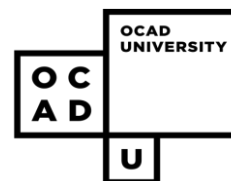


2025-30 Strategic Mandate Agreement (SMA4)

OCAD UNIVERSITY
100 MCCAUL ST
TORONTO, ON
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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

OCAD 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:



David Wai
Deputy Minister

Signed for and on behalf of OCAD
University by:



Ana Serrano
President & Vice-Chancellor

April 3, 2025

Date

March 28, 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 OCAD 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 6,792.36 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”.

OCAD University will have 2.6 WGUs added to its existing corridor midpoint for STEM enrolments. The resulting SMA4 midpoint will be 6,792.36 WGUs. With a per WGU funding rate of \$3,164.70, this represents a total of \$8,228 in STEM funding allocation for each year of SMA4.¹

For communication purposes, the ministry and the institution agree that this funding represents support for **0.76 STEM learners per year** at the institution, based on the ministry’s historical funding rates.²

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”.

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

² 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

OCAD 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 OCAD
University by:



David Wai
Deputy Minister



Ana Serrano
President & Vice-Chancellor

July 2, 2025

Date

26 June 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 OCAD University at 6,996.13 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 enrolment¹ lagged by one year and will be set for OCAD University at 6,426.22 WGUs. In SMA4 Year 2 (2026-27), the corridor floor will be lowered by an updated rolling average of STEM enrolment² 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).

OCAD University	SMA3	SMA4				
	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
Corridor Ceiling	6,993.45	6,996.13	6,996.13	6,996.13	6,996.13	6,996.13
Corridor Midpoint	6,789.76	6,792.36	6,792.36	6,792.36	6,792.36	6,792.36
Corridor Floor	6,586.07	6,426.22	TBD	6,586.07	6,586.07	6,586.07
Enrolment Target (Headcount)		3,400				

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.

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

² 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.

OCAD University (OCAD U) is Ontario's only—and Canada's leader in—art, design, and digital media education, training the next generation of creative, critical, design-driven professionals and innovators. It is a highly specialized university, supporting a unique education model, economic impact, and essential role in sustaining Ontario's creative, cultural, and IP-generating sectors.

OCAD U offers a differentiated, practice-based, and interdisciplinary model of education. Students learn by doing, in hands-on environments that reflect the professional settings of Ontario's creative and innovation industries. They also engage across disciplines, gaining adaptable, real-world skills to meet the challenges of a changing economy. Currently, 75 percent of OCAD U students are in STEM-related technology-intensive programs such as Design for Health, Digital Futures, Industrial Design, Environmental Design, and Inclusive Design. These programs help tackle pressing issues in healthcare, technology, public policy, and climate change—areas where Ontario is investing in long-term resilience and growth.

The university's 25,000 alumni contribute to nearly every sector of the economy. Graduates of OCAD U's programs bring creative and technical expertise to the workforce, launch businesses, create jobs, and help drive innovation across the province and country. For example, OCAD U alumni are shaping Ontario's cities through urban design and planning. Others are leaders in the film, video, and TV industries, which contribute more than \$3 billion annually to Ontario's economy. Entrepreneurs and creatives from OCAD U are strengthening Ontario's small business sector. A recent alumni survey found that OCAD U graduates working in Ontario generate more than \$520 million in direct economic impact.

By fostering entrepreneurship, supporting a diverse and highly skilled workforce, and advancing cultural and economic development, OCAD U plays a vital role in helping Ontario thrive. More than 46 percent of alumni are currently self-employed or entrepreneurs, and 81 percent will operate their own business at some point in their careers. This entrepreneurial mindset is supported not only among students but also across the university's faculty, many of whom are active professionals and business owners.

OCAD U's School of Continuing Studies (SCS) impacts the local and regional communities through the delivery of over 50 courses, 15 micro-credentials and 10 certificate programs focusing on specialized and transferrable art and design skills.

SCS programs are available online and through flexible delivery – enabling professionals and learners across Toronto, the GTA and further afield to access them. Strategic partnerships with other institutions enable lifelong learners in those regions to enroll in courses that are not otherwise available through local institutions. The award-winning ArtWorksTO partnership between the City of Toronto, Neighbourhood Arts Network and OCAD U will continue to expand to support Indigenous and newcomer populations, enabling access to thriving and inclusive economies in the creative industries.

OCAD U is a small institution with a large impact. As Ontario faces urgent challenges in sustainability, affordability, public health, and digital transformation, the university's unique programs, partnerships, and research capacity offer creative solutions to real-world problems. With its 150th anniversary approaching in 2026, OCAD U continues to stand as a model of creative excellence, preparing graduates to shape Ontario's future with purpose, imagination, and leadership.

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

OCAD University equips students with creative, technical, and entrepreneurial skills that prepare them for careers across Ontario's economy. A recent alumni survey conducted by OCAD U showed that a combined 86 percent of graduates say their education contributed to their professional success. Alumni are employed across sectors, including the public, private, and nonprofit spheres, in both creative and non-creative fields, demonstrating the versatility of an OCAD U education.

The survey also revealed that most Ontario-based graduates (58 percent) work in arts or design-related roles, while 42 percent are employed in other sectors such as education, science and technology, financial services, health care, and consumer services. Among those working in arts and design, 44 percent are in design, 25 percent in visual art, and 15 percent in music, publishing, performing arts, interactive media, and audiovisual production.

Fifty-nine percent of all graduates report that their current role is related to their OCAD U education. Among those, 72 percent work in design or visual art.

Entrepreneurial impact is also strong: 89 percent of companies founded by alumni are related to their education, with half in the design sector. This highlights the value of practice-based learning, and the entrepreneurial mindset developed at OCAD U. In

2024, the estimated direct economic impact of Ontario-based OCAD U graduates was \$521.1 million. Graduate labour income made up 93 percent of that total, while profits and business spending from alumni-founded companies accounted for the remaining 7 percent.³

The RBC Centre for Emerging Artists and Designers, especially through programs like Design4 and Career Launcher, provide students and new graduates with job placements, startup experience, and industry connections. These supports help launch successful careers in areas like cultural production, community planning, healthcare innovation, advanced manufacturing, and digital media.

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

OCAD University has undertaken several initiatives to improve graduation rates:

Financial Support: Our surveys indicate that financial challenges are the primary barrier to student success. The university has invested significant additional resources beyond the Tuition Set-Aside (TSA) to augment bursary support, ensuring students have the necessary resources to persist in their studies. The Advancement team prioritizes bursaries and scholarships in their fundraising efforts, and the university provides as many work-study opportunities as possible.

Mental Health and Accommodations: A comprehensive review of the Student Wellness Centre, completed in 2023, has led to several changes in the provision of mental health and accommodation supports.

Curricular Change: OCAD U is working to improve graduation rates through a university-wide curriculum transformation initiative. This initiative increases flexibility for students, making it easier for them to complete their programs successfully and better prepare for labor market demands. By providing opportunities for students to move across programs and follow emergent interests, OCAD U aims to improve the student experience and reduce time to completion through a more flexible, interdisciplinary, and self-directed education spanning programs and faculties. This approach also aims to reduce the likelihood of students leaving OCAD U for other institutions offering desired programs. These changes respond to the evolving nature of technology in art and design, global and local markets, and the needs of diverse

³ OCAD U Alumni Impact Study – Final Report, April 2025, prepared by Nordicity for OCAD University. Unpublished.

populations. This strategy is expected to positively impact retention and overall completion rates.

Economic Pressures: Students' specific interests and affordability challenges in the GTA impact OCAD University's graduation rates. Recent student surveys conducted by OCAD U show that many OCAD U students hold at least one job, with some having two or three jobs. OCAD U students are also somewhat older than the average university student, and many come from lower-income families, necessitating work to support themselves while attending university. Economic pressure is cited as the primary reason students drop courses and extend their studies. On a policy level, the university collaborates with all levels of government and the developer community to address affordable student housing.

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

Self-employment among graduates is higher at OCAD University than in the rest of the university system. A low estimate, based on the Ontario University Graduates Survey, is that 10% of OCAD U graduates were self-employed two years after graduation. This data compares to 3% for the rest of the Ontario university system. However, results from the 2022 Strategic National Arts Alumni Project (SNAAP) data indicates 81% of OCAD U alumni are or have been self-employed, independent contractors or freelance workers at some point in their careers.⁴

OCAD University graduates build their own companies from the ground up. Developing a new business is a time-consuming, demanding process; it may take several years to become profitable. Building up clientele within art and design sectors also requires time, including managing multiple clients and building professional reputation.

While tax filings provide an official record of taxable earnings, they do not capture the full picture of a creative entrepreneur's revenue-generating capacity. The deductions for high operational and reinvestment expenses mean that net income can be significantly lower than gross income, leading to an underestimation of the actual scale and financial activity of creative ventures when evaluated solely through tax documents.

⁴ Strategic National Arts Alumni Project. (2022). *SNAAP data results* [Unpublished raw data]. <https://snaaparts.org/>

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

OCAD University emphasizes practice-based learning, which is active, iterative, process-oriented, collaborative, and community- or industry-engaged. This approach combines skills development with knowledge acquisition. Work placements, community-based learning, and experiential elements are embedded in many undergraduate courses and students also have co-curricular opportunities in which they can participate.

The Experiential Learning Placement Program offers for-credit, work- and community-integrated placements for third- and fourth-year undergraduates and graduate students. These placements are tailored to individual skills and interests, partnership opportunities, project quality, and program requirements. Students can pursue placements through dedicated courses or independently in both Fall/Winter and Spring/Summer semesters.

The RBC Centre for Emerging Artists & Designers (CEAD) has increased capacity for for-credit placements, with over 300 students in external placements per year, 100 in paid work with on-campus and industry partners, and thousands more in other forms of employment, skills and experience development. The CEAD also supports students aiming to start businesses by providing workspaces, mentorship, funding, resources and other co-curricular support.

OCAD U offers extensive co-curricular opportunities for experiential learning, including exhibition and curation through the university's gallery system, career-related student monitor positions, early-stage entrepreneurship training, and research assistantships. The university is actively developing course-based collaborations with industry partners and donors to expose students to unique career paths and opportunities, both nationally and internationally.

The graduate show, [GradEx](#), is Toronto's largest student exhibition and a form of experiential learning. It allows graduating students to exhibit and sell their work and meet potential employers. GradEx attracts employers from many industries and draws over 50,000 guests annually.

OCAD U hosts regular job fairs to provide networking opportunities for students. The university has a strong record of undergraduate and graduate research assistance placements, with industry partners often offering jobs to students who have interned or worked as research assistants.

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: STEM-Related Programs
Data Source: University Statistical Enrolment Report (USER)
Narrative
At OCAD U, 75% of students are in STEM-related programs such as Design for Health, Digital Futures, Industrial Design, Environmental Design, and Inclusive Design. These programs drive innovation across healthcare, technology, climate solutions, and public policy— the sectors Ontario must strengthen to become more self-reliant. These STEM programs represent a priority for growth moving forward. The OCAD U Fabrication Centre, at the heart of campus, is the space that enables students to work with old, current and emerging technologies as they would working in industry by building files in 3D modeling and then intersecting with the Rapid Prototyping Centre that offers digital fabrication services such as 3D printing, laser cutting and engraving, computer numerical control (CNC) milling, 3D scanning, and waterjet cutting. Artificial Intelligence (AI) technology is also integrated into the OCAD U studios to support preparation for the labour market. For example, the Virtual Reality (VR) Capture Studio allows students to experiment with AI and VR. By leveraging AI algorithms and techniques, virtual reality experiences can be made more reactive and adaptable, enhancing the level of immersion and engagement for users. This supports the animation and gaming sectors. Another example is the Immersive Mobile Media Studio to manipulate existing visual content with AI and experiment with immersive audio, all of which are key to high quality Extended Reality (XR) experiences and projections.

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
OCAD U's gallery system showcases works by students, faculty, and internationally distinguished artists, designers, and researchers. Since Onsite Gallery's grand opening in 2017, it has presented eight major exhibitions and numerous public engagement programs. The gallery hosts 17,000 visitors annually and has become one of Toronto's most innovative spaces.

The university is a key partner with the City of Toronto. The City has a formal working group between the City Manager's office and post-secondary institutions in Toronto. OCAD U collaborates on key issues of interest and talent exchange, including affordable housing, transportation, cultural policy, research, and innovation. Through the Cultural Policy Hub, OCAD U partners with the City on key policy and planning issues. As an urban institution, OCAD U has been a leader and partner in city-building initiatives like BigArtTO and Nuit Blanche.

OCAD U is also part of the leadership team for ArtHubs, a not-for-profit organization based in Toronto that operates a portfolio of community cultural hubs. ArtHubs projects, programs and services are designed to support artists and creatives thrive while enhancing the broader communities they serve.

Lastly, The City of Toronto collaborates with OCAD University to transform the Bathurst Quay Silos into a vibrant hub for the Global Centre for Climate Action (GCCA). The GCCA is a research centre that uses creative vision, sustainable design, and artistic practice to explore new approaches to sustainability and climate action. It brings together a community of artists, designers, and scholars to build cultural communities, create arts projects, curate exhibitions, support creative action and research, and cultivate a global network for creative climate initiatives. The Centre emphasizes public art programming and community engagement.

Metric Name: Investment and Innovation Related - Tri-Agency Funding: Share to Ontario Total

Metric Definition: Share of funding received by university from federal research granting agencies divided by total funding from Tri-Agency received by Ontario universities

Data Source: Research Support Program, The Tri-Agency Institutional Programs Secretariat (TIPS) requested annually by MCURES and available every summer

Narrative

OCAD University has a growing research creation program that is making significant strides. The new five-year Strategic Research Plan (2024–29) sets a visionary path for the institution's research activities in design, art, media, and related scholarship. This plan articulates the community's aspirations and cultures of research, aiming to enhance research capacity, foster innovative interdisciplinary programs, and broaden the understanding of what constitutes research and scholarship at OCAD U.

OCAD University has long been a leader in defining research within the realms of art, design, and media practice. Over the past two decades, the university has built upon its rich history of academic and studio practice to establish significant leadership in these fields. The research produced at OCAD U not only informs but also impacts various disciplines, including the social sciences, humanities, and science and

technology. This interdisciplinary approach underscores the university's commitment to integrating creative and professional practice with scholarly inquiry.

Currently, OCAD University is allocated five Canada Research Chairs (CRCs), a prestigious federally funded program designed to enhance the research potential of Canadian universities. These chairs are awarded based on successful tri-council funding, and with OCAD U's recent successes, there is an expectation to increase this allocation within the next five years. The university strategically deploys its CRCs to attract and retain internationally recognized researchers who are leaders in their fields in accordance with our strategic and creative focus on health design, technology, artificial intelligence, strategic foresight, curatorial practice, research creation, and design thinking.

Metric Name: Institution-Specific - Year 1 to Year 2 Retention Rate

Metric Definition: Percentage of first-time, full-time undergraduate university students who commenced their study in a given fall term and have continued to study at the same institution in the next fall term

Data Source: Consortium for Student Retention Data Exchange (CSRDE), data available to institutions

Narrative

OCAD U's recent curriculum review program was designed to support improvement towards its retention metrics.

The program was designed to enhance the flexibility and accessibility of our degree programs, making them easier to complete and more aligned with students' individual interests and career goals. By reducing the number of specifically required courses and increasing the availability of open electives, it allows students to have more choice and self-direction over their learning. This flexibility is crucial in keeping students engaged and motivated, which directly impacts their decision to continue their studies at OCAD U.

Additionally, the program promotes interdisciplinary learning by making it easier for students to enroll in courses across different programs. The program also addresses practical concerns by reducing prerequisites and priority registration for courses, ensuring that students can more easily access the classes they need.

By implementing the curriculum review program, OCAD U ensures that we can continue to deliver studio-based education in a sustainable way that works for all students. This approach leverages strengths in applying creativity and design thinking to address complex issues, ultimately supporting student retention and success. As a result, our SMA metrics reflect the positive impact of these initiatives, demonstrating our commitment to continuous improvement and student satisfaction.

Appendix 4. STEM Accountabilities

Projections of Domestic STEM Enrolment

Below is OCAD University's projection of domestic STEM enrolment over the SMA4 period as of June 12, 2025.

OCAD University	STEM Enrolment (Domestic Full-time Equivalent)					
	Preliminary	Projections				
	2024-25	2025-26	2026-27	2027-28	2028-29	2029-30
STEM	32	25	20	16	16	16

Note: The STEM enrolments in the chart above reflect only one OCAD U program that was identified as having a STEM-related CIP code in 2024/25. OCAD U is currently working to adjust program-level CIP codes to better align with program focus.

OCAD 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. For OCAD University, waived recoveries of \$214,164 are equivalent to 19.65 funded enrolments in STEM programs. 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.

OCAD 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 student⁵: 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, OCAD 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 submitting their ACPs, meeting the expectation of the ministry for information and data requests and working to resolve data collection issues.

⁵ 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.

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

OCAD 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

OCAD 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 ⁶	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	\$7,434,516	\$7,434,516	\$7,434,516	\$7,434,516	\$7,434,516
2. Performance-Based Grant ⁷	\$6,109,602	\$6,109,602	\$7,331,523	\$8,553,443	\$9,775,364
3. Differentiation Envelope (Remainder) ⁸	\$10,274,280	\$10,274,280	\$9,052,360	\$7,830,439	\$6,608,519
4. STEM Funding	\$8,228	\$8,228	\$8,228	\$8,228	\$8,228
Total SMA-Related Funding (1+2+3+4)	\$23,826,626	\$23,826,626	\$23,826,626	\$23,826,626	\$23,826,626
Performance-Based Grant At Risk ⁹	\$305,480	\$305,480	\$366,576	\$427,672	\$488,768
Accountability Funding At Risk ¹⁰	\$1,221,920	\$1,221,920	\$1,221,920	\$1,221,920	\$1,221,920

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

⁶Further 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.

⁷The 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.

⁸ 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.

⁹The 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.

¹⁰ 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	83.84%									
Graduation Rate	64.15%									
Graduate Employment Earnings	\$32,836									
Experiential Learning	31.85%									
Community/ Local Impact	0.19%									
Institutional Strength/ Focus	74.69%									
Investment and Innovation Related	0.12%									
Institution-Specific	83.14%									

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	5%	\$305,480	%	\$	%	\$	%	\$	%	\$
Graduation Rate	5%	\$305,480	%	\$	%	\$	%	\$	%	\$
Graduate Employment Earnings	5%	\$305,480	%	\$	%	\$	%	\$	%	\$
Experiential Learning	5%	\$305,480	%	\$	%	\$	%	\$	%	\$
Community/L ocal Impact	25%	\$1,527,401	%	\$	%	\$	%	\$	%	\$
Institutional Strength/ Focus	25%	\$1,527,401	%	\$	%	\$	%	\$	%	\$
Investment and Innovation Related	25%	\$1,527,401	%	\$	%	\$	%	\$	%	\$
Institution- Specific	5%	\$305,480	%	\$	%	\$	%	\$	%	\$

This table is for illustrative purposes and will include 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.