

# 2025-30 Strategic Mandate Agreement (SMA4)

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**ALGOMA UNIVERSITY**  
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**Ministry of Colleges, Universities,  
Research Excellence and Security**



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# SMA4 Interim Agreement – To be Signed by March 31, 2025

2025-30 Strategic Mandate Agreement

Between

**Algoma University**

and the

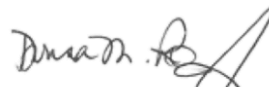
**Ministry of Colleges, Universities, Research Excellence and Security**

Signed for and on behalf of the Ministry  
of Colleges, Universities, Research  
Excellence and Security by:

Signed for and on behalf of Algoma  
University by:



David Wai  
Deputy Minister



Dr. Donna M. Rogers  
Interim President & Vice-Chancellor

April 3, 2025

Date

March 31, 2025

Date

This agreement focuses on accountabilities for funding related to the 2025-30 Strategic Mandate Agreements (SMA4), including corridor funding under the Enrolment Envelope, performance-based funding under the Differentiation Envelope, and STEM allocations. Special purpose/other institutional grants are not included as part of this agreement.

Once signed, the institution commits to work with the Ministry to finalize institutional technical appendices by June 2025. The signed technical appendices will be appended to this agreement. The ministry will conduct a thorough review of the postsecondary funding model ahead of SMA4 Year 3 (2027-28).

The agreement may be amended in the event of substantive economic or policy changes that would significantly affect the SMA deliverables. Any such amendment would be mutually agreed to in writing, dated, and signed by both parties. SMAs, including this

agreement, represent a joint expression of the parties' intentions and expectations. SMAs do not establish a contractual relationship or legally enforceable obligations.

## Preamble

Strategic Mandate Agreements (SMA) are bilateral agreements between the ministry and the province's publicly assisted colleges and universities. SMAs are a key component of the Ontario government's accountability framework for the postsecondary education system. This agreement is between the Ministry of Colleges, Universities, Research Excellence and Security and Algoma University.

SMA4 will run through the fiscal period from April 1, 2025 to March 31, 2030 and has been designed to advance three strategic objectives:

- 1) Improve education and economic outcomes of students,
- 2) Improve outcomes for communities, and
- 3) Support sector stability and accountability.

## SMA-Related Funding

Through SMAs, the ministry incentivizes stable domestic enrolment and accountability for student and community outcomes. The ministry agrees to fund a particular enrolment level of 1,734.26 Weighted Grant Units (WGU).

A portion of this SMA funding is linked to performance on 8 metrics. SMA4 Year 1 (2025-26) and Year 2 (2026-27) will maintain the 25% proportion of total ongoing operating funding for performance-based funding that was reached in SMA3 Year 5 (2024-25). The proportion is expected to grow by 5% starting in SMA4 Year 3 (2027-28) reaching 40% by SMA4 Year 5 (2029-30). This proportion may be revised based on the results of the funding model review prior to SMA4 Year 3 (2027-28).

Total "SMA-Related Funding" in SMA4 will be broken down into:

1. Enrolment Envelope: based on a corridor midpoint measured in WGUs to incentivize stable domestic enrolment; (for details see Appendix 1)
2. Differentiation Envelope (which includes Performance-Based Funding): to support accountability for student and community outcomes (for details on eight SMA4 metrics see Appendices 2-3); and
3. Priority Funding: STEM (Science, Technology, Engineering, and Mathematics) Funding related to the additional weighted enrolment units added to the corridor midpoint dedicated to the continued delivery and enhancement of STEM programs.

## Additional STEM WGUs and Adjusted SMA4 Midpoints

For SMA4, the ministry will provide funding to support the continued delivery and enhancement of STEM programs at Ontario's publicly assisted colleges and universities. This funding supports institutions to deliver high-quality STEM programs to

prepare students for in-demand careers and maintain a robust pipeline of STEM graduates in key industries such as advanced manufacturing, artificial intelligence and the life sciences.

Funding will be implemented through an adjustment to corridor midpoint for the five-year period of SMA4 and will be subject to the annual reporting requirements as outlined in Appendix 4 “STEM Accountabilities”.

Algoma University will have 209.26 WGUs added to its existing corridor midpoint for STEM enrolments. The resulting SMA4 midpoint will be 1,734.26 WGUs. With a per WGU funding rate of \$3,164.70, this represents a total of \$662,245 in STEM funding allocation for each year of SMA4.<sup>1</sup>

For communication purposes, the ministry and the institution agree that this funding represents support for **92.29 STEM learners per year** at the institution, based on the ministry’s historical funding rates.<sup>2</sup>

## Accountability Requirements

For the duration of SMA4, five per cent of an institution’s total operating grant will be linked to accountabilities that will support the government’s objective of improving sustainability, and increasing accountability, efficiency and transparency in Ontario’s postsecondary education system.

This five per cent excludes time-limited funding and will be assessed annually as part of SMA4.

Accountabilities will focus on timely reporting of the identified data and activities and annual attestation related to key activities. For the full list of reporting accountabilities, please see Appendix 5 “Accountability Requirements”.

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<sup>1</sup> Funding for 2028-29 and 2029-30 to be confirmed by the ministry through future multi-year planning exercises.

<sup>2</sup> To estimate the number of STEM learners supported, the ministry first estimated the institutional number of weighted enrolment units resulting from the STEM funding using the standard funding rates. The ministry then converted the number of weighted enrolment units to Full-Time equivalent (FTE) for universities and to full full-time headcounts for colleges using historical enrolment to weighted enrolment units ratios. The ratios were calculated based on the average of the latest five years of data (2019-20 to 2023-24) and were institution-specific. Data is derived from USER and CSER enrolment submissions.

## SMA4 Technical Appendices

Signed Between

**Algoma University**

and

**Ministry of Colleges, Universities, Research Excellence and Security**

Signed for and on behalf of the Ministry  
of Colleges, Universities, Research  
Excellence and Security by:

Signed for and on behalf of Algoma  
University by:



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David Wai  
Deputy Minister



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Dr. Donna Rogers  
Interim President & Vice-Chancellor

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June 30, 2025

Date

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June 17, 2025

Date

## Appendix 1. Enrolment Corridor Adjustments

**Corridor Ceiling:** The ceiling will remain at 3% above the corridor midpoint and will be held constant for Algoma University at 1,786.29 WGUs throughout the SMA4 cycle.

**Corridor Floor:** The corridor floor for SMA4 Year 1 (2025-26) will be lowered by institution's historical 5-year average STEM enrolment<sup>1</sup> lagged by one year and will be set for Algoma University at 965.76 WGUs. In SMA4 Year 2 (2026-27), the corridor floor will be lowered by an updated rolling average of STEM enrolment<sup>2</sup> if the institution submits a domestic enrolment target and meets this target.

The corridor floor will revert to the SMA3 level in SMA Year 3 (2027-28) to Year 5 (2029-30).

Algoma University	SMA3	SMA4				
	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
<b>Corridor Ceiling</b>	1,570.75	1,786.29	1,786.29	1,786.29	1,786.29	1,786.29
<b>Corridor Midpoint</b>	1,525.	1,734.26	1,734.26	1,734.26	1,734.26	1,734.26
<b>Corridor Floor</b>	1,479.25	965.76	TBD	1,479.25	1,479.25	1,479.25
<b>Enrolment Target (Headcount)</b>		760				

Note: Institutions that do not establish domestic enrolment targets will not see their corridor floor adjusted in Year 2 (2026-27), reverting to the SMA3 corridor floor

The ministry will review the corridor and performance-based funding model prior to SMA4 Year 3 (2027-28) which may result in changes to the corridor midpoint level in 2027-28. If no changes are communicated as part of that review, the corridor midpoint, ceiling and floor will be extended through to 2029-30 as outlined above.

<sup>1</sup> For SMA4 Year 1 (2025-26) the relevant years for the Corridor STEM adjustment will be 2019-20 to 2023-24.

<sup>2</sup> For SMA4 Year 2 (2026-27) STEM enrolment rolling average will be based on 2020-21 to 2024-25.



## Appendix 2. Performance-Based Funding and SMA4 Metrics

Performance-Based Funding in SMA4 is provided based on targets set for eight metrics in two priority areas:

- Student and Graduate Outcomes: 1) Graduate Employment Rate in a Related Field; 2) Graduation Rate; 3) Graduate Employment Earnings; and 4) Experiential Learning
- Community and Economic Outcomes: 5) Community/Local Impact; 6) Institutional Strength/Focus; 7) Investment and Innovation-Related; and 8) Institution-Specific.

These metrics are largely consistent with those used in SMA3, ensuring stability and predictability. They are also broad enough to recognize institutions' individual strengths and distinct mandates, as well as the role institutions play in their local communities and economies. Narratives below are intended to describe how the institution's activities and initiatives support metric performance.

## Appendix 3a. Institutional Profile

The ministry recognizes the importance of supporting a differentiated system and building on institutional strengths to enhance efficiencies in the postsecondary education sector.

The Institutional Profile is intended to describe how an institution's mission and strategic goals support the priority areas of the Ontario government, as identified in this agreement.

Algoma University (AU) was established on the site of the former Shingwauk Residential School in 2008, with a *Special Mission* to:

- be a teaching-oriented university that provides programs in liberal arts and sciences and professional programs, primarily at the undergraduate level, with a particular focus on the needs of northern Ontario; and
- cultivate cross-cultural learning between Aboriginal communities and other communities, in keeping with the history of Algoma University College and its geographic site.

AU is a multi-campus institution, serving the communities of Sault Ste. Marie, Timmins and Brampton. After several years of strong growth, we are stabilizing, per our strategic enrolment management plan, to a sustainable target of 5000 FTE students by 2029.

AU's vision is to offer a transformative education through a student-centred approach to teaching and learning. An access university, AU offers multiple entry points to a university education: secondary, college pathways, international credentials, certificate programs. We serve primarily the communities where we have campuses but our students come from across Ontario, Canada and the world. We are proud of our students' diversity and of the difference they make in their communities after graduation.

Uniquely in Ontario, AU partners and shares a site with Shingwauk Kinoomaage Gamig, an Ontario Indigenous Institute, through a Covenant with the Shingwauk Education Trust, which administers these lands set aside for education. The Children of Shingwauk Alumni Association (CSAA) continues to guide AU as the 55th anniversary of the closing (1970) of the Shingwauk Residential School nears. AU hosts the Shingwauk Residential Schools Centre, a cross-cultural research/educational project of AU and CSAA. The partners work with Survivors, educators, First Nations and others to research, collect, preserve, and display the history of residential schools across Canada, developing/delivering projects of sharing, healing, learning, cultural restoration. Our major capital project (opening 2026) is Makwa Waakaa'igan, a centre of cultural exchange and research grounded in our *Special Mission*. AU also partners with OSHKI-Wenjack, Omushkego Education/Payukotayno, *Ontario Native Welfare Administrators Association* and

*National Aboriginal Land Managers Association* to deliver program options created for their members.

Academic offerings include undergraduate arts/science programs and professional degrees; per the changes to our *Act* passed in 2021, we now offer select Master's degrees with several more under development, to meet the needs of the communities we serve, including Indigenous communities. Among AU programs that are Anishinaabe-focused are Social Work, Community Economic and Social Development, Anishinaabemowin (Ojibwe language), Anishinaabe Studies. Many programs include Indigenous focus/content in concerted efforts to decolonize the curriculum, supporting our *Special Mission*. With a significant population of international students, we see unique opportunities for cross-cultural learning among Anishinaabe, Canadian and international students, faculty and staff.

As we stabilize our enrolment, we will maintain our vision and our identity. Through the SMA4 process, we are committed to the principles of transparency and accountability--we value the opportunity to demonstrate that commitment to government, to our three campus communities and to partnering Indigenous communities.

## Appendix 3b. Metric Narratives

### Student and Graduate Outcomes

#### Metric Name: Graduate Employment Rate in a Related Field

**Metric Definition:** Proportion of domestic graduates employed full-time in jobs related to skills acquired in their program of study, two years after graduation

**Data Source:** Ontario University Graduate Survey (OUGS)

#### Narrative

At all three of Algoma University's (AU) campuses, we continue to build strong relationships with local employers, both to create more experiential learning opportunities for AU students and to enhance employment opportunities for graduates in their respective regions.

AU's founding campus in Sault Ste. Marie offers a variety of programs including: business administration, computer science, biology, psychology, and social work. AU's Timmins campus primarily offers social work. These disciplines have strong employment potential upon graduation; however, the smaller employer base in these communities coupled with a predominant single industry (mining in Timmins, steel in the Sault) makes it more challenging for every graduate to find employment locally. Relocation for employment, which may delay employment after graduation, may be required more so for AU students than those who graduate from institutions in the Greater Toronto Area (GTA), for instance.

Due to the demand for mental health and addictions and social work professionals, particularly in Northern Ontario, AU is expanding social work programs by: maintaining existing partnerships for social service and child/youth work programs in Timmins, building Master's programs in Social Work and Psychology, and securing additional educational partnerships with First Nations communities.

On AU's Brampton campus, we are expanding our academic program mix to meet labour market needs identified through consultation with the City of Brampton and other local partners (e.g., Brampton Board of Trade, local employers). The primary programs delivered at our Brampton campus are: business administration, computer science, psychology, community economic and social development and social work. Brampton is one of Canada's fastest-growing cities, and its population is, on average, notably younger than in Sault Ste. Marie or Timmins; we believe that there are and will continue to be significant employment opportunities in Brampton and the GTA.

### **Metric Name: Graduation Rate**

**Metric Definition:** Proportion of domestic and international students who graduated within a certain period of time

**Data Source:** University Statistical Enrolment Report (USER)

#### **Narrative**

Student success and retention of admitted students are important priorities for AU within our strategic enrolment management plan. We are aware that attrition is highest from first year to second year, and that students leave university studies at different points for diverse reasons, not solely because of academic performance. Today's university students face challenges that include health and family issues, financial concerns, changing career goals, and many others.

As an access university, AU admits students with lower entering averages than most other Ontario universities; many are first-generation students (domestic, Anishinaabe and international) and many are mature students (usually but not always via college pathways). We strive to provide appropriate support for all our students, through a one-stop-shop type integrated holistic approach to advising, counselling, health, registrarial and financial services. This is delivered by our Student Success Central operation, overseen by an experienced Manager of Student Success and Wellbeing. We have created retention programs such as Early Alert (identifying students who may be at risk academically or personally) and Bounce Back (encouraging students to re-engage with their studies, with support), which help to keep students engaged with academics despite some of the challenges noted above.

Academic leaders at AU are taking additional steps to promote decolonization and indigenization of the curriculum and academic programs; this is an initiative we believe will assist in the success and retention of Anishinaabe students. A broad retention-specific strategy is under development within the strategic enrolment management plan. We believe these measures will maintain and potentially strengthen our graduation rate.

### Metric Name: Graduate Employment Earnings

**Metric Definition:** Median employment earnings of domestic graduates, two years after graduation

**Data Source:** T1 Family File tax data and Postsecondary Student Information System (PSIS) (linked via Statistics Canada's Education and Labour Market Longitudinal Platform (ELMLP))

#### Narrative

Across the university, we have enhanced our employment readiness programming for students on all three campuses; some of those initiatives are described in the "Experiential Learning" narrative. We know that our graduates' job readiness will be strengthened by greater access to work-integrated learning (WIL) opportunities such as co-op, internships, and professional placements. We have recently introduced computer science degrees with integrated co-op opportunities. Greater WIL opportunities will, we believe, lead to outcomes of strong preparedness for employment, recognition by employers of graduates' experience, and thus good prospects for earnings.

Our expansion of programming in the Sciences (specifically Biology, Environmental Science and Computer Science) is already underway and will lead to good outcomes on this metric as well. Graduates' salaries are generally somewhat higher in these fields.

At the same time, many of our programs are very small - so even in a high-quality program with good prospects, the number of graduates in a given year might not reach the minimum for inclusion (> 20 graduates). As a multi-campus university we also recognize that our outcomes will vary by region - salaries in Northern Ontario are lower than in Southern Ontario generally, and we have factored that into our weighting strategy. (By way of illustration, using [Statistics Canada's 2021 Census](#) information, median employment income in Algoma region was \$32,000 as compared to \$38,000 for all of Ontario.)

### Metric Name: Experiential Learning

**Metric Definition:** Proportion of domestic students who had experiential learning/work-integrated learning opportunities as part of their program of study

**Data Source:** Institutional Data

#### Narrative

AU has grown our course-based Experiential Learning opportunities and internships over the course of SMA3. We intend to maintain our growth and continue to seek further opportunities for WIL for our students.

Co-operative education has been integrated as a stand-alone degree program in the Bachelor of Computer Science (Honours) - Cooperative Education and will expand to

the Bachelor of Business Administration degree. Co-op programs are overseen centrally and are built to align with accreditation standards.

A number of programs, such as our growing Social Work program, require professional placements and these are factored into our planned outcomes.

As a small, multi-campus university, with a variety of forms of work-integrated learning, we have had great success in incorporating experiential learning into many program options. Our partnerships with not-for-profit, industry, and community-based organizations in Sault Ste. Marie are strong. Our student population in Timmins is very small, but the percentage of students on that campus who participate in EL courses is high, because they are primarily Social Work students entering the professional years of their degree. In Brampton, we have expanded human resource capacity to facilitate placements for social work and community economic and social development students.

We will track the number and proportion of graduates in programs who participated in at least one course with required EL components. Our ongoing growth will bring about a higher **number** of graduates who will be counted in this metric, but our overall enrolment projections may mean that as a **proportion** of AU graduates, they will not increase significantly in the early years of this Agreement. Thus, our weighting strategy is one of caution.

## Community and Economic Outcomes

### Metric Name: Institutional Strength/Focus

**Metric Definition:** Proportion of domestic enrolment in an institution's self-identified program area(s) of strength to the total institutional domestic enrolment

**Area of Strength:** Biology, Computer Science, Psychology, Social Work

**Data Source:** University Statistical Enrolment Report (USER)

#### Narrative

AU's identified programs of strength and focus are *Biology, Computer Science, Psychology and Social Work*. Approximately 47.6% of our total domestic FFTE students are currently enrolled in these programs. We are confident in our weighting of this metric.

We are planning to, or have recently, developed graduate studies programming in all four of our programs of strength and focus. We believe that these program areas align well with the labour market needs in the regions that we support and that offering graduate level programming will provide access to advanced and specialized skills that are not easily accessible to domestic professionals, particularly on our Northern campuses.

AU's unique context, as set out in our Institutional Profile, is centred around our *Special Mission* to "cultivate cross-cultural learning between Aboriginal communities

and other communities.” Our small, but vitally essential degree programs in Anishinaabemowin (Ojibwe language) and Anishinaabe Studies are critical to our identity as a university situated in a former residential school; we have an obligation to work to restore the language, culture and history that were forcibly taken away from the generations of Anishinaabe people who were sent to the Shingwauk School. We have not included this program in this metric due to small enrolment; however, we acknowledge its importance in our institutional identity. Furthermore, we embed a strong Indigenous focus in academic offerings, community-based learning, and placement/internships in our Social Work and Community, Economic, and Social Development programs.

### **Metric Name: Community/Local Impact**

**Metric Definition:** Proportion of domestic enrolment in the population of the city (cities)/town(s) in which the institution is located

**Data Source:** University Statistical Enrolment Report (USER)

#### **Narrative**

For this metric, AU is providing data for all three campuses. We do face some challenges as a small, multi-campus university in determining the best approach for this metric.

Our founding campus in Sault Ste. Marie is the only university between Lakehead in Thunder Bay and Laurentian in Sudbury. We are a small university in a small city, so our impact factor at this location is modest but very significant to the city and the region, especially as we grow.

Our Timmins campus population is extremely small--although Timmins is a much smaller city than Sault Ste. Marie, the Social Work and Community Development programs account for AU's entire student population there--and that comprises only a few dozen. We anticipate adding additional programs in Timmins (primarily in a 2+2 model), and some of those will be programs of strength and focus, such as computer science.

We are delighted that our Brampton campus is experiencing rapid enrollment growth, but it is still a small student population in the ninth largest city in Canada, and the third largest in the GTA. While we will continue to offer additional academic programs in Brampton over the life of this Agreement to serve students there, the city is one of the fastest-growing in Canada, and it is possible that Brampton's population growth rate will exceed our enrollment growth rate during these years. We appreciate the Ministry's commitment to a funding model review and look forward to engaging discussions on funding issues in the sector.

We are cautious with our weighting for this metric for the reasons provided above.



### Metric Name: Investment and Innovation Related

<b>Metric Definition:</b> Total Sponsored Research Revenue
<b>Data Source:</b> Council of Ontario Finance Officers (COFO), Table 2, Column H, publicly available
<b>Narrative</b>
<p>Historically, Algoma had an undergraduate, teaching-oriented focus which included faculty research and a strong commitment to direct involvement in research for undergraduates. With changes to our enabling legislation, Algoma now included graduate education. We recently added Master's-level programs: M.Sc. in Biology (thesis-based) and Master of Computer Science (course-based). We plan to add three more in Fall 2025: M.Sc. in Computer Science (thesis-based), Master of Global Business and Economy (course-based) and M.Sc. in Business Analytics (course-based). We anticipate these programs will have a positive effect on our research productivity and funding.</p> <p>We have made recent investments (since 2017) into establishing and supporting an Office of Research and Innovation, recently hiring an Associate Vice President, Research and Graduate Studies, and investing tri-agency Research Support Fund (RSF) funds into expanding support for faculty research, including grant writing. Research funding awarded annually is approximately \$1M and is growing.</p> <p>Algoma currently has three Tier 2 Canada Research Chairs (CRC) and have been allocated 3 more Tier 2 and 1 Tier 1 CRC. We are currently assessing how best to use these allocations to grow research across the university. Our current CRC holders have been effective at getting funding and involving students in research. We anticipate that they will continue to apply for funding and serve as mentors for the new CRCs we will add during the term of this agreement.</p> <p>While we are proud of our tri-agency funding growth, the Total Sponsored Research Revenue metric matches our focus on diverse streams of funding to support research including not-for-profit and private-sector funding. Algoma has built capacity and relationships with current and potential partners/funders and through the Office of Research and Innovation. Our weighting strategy is optimistic, as we build the research and partnership infrastructure that will attract and support the funding captured in this metric.</p>

### Metric Name: Institution-Specific

<b>Metric Definition:</b> Student Experience with Two or More High Impact Practices
<b>Data Source:</b> National Survey of Student Engagement (NSSE)
<b>Narrative</b>
<p>As Algoma University continues to grow – and, in particular, with the introduction of graduate programming – we are committed to enhancing the quality and depth of the student experience. A key component of this commitment is increasing student engagement in High Impact Practices (HIPs), such as service learning, learning</p>



communities, faculty-led research, internships or field placements, study abroad, and culminating senior experiences. These practices are widely recognized for their ability to deepen learning, foster student success, and improve retention and graduation outcomes.

To support this goal, the university is investing in both institutional infrastructure and academic innovation. The creation of a new Office of Research and Innovation is central to this effort. As the Office of Research and Innovation supports research growth across Algoma, a focus is to provide experiential learning for undergraduate students through faculty funded research. As a smaller university, faculty lean heavily on undergraduate students to help accomplish research work and provide a rich opportunity to apply their classroom learning on a research project. Furthermore, all of our recent graduate programs have a mix of self-directed research (e.g., thesis), independent projects working with real data, placements, and other real-world, high impact learning practices.

We have also greatly expanded our international learning experiences in recent years (study abroad, international internships, and service learning). We expect to maintain the high level of participation in international high-impact practices.

By measuring student participation in two or more HIPs, we aim to ensure that students are gaining the breadth and depth of experience needed to thrive beyond university. This measurement helps us assess the effectiveness of our programming and reinforces our commitment to delivering a high-quality, engaging education that aligns with best practices in student development and experiential learning.

## Appendix 4. STEM Accountabilities

### Projections of Domestic STEM Enrolment

Below is Algoma University's projection of domestic STEM enrolment over the SMA4 period as of May 2025.

Algoma University	STEM Enrolment (Domestic Full-time Equivalent)					
	Preliminary	Projections				
	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
STEM	373.77	370	390	410	430	450

Algoma University will strive to meet or exceed STEM enrolment as projected above.

### 2024-25 Corridor Recoveries One-time Suspension (if applicable)

For 2024-25, the ministry will suspend funding corridor recoveries for institutions that have fallen below their corridor floor. The funding is intended to be used to retain this level of STEM enrolment.

### Accountability Requirements for Additional STEM WGUs

To ensure accountability for STEM funding, the ministry will monitor annually institutional data on STEM enrolment, number of STEM programs and STEM program graduate outcomes. The depth of report-backs required will be calibrated based on the amount of STEM funding received. Universities receiving less than \$500,000 can provide higher-level report backs and may omit other elements identified below.

Algoma University will be asked to review and add to data populated by the ministry through the SMA4 annual evaluation process, provide a narrative explanation of key trends related to STEM enrolments, programs, and labour market demand and attest on working with the ministry to develop and report on commercialization metrics through the SMA4 Annual Evaluation Process.

### Institutional Data and Outcomes

To be populated by the Ministry

- STEM enrolment (count in FTEs and share of total)
- STEM programs (count and share of total)
- Employment Earnings of STEM domestic graduates two years after graduation
- Graduation Rate of STEM domestic graduates
- Graduate Employment Rate of STEM domestic graduates (two years after graduation)

To be populated by the University

- Experiential Learning in STEM programs

### Narrative

Institutions will include an annual narrative with an explanation of how STEM funding supports the continued delivery or enhancement of STEM programs at the institution, such as maintaining enrolment and program offerings or providing more experiential learning (EL) opportunities. The narrative will include the following elements:

- The list and breakdown of the use of funds by expenditure categories to support STEM program costs: salaries and wages, student services, program delivery, equipment / supplies, communications, and technology / IT services. Unused funds that were not used to support STEM costs in these areas may be recovered by the ministry in the following year.
- If STEM enrolment is less than projected in a given SMA4 year or there is a reduction in STEM programming, the institution must provide an explanation and outline its plan to rebuild STEM enrolments.

Required only if allocation is above \$500,000:

- Supporting information on STEM faculty/staff and STEM cost per student:
  - For example, STEM faculty and staff: number and share to total of full-time faculty and administrative staff in STEM program departments.
  - STEM program cost per student<sup>3</sup>: estimate of total, direct and indirect, costs per student to deliver STEM programs at the institution.

### Attestation Related to Commercialization Metrics

Since 2023-24, the ministry has been requiring institutions to submit qualitative annual commercialization plans (ACPs) outlining their activities. Starting in 2025-26, reporting will shift to include a standard set of quantitative IP and commercialization metrics. To align the work being done on ACP system performance metrics with SMA4, encourage sector adoption of commercialization metrics and drive overall improvements for Commercialization and STEM programs, Algoma University will commit annually to:

**SMA4 Year 1 (2025-26) and Year 2 (2026-27):** Engaging with the ministry, as called upon, to refine the ACP metrics and streamlining the list of commercialization metrics to a shortlist of common sector metrics that may be appropriate for inclusion as a performance-based funding in a future SMA cycle. Institutions will also attest to

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<sup>3</sup> Direct costs include at minimum instructional costs related to salaries, wages and benefits (for both academic and support staff such as lab technicians or teaching assistants) and other direct costs as deemed necessary (e.g., materials and supplies; furniture and equipment purchases). Indirect costs include the costs of space, student services, administration and other campus-wide costs. Methodology details will be confirmed during the SMA4 Annual Evaluation Process in further consultation with the sector.

submitting their ACPs, meeting the expectation of the ministry for information and data requests and working to resolve data collection issues.

**Remaining years of SMA4:** Attesting to reporting the agreed-upon commercialization metric(s) annually through the ACP.

Note that commercialization metrics will not be linked to funding in SMA4, unless an institution has chosen a commercialization metric as one of its 8 metrics tied to performance-based funding.

Failure to report on the STEM accountabilities elements as described above, may trigger a recovery of STEM funding by the ministry in the fiscal year following the Annual Evaluation process.

## Appendix 5. Key Data Reporting and Attestations

For the duration of SMA4, five per cent of an institution's total operating grant will be linked to accountabilities and if any one element of the accountability requirements is not met, five per cent of total operating funding will be deducted. This deduction will operate on a slip-year such that if accountabilities are not met in 2025-26, for example, the funding reduction will take place in 2026-27.

This five per cent excludes time-limited funding and will be assessed annually as part of SMA4.

### Data Reporting

Algoma University will submit on time the following annual reports:

- Audited Enrolment Report by December 31 of each year
- Graduate Record File by February 15 of each year
- University Financial Accountability Framework: Due dates for risk rating reporting requirements following ministry memo released each year to all universities. Institutions will submit their responses within the timeline articulated in the ministry memo and the most recent financial accountability guidelines sent out to the sector.

The accountability relates to the fiscal year of submission, not the year of underlying data. For example, in SMA4 Year 1 (2025-26) the accountability will relate to the submission of audited enrolment for 2024-25 which is due on December 31, 2025.

### Attestations

Algoma University will attest annually on:

#### 1. Research Security:

**SMA4 Year 1 (2025-26):** As called upon, institution will attend meetings and collaborate with the ministry to develop the approach for institutional research security plans. Institutions will also submit disclosure of their international agreements as requested by the Ministry.

**Remaining years for SMA4:** Requirements for the annual attestation will be communicated to the sector each year in March in advance of the next fiscal.

#### 2. Efficiency Metrics

**SMA4 Year 1 (2025-26):** Institutions will agree to engage with the ministry, as called upon, to develop efficiency metrics that use consistent and verifiable data and benchmarks that will help find efficiencies in the sector. The institutions also attest to

meeting expectations of information requests communicated, or to work with the ministry to resolve any issues with respect to data collection.

**Remaining years for SMA4:** Requirements for the annual attestation will be communicated to the sector each year in March in advance of the next fiscal.

### **3. Skills and Competencies Assessment**

**SMA4 Year 1 (2025-26):** As called upon and in collaboration with MCURES, institution will participate in a sector Working Group related to scoping and developing an implementation approach for the skills and competencies assessment.

**Remaining years for SMA4:** Requirements for the annual attestation will be communicated to the sector each year in March in advance of the next fiscal.

The ministry will confirm attestation requirements through each Annual Evaluation cycle ahead of the next fiscal year.

Accountability requirements implementation will be monitored through Metric and Data Workbooks and will be confirmed by the institution during the SMA4 Annual Evaluation Process.

If an institution anticipates delays in submitting any of the reporting items, the institution must request an extension with a reason for delay and the institution's proposed new submission date by emailing the ministry contacts as listed in the technical manual, in advance of the deadline. Ministry approval of the extension is required.

## Appendix 6. Projected Financial Information

Funding Envelope <sup>4</sup>	SMA4 Year 1 (2025-26)	SMA4 Year 2 (2026-27)	SMA4 Year 3 (2027-28)	SMA4 Year 4 (2028-29)	SMA4 Year 5 (2029-30)
1. Enrolment Envelope	\$1,669,814	\$1,669,814	\$1,669,814	\$1,669,814	\$1,669,814
2. Performance-Based Grant <sup>5</sup>	\$2,489,066	\$2,489,066	\$2,986,879	\$3,484,692	\$3,982,505
3. Differentiation Envelope (Remainder) <sup>6</sup>	\$2,041,536	\$2,041,536	\$1,543,723	\$1,045,910	\$548,096
4. STEM Funding	\$662,245	\$662,245	\$662,245	\$662,245	\$662,245
Total SMA-Related Funding (1+2+3+4)	\$6,862,661	\$6,862,661	\$6,862,661	\$6,862,661	\$6,862,661
Performance-Based Grant At Risk <sup>7</sup>	\$124,453	\$124,453	\$149,344	\$174,235	\$199,125
Accountability Funding At Risk <sup>8</sup>	\$497,813	\$497,813	\$497,813	\$497,813	\$497,813

In addition to “SMA-related funding” the ministry also provides funding via Special Purpose Grants (SPGs) and the Postsecondary Education Sustainability Fund (PSESF).

<sup>4</sup>Further details on calculations are available in Ontario’s Performance-Based Funding Technical Manual. Funding data presented for SMA4 Years 1-5 are estimates based on the 2024-25 final operating grant totals. This table will be updated on the Ontario.ca Open Data portal. Updates in Years 3-5 will be based on a broader funding review, decisions on performance-based funding proportions, and metric performance. As the SMA-related funding does not include SPGs, the ministry holds these figures constant, for modelling purposes, based on the latest final operating grant totals.

<sup>5</sup>The Performance-Based Grant has been capped at the system-average annual proportion of 25% in SMA4 Year 1 and Year 2, with potential increase by 5% each year up to 40% in Year 5, pending a broader funding review ahead of Year 3.

<sup>6</sup> The Differentiation Envelope (Total) has been kept at the system-average proportion of 60% of total operating funding in SMA4 Year 1 and Year 2 (proportion for Years 3 to 5 pending broader funding review ahead of Year 3). The Differentiation Envelope (Remainder) in this table reflects Differentiation Envelope without the Performance-based Funding Grant.

<sup>7</sup>The total amount of performance-based grant at risk is five per cent of the total performance-based grant due to the Stop-Loss Mechanism, which caps metric losses at five per cent.

<sup>8</sup> Five per cent of an institution’s total operating funding would be clawed back if the institution does not meet all accountability requirements.

## Appendix 7. Data, Targets, and Results

Metric	2025-26 APT	2025-26 Actual	2026-27 APT	2026-27 Actual	2027-28 APT	2027-28 Actual	2028-29 APT	2028-29 Actual	2029-30 APT	2029-30 Actual
Graduate Employment Rate in a Related Field	78.71%									
Graduation Rate	57.81%									
Graduate Employment Earnings	\$44,163									
Experiential Learning	62.08%									
Community/ Local Impact	1.28%									
Institutional Strength/ Focus	53.07%									
Investment and Innovation Related	1,768,053									
Institution-Specific	53%									

Note: Data for 2025-26 APT may be updated as part of the Annual Evaluation Process, as the ministry continues working with the institutions on data validation. "2025-26 Actual" refers to the year in which the evaluation takes place and not (necessarily) the year of the data. Data for out-years will be updated on Ontario.ca and in the SMA4 Dashboard in Open SIMs every year after the completion of Annual Evaluation Process.



## Appendix 8. Weighting Strategy

Metric	2025-26 Weighting (Min 5%, Max 25%)	2025-26 Notional Allocation	2026-27 Weighting (Min 5%, Max 25%)	2026-27 Notional Allocation	2027-28 Weighting (Min 5%, Max 25%)	2027-28 Notional Allocation	2028-29 Weighting (Min 5%, Max 25%)	2028-29 Notional Allocation	2029-30 Weighting (Min 5%, Max 25%)	2029-30 Notional Allocation
Graduate Employment Rate in a Related Field	10%	\$248,907	%	\$	%	\$	%	\$	%	\$
Graduation Rate	5%	\$124,453	%	\$	%	\$	%	\$	%	\$
Graduate Employment Earnings	15%	\$373,360	%	\$	%	\$	%	\$	%	\$
Experiential Learning	10%	\$248,907	%	\$	%	\$	%	\$	%	\$
Community/Loc al Impact	0%	\$0	%	\$	%	\$	%	\$	%	\$
Institutional Strength/ Focus	25%	\$622,266	%	\$	%	\$	%	\$	%	\$
Investment and Innovation Related	25%	\$622,266	%	\$	%	\$	%	\$	%	\$
Institution- Specific	10%	\$248,907	%	\$	%	\$	%	\$	%	\$

Note: This table includes weightings and notional allocations for only 2025-26. Data for out-years will be updated on Ontario.ca every year after the completion of the Annual Evaluation Process.