Grievance Officer) Marisa Tippet (Associate Grievance Officer)
Pension & Benefits	Barry Hawn
Policy & Governance	Kimberly Verwaayen
University Finance and Salary	Gildo Santos

The Dan Belliveau Memorial Service Award

Dan Belliveau was a faculty Member from 1998 to 2020. He was a founding member of the School of Health Studies and served as its Director. He devoted many years of dedicated service to UWOFA, his most significant contributions being as Chair of the Pensions & Benefits Committee, Deputy Chief Negotiator, and President. This award honours Dan's legacy by recognizing exceptional service to UWOFA while adhering to high standards of integrity.

The inaugural award this year is being presented to Vaughan Radcliffe of Ivey Business School.

2025 Recipient – Vaughan Radcliffe

Vaughan Radcliffe has been a dedicated member of UWOFA since 2003 and has played a pivotal role in the administration and financial stewardship of the Dependent Tuition Scholarship Plan Committee. The Dependent Tuition Scholarship Plan is of incredible value to the full-time UWOFA membership as it is a significant scholarship available to our spouses and dependent children enrolled at any recognized university, national or international, for a maximum of four years. Vaughan joined the committee shortly after becoming a UWOFA member, where he has served with distinction for nearly two decades, including two terms as Chair from 2006 to 2010 and again from 2016 to the present. His leadership has been instrumental in ensuring the program's long-term financial stability, allowing the plan to maintain and even increase scholarship values despite economic challenges, such as those posed by Bill 124. Through his careful oversight, the plan has consistently operated with a surplus, ensuring that members and their families can rely on it for support. Vaughan has also played a key role in shaping policy decisions, advocating for financial stability over short-term distribution models to safeguard the plan's future. His ability to navigate complex financial and policy challenges with resilience and foresight has been widely recognized. Vaughan's unwavering commitment, financial acumen, and sound policy leadership have safeguarded the scholarship's value and strengthened the program's ability to serve future generations.

2024-2025 Recipient of the CAUT Dedicated Service Award

The Executive Committee voted unanimously to nominate the following UWOFA member as the sole recipient of the CAUT Dedicated Service Award.

Nigmendra Narain

Nigmendra has demonstrated unwavering dedication to UWOFA through an extensive and multifaceted record of service, spanning over a decade. Since 2015, he has been a committed member of the Committee for Contract Faculty, serving as co-chair from 2019 to 2021, where he played a key role in advocating for the rights and interests of contract faculty members. Nig also lent his energy, expertise and positive spirit to UWOFA's Strike Action Committees over the past few rounds. His contributions extend beyond UWOFA to the broader Western University community. He has taken on key governance and advisory roles, serving as the Alternate Lecturer Observer on Senate from 2022 to 2024, representing UWOFA on the Western Award of Excellence Committee since 2019, and contributing to the Parking Appeals Committee since 2015. Additionally, his work on the Evaluation of Courses and Teaching Joint Working Group underscores his commitment to academic standards and faculty support.

Beyond these essential roles, Nigmendra has provided steadfast leadership in some of UWOFA's most complex leadership positions. He served on the Board of Directors from 2014 to 2019 and was a member of the Executive Committee from 2016 to 2017. His leadership trajectory continued as he took on the roles of Vice-President, President, and twice Past-President between 2020 and 2024, guiding the association through critical negotiations and advocacy efforts such as the pandemic response and 'lanyard gate'. From 2021 to 2023, he chaired the Faculty Representatives Council, where he has also served as a Faculty Representative for Political Science since 2015, ensuring strong faculty representation across the university. Nigmendra continues to serve on the UWOFA Nominating Committee and is the President of OCUFA (Ontario Confederation of University Faculty Associations) where he fights for all of us at the provincial scale.

Annual Committee Reports

Committee for Contract Faculty (CCF)

Co-Chairs: Katie Korycki and Duane Jacques

Members: Lauren Barr, Laura Cayen, Jason Dyck, Graeme Hayne, Shawn Hendrikx, Les Kalman, Peter Krats, Leigh MacDonald, Natalie Myrrha Melo, Nigmendra Narain, Jason Sandhar, Carla Duarte Da Silva, Alex Timoshenko, Nina Zitani

Assessment and Disbursement of Contract Faculty Research and Professional Development Fund. We struck a committee of 6 members in September and June 2024 and finalized the adjudication by October 12. We reviewed 24 applications divided into 12 LT and 11 LT/SA members, requesting \$70,562. We awarded grants to 21 applicants in the amount of 19,999.96. After the adjudication was completed, 2 further applicants withdrew their applications due to personal circumstances. This resulted in \$1943.46 being forfeited and the total amount awarded stands at \$18,056.50. The total reimbursed thus far \$6,954.50. (Note, this was an unusual year in which the committee was awarding grants based on two years of funding.

Before the new round of adjudication begins, we plan to streamline the application to ask if ethics approval has been granted for the proposed research and whether the member has been accepted to a concrete conference of PD activity. This will allow us to adjudicate applications that are indeed fundable and not ones that may result in forfeited funds. This work will be undertaken after the Winter semester ends.

Research into the statistical distribution of Contract Faculty: what are their total numbers, distribution between LT and LD, distribution among Faculties (and/or departments); variability in contract length and an overall trend in contract types and length granted by employer. This work has not been completed yet, but will be by mid May.

Attendance at OCUFA meetings was less than our usual participation level due to scheduling conflicts, particularly in the fall term of 2024-2025. Key points of discussion that have come back to the committee from OCUFA have been both about successes on campaigns to increase the visibility of the situation for contract faculty, but also how much precarity this group faces at many institutions. The increases in enrollment driving larger classes and more administrative workload per course is also a topic of discussion at OCUFA. The data collection relating to contract faculty distribution listed as CCF priority #2 is a discussion topic to raise at upcoming OCUFA meetings to determine how Western fares among other institutions.

Communications, Mobilization, and Organizing Committee

Co-Chairs: David Heap (Mobilization and Organizing Chair) and Jana Seijts (Communications Chair)
Communications and Engagement Officer: Bethany Taylor

At the heart of the Communications, Mobilization, and Organizing (CMO) Committee is a commitment to ensuring our faculty, librarian and archivist Members are informed, engaged, and empowered. Our role is to promote UWOFAs positions, amplify faculty, librarian and archivist voices, and foster solidarity within our membership. Through thoughtful communication strategies, we strive to create transparency, inclusivity, and responsiveness in all messaging. We also collaborate with key stakeholders across and beyond Western University to advocate for faculty, librarian, and archivist rights and well-being.

Our work is guided by key communication principles that reflect our dedication to an informed and active membership:

- **Transparency** – Open and honest communication is the foundation of trust. We are committed to ensuring our members have access to clear, timely, and accurate information about UWOFAs activities, priorities, and decisions.
- **Accuracy** – Trust is built on reliable information. We diligently check all reports, emails, and announcements to prevent misinformation and uphold our credibility.
- **Timeliness** – Whether it's negotiations, mobilization, or urgent updates, we prioritize delivering timely information so members can make informed decisions and stay engaged.
- **Inclusivity** – UWOFAs represents a diverse membership. We strive to amplify a variety of perspectives and actively seek input from faculty, librarians and archivists to ensure all voices are heard.
- **Consistency** – Unified messaging across all platforms reinforces our mission and keeps Members informed, whether they engage with us via email, social media, or in person.
- **Responsiveness** – Two-way communication is essential. We are committed to listening and responding to member inquiries, concerns, and feedback to foster dialogue and community.
- **Confidentiality** – We respect and protect sensitive information, ensuring that strategic discussions and member data remain secure.
- **Engagement** – We aim to cultivate active participation by inspiring Members to join campaigns, attend events, and share insights that strengthen UWOFAs collective voice.
- **Adaptability** – The higher education landscape is evolving, and so must we. We continuously refine our communication strategies to ensure they remain effective, relevant, and impactful.
- **Advocacy** – Our communications are a tool for action, designed to clearly articulate UWOFAs goals, elevate faculty concerns, and influence policies that impact our members.
- **Education** – Knowledge is power. We provide accessible and informative content that

equips Members with the resources they need to navigate workplace policies, bargaining, and their rights.

- **Strategy Alignment** – Every communication effort we undertake is purpose-driven, aligning with UWOFAs broader goals to strengthen advocacy, bargaining power, and Member engagement.

Accomplishments

The past year has been one of action, growth, and meaningful engagement. Through various initiatives, we have strengthened faculty, librarian and archivist solidarity, refined our communication strategy, and worked tirelessly to ensure that our members feel informed and empowered.

- **Support for CUPE 2361 and PSAC 610 strikes** – We mobilized Member's support during contract negotiations through press releases, rally participation, coordinated solidarity pickets and other actions. Our messaging helped amplify their Unions' demands and contributed in part to pressure on Administration to come to the table and come to a successful agreement.
- **Communications Operating Principles** – We formalized our communication principles to align with UWOFAs mission. These principles now serve as a foundational framework guiding our approach to transparency, accuracy, and engagement across all platforms.
- **MAPP Policy Discussion and Information Dissemination** – Recognizing the need for greater awareness, we initiated efforts to educate Members and the broader UWO community about the Manual of Administrative Policies and Procedures 1.1 (MAPP). This was done primarily through communication in our Weekly, as well as by creating a task force, driving member engagement through the feedback process, and working through Teach-In ideas for the spring, with the goal of ensuring faculty voices are heard in shaping policy.
- **Navitas Advocacy and Task Force** - Responding to serious member concerns about the privatization of the first-year international undergraduate curriculum, we used press releases, social media, and a task force with faculty members, OCUFA, and CAUT to push back against the proposed Navitas agreement. We continue to advocate on this issue, holding the Employer accountable to our collective agreement and ensuring they do not impose Navitas without faculty consultation and agreement.
- **Transition to MailChimp for UWOFAs Weekly** – One of our biggest successes was the transition to MailChimp, which allowed for improved email engagement tracking, better formatting options, and an accessible online archive of past bulletins. With open rates and engagement levels now trackable, we can refine communication strategies to better serve our members.
- **Draft Communications Strategy** – A comprehensive communications strategy is in development for implementation in 2025. This strategy aims to enhance message consistency, strengthen digital engagement, and introduce new tools to streamline faculty outreach.
- With OCUFA, we hosted an MPP Candidates Meet and Greet for the London North Centre during the recent Ontario Election, and helped promote OCUFA's election messaging to Members and to the community.

- Supported Members during Faculty Budget town halls, providing analysis and materials for questions, and helped encourage; convened pre-Senate caucus meetings bringing together Members with student and other employee group constituencies to work on common goals.

Strategic Priorities for the Upcoming Year

1. **Gearing Up for Negotiations** – As we approach the next round of bargaining, we are developing a dynamic member education campaign. This will include interactive workshops, digital resources, and consistent updates to demystify the negotiation process and clarify what's at stake. Our goal is to create a unified front, ensuring Members are informed, engaged, and prepared to advocate for their rights at every stage.
2. **Implementing the Communications Strategy** – With our communications strategy nearing completion, the next step is execution. We are streamlining our messaging to ensure all communication efforts align with UWOFA's goals. This will involve optimizing email outreach, enhancing social media presence, and incorporating multimedia content to make information more engaging and accessible. By fine-tuning our approach, we aim to increase participation, build momentum, and ensure every faculty member stays informed.
3. **Enhancing Member Engagement** – Building strong connections with our Members is a priority. To facilitate this, we will conduct online surveys and meetings with Members in Units. These spaces will allow Members to share concerns, provide input on union initiatives, and foster deeper engagement with UWOFA's mission. By leveraging real time data and feedback, we will ensure our communication strategies continue to meet members' needs.
4. **Addressing Challenges** – While we are optimistic about increasing engagement, we recognize the challenges ahead. Maintaining high participation, countering external pressures from university administration, and adapting to changing communication landscapes will require proactive strategies. We are committed to launching targeted messaging campaigns, equipping Members with advocacy training, and implementing contingency plans to navigate potential roadblocks. Our focus is on maintaining resilience, adaptability, and impact in every aspect of our communication efforts.

If you're interested in contributing to this meaningful work, please reach out to any of the following:

David Heap: mobilization@uwofa.ca Bethany Taylor: outreach@uwofa.ca

Jana Seijts: commschair@uwofa.ca

Dependents' Tuition Scholarship Plan Committee

Chair: Vaughan Radcliffe

Members: Miranda Green-Barteet, Barry Hawn, John Wilson

The Dependents' Tuition Scholarship (DTSP) Committee oversees the DTSP program and, where needed, reviews cases for program eligibility, liaising with university staff who administer the plan. The Committee appreciates the continued diligence of members of the Registrar's Office in this regard. The UWOFA Board has provided guidance on specific program policies in relation to financial management. In general, the Board has encouraged the continuance of a conservative approach. We intend that any increases in scholarship levels be sustainable such that scholarship recipients can count on the value of the award throughout the period in which they meet the eligibility conditions. The Board has delegated its authority in program appeals to the DTSP Committee, and the committee's decisions are final.

The accounts presented feature calendar year numbers for the year. The DTSP committee continues to report calendar year numbers to this meeting to allow the presentation of statements on a full twelve months' results in time for the UWOFA General Meeting and, hence, presentation of a full operating cycle, thus providing better information for plan members. The prior reporting date of March had historically been driven by the date of the UWOFA General Meeting, which meant that only nine months' data was reported. We will use additional financial information in the form of financial year May-April accounts for plan financial management and, specifically, decision-making by the UWOFA Board concerning scholarship levels.

The calendar year accounts show an operating deficit of \$152,743. We anticipated that there might have been some decline in the fund balance due to the decision to increase scholarship value by \$500 to \$6,500. Last year we awarded some 312 scholarships; this calendar year the Registrar's Office reports that some 363 scholarships were awarded. The plan has ample funds to pay out these scholarships, having an accumulated fund balance at the close of 2024 of \$2,294,392. The decline in fund balance essentially erases last year's surplus. These numbers are subject to change in receipt of fiscal year accounts. Our greatest success has been prudent fiscal management allowing steady scholarship increases and consistent payments to scholarship recipients.

The committee will thoroughly review the plan's finances in the summer once more complete financial information is available. We will then make a recommendation to the UWOFA Board regarding scholarship levels for the coming year. We prefer that the scholarship level not be reduced once it is declared. Therefore, we must be fully confident that any increases are sustainable before declaring them. To this end, we maintain an appropriate fund balance to protect against deficits during leaner times, demonstrating our commitment to the long-term stability of the plan.

The extension of the deadline for receipt of awards to June 30 has markedly lowered appeals and other inquiries. One source of appeal concerns a student's failure to maintain the required GPA. In such cases, confidentiality rules prevent staff from disclosing academic results. After reviewing other elements of plan eligibility, colleagues wondering about a failure to receive an award may wish to inquire with their dependent student about recent academic progress.

Colleagues are reminded that DTSP Scholarships can be applied for as soon as the forms are available at the start of the fall term, using last year's academic grades (university or high school) as support. Many wait until the end of the academic year when they could have made good use of funds when first available.

**Faculty and Librarian Dependents' Tuition Scholarship Plan
 Income Statement
 For the 2024 calendar year, with comparative information for 2023**

	2024	2023
	\$	\$
Balance Forward	2,447,136.07	2,303,510.45
Revenue		
Scholarship Fees	1,914,410.68	1,916,303.33
Interest Income	104,831.00	98,677.29
	<u>2,019,241.68</u>	<u>2,014,980.62</u>
Expenses		
Scholarships	(2,171,985.00)	(1,871,355.00)
Operating 12 month surplus/(deficit)	(152,743.32)	143,625.62
Closing Balance	<u>2,294,392.75</u>	<u>2,447,136.07</u>

Equity, Diversity, Inclusion, and Accessibility (EDIA) Committee

Co-Chairs: Abbas Ali Jessani and Alison Konrad

Members: Esperanza Bohorquez, Styliani Constas, Jennifer Ingrey, Melanie Lawrence, Beth Lee, Scott Schaffer, Jana Seijts, Zheng Zhang

During the 2024-25 academic year, the UWOFA EDIA committee met one time. We accomplished the following tasks:

- Reviewed and expressed support for a letter of concern by faculty members
- Reviewed Western's Equity, Diversity, Inclusion, Decolonization and Accessibility (EDIDA) Strategic Plan (Fall, 2024)
- Monitored EDIDA and related processes for inclusion and accessibility, successfully pushed for a hybrid format for key meetings on implementation of the EDIDA Strategic Plan

Faculty Stewards Council

Chair and Chief Steward: Kamila Kolpashnikova

Deputy Chief Steward: Kimberly Verwaayen

[Faculty Stewards Council](#)

This is the first year of the Faculty Stewards Council, which replaces the previous Faculty Representatives Council. The UWOFAs office now administers elections, a responsibility that was previously managed by individual units. Stewards are now appointed for a renewable two-year term. Training sessions for Stewards are under way. The first training session was held on October 21, 2024. The second training session was held on January 10, 2025, focusing on performance evaluation and workload issues.

UWOFAs Past President, Rachel Heydon, led the Stewards Council until January 2025, when the council welcomed Kamila Kolpashnikova as Chief Steward and Kimberly Verwaayen as Deputy Chief Steward. Meetings are underway to begin strategizing and setting goals for the council. The Chief Steward and Deputy Chief Steward met on February 21, 2025, and sent a self-introduction email with the Steward Resources and Feedback attached. Stewards are still needed for these units: FIMS, Kinesiology, Epidemiology & Biostatistics, Pathology, and Biology

Grievance Committee

Chair and Grievance Officer: Steven Laviolette

Associate Grievance Officer: Marisa Tippet

Case Officers: Neil Banerjee, Dianne Bryant, Anestis Dounavis, Kane Faucher, James Grier, Ben Kajaste, Beth Lee, Robert MacDougall, Kyle Maclean, Lianna Zanette

Ex Officio (non-voting): Shawn Hendrixx, Rachel Heydon, Johanna Weststar, Melody Viczko

Member Services Officers: Tolga Karabulut and Lina Rodriguez

The UWOFAs Grievance Committee remains steadfast in its commitment to upholding the collective agreement and protecting the labour rights of its members. In response to persistent challenges from the employer over the past year, the Grievance Committee and its Case Officers have been actively advocating against ongoing violations of 'management rights' infringements, ensuring that faculty members retain their negotiated rights and protections. The Association has worked tirelessly to push back against unfair and unilateral changes to working conditions, reinforcing the importance of a fair and transparent work environment.

One of the key areas of focus has been defending our members against unfair investigations. Our Case Officers have provided crucial support to faculty members facing unjust scrutiny and allegations, ensuring that proper investigative procedures are followed and that due process is respected. Additionally, the Grievance Committee has taken a strong stand in defending academic freedom, a fundamental principle that underpins the integrity of scholarly work and intellectual inquiry. We continue to challenge any attempts to erode this right. We are committed to protecting the ability of our members to engage in independent research and teaching without fear of reprisal.

As a result of these efforts, UWOFAs now has multiple important rights cases proceeding to arbitration. These cases are critical in setting precedents that will safeguard faculty rights and prevent further encroachments on the collective agreement. The Grievance Committee remains dedicated to ensuring that these disputes are resolved in a manner that upholds fairness and justice for its members.

Moreover, we have been actively working to secure proper compensation for hours worked, particularly for contract and part-time faculty members. These educators play a vital role in the university community, yet they often face precarious employment conditions and inadequate pay. The Grievance Committee continues to advocate for equitable wages, fair workload distribution, and improved job security to reflect the invaluable contributions of all faculty members.

Through persistent advocacy, firm legal action, and unwavering member support, the UWOFA Grievance Committee remains at the forefront of defending faculty rights. Our collective strength ensures that the principles of fairness, equity, and academic integrity remain central to the university's operations. We will continue to challenge injustices and work toward a stronger, more just working environment for all faculty members.

As Grievance Officer, I would like to thank each and every member of the committee for their tireless devotion, compassion and diligence, in making sure the interests of all our members are defended. It is the remarkable dedication of our Case Officers that allow us to continue our advocacy for a better work environment, now and in the future. Finally, I would like to thank our Associate Grievance Officer, Marisa Tippet, for her continuing dedication to the operation of the Grievance Committee along with our dedicated Member Services Officers, Tolga Karabulut and Lina Rodriguez, who continue to provide outstanding support and compassion for all of our members.

Librarians and Archivists Stewards Committee (LASC)

Chair and Chief Steward: Elizabeth Marshall

Stewards and their related constituencies: Katie Holmes (Teaching and Learning), Alie Visser (CollectiContent Management, Discovery and Access), Jennifer Robinson (User Experience and Student Engagement), Leslie Thomas (Archives and Special Collections), Courtney Waugh (Research and Scholarly Communications / Non-Western Libraries)

Other members: Christina Zoricic (UWOFA-LA Joint Committee Representative), David Heap (Mobilization and Organizing Chair), Lina Rodriguez (UWOFA Member Services Officer), Tolga Karabulut (UWOFA Member Services Officer), Bethany Taylor (UWOFA Communications and Engagement Officer), Yasmeen Hakooz (Operations Officer)

The Librarians & Archivist Stewards Group continues to meet monthly, in a hybrid format. Continuing with the Lunch and Learn Workshop series, we are planning a late March or April meeting on the timely topic of Professional Leaves. This was identified as an area of interest to our membership when we conducted the survey of members' needs in 2024. Members continue to work on finalizing Job Descriptions within their teams.

Pension and Benefits Committee

Chair: Barry Hawn

Members: Elysee Nouvet, George Gadanidis, Mohammad Hossain, Natalia Melo

Overview: The Pension and Benefits Committee is tasked with supporting UWOFA in a variety of issues that arise pertaining to pension and/or the benefits provided by the employer.

Accomplishments: The P&B Committee successfully supported a member whose pension was impacted by the Brescia merger. A member of the P&B Committee supported the member in meeting with the employer to discuss this issue. The matter was then referred for potential grievance, but we are happy to

report that a successful resolution was achieved without having to go down the road of a formal grievance.

Besides a few other ancillary issues of minor importance, the committee, in collaboration with Jeff Tenant, has been working on a strategy to take concrete steps to improve the pension plan for all members. This work has included seeking input from many P&B and UWOFAs Executive and Board members, as well as consulting with members of the University Pension Plan (UPP) and OCUFA. The membership at large will see the many outcomes of these efforts in the coming months. The committee is excited as the proposed next steps will involve a very high level of member engagement and will hopefully lead to great steps forward in the improvement of pension benefits for our members.

Next Steps: The exact next steps of the committee, in conjunction with the Board, have been mapped out but are still being finalized. A report, developed in collaboration with Jeff Tennant, will be presented to the Board that provides greater details on our path forward.

Policy and Governance Committee

Chair: Shawn Hendriks, UWOFAs Vice President

Members: Jason Dyck (end of 2024), David Heap, John Mitchell, Stephen Pitel, Jennifer Sutton, Melody Viczko

Policy revisions approved by Board:

Committee Terms of Reference

Awards, Scholarships, and Grants Policy

Release Time and Payment in Lieu Policy

Grievance and Member Services Policy

Items in Progress:

Faculty Stewards' Council Policy

By-law no. 2: Responsibilities of Officers

Indigenous Faculty Sovereignty Policy

Policies are approved by the UWOFAs Board, and by-laws are approved by Board and UWOFAs Membership. Up-to-date versions are on the UWOFAs website.

Reports from UWOFA Appointees to Western Committees and Committees mandated under the Collective Agreements:

Childcare Advisory Committee

UWOFA-F Representative: Veronica Pacini-Ketchabaw

UWOFA-LA Representative: Christina Zoricic

The Childcare Advisory Committee serves as a liaison between UWOFA members and the university administration, ensuring that adequate on-campus childcare spaces are available for faculty and librarians. The committee specifically oversees the allocation of Faculty Priority (FP) spaces and advocates for improvements where necessary. It also provides advisory support on childcare-related issues, responds to member inquiries, and engages in relevant discussions around collective agreements and childcare policies.

This year, the committee successfully facilitated discussions regarding the current allocation of FP spaces, identifying that the existing number may not be sufficient given the demand. The waitlist has grown to 28, including 17 for infant spaces, 10 for toddler spaces, and 1 for preschool spaces.

The committee has been actively engaged in interpreting and clarifying the Child and Family Care clause of the collective agreements (CAs), ensuring the provisions are understood and adhered to.

The committee's success this year includes both advocating for the needs of UWOFA members in the childcare space and clarifying key elements of the collective agreements. The growing waitlist for childcare spaces highlighted the need for further action. Additionally, the ongoing work to clarify the meaning of the childcare advisory committee's membership within the UWOFA collective agreement (particularly the role of "the day care facility" in the advisory committee) has been an important focus.

The committee suggests to address the growing waitlist by ensuring that members' childcare needs are better met. There also needs to be further work to finalize the interpretation of the Child and Family Care clause, particularly regarding the role and representation of the YMCA University facility in the childcare advisory committee. The committee will seek more feedback and clarity from UWOFA leadership and the employer to ensure all parties are aligned on the meaning and intent of this clause. Furthermore, continued engagement with members will be critical in addressing ongoing childcare concerns and maintaining open communication on available resources.

Employee Assistance Program (EAP) Committee

UWOFA Representative: Courtney Waugh

Western's Employee Assistance Program is delivered by Telus Health. Information about Telus Health services is available to UWOFA Members here: <https://www.uwo.ca/hr/benefits/eap/faq.html#Q12>

Services are available to Members via web and app-based options through the [Telus Health One website](#), as well as via phone and in-person. The EAP Committee meets twice a year, with representation from different employee groups, Western human resources, and Telus Health. For this period, the EAP Committee met on October 30, 2024. The next meeting of the EAP Committee has not yet been scheduled but is expected to take place sometime in May or June 2025.

Most services are accessed via telephone (48%), followed by video, and lastly via in-person consultations (25%). Members across employee groups continue to advocate for in-person options and have raised concerns about accessing specialized counseling services (such as counseling for children and adolescents).

Members are encouraged to contact UWOFA Member Services Officers if they need assistance accessing EAP services. Questions and concerns will be shared with the EAP Committee through the UWOFA representative.

Joint Committee

UWOFA Chair: Melody Viczko

UWOFA Representatives: Shawn Hendrikx (Vice-President), Steven Laviolette (Grievance Officer), Johanna Weststar (President), Christina Zoricic (L&A representative)

Joint Committee (JC) representatives of UWOFA's two Bargaining Units meet on a monthly basis with the Employer's representatives to discuss arising and ongoing matters related to the implementation of our Collective Agreements, seeking resolutions to issues and problems that arise. In addition, Joint Committee monitors various processes and ongoing dossiers, such as notice for amendments on new policies and or changes to practices where required under the *Management Responsibilities* article, receipt of reports required under the *Information* article, and advance notice of changes in existing practices with respect to computing and information technology where required by the *Implications of Technology* article.

In the 2024-25 academic year, JC met on the following dates: September 24, October 22, November 5, December 13, January 14, February 11.

Meetings are scheduled for March 26, April 22, May 21, and June 9.

Update on LOUs

- *LOU: Indigenous Education* – signed December 20, 2024, and is available on the UWOFA website. Much gratitude to Brent Debassige and Jeff Tennant for their work with JC.
- *LOU: Equity Representative on Appointments Committee* – signed and available on the UWOFA website
- *LOU: Performance Evaluation ("PE") Procedures for Members Returning from Academic Administrator Roles*
- *LOU: Application of Career Trajectory Fund for Former BFA Members*
- *LOU: Researcher Profiles* - Many thanks to Kristin Hoffman and Jo Patterson for their work with JC

Key issues addressed at Joint Committee in 2024-25

- MAPP 1.1 – Use of University Facilities for other than Regularly Scheduled Academic Purposes
- MAPP 1.35- Non-Discrimination, Harassment and Sexual Misconduct Policy and Procedures
- University change in practice in response to Bill 166
- Structure of the Academic Year Policy
- Storage capacities in Microsoft 365
- Migration to Brightspace
- Compensation for Limited Duties Members related to additional workload
- UWOFA-LA CA article Promotion & Continuing Appointment
- Training for administration on Biennial Review and Report

- Governance and administrative matters from the November 15, 2023, Memorandum of Agreement between Western and UWOFA (Brescia integration)
 - eg. New positions for Librarian, archivist and faculty positions
 - eg. PE for former Brescia Members at Western
- Continuance of OWL sites for research and data management protection related to approved ethics protocols
- Timeline for training of Workload Committees as required in the CA
- Updates to both CAs related to calculating Basic Salary Points (BSPs) for Members after PE/BRR
- Processes from the new LOU: Transition to Biennial Report and Review
- Training for Workload Committees
- Researcher IDs and the research information management system (RIMS) at Western
- Structure of the Academic Year review by Senate ad hoc committee
- Role of deans on Appointment Committees in non-departmentalized units
- Training for Performance Evaluation committees on the evaluation of Indigenous Scholars' files (LOU: Indigenous Faculty)
- Benefits booklet for post-retirement benefits

Joint Employment Equity Committee

UWOFA Representatives: Dr. Sabina Rakhimbekova and Dr. Katarzyna Korycki

The committee includes all new members from both sides so the effort was put on identifying the committee mandate, its composition (i.e. non-voting members) and how it fits with other offices (e.g. EDID and Human Rights Office). In the future, the committee aims to update the Employment Equity guide (last update in 2014).

Joint Occupational Health & Safety Committee

UWOFA Representatives: Peter Chidiac and Felix Lee

The Joint Occupational Health & Safety Committee (JOHSC) provides a forum whereby representatives of all Employee groups and the Employer can identify workplace health & safety hazards and make recommendations to reduce or eliminate such hazards. The JOHSC functions within the requirements of the Occupational Health and Safety Act (OHSA) and the applicable Regulations, Guidelines and Standards.

The main roles of UWOFA representatives (Peter Chidiac and Felix Lee) on the JOHSC are to participate and represent UWOFA in the monthly meetings of the JOHSC. The Committee meets monthly to review any safety-related issues within the University. These include accident/injury reports, work refusals, critical injuries, and workplace violence and harassment. The committee examines how incidents have been resolved by the Employer or by the university unit in which they occurred. The UWOFA representatives on the JOHSC also raise any concerns that may exist regarding various health and safety issues that directly affect faculty and librarians/archivists within the university community.

The JOHSC also invites the Director of Campus Police or a representative to outline any safety issues or security issues that may exist on campus. A UWOFA representative participates in yearly safety inspections of specified university facilities to ensure a safe and productive working environment for all members of the University community, including UWOFA members.

A great concern to the UWOFA representatives this year pertained to the safety concerns that surfaced during the CUPE 2361 strike. The representatives and the other JOHSC members collaborated with the

employer to address these concerns, which included ensuring that replacement workers were adequately trained and supplied with proper PPE, and ensuring that safety equipment such as eyewashes adhered to the inspection schedule.

Other topics that were discussed included accident/incident trends, critical injuries, slips and falls in the winter, gender-based sexual violence, Ministry of Labour field visits, workplace violence, ergonomics assessments, orientation week, and electrical safety.

Parking Appeals Committee

UWOFA Representative: Nigmendra Narain

Members: Six *Voting* members of the Committee are nominated from the following university representative groups from across Campus, and each one nominates one member to sit on the Committee: Professional and Managerial Association; CUPE Local 2361(Physical Plant) or CUPE Local 2692 (Food Services) – rotating selection of member; Society of Graduate Students; University Students' Council (which has 2 voting members); UWO Faculty Association (UWOFA); and, UWO Staff Association (UWOSA). Three *non-voting* members of the Parking Services sit on and assist the Committee with its deliberations. The Committee continues to face representation issues with intermittent undergraduate representatives or graduate representative presence.

Meetings: Bi-monthly

Mandate: Address appeals from customers of Western's parking facilities and operations, and provide direction to UWO Parking for clarity and amelioration to help remediate and prevent future issues, etc.

Accomplishments: The committee does not have particular actions it undertakes, only making general suggestions and advice to assist both parkers and Western Parking with their activities and facilities efforts.

Consequently, the cautions and advice to Members remain the same year-after-year:

1. Renew your permit on-time and without delay
2. Pictures are taken by Parking Enforcement *almost always*, so step out and check your vehicle's location, pass visibility, parking between lines, avoid blocking through lanes, etc.
3. Cameras are installed at all entry and exit gates, so they record all actions going in and out of the lots, so do not try to tail-gate in, use others' passes, etc.
4. Don't touch, damage or break the gate arms or other equipment *ever* – this is one of the largest, most costly tickets you will receive, and repairs to damage or broken equipment are very expensive and inconvenient *for all of us*
5. Snow days:
 - a. Do *not* assume *automatic* suspension of parking rules; this must be approved and is *rarely* done, so always assume parking rules will be enforced.
 - b. Clear the snow around and under your car to ensure you are parked in a designated parking spot, that is, you have found the parking lines under the snow

- c. If in doubt, if possible, confirm with an Attendant that you are okay to park *specifically* there in *that spot*, email Parking Services to let them know what happened and who you spoke to at the Lot
 - d. Take pictures of where you parked, where the poles or signs are located, and the other cars in relation to where you parked; these can provide a context for you parking appeal to lessen or dismiss it based on the evidence (especially time of start-parking)
 - e. Never park on landscaping (grass, sidewalk), emergency routes or cargo routes, or throughway areas
 - f. Most appeals for snow-related parking infractions are similar in infraction, so avoid making the same errors by considering the points above
6. Parking permits:
- a. Don't alter permits for *any reason*
 - b. Ensure all information is correctly identified on the permit and in the appropriate locations
 - c. Place *only* on the driver's side of your vehicle
 - d. Don't put obscuring objects, etc., on top/in front of the permit
 - e. Take reasonable efforts to remove snow, ice, etc., to make permits visible
 - f. Ensure *special permits* for guests, delivery, limited temporary, construction, etc., parking are the *correct type* of permit, and *do not* transgress the terms of the special permit, e.g. using for faculty parking
 - g. If you are unsure about a permit, check with the Parking Service office *only*; other faculty, administrators, etc., are often unaware of the permit particularities and designations
 - h. Do not share your permit – register your vehicles on your profile page – and note passes used by multiple drivers and cars are immediately suspended and the pass-holder is flagged for non-renewal
 - i. Permit usage is electronically logged at every entry and exit
7. Parking staff at booths and gates:
- a. Don't be in rush: get clear instructions and verifications from the staff when you are unsure of where to park
 - b. Don't be abusive to the staff – this is also covered by workplace relations rules
 - c. Don't be dismissive of instructions given by the staff
 - d. If the staff give you a time-limited temporary reprieve to park or stop in a designated area, park/stop only there and *don't overstay* the courtesy

- e. *Entry does not mean approval in some cases:* if you try to move against the parking equipment or harass/abuse the staff, they *may* open the gate to move you along and avoid damage to equipment (which is *very expensive*), and then you will likely be *immediately* ticketed, your car may be towed, and/or Campus Police will be called
8. Read the signs fully and properly, and *follow* the instructions
9. If you are given options at the Parking Service counter to settle infractions matters, seriously consider their offer as you are unlikely to do better unless you provide a compelling appeal submission with evidence

Western Award for Excellence Committee (University Staff)

UWOFA Representative: Nigmendra Narain

The Western Award of Excellence, launched in 2005, is the highest level of campus-wide recognition for exceptional performance at Western University for staff. Since inception, 100+ Western University staff members have received this award. Normally nearly 100 nominations are received by the Office of Human Resources from faculty, staff, students and alumni for a staff member or a team of staff members who have individually and collectively made an outstanding contribution not only to the campus community, but also London community (and beyond) over a number of years.

Members: The selection committee is composed of members from several employee groups on campus: an UWOFA representative, a Professional Management Association (PMA)/Canadian Union of Public Employees (CUPE) staff representative, a Western Alumni, a representative from University Students' Council/Society of Graduate Students (USC/SOGS), a representative from Human Resources, and normally a past recipient. UWOFA representative for the up-coming year will be Nigmendra Narain. The committee is mandated with the responsibility for acknowledging excellence in the workplace by Western University staff members. Each committee member reviewed and ranked the nominations received, and then the Committee discusses and decides the award winner. In addition, all nominees are recognized for their contribution to making Western University a better workplace.

Meetings: One meeting

Mandate: Select winners: maximum 7 individuals and maximum 2 teams

Western Equity, Diversity and Inclusion Central Working Group

UWOFA Representative: Alanna Marson

The [EDI Central Working Group](#) shares knowledge and practices across Western's faculties, administrative units and student organizations to promote equity, anti-racism, and accountability. It is led by the Associate Vice-President of Equity Diversity and Inclusion and Vice-Provost & Associate Vice-President Indigenous Initiatives and has representatives from across Western. A key accomplishment was the launch of the [EDIDA Strategic Plan](#) in December 2024. The Plan identifies five priority areas toward building an inclusive campus: Diverse representation and engagement; Inclusive excellence in learning and teaching; Inclusive excellence in research and innovation; Safe, accessible and inclusive spaces, places and experiences; & System-wide capacity building and cultural change. Units across Western have been tasked with implementing the Plan and are supported with the [EDIDA Strategic Plan Companion Guide](#) and [Action Planning Tool](#). The initial implementation phase of the EDIDA Strategic Plan will run from December 2024 to June 2027.