

From: [Roberts, Glen](#)
To: [Woolfrey-Fahey, Sandy](#)
Cc: [Browne, Lisa](#)
Subject: RE: Ongoing Investment-Related Protests at McGill
Date: Friday, May 3, 2024 4:30:08 PM
Attachments: [image005.png](#)
[image007.png](#)
[image008.png](#)

Hi Sandy,



s. 29 (1) (a)

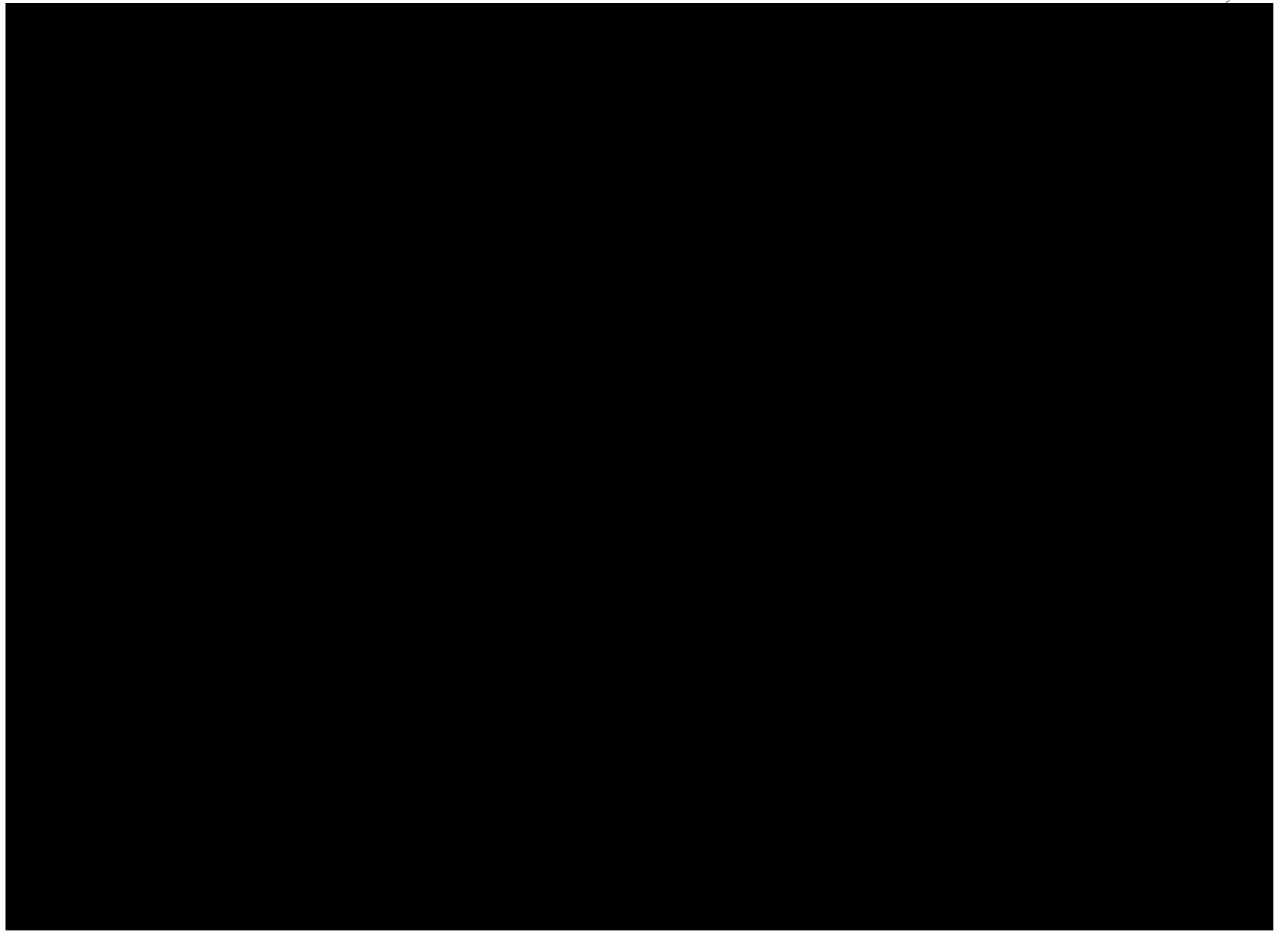
Answers below:

Glen

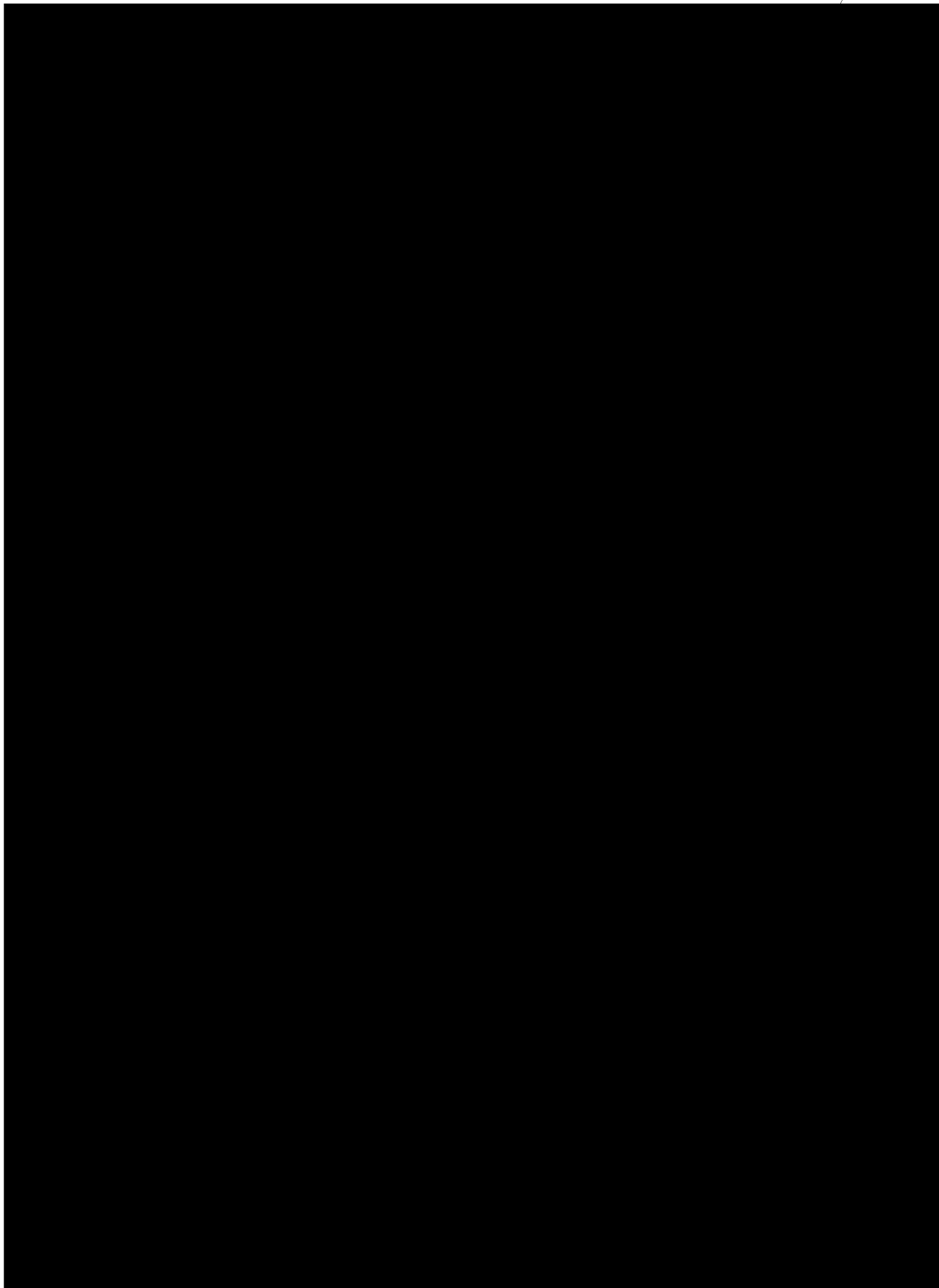
From: Woolfrey-Fahey, Sandy <sandywf@mun.ca>
Sent: Friday, May 3, 2024 9:06 AM
To: Roberts, Glen <glenr@mun.ca>
Cc: Browne, Lisa <lisa.browne@mun.ca>
Subject: RE: Ongoing Investment-Related Protests at McGill

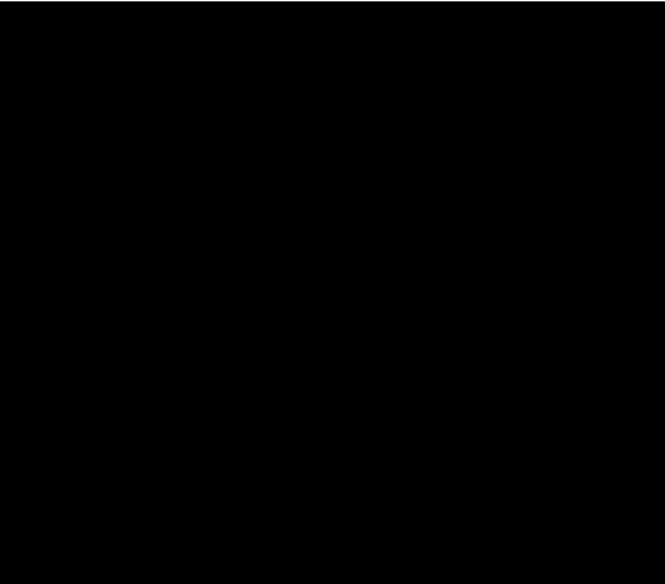
This is very helpful Glen. I'm trying to digest and understand this and have a few questions.

s. 29 (1) (a)



s. 29 (1) (a)





s. 29 (1) (a)

Sandy Woolfrey-Fahey (she/her) | Communications Manager
Office of the Vice-President (Administration, Finance & Advancement)
Memorial University of Newfoundland
St. John's, NL A1C 5S7
Ph: 709-725-3464 Email: sandywf@mun.ca

From: Browne, Lisa <lisa.browne@mun.ca>
Sent: Thursday, May 2, 2024 4:12 PM
To: Roberts, Glen <glenr@mun.ca>
Cc: Woolfrey-Fahey, Sandy <sandywf@mun.ca>
Subject: RE: Ongoing Investment-Related Protests at McGill

Hi Glen, I very much appreciate your thoughtful response. Very helpful - thank you.
Good evening lol

Lisa

NOTE TO APPLICANT: The remainder of this email thread has been provided to you previously via ATIPP Request 002-09-27-24.
IAP Office

From: Roberts, Glen <glenr@mun.ca>
Sent: Thursday, May 2, 2024 1:41 PM
To: Browne, Lisa <lisa.browne@mun.ca>
Subject: RE: Ongoing Investment-Related Protests at McGill

Good morning Lisa,

..been trying to finish this all morning....and now its afternoon.

s. 29 (1) (a)

[Redacted] First, the piece which I've highlighted in Debbie's e-mail below was actually written by me on Tuesday

s. 29 (1) (a)

[Redacted]

From: [Woolfrey-Fahey, Sandy](#)
To: [Collis, Deborah](#); [Roberts, Glen](#)
Cc: [Browne, Lisa](#); [Dyke, Paula](#); [Whelan, Meaghan](#)
Subject: Draft comms
Date: Tuesday, May 7, 2024 4:27:26 PM
Attachments: [investment-divestment comms plan.docx](#)
[Universities Canada May 3.docx](#)

Confidential comms advice to follow/attached:

Hi all,

Please find attached draft comms (particularly messages) related to Memorial investments/potential call for divestment for your review. Glen and Debbie, s. 29 (1) (a)

[Redacted] This is a draft, [Redacted]

s. 29 (1) (a)

[Redacted] Meaghan and Paula, I'm happy to chat further about any discussions [Redacted]

The attached Universities Canada notes are being attached as FYI and were taken during a conversation with communicators across the country last week (they are not minutes, but simply my notes that I captured during this meeting). s. 29 (1) (a)

[Redacted] I have included in the comms plan, the key messages Universities Canada provided us.

Please let me know if you have questions.

Sandy Woolfrey-Fahey (she/her) | Communications Manager
Office of the Vice-President (Administration, Finance & Advancement)
Memorial University of Newfoundland
St. John's, NL A1C 5S7
Ph: 709-725-3464 Email: sandywf@mun.ca

Universities Canada – response to encampments

Meeting of communicators - May 3 1:30 NST

- Universities Canada has asked members for any collateral, messages etc. that we'd like to share.
- Universities Canada have hosted a meeting on this topic with university presidents earlier today to brief them and they will receive more information than will be shared with communicators. Presidents can share with support team as they see relevant.

-  s. 29 (1) (a)

- High level key messages around encampment – will be sent this afternoon.

-  s. 29 (1) (a)

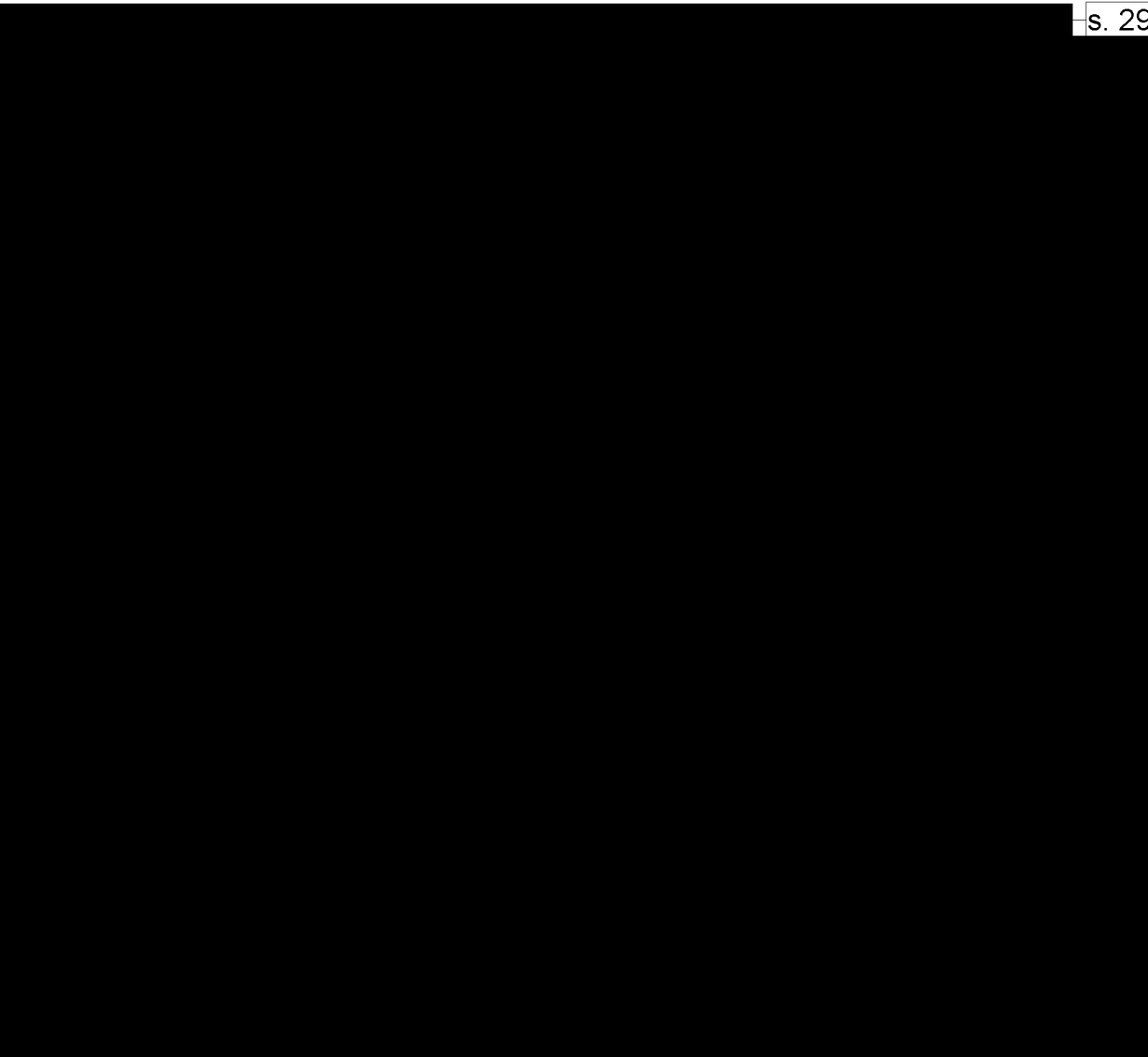
- Antisemitism study will start next week.

- Universities Canada knows of five active encampments in Canada right now.

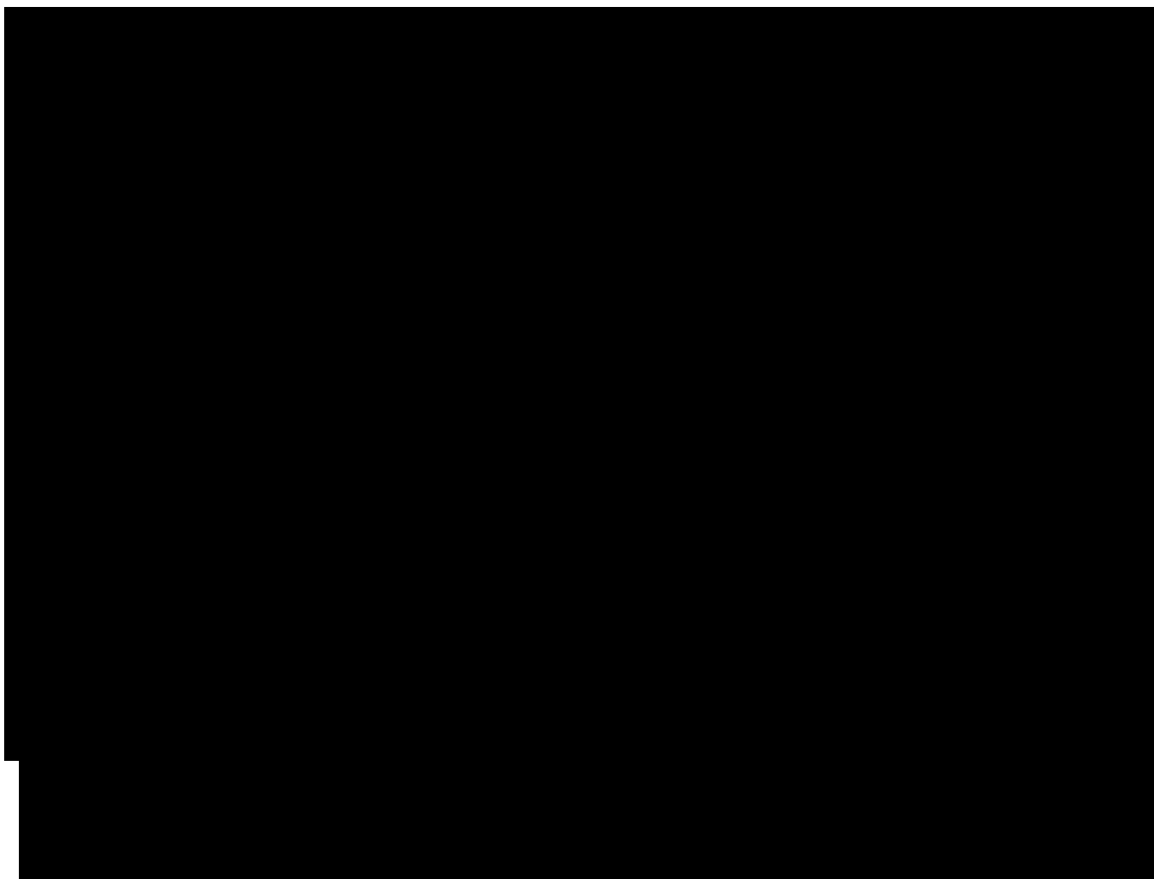
-  s. 29 (1) (a)

-

-



s. 29 (1) (a)



s. 29 (1) (a)

Confidential
Draft Communications Plan
Announcement of VP (Administration, Finance and Advancement)
Updated: December 4, 2024

Background:

A movement of public protests, sit-ins and encampments is moving across North American universities calling on institutions to divest of Israel (Israeli holdings).

Rooted in geopolitical, humanitarian, and ethical concerns, these protests are a non-violent means of exerting pressure and demands and offer solidarity with the Palestinian people against the ongoing Israeli-Palestinian conflict. It calls for divestment of funds and support for any business owned or seeming to support Israel.

The Boycott, Divestment, and Sanctions (BDS) movement has played a central role in mobilizing public opinion and catalyzing divestment efforts worldwide pressuring Israel to comply with international law, respect human rights, and engage in meaningful negotiations for peace. The BDS movement calls for non-violent economic and cultural boycotts of Israel until it complies with three demands: ending the occupation and colonization of all Arab lands, recognizing the fundamental rights of Arab-Palestinian citizens of Israel, and respecting the right of return for Palestinian refugees.

Divesting or considering what contributes to investments is not simple or straightforward. Divestment of any company that plays a role in the Israel Hamas conflict or the Israeli economy generally is very complex.

s. 29 (1) (a)

(<https://bdsmovement.net/what-is-bds>) and
([https://en.wikipedia.org/wiki/Boycott, Divestment and Sanctions](https://en.wikipedia.org/wiki/Boycott,_Divestment_and_Sanctions)).

The Memorial perspective

At Memorial, the endowment funds, non-endowment funds, and pension funds are invested in pool accounts with the individual investment management firms – as such the university does not hold individual investments.

Any changes to investing in a particular business would be done through the pooled fund managers who provide details on related holdings. However, Memorial would have no option to divest of any particular holding as they are held in the pool. The university can engage with the manager to discuss the rationale for the investment and the only option would be to replace a manager if there was a decision to get out of that investment.

Memorial does not actively choose which companies and real assets its investment (endowed and non-endowed) and pension fund will hold. Decisions at the geographic, sector and individual security level

are made by professional external investment management firms. These firms are engaged to choose investments that balance the risk and return expectations of the university which is acting in a fiduciary capacity along with its constituent pension and investment committees to protect the income security of employees, retirees, students and other beneficiaries.

Memorial has Environmental, Social and Governance (ESG) statements in investment policies for the pension fund and the endowed/non-endowed investment fund. The statements recognize the importance of ESG and impose a monitoring obligation. Memorial is not resourced to take a more active role on ESG matters across all Memorial’s investments, which is why the university contracts investment professionals. Memorial seeks to ensure these firms incorporate ESG considerations into their investment philosophy to safeguard the long-term viability of the investment. Should geopolitical or other ESG considerations jeopardize the fundamental viability of an investment, the investment management firms would be expected to incorporate this into their decision on investing or divesting of any particular security.

Memorial is a fiduciary, acting in the best interest of beneficiaries – on the pension side that is to guarantee a predictable and secure lifetime pension income. A defined benefit pension plan like Memorial’s does provide comfort to plan members, but must be funded. Not only does the university have to balance risk and reward opportunities for the investment fund, the university also needs to balance the objectives of constituent groups. Employees / retirees desire an affordable, reasonable and secure retirement income and the university desires a pension plan that it can afford and provides the necessary recruitment incentives and long-term income protection for retirees. This also applies to endowed funds.

Interests of particular constituent groups, their individual beliefs and moral values don’t necessarily inform investment policy decisions or objectives. To please one group could displease another.

Approach:



s. 29 (1) (a)

Key audiences:



s. 29 (1) (a)

Communications objective:

[Redacted]

s. 29 (1) (a)

Strategic considerations:

[Redacted]

s. 29 (1) (a)

Spokespeople:

[Redacted]

s. 29 (1) (a)

Key messages:

Regarding protest

- Memorial acknowledges the tragedy, strife and hardship experienced by individuals affected by the ongoing Israeli-Palestinian conflict and supports a peaceful resolution for citizens in the impacted region. We also acknowledge that many individuals in our university community share concerns and worry for their families and friends in the region and share our support at this time.
- Memorial University respects the rights of protesters to gather in solidarity for their cause in a safe and peaceful way as long as it does not impact on the core operations of teaching, learning, research and engagement. Encampments or occupations of any sort on our campuses are prohibited. The university is an inclusive and welcoming place for open and productive dialogue and the safety of the community is the primary concern.

Regarding request to divest

- Responding to the demand to divest of Israel is not a simple matter. Investment portfolios are complicated.
- At any given time, across Memorial’s investment portfolio, the university has thousands of holdings across Canadian equity, emerging markets and global small cap funds (for example more than 3400 funds with one investment manager as of the end of March).
- In an interconnected and interdependent world connecting the dots to companies that have some relationship with either Israel or Hamas is very difficult and identifying which companies do not align with the values and priorities of any divestor is challenging.
- Memorial does not publish a list of companies in holdings because they change frequently depending on the market on any given day and are determined based on the fiduciary duty of our investment firms.

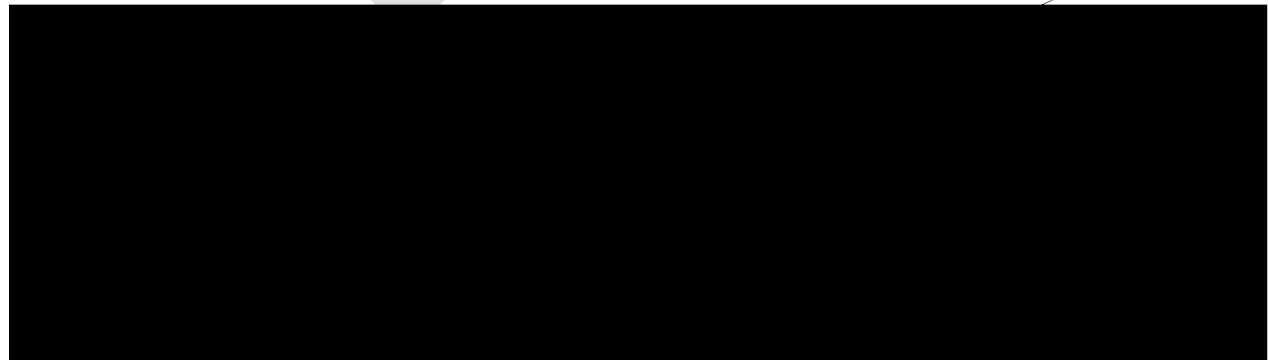
- Memorial has Environmental, Social and Governance (ESG) statements in the investment policies. Memorial expects investment firms to incorporate ESG considerations into their investment philosophy to safeguard the long-term viability of the investment.
- Investment firms are engaged to choose investments that balance the risk and return expectations of the university, which is acting in a fiduciary capacity, to protect the income security of employees, retirees, students and other beneficiaries.
- Memorial’s investments are primarily in pooled funds so the university is not direct investors in the stock of any particular company per se. To get out of a stock in a pooled fund means to exit the fund (i.e. ending partnership with a firm). The university cannot control investment at the security, sector or geographic level in a pooled fund.
- The pension fund is more sophisticated and complex. The university invests via pooled funds, but also has what are called segregated accounts whereby the university is the direct owner of corporate stock.

Universities Canada messages

- Canada’s universities, like Canadian society, are fundamentally guided by the Charter of Rights and Freedoms, and as such we respect the right to peaceful demonstrations.
- Canada’s universities are committed to protecting and supporting freedom of expression in our university communities. Universities are places for diverse ideas and difficult dialogues.
- There are reasonable limits and our universities have shared these limits under university policies and through the provincial and federal laws that govern us. There will be no tolerance for hate speech or hate crimes.
- We want to make clear that our universities will not tolerate harassment or intimidation of members of our community.
- Universities remain committed to fostering an environment of respectful and mutual engagement on campus. All members of the university community have the right to learn, live and work in an environment free from discrimination and harassment.
- Along with freedom of expression comes the freedom to confront opinions and/or statements individuals or groups may find misguided, unfounded or offensive.
- Respectful dialogue, debate and the exchange of ideas advance understanding and knowledge and lie at the heart of the university mission. We acknowledge these aren’t always easy conversations.
- Our universities are carefully monitoring the situations and student, staff and faculty physical safety remains the utmost priority.

s. 29 (1) (a)

Communications tactics:



Audience	Tactic	Timing	Responsible	Materials

DRAFT

Evaluation and monitoring



s. 29 (1) (a)

DRAFT

FAQs

How are Memorial's invested funds (endowed, non-endowed and pension) managed?

At Memorial, the endowment funds, non-endowment funds, and pension funds are invested in pool accounts with the individual investment management firms – as such the university does not hold individual investments.

Can Memorial make changes to its investment portfolio?

Any changes to invest or not in a particular business would be done through the pooled fund managers who provide details on related holdings. However, Memorial would have no option to divest of any particular holding as they are held in the pool. The university can engage with the manager to discuss the rationale for an investment and the only option to divest would be to replace a manager if there was a decision to get out of that investment.

Does Memorial choose the companies and assets that make up its investment portfolio?

Memorial does not actively choose which companies and real assets its investment (endowed and non-endowed) and pension fund hold. Decisions at the geographic, sector and individual security level are made by professional, external investment management firms. These firms are engaged to choose investments that balance the risk and return expectations of the university which is acting in a fiduciary capacity along with its constituent pension and investment committees to protect the income security of employees, retirees, students and other beneficiaries.

Does Memorial consider Environmental, Social and Governance (ESG) in its investment policies?

Memorial has Environmental, Social and Governance (ESG) statements in investment policies for the pension fund and the endowed/non-endowed investment fund. The statements recognize the importance of ESG and impose a monitoring obligation. Memorial is not resourced to take a more active role on ESG matters across all Memorial's investments, which is why the university contracts investment professionals. Memorial seeks to ensure these firms incorporate ESG considerations into their investment philosophy to safeguard the long-term viability of the investment. Should geopolitical or other ESG considerations jeopardize the fundamental viability of an investment, the investment management firms would be expected to incorporate this into their decision on investing or divesting of any particular security.

What is Memorial's obligation(s) regarding the investment portfolio?

Memorial is a fiduciary, acting in the best interest of beneficiaries. On the pension side that is to guarantee a predictable and secure lifetime pension income. A defined benefit pension plan like Memorial's does provide comfort to plan members, but it must be funded. Not only does the university have to balance risk and reward opportunities for the investment fund, the university also needs to balance the objectives of constituent groups. Employees/retirees desire an affordable, reasonable and secure retirement income and the university desires a pension plan that it can afford and provides the necessary recruitment incentives and long-term income protection for retirees. This also applies to endowed funds.

Will Memorial consider divesting of Israel?

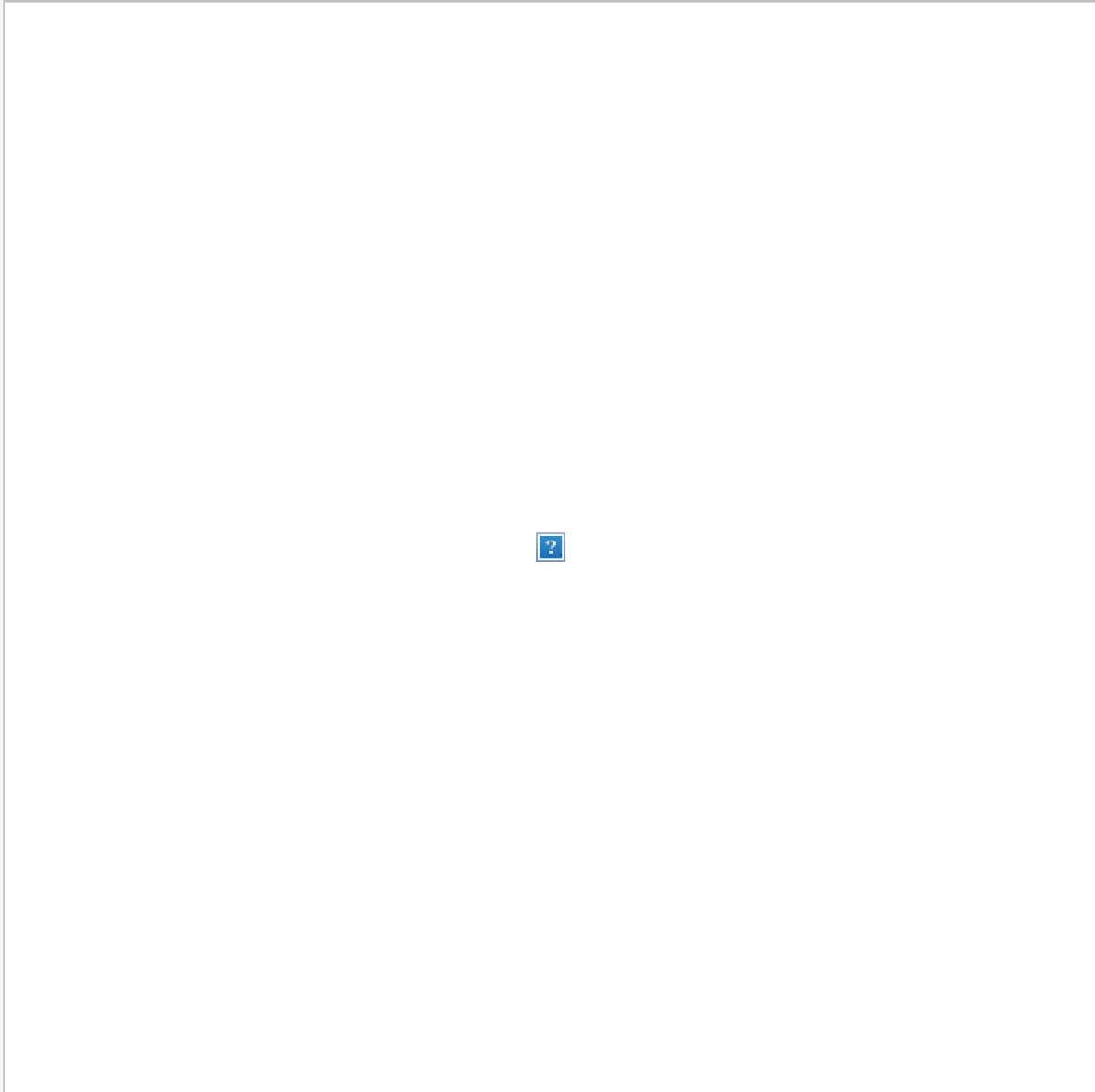
Regarding the demand of protesters to divest of Israel, this is not a simple matter of taking a stand to divest or not. In an interconnected and interdependent world connecting the dots to companies that have some relationship with either Israel or Hamas is very difficult and identifying which companies do not align with the values and priorities of a divestor is challenging. Interests of particular constituent groups, their individual beliefs and moral values don't necessarily inform investment policy decisions or objectives. To please one group could displease another.

DRAFT

From: [Academica Group](#)
To: [Browne, Lisa](#)
Subject: Today's Top Ten in Higher Ed
Date: Thursday, May 23, 2024 6:00:26 AM

NOTE TO APPLICANT: Pages 2,3, and 4 of this record is non-responsive to the wording of the request. As such, they have been removed.
IAP Office

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Thursday, May 23, 2024

Good morning,

A new MOU between ULEthbridge and UCalgary is the latest in a series of announcements related to two new Rural Medical Education Program **Training Centres** (RMEPTC) in Alberta. The MOU will move the

Protesters set up encampments at UoGuelph, Memorial

Protestors have set up encampments at the University of Guelph and Memorial University. At UoGuelph, protesters are calling on the university to provide information about its endowment portfolio. A statement from UoGuelph said that the university has received and is reviewing a divestment submission. Tents were set up on Memorial's campus by a student group expressing its solidarity with Palestine to bring awareness to the conflict in Gaza and to pressure university staff to adhere to a meeting scheduled for later this month. Memorial President Dr Neil Bose reminded community members that protests must be conducted within the university's policies, codes of conduct, and the law.

(Newfoundland and Labrador, Ontario)

[UoGuelph](#) | [Memorial](#) | [CTV News \(UoGuelph\)](#) | [Saltwire \(Memorial\)](#)

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We always like to hear your thoughts on the Top Ten: Just reply to this newsletter if you would like to share feedback.

Contributors

Rachel Janzen
Editor

Kristine Abramoff
Assistant Editor

Clare Church
Top Ten Writer

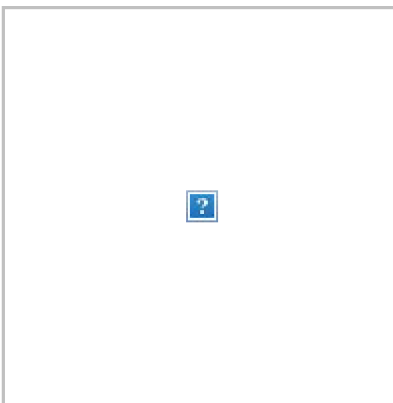
Brittany Ally
Careers Platform Manager

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From: [Collis, Deborah](#)
To: [Pelley, Chad](#); [Browne, Lisa](#)
Cc: [Whelan, Meaghan](#)
Subject: RE: media enquiry
Date: Tuesday, May 28, 2024 5:17:53 PM
Attachments: [image002.png](#)

Hi Chad,

s. 29 (1) (a)

[Redacted]

Debbie

Deborah Collis, CPA, CA
Chief Financial Officer
Memorial University of Newfoundland
A2022 – 230 Elizabeth Ave., St. John’s, NL A1C 5S7
Ph: 709-864-8222 Email: dcollis@mun.ca

From: Pelley, Chad <chad.pelley@mun.ca>
Sent: Tuesday, May 28, 2024 4:31 PM
To: Collis, Deborah <dcollis@mun.ca>; Browne, Lisa <lisa.browne@mun.ca>
Cc: Whelan, Meaghan <mcwhelan@mun.ca>
Subject: Re: media enquiry

Thanks, Debbie.

s. 29 (1) (a)

[Redacted]

CHAD PELLEY | MANAGER OF COMMUNICATIONS AND MEDIA RELATIONS

Marketing and Communications
Memorial University of Newfoundland
St. John's, Newfoundland A1C 5S7
T 709 864-2143 | O A-1024

From: "Collis, Deborah" <dcollis@mun.ca>
Date: Tuesday, May 28, 2024 at 3:49 PM
To: "Browne, Lisa" <lisa.browne@mun.ca>, "Pelley, Chad" <chad.pelley@mun.ca>
Cc: "Whelan, Meaghan" <mcwhelan@mun.ca>
Subject: RE: media enquiry

Hi all,

s. 29 (1) (a)

Chad

s. 29 (1) (a)

Happy to have a call if you'd like.

Debbie

Deborah Collis, CPA, CA
Chief Financial Officer
Memorial University of Newfoundland
A2022 – 230 Elizabeth Ave., St. John's, NL A1C 5S7
Ph: 709-864-8222 Email: dcollis@mun.ca

From: Browne, Lisa <lisa.browne@mun.ca>
Sent: Tuesday, May 28, 2024 1:50 PM
To: Pelley, Chad <chad.pelley@mun.ca>; Collis, Deborah <dcollis@mun.ca>
Cc: Whelan, Meaghan <mcwhelan@mun.ca>
Subject: RE: media enquiry

Hi Chad, I will have to deter to Debbie. [Redacted] s. 29 (1) (a)

Lisa

From: Pelley, Chad <chad.pelley@mun.ca>
Sent: Tuesday, May 28, 2024 1:17 PM
To: Collis, Deborah <dcollis@mun.ca>; Browne, Lisa <lisa.browne@mun.ca>
Cc: Whelan, Meaghan <mcwhelan@mun.ca>
Subject: media enquiry

Hi Debbie, Lisa.

s. 40 (1)

I'm at [REDACTED] if a phone call is easier here.

In response to this line in a media statement yesterday:

[REDACTED]

s. 29 (1) (a)

I have received the follow-up question:

I recall a similar discussion occurred several years ago, when students and faculty were asking for divestment from fossil fuel companies. Were any policies developed at that time that would be relevant here?

I am seeking info on:

[REDACTED]

s. 29 (1) (a)

CHAD PELLEY | MANAGER OF COMMUNICATIONS AND MEDIA RELATIONS

Marketing and Communications
Memorial University of Newfoundland
St. John's, Newfoundland A1C 5S7
T 709 864-2143 | O A-1024

From: [Carroll, Maria K](#)
To: [Browne, Joseph Francis](#); [Browne, Lisa](#); [Whelan, Meaghan](#); [Dyke, Paula](#)
Cc: [Osmond, Michelle](#)
Subject: Social media monitoring- May 31
Date: Friday, May 31, 2024 5:07:26 PM
Attachments: [Memorial University- social analysis- May 31.docx](#)

Hi folks,

Please see attached social media monitoring document from today, May 31.

Thanks,
Maria

—

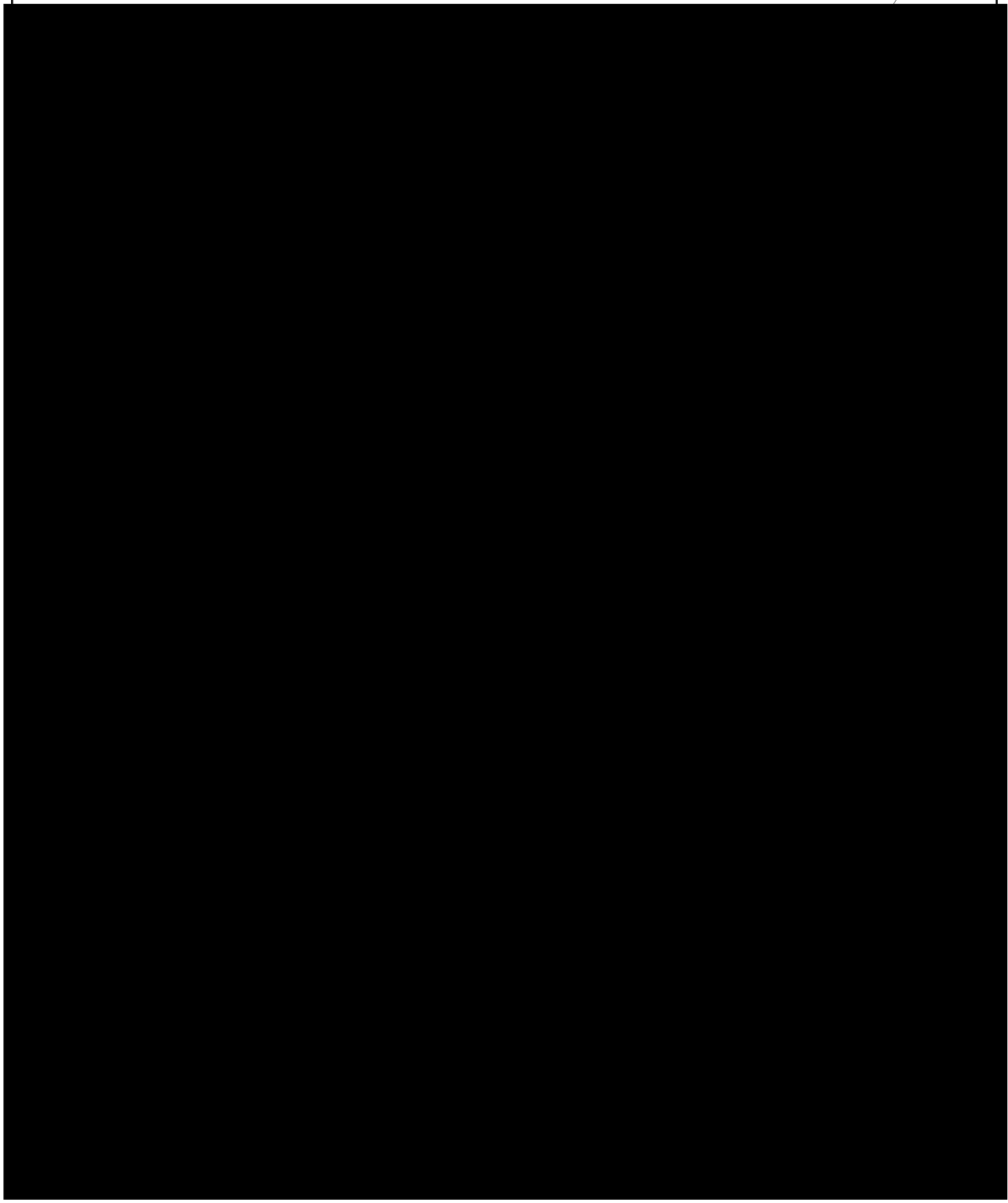
MARIA CARROLL (*she/her*)
SENIOR COMMUNICATIONS AND SOCIAL MEDIA ADVISOR

Marketing and Communications
Memorial University of Newfoundland
St. John's, NL, Canada | A1C 5S7
maria.carroll@mun.ca

We acknowledge that the lands on which Memorial University's campuses are situated are in the traditional territories of diverse Indigenous groups, and we acknowledge with respect the histories and cultures of the Beothuk, Mi'kmaq, Innu and Inuit of this province..

**Memorial University- Social Media Analysis
MUN students for Palestine encampment
Friday, May 31, 2024**

s. 29 (1) (a)



From: [Carroll, Maria K](#)
To: [Browne, Joseph Francis](#); [Browne, Lisa](#); [Whelan, Meaghan](#); [Dyke, Paula](#)
Cc: [Osmond, Michelle](#)
Subject: Social monitoring- May 28
Date: Tuesday, May 28, 2024 4:43:40 PM
Attachments: [Memorial University- Social Media Analysis- May 28.docx](#)

Hi folks,

Please see attached social media monitoring doc for today, May 28.

Thanks,
Maria

PS- there were also lots of wonderful mentions/tags on social today from convocation that were not captured in the doc

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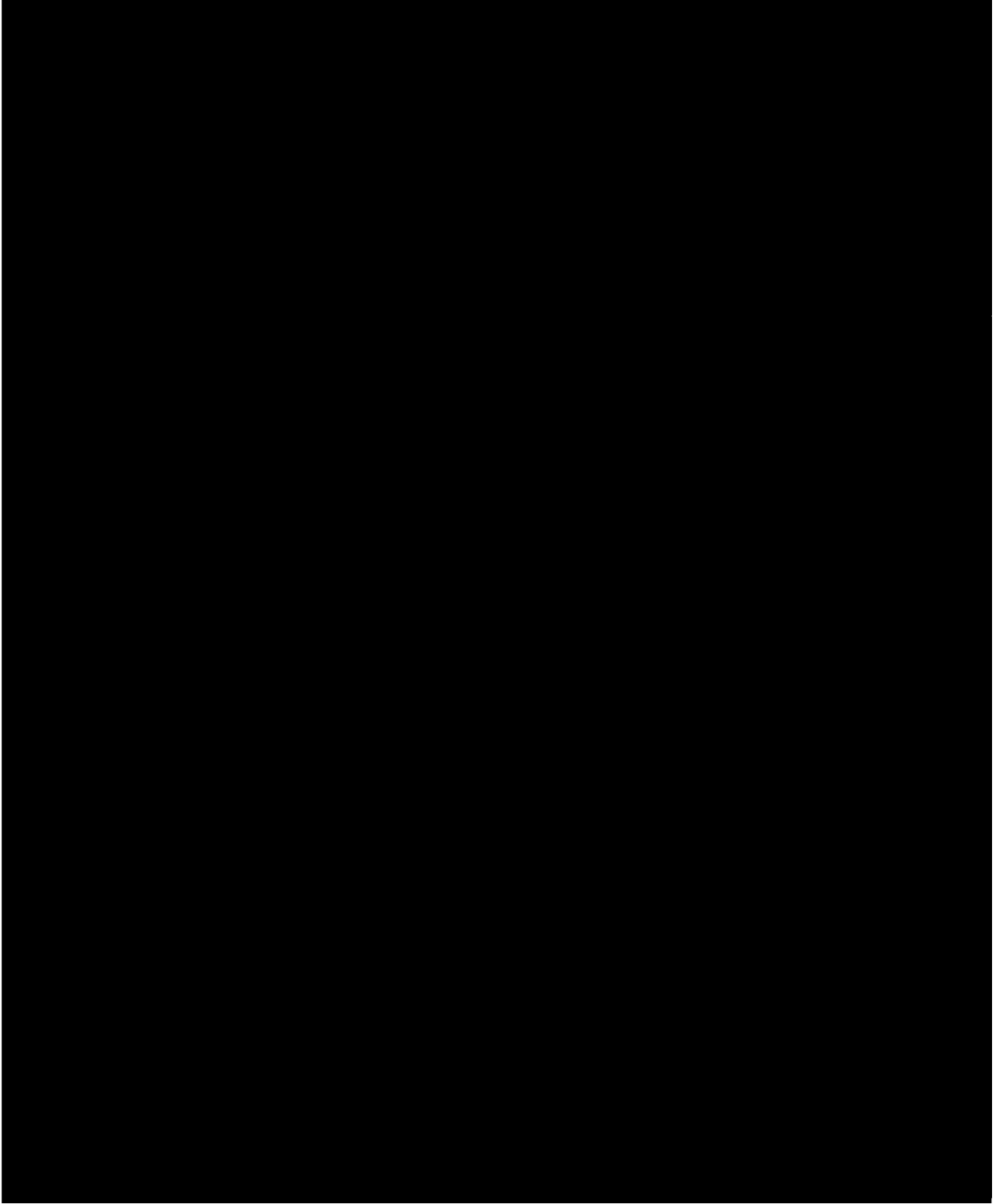
MARIA CARROLL (*she/her*)
SENIOR COMMUNICATIONS AND SOCIAL MEDIA ADVISOR

Marketing and Communications
Memorial University of Newfoundland
St. John's, NL, Canada | A1C 5S7
maria.carroll@mun.ca

We acknowledge that the lands on which Memorial University's campuses are situated are in the traditional territories of diverse Indigenous groups, and we acknowledge with respect the histories and cultures of the Beothuk, Mi'kmaq, Innu and Inuit of this province..

**Memorial University- Social Media Analysis
MUN students for Palestine encampment
Tuesday, May 28, 2024**

s. 29 (1) (a)



From: [Carroll, Maria K](#)
To: [Browne, Joseph Francis](#); [Browne, Lisa](#); [Whelan, Meaghan](#); [Dyke, Paula](#)
Cc: [Osmond, Michelle](#)
Subject: Social monitoring- May 29
Date: Wednesday, May 29, 2024 4:32:47 PM
Attachments: [Memorial University- Social Media Analysis- May 29.docx](#)

Hi folks,

Please see attached social monitoring doc for today, May 29.

Thanks,
Maria

—

MARIA CARROLL (*she/her*)
SENIOR COMMUNICATIONS AND SOCIAL MEDIA ADVISOR

Marketing and Communications
Memorial University of Newfoundland
St. John's, NL, Canada | A1C 5S7
maria.carroll@mun.ca

We acknowledge that the lands on which Memorial University's campuses are situated are in the traditional territories of diverse Indigenous groups, and we acknowledge with respect the histories and cultures of the Beothuk, Mi'kmaq, Innu and Inuit of this province..

**Memorial University- Social Media Analysis
MUN students for Palestine encampment
Wednesday, May 29, 2024**

s. 29 (1) (a)

