

Board of Governors □
April 28, 2005

Attachment to □
APPENDIX V



The University of Western Ontario

Performance and Activity Indicators

Annual Report to the Board of Governors

April 2005

President's Message

Since 1995 I have presented the Board with an annual report describing Western's progress towards our strategic goals and giving members of our community a sense of our relative standing within the Province and the country on a variety of statistical measures. This report is intended to give the annual presentation a more formal structure. Future annual reports will reproduce the same array of core performance and activity indicators on a consistent basis, so that we will have a set of benchmarks which can be measured over time.

This report will be an important element of the administration's accountability to the Board. Increasingly the provincial government and the Provincial Auditor have been calling upon Ontario's universities for greater levels of accountability and transparency. At Western we are already well-positioned to respond to these calls, in the sense that our academic plans, budget plans, financial statements, and Board and Senate proceedings are already publicly available. The addition of an annual Performance and Activity Indicators Report will complete the picture.

The core indicators in this report have been drawn from a much larger set of indicators, all of which will be available on our website. In selecting a set of core indicators, we have attempted to produce a concise and focussed report; the interested reader will, however, be able to explore Western's performance and activities in greater depth through a review of the supplementary indicators.

It is important to note that this is not intended as a promotional document. It contains not only indicators which suggest significant achievement by Western, but also ones that identify areas where improvement is necessary in order to achieve our strategic plans and aspirations.

Dr. Paul Davenport
President and Vice Chancellor
April 13, 2005

The Primary Data Sources

The Council of Ontario Universities has for many years collected a wide variety of information from its member institutions: applications and marks data, space inventory, faculty and staff counts, and an annual financial report. By agreement, the member institutions do not publish comparisons which might damage the reputation of another member institution. Therefore, Western's performance indicators compare us to the aggregate of the other seventeen member institutions.

In 1999 the executive heads of the G10, Canada's ten most research-intensive universities (Laval, Montreal, McGill, Queen's, Toronto, McMaster, Waterloo, Western, Alberta, and British Columbia) formed a data exchange consortium to facilitate comparative analysis and benchmarking. The G10 data exchange (G10DE) was modelled after a similar data exchange consortium of leading American research universities, and in a comparatively short period of time, the G10DE has produced a valuable set of comparative data. The scope of the G10DE continues to expand, and it holds promise for the development of additional benchmarking data in future.

Western also participates in a number of American-based data exchange initiatives which can be used for comparison purposes:

- The Consortium for Student Retention Data Exchange
- The Association of Research Libraries
- The National Survey of Student Engagement, and
- The Graduate and Professional Student Survey

When considering comparisons to American universities, Western has chosen a peer group of five publicly-assisted research universities which most closely resemble Western in terms of program mix: Michigan State University, the University of Arizona, the Ohio State University, the University of Iowa, and the University of North Carolina at Chapel Hill.

The Format for the Indicators

The indicators in this report will be presented in one of three formats, and the selection of a particular format is in large measure a function of data availability. Over time, with increased data availability, the format of a particular indicator may be modified and enhanced. Data will be presented as one of:

1. Western compared to peer institutions over time (normally five years),
2. Western compared to peer institutions at a point in time (the most recently available year), or
3. Western's performance over a period of time with no peer comparator data.

Acknowledgements

The analyses in this report have been prepared by James MacLean and Angela Sutton of the Office of Institutional Planning and Budgeting. They have been assisted by staff in all of the central administrative offices in the data collection effort. Ruban Chelladurai and Martin England are responsible for the integrity of the analyses presented here, as well as for the organization of the report. We are grateful for their efforts.

Secondary School Grades of Incoming Students

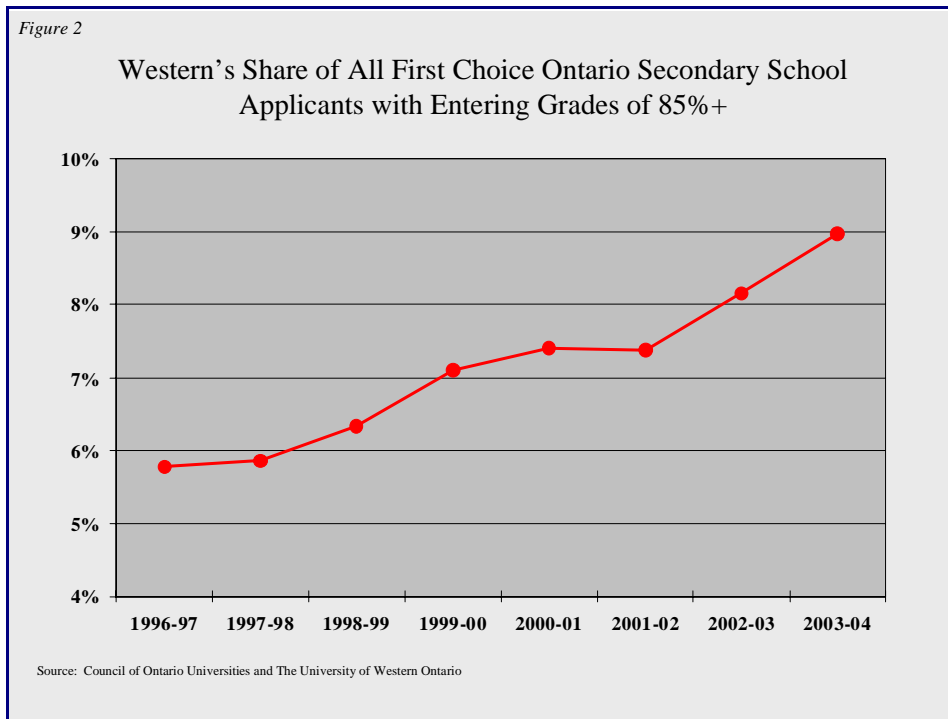
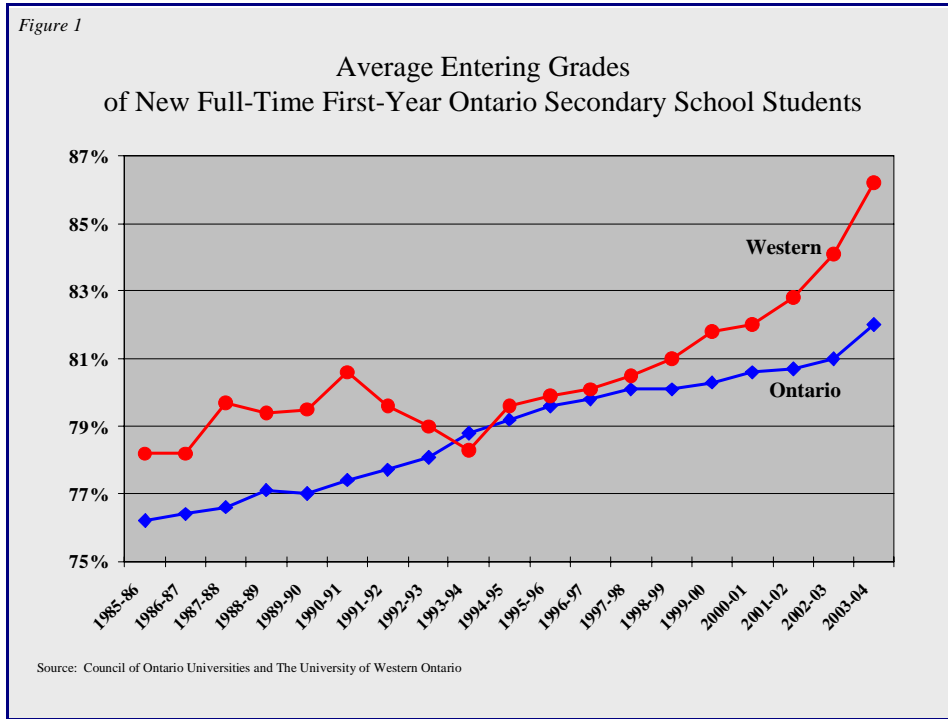
Figures 1 and 2

Data Source: Ontario University Applications Centre (OUAC)

Calculation of Indicator: The analysis displays the final Ontario secondary school average grades for all first-time applicants who registered in the first year of study as full-time students at an Ontario university. The figure shows the average for first-year registrants at Western as compared to the aggregate of all Ontario universities.

Relation to Strategic Plan: Commitments 4.1 and 4.2 of *Making Choices* refer to improving student recruitment, including higher entering grades and improved recruitment outside Ontario.

Commentary: In the mid-1990s the average entering grade for Western students fell below the Ontario average. This trend has been reversed, and in spite of high levels of intake to accommodate the double cohort, the average entering grade of Western's first-year students is now considerably higher than the provincial average. This trend is particularly pronounced at the highest end of the grade scale: Western's share of all Ontario secondary school applicants with averages of 85 percent or better has increased by approximately 50 percent, from just under 6 percent of the provincial total in 1996-97 to 9 percent in 2003-04.



Out-of-Province and International Students

Figures 3 and 4

Data Source: Ontario University Applications Centre (OUAC)

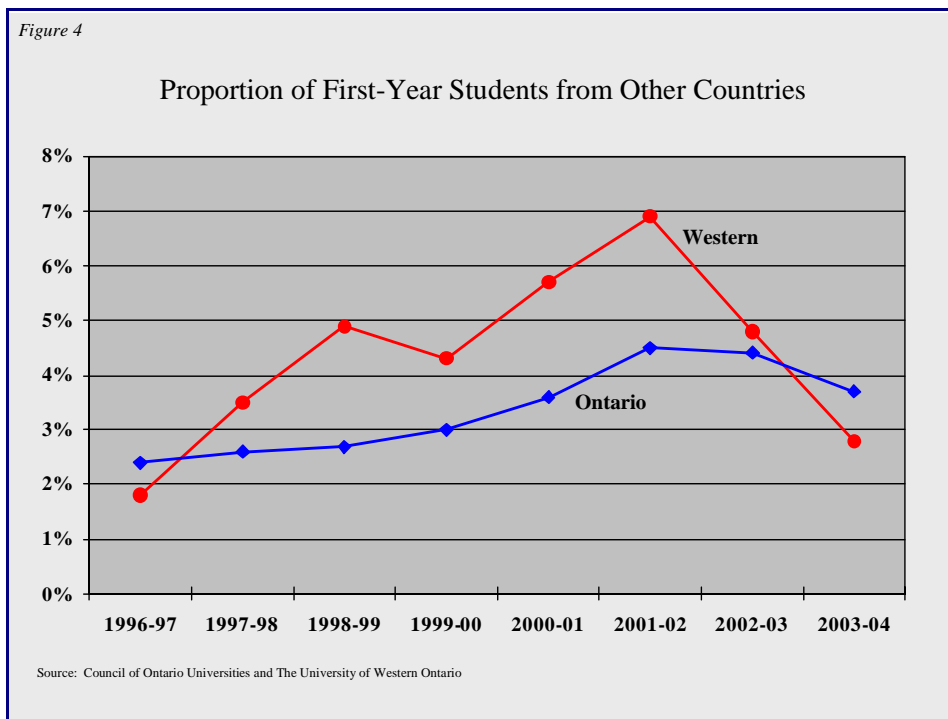
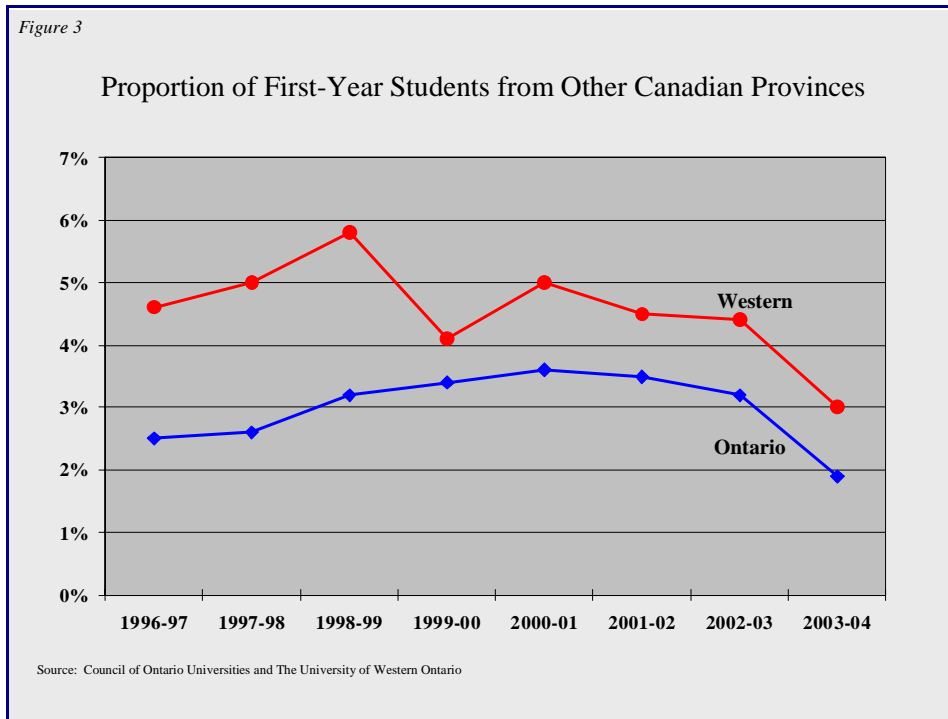
Calculation of Indicator: The proportion of Western's first time, first-year registrants in direct entry programs from out-of-Province and out-of-country are compared to the proportion of these first time registrants for the aggregate of all Ontario's universities.

Relation to Strategic Plan: Commitment 4.5 of *Making Choices* involves an investment of resources in the recruitment of students from other provinces and countries.

Commentary: In cooperation with the Ministry of Training, Colleges, and Universities, all of Ontario's universities, including Western, deliberately reduced the intake of out-of-Province and international students in 2002-03 and 2003-04 in order to create more first-year places for Ontario secondary school students who were graduating as part of the double cohort.

Prior to this event, Western's proportion of international first-year students had been on a steady upward trajectory and exceeded the provincial average by a considerable margin. The trend in out-of-Province enrolment was not as pronounced, and while Western exceeded the provincial average, the proportion fluctuated within a band of four to six percent of the first-year class.

With the passage of the double cohort pressures, Western now has the opportunity to examine critically its long-term aspirations for out-of-Province and international undergraduate enrolment.



Undergraduate Retention and Graduation Rates

Figures 5 and 6

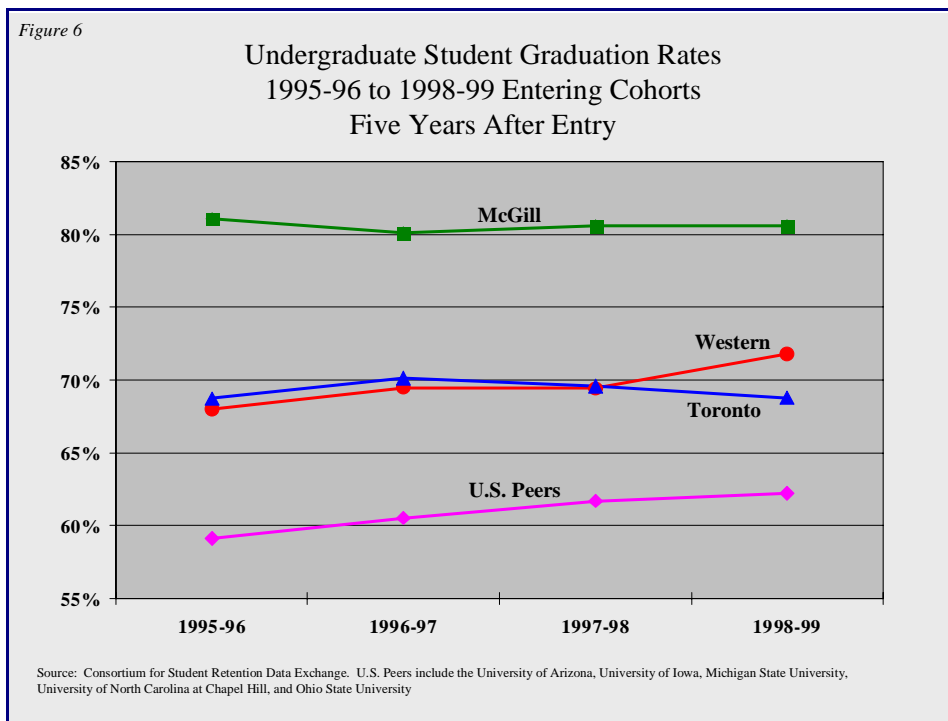
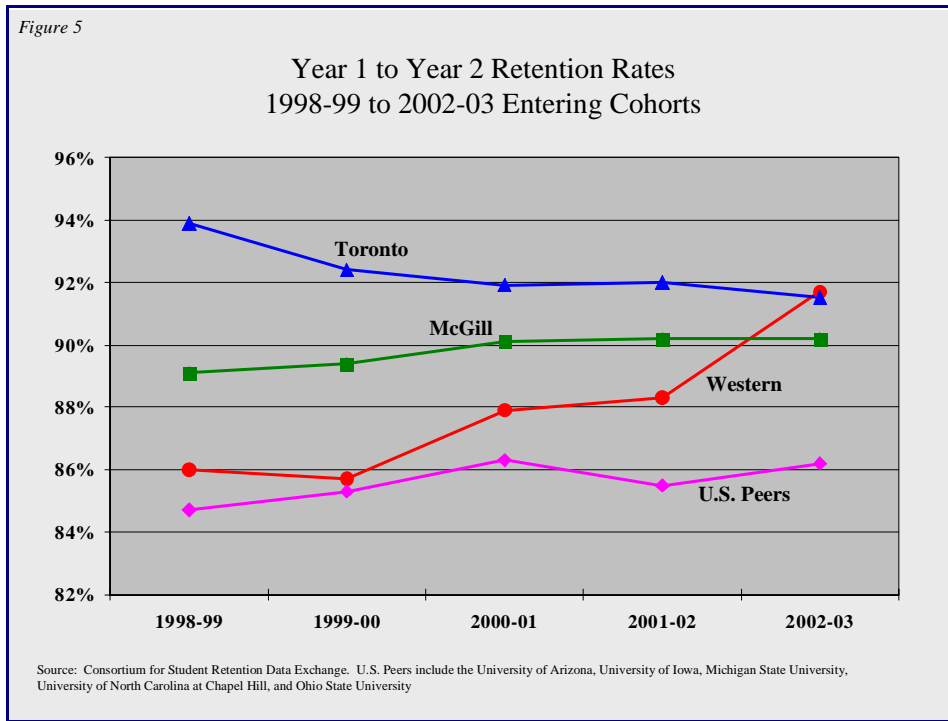
Data Source: Consortium for Student Retention Data Exchange (CSRDE)

Calculation of Indicator: Each year the participants in the CSRDE submit two sets of data: the number of students who have successfully proceeded from year 1 to year 2 of study in direct-entry undergraduate programs; and the number of students who have successfully graduated after five, six, and seven years of their registration since the time of their entrance to the program.

Relation to Strategic Plan: Commitment 4.3 of *Making Choices* refers to the role of our residences and the Centre for New Students in helping students succeed in their first year. The ability to graduate is a fundamental part of a successful student experience and central to our ability to recruit outstanding students.

Commentary: At present, there is limited participation in the CSRDE by Canadian institutions, with only Western, McGill, and Toronto among the G10 universities as comparators. Western has taken a leadership role in encouraging participation in future years by all of the G10 universities and all of Ontario's universities. Future presentations of these indicators will likely include more comparison points.

The data suggest that, as the quality of Western's incoming class (as measured by entering averages) has steadily improved, so too have the retention and graduation rates of our students. Western compares favourably in year 1 retention rates with McGill and Toronto, and considerably exceeds the rates experienced by our American peer institutions. Western's graduation rates exceed the American peers and compare favourably with Toronto, but fall short of McGill. McGill's relatively high graduation rate is, in part, because a large number of McGill's students pursue a three-year degree program, following completion of a two-year college program.



Proportion of First-Year Students in Residence

Figure 7

Data Source: The University of Western Ontario

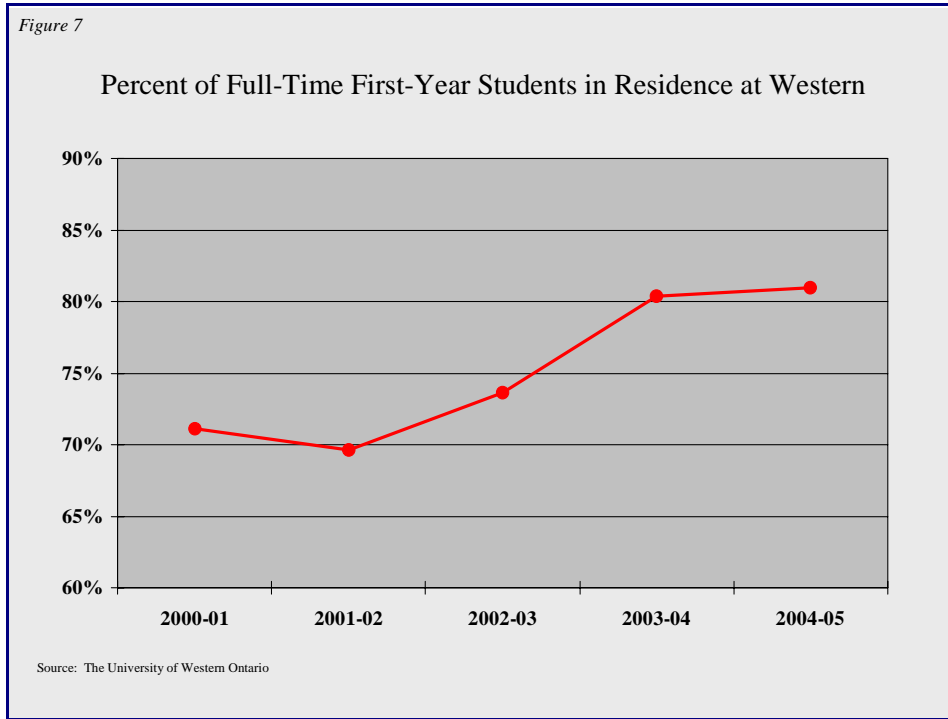
Calculation of Indicator: The number of full-time, first-year students living in Western student residences expressed as a percentage of the full-time first-year student population.

Relation to Strategic Plan: The Plan notes that “One of the attractions of Western for undergraduate students is the residential nature of our campus ...” and in commitment 4.3 the role of student residences in first-year mentoring is underlined. The guarantee of a first-year residence space has been fundamental to achieving the recruitment objectives of the Plan.

Commentary: One of the hallmarks of the Western undergraduate experience is the commitment to an offer of a residence place for all first-year students. This has become increasingly important to prospective students and their parents because of the compressed Ontario secondary school curriculum and the resulting younger postsecondary incoming class.

Through the construction of new residences and effective use of existing residences, Western increased the proportion of first-year students in residence through the double cohort period.

This is an indicator which would benefit from comparative data from other institutions, but none is currently available.



Student Satisfaction: Evaluation of Instructor Effectiveness and Overall Satisfaction with Education Received

Figure 8 and 9

Data Source for Figure 8: Instructor/Course Evaluation Survey at Western

Calculation of Indicator: Each year all Western undergraduate students are invited to submit a course evaluation. Students grade their course experience on a variety of measures, on a scale of 1 (poor) to 7 (outstanding). The indicator summarizes five years of these student evaluations of their course instructor's effectiveness.

Relation to Strategic Plan: Commitment 4.1 of *Making Choices* refers to the importance of maintaining high levels of quality in instruction.

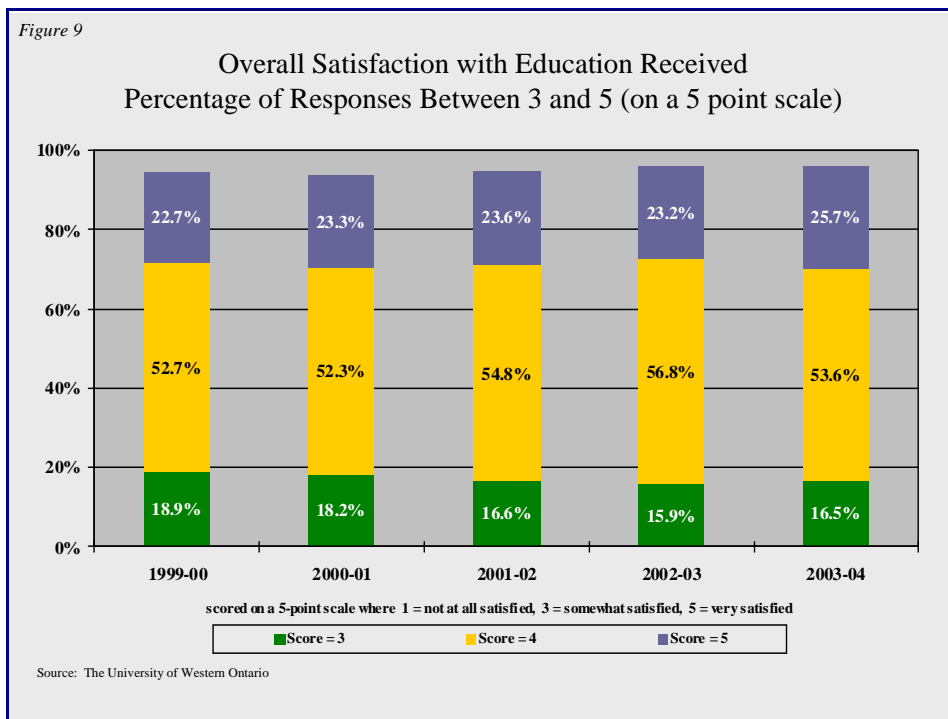
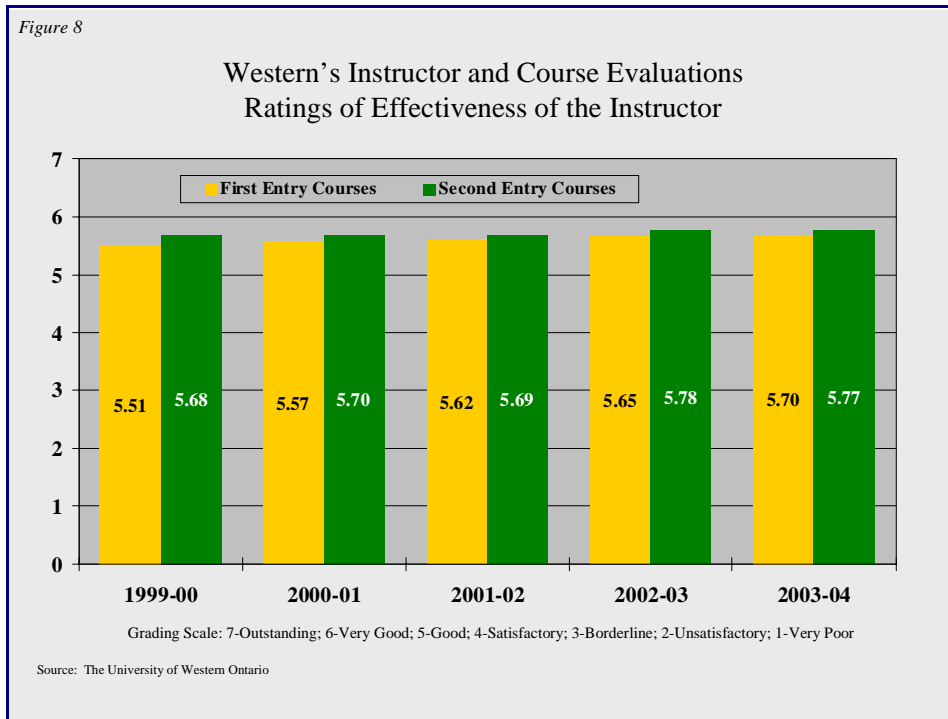
Commentary: The survey results indicate a very high level of satisfaction on the part of students at both the direct-entry and second-entry level. The results also indicate modest but steady improvement over time.

Data Source for Figure 9: Exit survey of all undergraduate students at time of graduation

Calculation of Indicator: Graduating students are invited to grade their undergraduate experience at Western on a variety of measures on a scale of 1 (not at all satisfied) to 5 (very satisfied). The indicator presents a five-year history of students' satisfaction with the overall educational experience.

Relation to Strategic Plan: Commitment 5.1 of *Making Choices* calls for "the reform of undergraduate programs approved by Senate for implementation in 2004; encourage Faculties and professional Schools to work cooperatively with one another and with other parts of the university in the delivery of programs and in the reform process".

Commentary: The results indicate that, at the time of graduation, about 95 percent of Western's undergraduates were satisfied with the overall educational experience. This level of satisfaction has been consistent over the past five years, but there has been improvement in the proportion who were 'very satisfied' rather than 'satisfied'.



Undergraduate Student Engagement

Figures 10 and 11

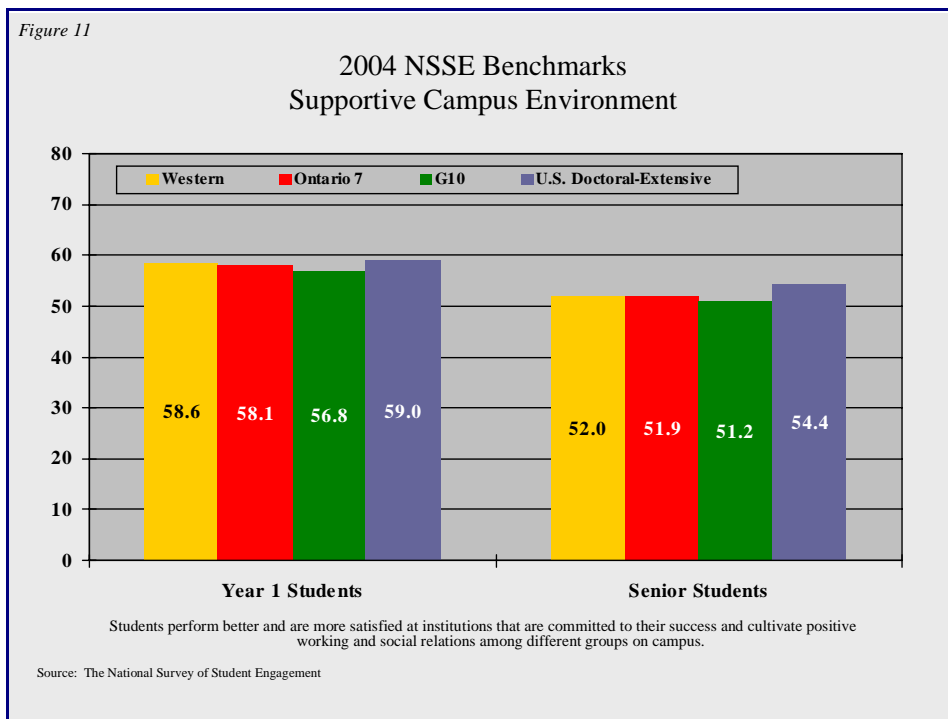
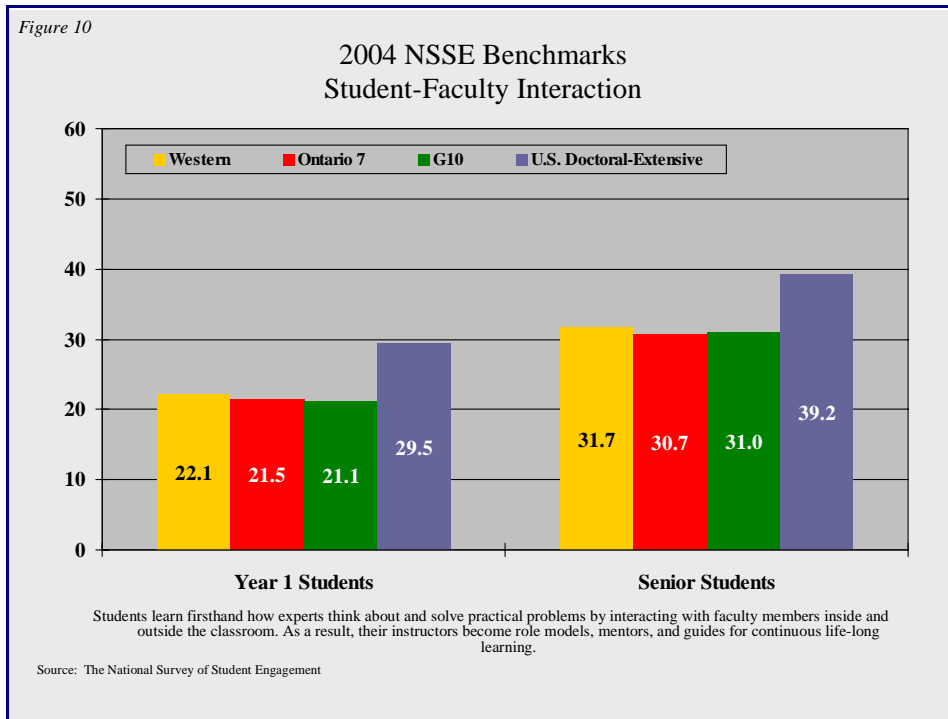
Data Source: National Survey of Student Engagement (NSSE)

Calculation of Indicator: In early 2004, eight of the G10 universities, including Western, elected to participate in the National Survey of Student Engagement (NSSE) administered through Indiana University. In addition, several Canadian universities outside the G10 participated in the survey, along with 450 universities in the United States. The NSSE survey, it must be emphasized, is not a student satisfaction survey, but rather an attempt to measure the extent to which students are involved in campus life and their academic program. NSSE groups the responses to the approximately 80 questions into five benchmarks which can then be used to compare results among peer institutions.

Relation to Strategic Plan: Commitment 2.12 of *Making Choices* calls for the substantial improvement of student-faculty ratios, and commitment 4.4 calls for student involvement in the creation of a supportive campus environment.

Commentary: Figure 10, Student-Faculty Interaction, measures the extent to which students have been able to meet one-on-one with faculty members and the extent to which students have been graded on essays and class presentations as opposed to multiple-choice questions. This measure, it should be noted, is not a measure of the effectiveness of faculty members. It is, in most important respects, a result of student-faculty ratios. In this measure, Western performed near the average for the other Ontario and G10 participants, but significantly below the doctoral institutions in the United States. These results have recently been cited by Mr. Rae in his post-secondary review as evidence that Ontario universities are significantly under-resourced when compared to similar institutions in the United States.

Figure 11, Supportive Campus Environment, measures the extent to which students experience support from faculty, staff, and fellow students outside the classroom. In this indicator, Western ranks slightly above the Ontario and G10 average, and close to the average of U.S. doctoral institutions.



Student Aid Funding at Western

Figure 12

Data Source: The University of Western Ontario

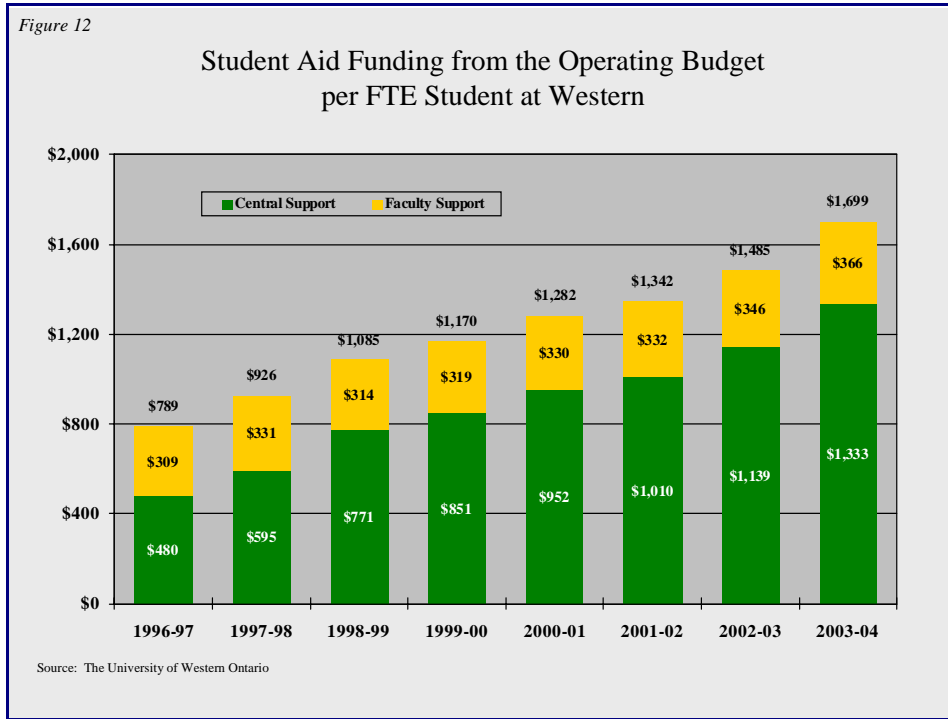
Calculation of Indicator: Total operating budget expenditures for student aid divided by total full-time equivalent (FTE) enrolment, 1996-97 through 2003-04. Expenditures from the central budget are presented separately from expenditures from Faculty budgets.

Relation to Strategic Plan: Commitments 7.1 of *Making Choices* affirms the importance of undergraduate student aid:

“In all our undergraduate programs, maintain the commitment of The University of Western Ontario that no qualified student will be unable to attend Western or will be required to withdraw from any academic program at Western for financial reasons”.

Commentary: Commencing in 1996-97 Ontario universities were compelled to reserve 30 percent of all revenues arising from tuition rate increases for needs-based student aid. Western has met and exceeded this requirement, and has adopted as policy the intention that no qualified student shall be denied access to a program due to lack of financial resources. This policy further guarantees that no student shall have to withdraw from a program of study because of the lack of financial resources.

In satisfaction of this policy, Western’s per-student expenditure for student aid has more than doubled, from just under \$800 per FTE student in 1996-97 to \$1,700 per FTE student in 2003-04. Efforts to further increase student aid continue through fundraising efforts under the Ontario Student Opportunity Trust Fund (OSOTF).



Student Debt

Figure 13

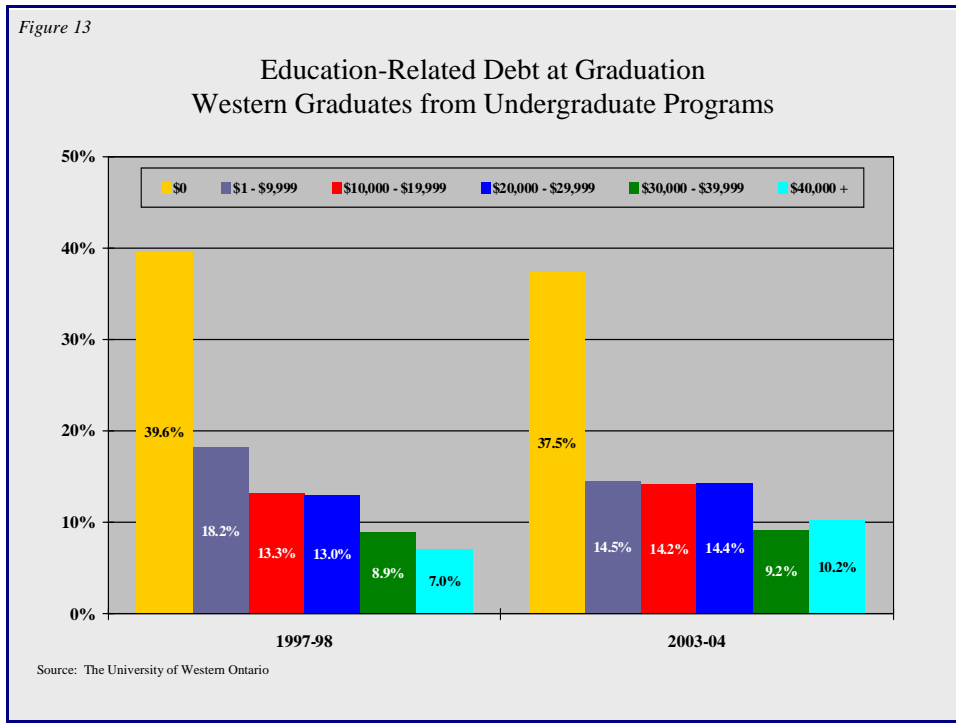
Data Source: Western's exit survey of all undergraduate students at time of graduation

Calculation of Indicator: All undergraduate students, including students in second-entry undergraduate programs, are asked to report on the level of education-related debt they have accumulated at the time of graduation. Reported debt is presented for the 1997-98 and 2003-04 graduating classes.

Relation to Strategic Plan: Commitment 7.5 of *Making Choices* establishes priorities for student aid reform, including post-graduation debt relief:

“Continue to advocate increased, harmonized, fair and appropriate student loan programs at both the federal and provincial levels, including a debt reduction program available after graduation to those in greatest need”.

Commentary: The analysis indicates that the majority of Western's undergraduates continue to graduate with debt less than \$10,000. However, with the deregulation of tuition fees for professional programs, the proportion of students with debt in excess of \$40,000 has increased from seven percent of the graduating class to just over ten percent. It is for this reason that Western is gratified that the Rae Panel has concurred with our recommendation for a system of post-graduation debt relief for those graduates who experience difficulty in loan repayment because of a low income level.



Doctoral Enrolment as a Proportion of Total Enrolment

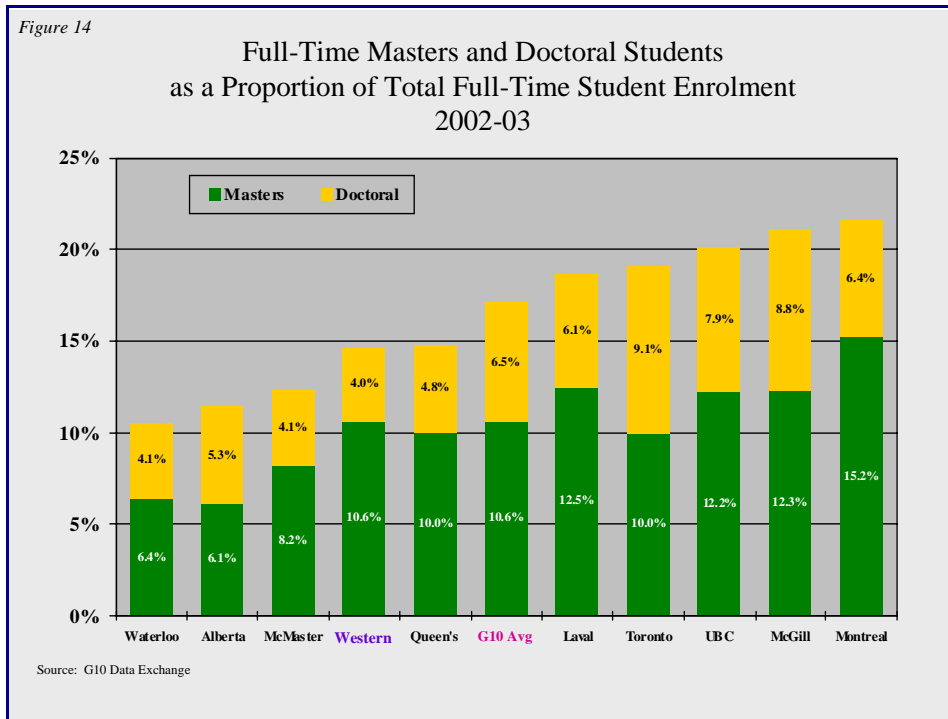
Figure 14

Data Source: G10 Data Exchange

Calculation of Indicator: For each of the G10 universities, fall full-time headcount enrolments for Masters and Doctoral students are expressed as a percentage of total fall full-time headcount enrolment.

Relation to Strategic Plan: Commitment 6.1 calls on Western to undertake a substantial increase in graduate enrolment.

Commentary: Western has established the priority to double its doctoral enrolment over the ten-year period commencing in 2001. Western's doctoral enrolment currently stands at approximately four percent of total enrolment, whereas UBC, McGill, and Toronto are in the eight to nine percent range. This comparison puts the doubling objective into context: if Western attains this objective, we will enjoy an enrolment balance comparable to other leading research universities.



Doctoral Students: Completion Rates and Time-to-Completion

Figures 15 and 16

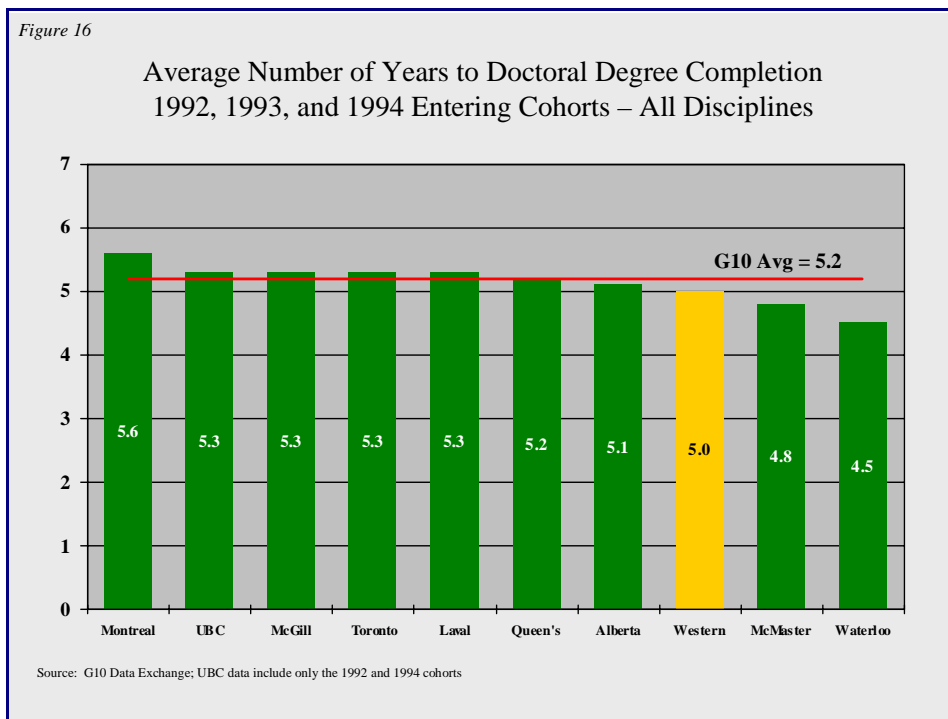
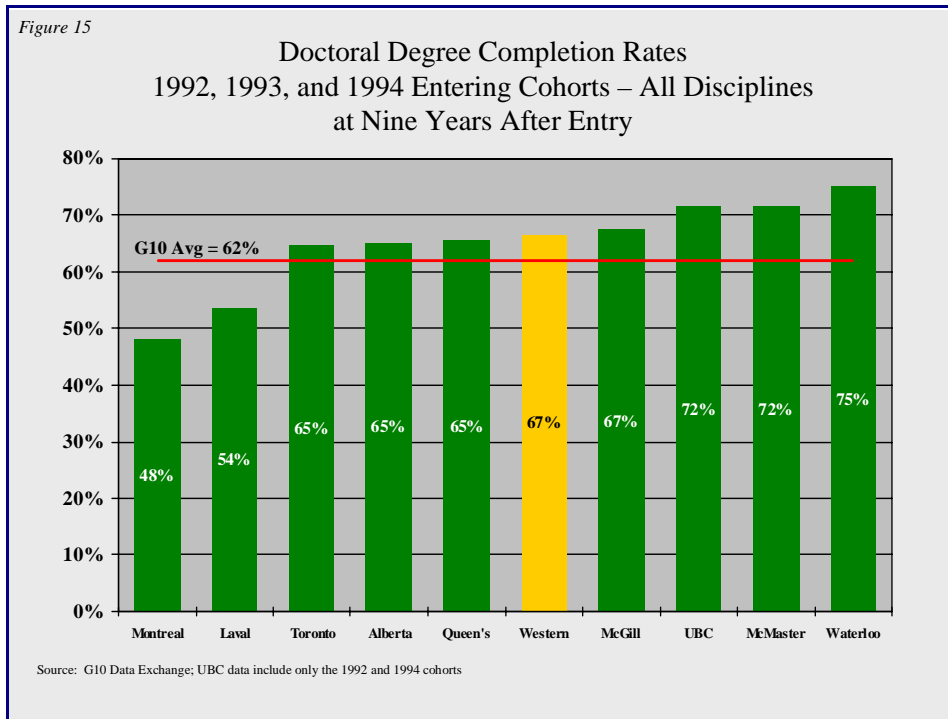
Data Source: G10 Data Exchange

Calculation of Indicator: In order to accurately measure the completion rates and time-to-completion for students in doctoral programs, the G10 data exchange developed a detailed methodology which tracks each entering student on a term-by-term basis for nine years after first registration. This gives a precise reading on the percentage of each entering cohort who graduate, as well as the length of time involved to complete the program. The exchange has already gathered information on the 1992, 1993, and 1994 entering cohorts, and data collection is in process for the 1995 cohort.

Relation to Strategic Plan: Commitment 6.4 refers specifically to monitoring time-to-completion in our programs.

Commentary: About two-thirds of Western's doctoral students successfully complete the PhD, taking an average of five years to do so. Both indicators for Western are slightly better than the G10 average. As Western proceeds with expansion of doctoral enrolment, it will be important to monitor these two indicators.

A cautionary note about these two indicators: both the completion rate and the time-to-completion will vary significantly by disciplinary group, with lower completion rates and longer completion times, for example, in the humanities disciplines across all universities. The supplementary volume of indicators displays these disciplinary variations.



Average Financial Support per Doctoral Student

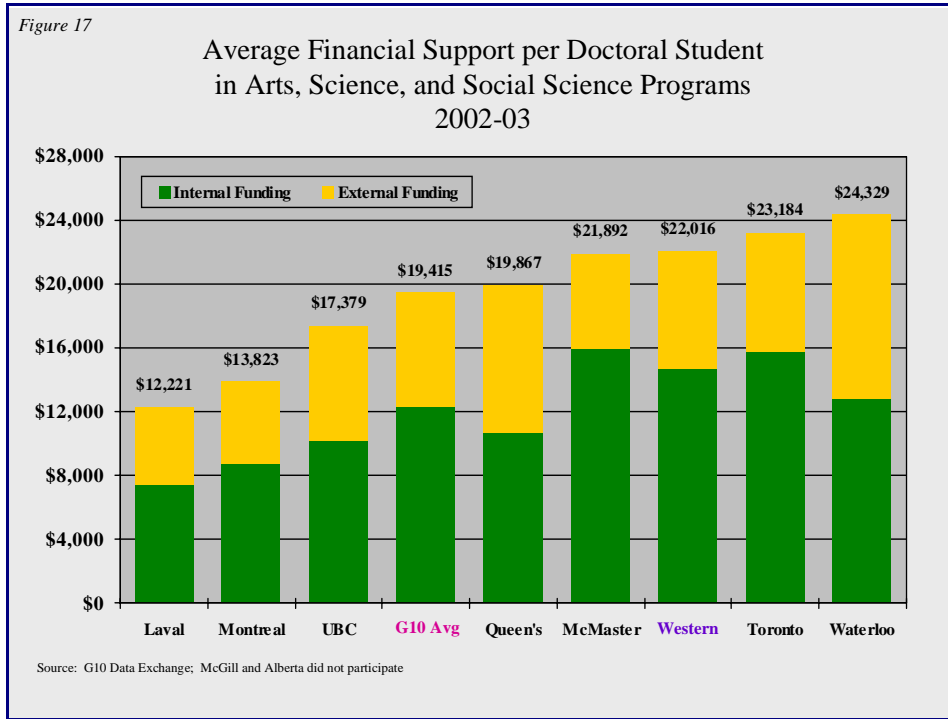
Figure 17

Data Source: G10 Data Exchange

Calculation of Indicator: Each of the G10 institutions, except for Alberta and McGill, has submitted a record-level file of all student support provided to its doctoral students in Arts, Science, and Social Science disciplines for the 2002-03 academic year. Data collection has been completed for the 2003-04 academic year, expanding the scope of disciplines, but results of the survey are not yet available.

Relation to Strategic Plan: Commitment 7.2 of *Making Choices* refers to the maintenance of competitive financial support for graduate students.

Commentary: In order to realize its plans to significantly increase doctoral enrolment, Western must offer a competitive package of financial support to prospective students. The data indicate that Western's support, both from internal and external sources, is highly-competitive among the leading research universities. These analyses do not compare levels of support for students in masters programs, and this would be a logical future extension of the G10 analysis.



Graduate Student Support from Federal Granting Councils

Figures 18 through 20

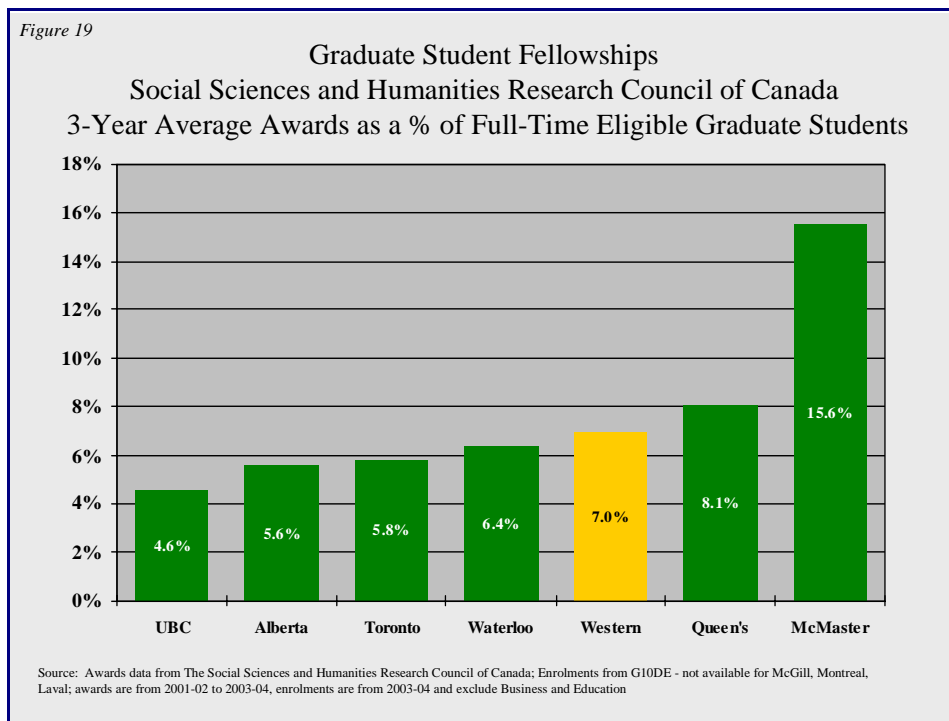
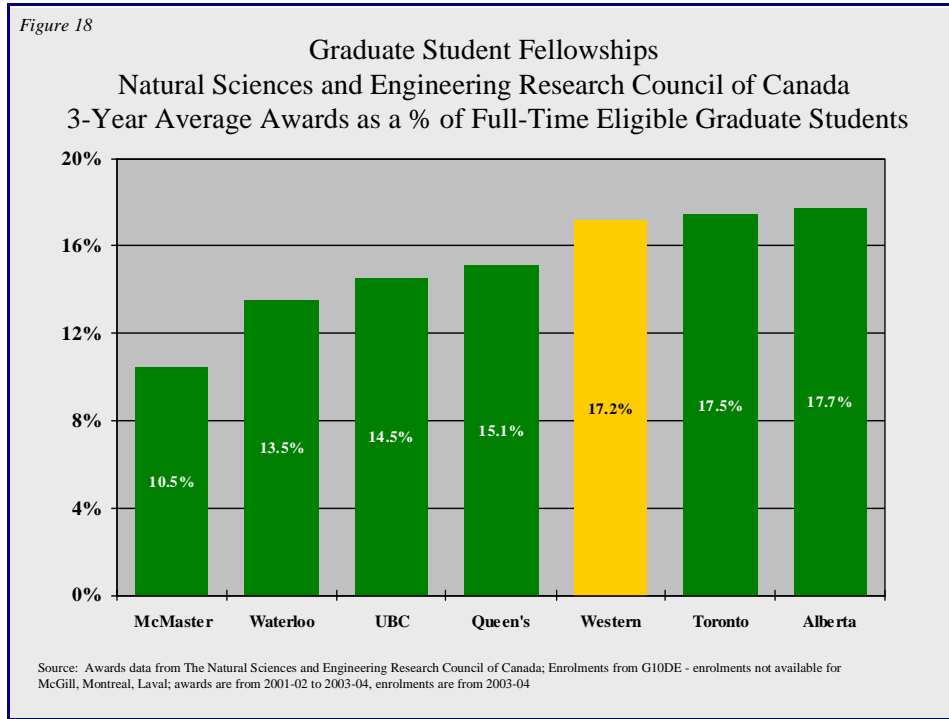
Data Source: Awards data from the three federal granting councils for the years 2001-02 through 2003-04, and graduate enrolment data from the G10 data exchange for the academic year 2003-04.

Calculation of Indicator: The average number of fellowships from the three federal granting councils are expressed as a percentage of the total graduate student population (masters and doctoral) at each of the G10 institutions. The graduate enrolments for each institution have been subdivided into the three granting council categories for the analysis: engineering and physical sciences (NSERC); humanities and social sciences (SSHRC); and health sciences (CIHR).

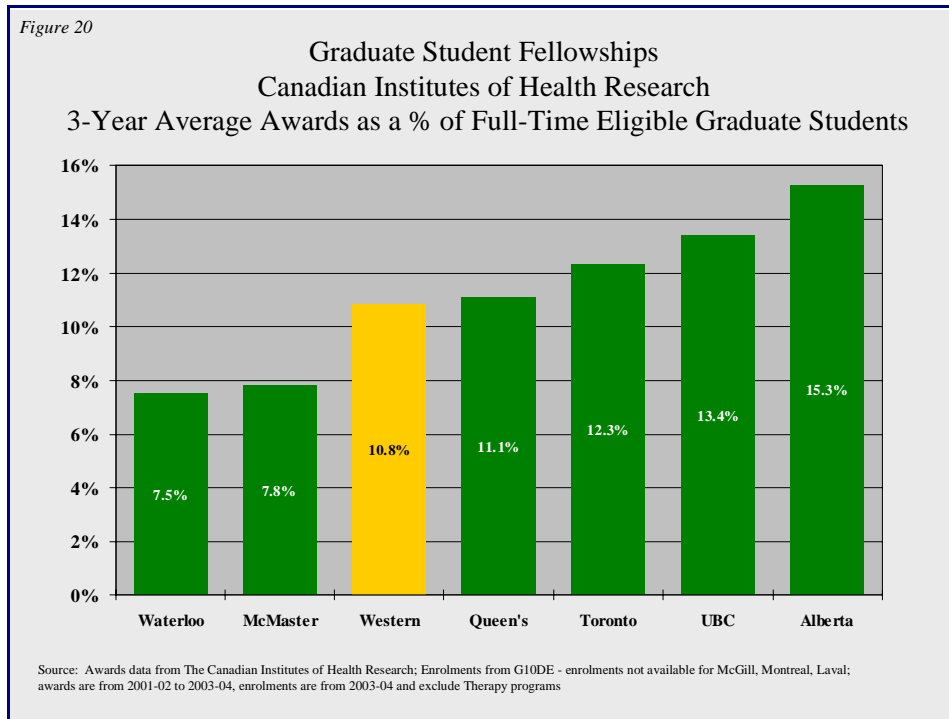
Relation to Strategic Plan: *Making Choices* refers to Western as a research-intensive university with a strong record of scholarship apparent in peer-reviewed publications, external awards to faculty members and students, substantial successes in recent external funding competitions, and engagement in international conferences.

Commentary: The data suggest that Western compares very favourably with the other G10 institutions in competition for graduate student awards from the three federal granting councils.

This is an important indicator to monitor as Western realizes its aspirations for growth in doctoral stream programs.



[this page intentionally left blank]



Gender Balance of New Tenure-Track Faculty Appointments

Figure 21

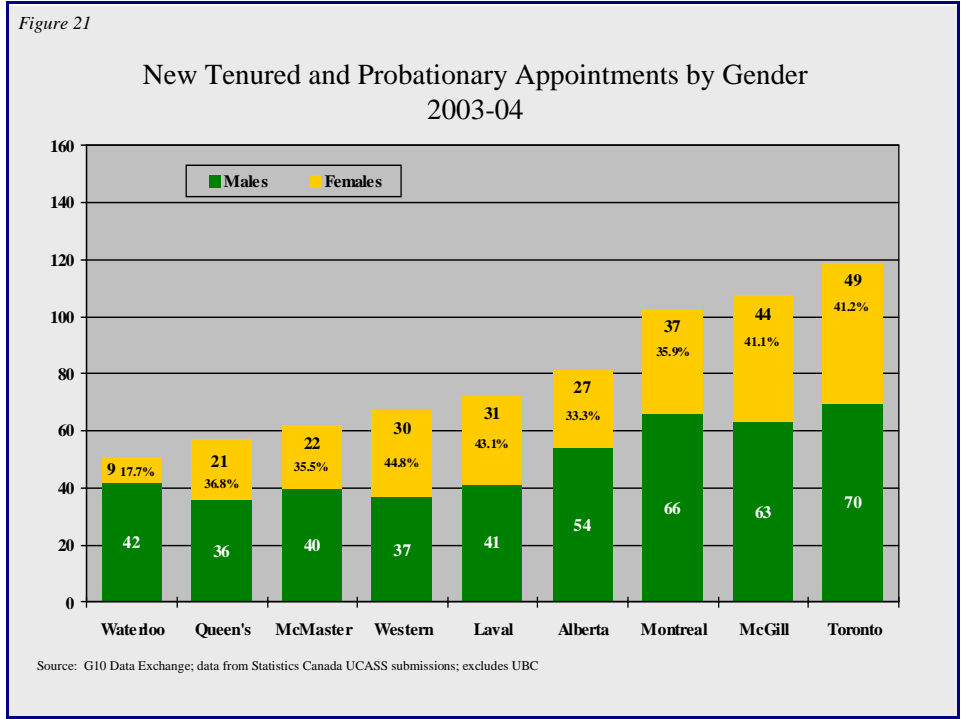
Data Source: G10 Data Exchange

Calculation of Indicator: All new tenure-track faculty appointments for 2003-04 are shown by gender and by institution. Comparable data are not available for UBC.

Relation to Strategic Plan: Commitment 2.4 of *Making Choices*:

“Continue our efforts to hire and retain more female faculty and to promote more female faculty members to positions of Department, School, Faculty, and University leadership”.

Commentary: For the 2003-04 academic year, the G10 institutions (excluding UBC) appointed 719 new tenure-track faculty, of whom 38 percent were women. For Western, approximately 45 percent of all new hires were women, the highest percentage among the G10 universities.



Student-Faculty and Student-Staff Ratios

Figures 22 and 23

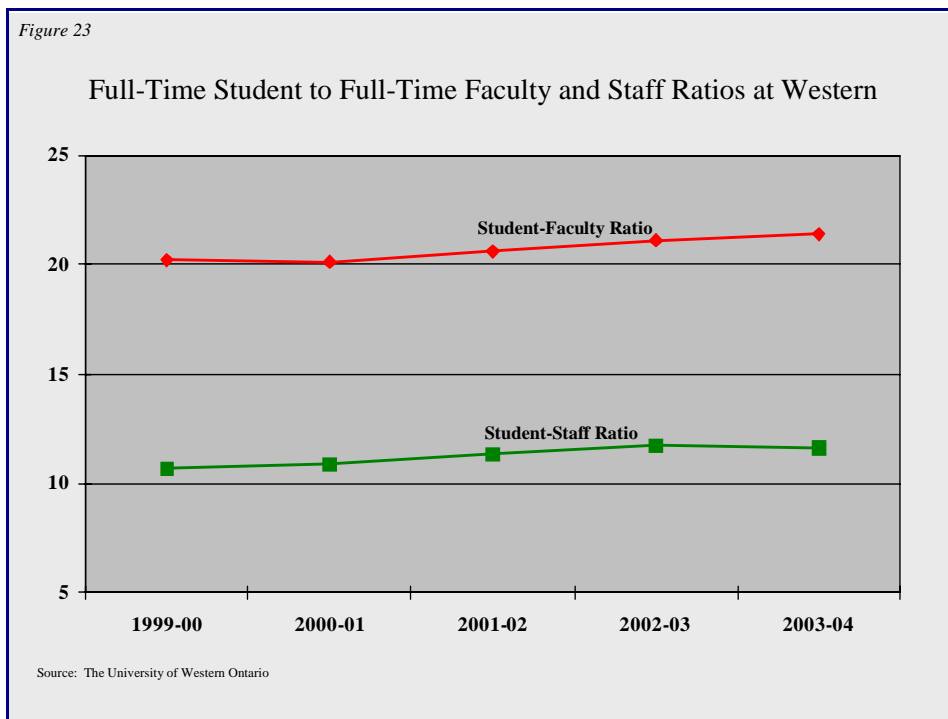
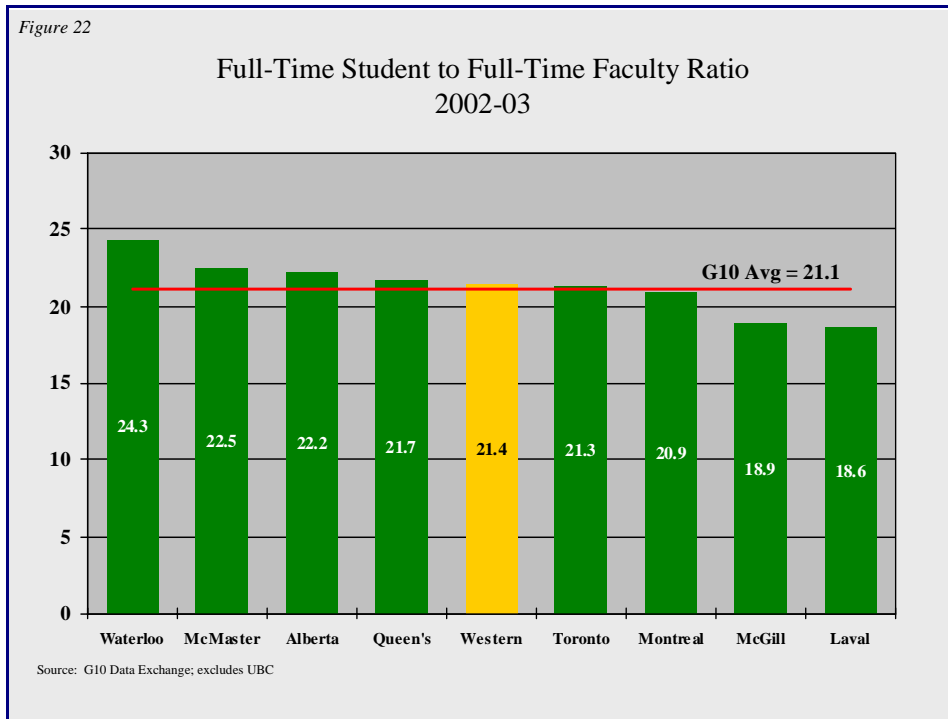
Data Source: G10 Data Exchange and Western's Student and Human Resources databases

Calculation of Indicator: Two indicators are presented: the full-time student to full-time faculty ratio for the G10 universities for 2002-03; and a summary of the full-time student to full-time faculty and full-time student to full-time staff ratios at Western from 1999-2000 through 2003-04.

Relation to Strategic Plan: Commitments 2.12 and 3.9 of *Making Choices* call for a significant increase in faculty and staff complement.

Commentary: The comparative analysis indicates that Western experiences a higher student-faculty ratio than the G10 average, and this is true for all of the Ontario members of the G10. It is a direct result of the resource shortfall experienced by Ontario universities compared to the national average.

The five-year trend for Western indicates a deterioration in both the student-faculty and student-staff ratio. Recent large-scale increases in undergraduate enrolment have not been accompanied by the necessary resources to increase faculty and staff complement.



Research Funding: SSHRC Awards per Eligible Faculty Member

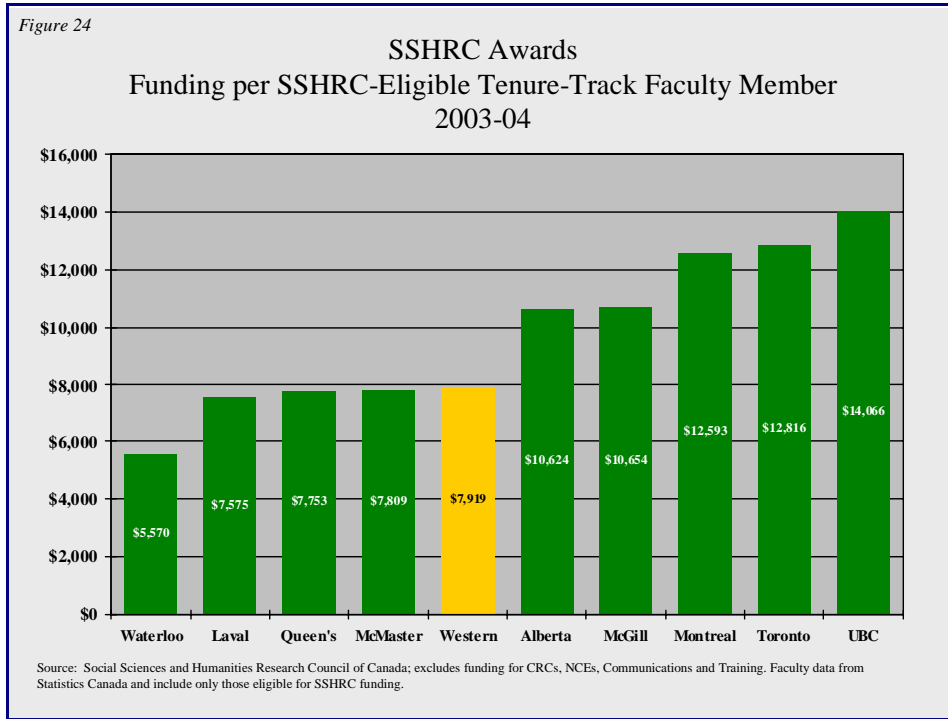
Figure 24

Data Source: Social Sciences and Humanities Research Council (SSHRC) for grants and G10 data exchange for faculty counts.

Calculation of Indicator: The total value of peer-adjudicated research grants awarded by the SSHRC in 2003-04 divided by the number of tenure-track faculty members at each institution in SSHRC disciplines.

Relation to Strategic Plan: *Making Choices* refers to Western as a research-intensive university with a strong record of scholarship apparent in peer-reviewed publications, external awards to faculty members and students, substantial successes in recent external funding competitions, and engagement in international conferences.

Commentary: On a per-faculty-member basis, Western's success in competition for SSHRC grants is in the mid-range of the G10 universities, clustered with Laval, Queen's and McMaster, but significantly lower than Montreal, Toronto, and UBC.



Research Funding: NSERC Awards per Eligible Faculty Member

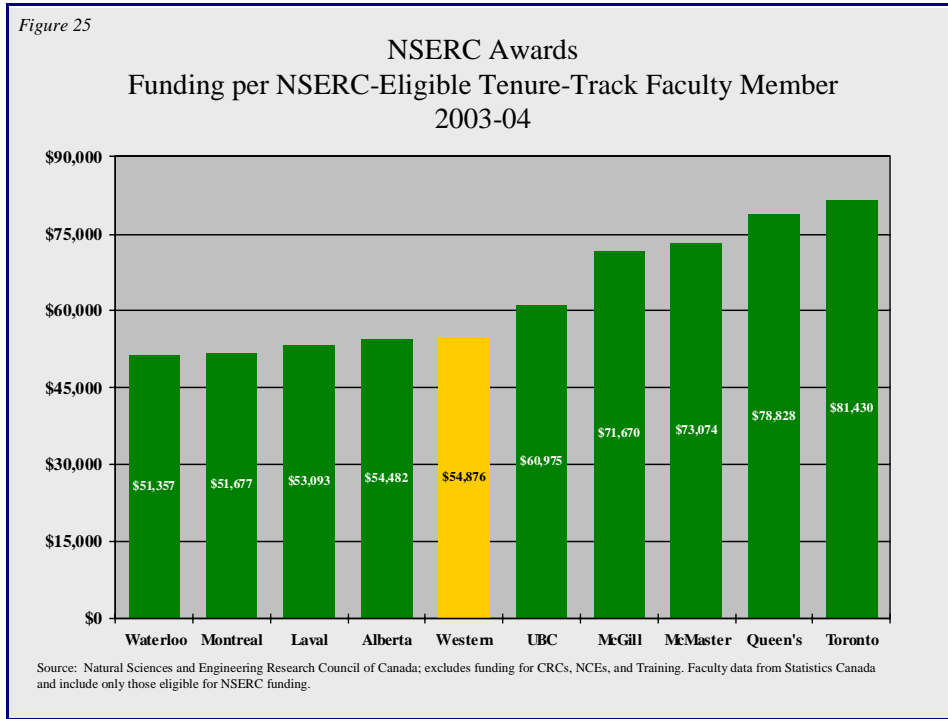
Figure 25

Data Source: Natural Science and Engineering Research Council (NSERC) for grants and G10 data exchange for faculty counts.

Calculation of Indicator: The total value of peer-adjudicated research grants awarded by the NSERC in 2003-04 divided by the number of tenure-track faculty members at each institution in NSERC disciplines.

Relation to Strategic Plan: *Making Choices* refers to Western as a research-intensive university with a strong record of scholarship apparent in peer-reviewed publications, external awards to faculty members and students, substantial successes in recent external funding competitions, and engagement in international conferences.

Commentary: On a per-faculty-member basis, Western's success in competition for NSERC grants is in the mid-range of the G10 universities, clustered with five other universities, but significantly lower than McGill, Queen's, McMaster, and Toronto.



Research Funding: CIHR Awards by Institution

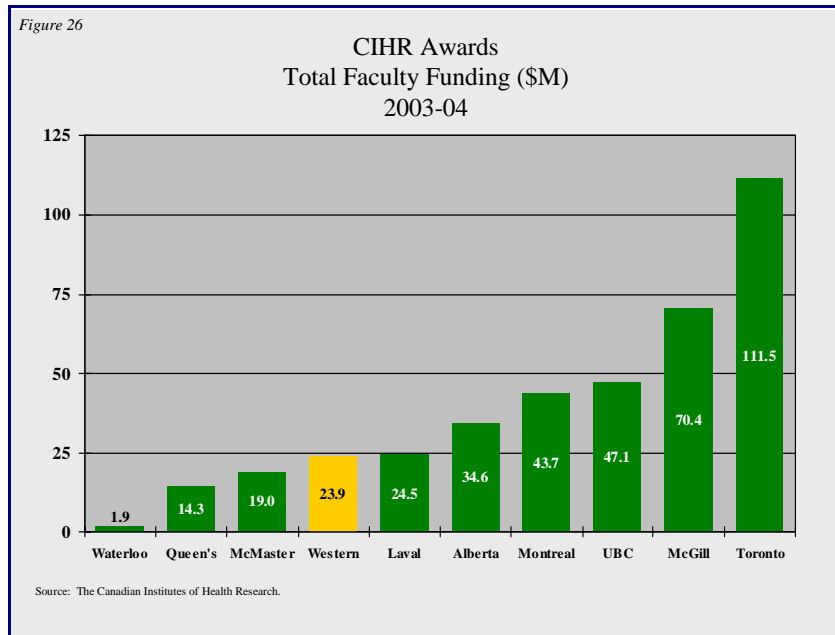
Figure 26

Data Source: Canadian Institutes for Health Research (CIHR)

Calculation of Indicator: The total value of peer-adjudicated research grants awarded by the CIHR in 2003-04, by institution.

Relation to Strategic Plan: *Making Choices* refers to Western as a research-intensive university with a strong record of scholarship apparent in peer-reviewed publications, external awards to faculty members and students, substantial successes in recent external funding competitions, and engagement in international conferences.

Commentary: This particular indicator, unlike the comparable indicators for SSHRC and NSERC, presents the dollar value of CIHR awards by institution in order to give an overall sense of scale of the health research enterprise at each of the G10 institutions. It is not possible to compute the grants on a per-faculty-member basis due to different practices from one institution to the next in counting clinical faculty members.



Bibliometric Measures: Publications per Faculty Member

Figure 27

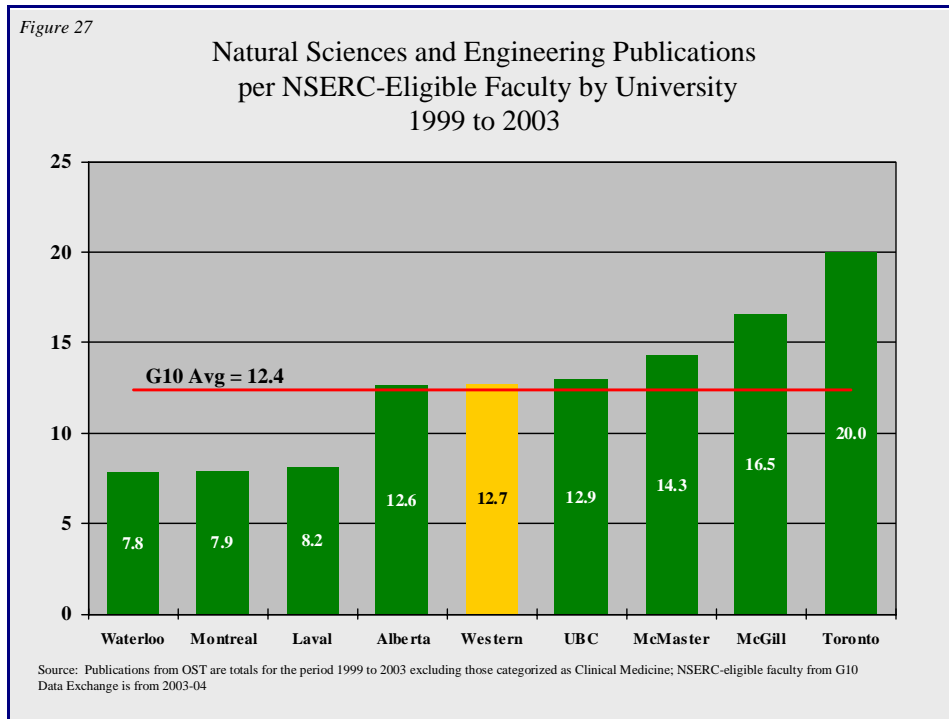
Data Source: Observatoire des Sciences et Technologie (OST)

Calculation of Indicator: Western is a subscriber to the OST, a research affiliate of the Université de Québec à Montréal, whose mandate is to analyse data concerning the performance of Canada's institutions in various research measures. The OST collects data on the publications of Canadian faculty members in refereed journals via the International Science Indicators (ISI). The number of publications by faculty members at the G10 institutions in NSERC disciplines are expressed on a per-faculty-member basis.

Relation to Strategic Plan: *Making Choices* refers to Western as a research-intensive university with a strong record of scholarship apparent in peer-reviewed publications, external awards to faculty members and students, substantial successes in recent external funding competitions, and engagement in international conferences.

Commentary: Western's faculty members in the NSERC disciplines publish in refereed journals at the average of the G10 group, about the same as the University of Alberta and UBC. Bibliometric output is commonly used as a proxy for research productivity.

Comparable analyses for the SSHRC and CIHR disciplines are not presented here. While the analysis is reliable for the NSERC disciplines, in the case of SSHRC the ISI does not capture the full spectrum of published faculty output. With respect to CIHR disciplines, the G10 has been unsuccessful in attempts to accurately and consistently report the clinical research population to which the clinical discipline publications could be normalized.



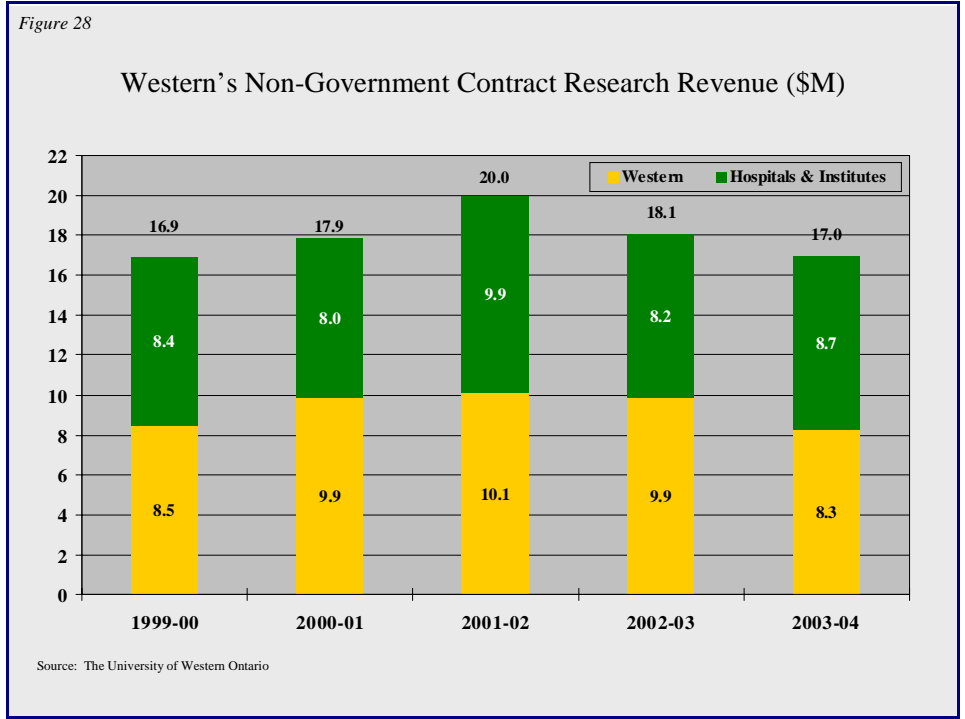
Contract Research Revenue

Figure 28

Data Source: The University of Western Ontario

Calculation of Indicator: This indicator is a five-year summary of Western's revenue from research contracts, excluding government research contracts. Research contracts administered through the hospitals and affiliated research institutes are included, but displayed separately.

Commentary: The volume of contract research is a limited measure of the university's research collaboration with industry. Over the past five years, the volume of contract research at Western has been relatively stable in the range of \$17 to \$20 million per year.



Total Endowment Value

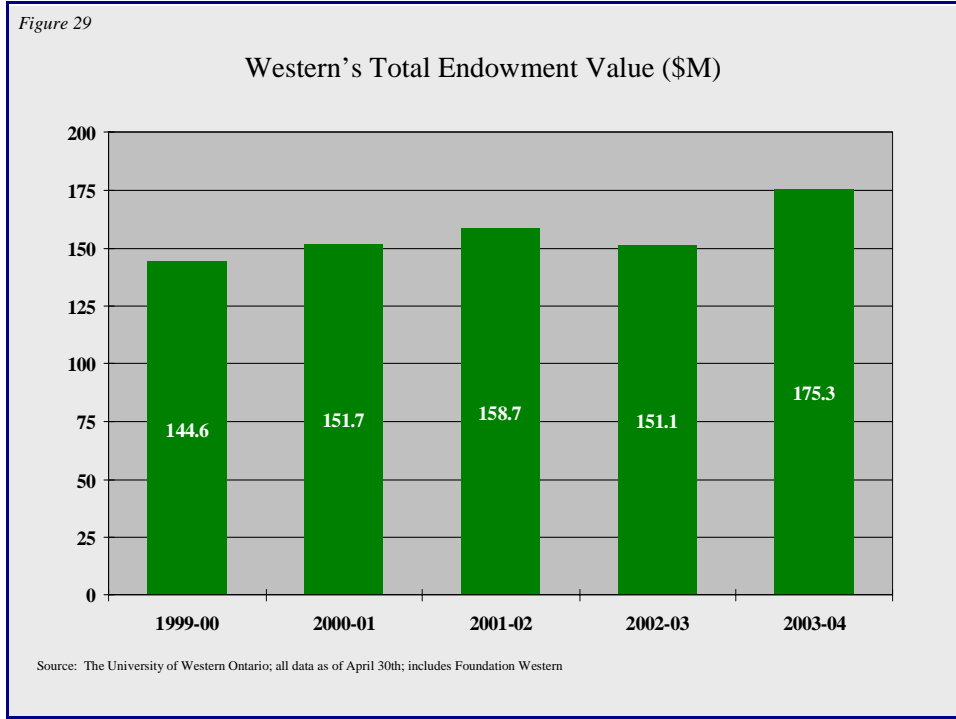
Figure 29

Data Source: The University of Western Ontario

Calculation of Indicator: This indicator is a five-year summary of the value of Western's endowment at the end of the fiscal year.

Relation to Strategic Plan: Commitment 14.4 of *Making Choices* establishes an objective "...to raise endowed funds, in partnership with Foundation Western, to provide for long-term financial security and independence and to secure funds for those disciplines and units that may not be able to attract targeted government funding".

Commentary: Western's endowment fund has been relatively stable until 2003-04, when the first large gifts were received in response to the Ontario Student Opportunity Trust Fund, a provincial government matching program to encourage endowed gifts for student aid. Initial success in attracting future pledges under this program will lead to an enhanced endowment fund in the coming years.



Total Gifts to Western

Figure 30

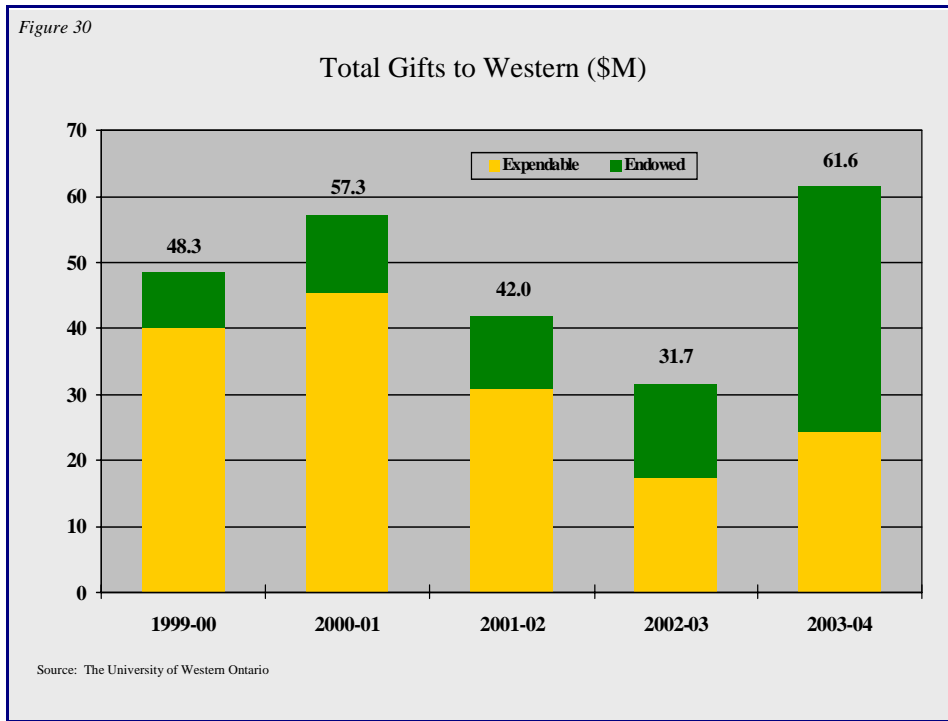
Data Source: The University of Western Ontario

Calculation of Indicator: This indicator is a five-year history of gifts to Western, segregated between endowed and expendable purposes.

Relation to Strategic Plan: Commitment 9.7 of *Making Choices* establishes objectives for fundraising:

“Carry out successfully Campaign Western, by reaching the target of \$270 million before April 30, 2004, and maintaining the flow of new gifts and pledges at a level above \$40 million per year for the five years after the conclusion of the Campaign”.

Commentary: The target for Campaign Western has been met and exceeded, and the annual target of \$40 million seems realistic for the foreseeable future.



Comparative Endowment Levels

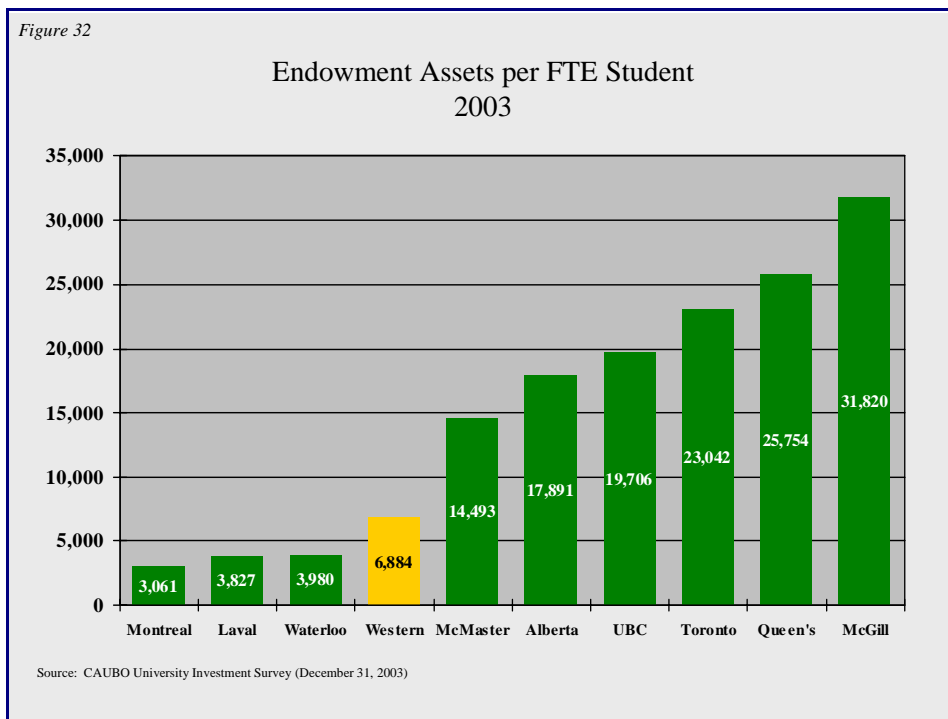
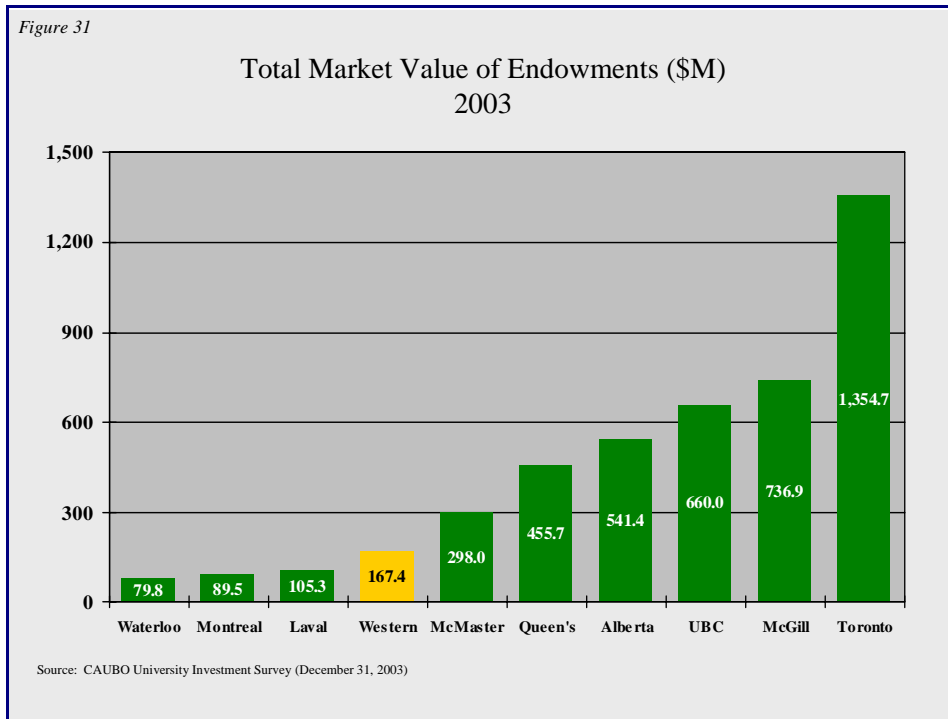
Figures 31 and 32

Data Source: Canadian Association of University Business Officers (CAUBO)

Calculation of Indicator: Data on the total market value of endowments as at December 31, 2003 for the G10 universities are displayed both in terms of the absolute value, and as a value per FTE student.

Relation to Strategic Plan: Commitment 14.4 of *Making Choices* establishes an objective “to raise endowed funds, in partnership with Foundation Western, to provide for long-term financial security and independence and to secure funds for those disciplines and units that may not be able to attract targeted government funding”.

Commentary: The analysis indicates that Western’s endowment fund, as compared to other G10 institutions, is quite modest both in absolute terms and on a per-FTE-student basis.



Physical Infrastructure: Actual vs. Required Space

Figure 33

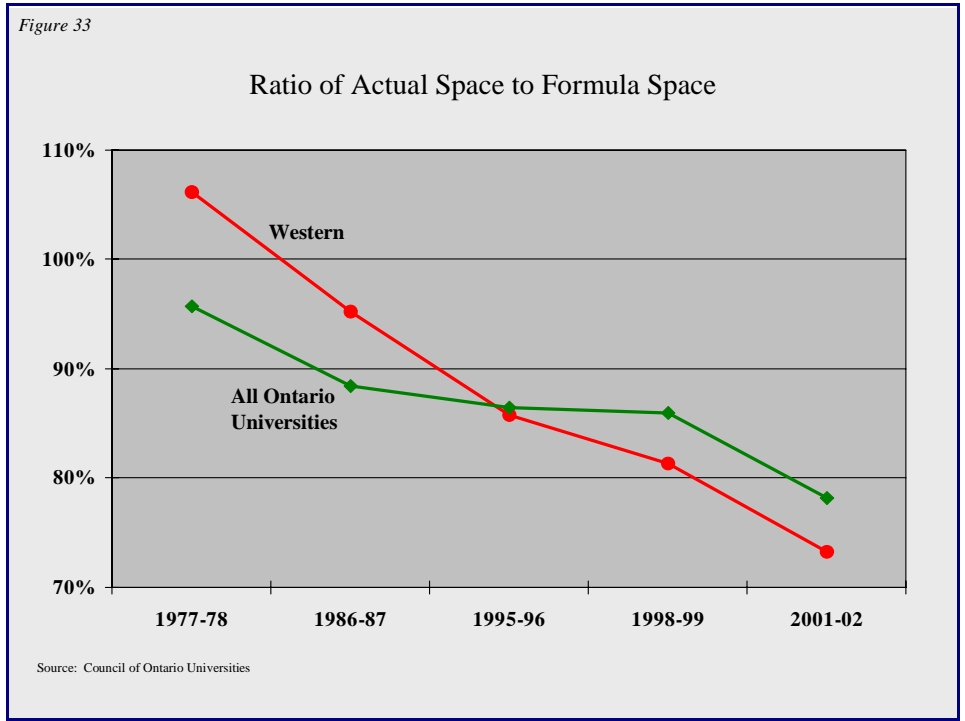
Data Source: Council of Ontario Universities (COU)

Calculation of Indicator: On a triennial cycle, each Ontario university reports to COU, quantifying space inventory in a number of categories such as research space, classrooms, faculty offices, student services. The COU then calculates the amount of space required by each university through the use of space standards formulae. The analysis then computes each university's actual space inventory as a percentage of the space requirement generated by the formula.

Relation to Strategic Plan: Commitment 9.4 of *Making Choices* refers to strategies for more appropriate, innovative and intensive use of existing space.

Commentary: The analysis suggests that Western has fallen considerably below the provincial space standard, and significantly below Ontario's other universities. This is due to two factors. Since 1995-96, Western's enrolment growth has outpaced that at the other universities. Also, Western, in proportional terms, took on less debt than other institutions to construct facilities that might be more appropriately funded through provincial capital grants.

This indicator will in all likelihood show some modest improvement for all Ontario universities, because the next triennial survey will reflect the capital expansion funded through the SuperBuild program.



Maintenance, Modernization, and Infrastructure Expenditure

Figure 34

Data Source: The University of Western Ontario

Calculation of Indicator: Annual expenditures for facilities maintenance, modernization, and infrastructure are expressed as a percentage of the estimated building replacement value, excluding the value of student residences.

Relation to Strategic Plan: Commitment 9.5 of *Making Choices* establishes a target for the appropriate level of annual expenditure:

“Continue to increase the transfer from the operating budget to the capital budget for deferred maintenance by \$750,000 a year, until the annual transfer reaches \$7.5 million”.

Commentary: The absolute target of \$7.5 million has been met and exceeded. Annual expenditures are now at just under three percent of the replacement value of campus buildings, which compares favourably to industrial standards.

