



Western
UNIVERSITY • CANADA

**Student Fee-Funded Units, Ancillaries,
Academic Support Units, and Associated
Companies 2016-17 Budgets**

March 21, 2016

**Student Fee-Funded Units, Ancillary Units, Academic Support Units, and
Associated Companies**

2016-17 Budget and Ancillary Fees

Summary of Unit Budgets

Table 1 includes a summary of the 2015-16 projected results and 2016-17 budgets for Student Fee-funded Units, Ancillary Units, Academic Support Units, and Associated Companies. The following commentary provides an overview of the funding source for each category of units and brief notes pertaining to specific 2015-16 financial projections, 2016-17 budgets, and forecasted unit reserve positions that may require further explanation.

A. Student Fee-Funded Units

Student Fee-Funded Units are supported, in whole or in part, by non-tuition related compulsory ancillary fees. The recommended ancillary fees for 2016-17 are discussed at the end of this report.

Sports and Recreation Services (SRS): Thompson Recreation & Athletic Centre (line 4) – The budgeted deficit in the unit capital reserve at the end of 2016-17 (\$161,000) includes the remaining unfunded balance resulting from a major capital project completed in 2014-15 – the replacement of the structural roof support cables and weather membrane covering. The unit is on track to fully retire this deficit by the end of 2017-18.

Student Success Centre (line 10) – The 2015-16 projected deficit (\$89,500) is the result of one-time expenses for a student intern position and the addition of a part-time career program coordinator on a trial basis. The deficit budgeted for 2016-17 is primarily due to one-time startup costs associated with a new fee funded Global Experiential Learning coordinator position and a continuation of the intern position for one more year. The reserve level for this unit is above the target level and is sufficient to cover the shortfalls.

Student Health Services (line 11) – The deficit budgeted for 2016-17 (\$60,200) is due to the anticipated recruitment of a new Medical Director. The reserve level for this unit is well above the target level and is sufficient to cover the shortfall.

B. Ancillary Units

Revenues that support the *Ancillary Unit* budgets are primarily derived from the sale of goods and services to the general University community.

Housing Services (line 17) – The surplus projected for 2015-16 (\$3,764,500) is due to a lower than anticipated vacancy rate, a higher contribution from food sales, lower caretaking costs,

lower utility costs, and the deferral of a portion of the Essex Hall HVAC major maintenance project until next year. The deficit budgeted for 2016-17 is primarily due to a planned \$4.3 million increase in major maintenance expenses to cover the Essex Hall HVAC upgrades deferred from 2015-16 and the modernization of the Saugeen Maitland dining hall. The reserve for this unit is above the target level and is sufficient to cover the shortfall.

Parking Services (line 18) – The deficit budgeted for 2016-17 (\$430,600) is primarily due to capital amortization and implementation costs associated with the new gate infrastructure project. The new gate system will improve service levels and eventually lead to operational cost reductions that will help offset the initial capital investment. The reserve level for this unit is above the target level and is sufficient to cover the shortfall.

C. Academic Support Units

The budgets for the *Academic Support Units* are funded from various sources, including recoveries from internal research projects, revenues from external industrial contracts, and course fees. In addition, Animal Care & Veterinary Services receives support from the University operating budget to help offset the costs of unrecoverable regulatory requirements and training for animal users.

Animal Care & Veterinary Services (line 22) – The deficit budgeted for 2016-17 (\$105,000) is primarily due to the purchase of replacement caging, animal census system upgrades, and conservative estimates from Researchers for animal acquisitions and per diem care requirements.

Boundary Layer Wind Tunnel (line 23) – The April 30th, 2017 budgeted operating reserve balance for this unit is net of a \$113,500 transfer to the Faculty of Engineering. On a slip year basis, the balance of the operating reserve in excess of \$500,000 is transferred to the Faculty to support wind engineering initiatives. The slip year transfer completed in 2015-16 was \$97,100.

Fraunhofer Project Centre (line 25) – Now that all the technologies are fully operational at the Fraunhofer Project Centre, the focus has shifted to marketing. Aggressive marketing efforts in 2016-17 are expected to more than double industry contract revenue, resulting in a much improved bottom line.

Continuing Studies at Western (line 27) – Revenue growth from the newly introduced open-learning and corporate training programs has been slower than anticipated, resulting in deficits forecasted for 2015-16 and 2016-17. The reserve for this unit is above the target level and is sufficient to cover the losses from these new programs throughout the development stage.

D. Associated Companies

The following Associated Companies are consolidated into the Combined Western University Financial Statements:

Western Research Parks (line 30) – The deficit projected for 2015-16 (\$400,700) is primarily due to curtailed food and hotel operations in the last quarter, to facilitate a major overhaul of the

Café kitchen and a slower than anticipated ramp up of tenancy for the Catapult Centre for Technology and Commercialization located at the Advanced Manufacturing Park. The combined operations of the Research Park are expected to return to a profitable position in 2016-17 following the completion of kitchen renovations at Windermere Manor and further tenancy of the Catapult Centre.

Richard Ivey School of Business Foundation (line 31) – The surplus for the Richard Ivey School of Business Foundation in 2016-17 is forecasted to be approximately \$1.2 million lower than the prior year due to an increase in the contribution to support academic programs at the Richard Ivey School of Business (UWO).

Richard Ivey School of Business – Asia (line 32) – As a result of difficulties cracking the competitive China market, the Asia EMBA will be discontinued following the graduation of the current cohort. Short term losses for the Asia operation are expected to continue into 2016-17 as new collaborative education opportunities are explored to replace the EMBA program.

Recommended 2016-17 Ancillary Fees

A listing of Western's proposed 2016-17 Student Organization and Ancillary Fees are presented in Tables 2 and 3. Student involvement in establishing fee levels for ancillaries is facilitated through the Student Services Committee (SSC) – a student-run group comprised of voting representatives from the University Students' Council (USC), the Society of Graduate Students (SOGS), and the Master of Business Administration Association (MBAA).

In 2004, the SSC implemented a fee adjustment mechanism designed to avoid the erosion of service levels caused by the negative financial impact of progressive inflation. The mechanism provides for an overall adjustment to ancillary fees equal to the greater of 2% or the rate of Canadian CPI for the preceding calendar year. Each year the 'adjustment pool' is allocated to units based on the needs and priorities identified in the individual planning submissions.

The total adjustment pool available for allocation in fiscal 2016-17 is the 2% minimum as specified by the rate adjustment mechanism. The SSC has approved the allocation of the 2% adjustment pool uniformly to all ancillary units.

The SSC has also approved the following unit specific increases to fund new initiatives and expanded programming – which are in addition to the base 2% inflation adjustment referenced above:

Indigenous Services – a \$0.74 fee increase to develop an Elders-in-Residence program which will make available culturally based guidance and counseling to indigenous students.

Student Development Centre – a \$2.56 fee increase to fund a full-time psychologist who will continue the newly introduced and highly successful Single Session Therapy program on a permanent basis.

Student Success Centre – a \$2.66 fee increase to create a Global Experiential Learning Coordinator position which will develop expertise and new opportunities in the area of international community engagement learning.

Student Health Services – a \$2.36 fee increase to continue funding a social worker on a permanent basis. The social worker provides increased counseling hours for crisis intake.

Table 1
Western University
Student Fee-Funded Units, Ancillary Units, Academic Support Units, and Associated Companies
2016-17 Budget (\$ 000)

		2015-16 Projected			2016-17 Budget			% Change		Budgeted Reserves	
		Revenues	Expenses	Rev-Exp	Revenues	Expenses	Rev-Exp	Revenues	Expenses	Operating	Capital
		at April 30, 2017									
1	A - Student Fee-Funded Units										
2	SRS: Campus Recreation	5,661.4	5,668.9	-7.5	5,823.8	5,834.6	-10.8	2.87%	2.92%	743.1	479.7
3	SRS: Intercollegiate Athletics	6,295.0	6,311.0	-16.0	6,200.6	6,207.8	-7.2	-1.50%	-1.64%	92.8	
4	SRS: Thompson Recreation & Athletic Centre	1,208.1	1,185.7	22.4	1,211.0	1,211.7	-0.7	0.24%	2.19%	309.4	-161.0
5	Financial Aid Office	1,072.6	1,072.8	-0.2	1,109.7	1,109.7	0.0	3.46%	3.44%	60.1	
6	International Student Services	437.4	437.3	0.1	452.3	452.4	-0.1	3.41%	3.45%	-0.2	
7	Indigenous Services	726.6	715.6	11.0	677.2	672.2	5.0	-6.80%	-6.06%	68.8	
8	Services for Students with Disabilities	442.1	442.1	0.0	457.4	457.4	0.0	3.46%	3.46%	17.4	74.2
9	Student Development Centre	2,323.9	2,315.9	8.0	2,482.9	2,482.9	0.0	6.84%	7.21%	293.5	
10	Student Success Centre	1,468.2	1,557.7	-89.5	1,603.3	1,649.7	-46.4	9.20%	5.91%	135.7	
11	Student Health Services	4,412.2	4,340.3	71.9	4,473.2	4,533.4	-60.2	1.38%	4.45%	1,123.9	
12	Off-Campus Housing & Housing Mediation Svcs	437.9	415.7	22.2	441.1	445.4	-4.3	0.73%	7.14%	119.8	
13	Western Foot Patrol	182.5	182.2	0.3	190.2	189.9	0.3	4.22%	4.23%	28.6	36.9
14	Sub-Total	24,667.9	24,645.2	22.7	25,122.7	25,247.1	-124.4	1.84%	2.44%	2,992.9	429.8
15	B - Ancillary Units										
16	Family Practice Clinic and Workplace Health Svcs	549.8	517.6	32.2	539.5	513.8	25.7	-1.87%	-0.73%	157.7	
17	Housing Services	70,004.5	66,240.0	3,764.5	72,467.3	73,039.5	-572.2	3.52%	10.26%	45,217.0	
18	Parking Services	4,879.1	4,896.5	-17.4	5,138.7	5,569.3	-430.6	5.32%	13.74%	4,444.4	
19	Retail Services	33,254.7	33,193.4	61.3	33,404.5	33,402.4	2.1	0.45%	0.63%	1,420.5	
20	Sub-Total	108,688.1	104,847.5	3,840.6	111,550.0	112,525.0	-975.0	2.63%	7.32%	51,239.6	0.0
21	C - Academic Support Units										
22	Animal Care & Veterinary Services	4,060.9	4,054.5	6.4	3,971.9	4,076.9	-105.0	-2.19%	0.55%	-61.4	
23	Boundary Layer Wind Tunnel	2,328.3	2,214.8	113.5	2,398.2	2,229.5	168.7	3.00%	0.66%	668.7	300.0
24	University Machine Services	1,752.4	1,644.2	108.2	1,827.4	1,734.5	92.9	4.28%	5.49%	463.5	
25	Fraunhofer Project Centre	837.6	972.4	-134.8	1,739.0	1,449.5	289.5	107.62%	49.06%	-678.1	91.4
26	Surface Science Western	1,817.4	1,766.1	51.3	1,846.4	1,802.9	43.5	1.60%	2.08%	255.4	424.6
27	Continuing Studies at Western	2,487.2	2,589.4	-102.2	2,728.4	2,805.6	-77.2	9.70%	8.35%	258.2	
28	Sub-Total	13,283.8	13,241.4	42.4	14,511.3	14,098.9	412.4	9.24%	6.48%	906.3	816.0
29	D - Associated Companies										
30	Western Research Parks (incl. Windermere Manor & AMP)	7,191.4	7,592.1	-400.7	7,910.2	7,861.9	48.3	10.00%	3.55%	-13,884.4	
31	Richard Ivey School of Business Foundation	25,009.0	22,463.0	2,546.0	26,435.0	25,134.0	1,301.0	5.70%	11.89%	10,999.0	
32	Richard Ivey School of Business - Asia	4,376.0	5,068.0	-692.0	3,930.0	4,646.0	-716.0	-10.19%	-8.33%	-7,383.0	
33	Sub-Total	36,576.4	35,123.1	1,453.3	38,275.2	37,641.9	633.3	4.64%	7.17%	-10,268.4	0.0
34	Grand Total	183,216.2	177,857.2	5,359.0	189,459.2	189,512.9	-53.7	3.41%	6.55%	44,870.4	1,245.8

Table 2
Western University
Recommended 2016-17 Ancillary Fees for Full-Time Students

	Full-Time Undergraduate				Full-Time Graduate - Three Terms				Full-Time MBA			
	Actual 2015-16	<a> Proposed 2016-17	\$ Change	% Change	Actual 2015-16	<a> Proposed 2016-17	\$ Change	% Change	Actual 2015-16	<a> Proposed 2016-17	\$ Change	% Change
1 Student Organization Fees												
2 Organization Fee 	127.60	135.60 	8.00	6.3%	90.84	96.93	6.09	6.7%	600.00	550.00 <c>	-50.00	-8.3%
3 Health Plan (and Dental Plan for Graduates only)	122.01	127.39	5.38	4.4%	535.98	530.79	-5.19	-1.0%	122.01	145.02 <d>	23.01	18.9%
4 USC Dental Plan	123.81	130.37	6.56	5.3%								
5 LTC 12-Month Bus Pass	217.88	224.88	7.00	3.2%	217.11	224.10	6.99	3.2%				
6 Ombudsperson	3.23	3.31	0.08	2.5%	3.23	3.31	0.08	2.5%				
7 Community Legal Services	5.29	5.42	0.13	2.5%	5.29	5.42	0.13	2.5%				
8 Late Night Busing Service	12.93	12.93	0.00	0.0%								
9 World University Services of Canada Fee	0.84	0.83	-0.01	-1.2%								
10 Orientation Week Fee <first year students only>	90.00	90.00	0.00	0.0%								
11 Marching Band Fee	0.50	0.50	0.00	0.0%								
12 USC Capital/Facility Fee	31.83	32.34	0.51	1.6%								
13 USC Operating Fee	63.50	66.68	3.18	5.0%	30.60	31.33	0.73	2.4%	95.25	100.02	4.77	5.0%
14 Sub-Total	799.42	830.25	30.83	3.9%	883.05	891.88	8.83	1.0%	817.26	795.04	-22.22	-2.7%
15 Building and Student-Aid Endowment Fees												
16 Student Recreation Centre Fund	73.80	76.01	2.21	3.0%	73.80	76.01	2.21	3.0%	73.80	76.01	2.21	3.0%
17 Student Aid Endowment Fund	50.00	50.00	0.00	0.0%	50.00	50.00	0.00	0.0%	50.00	50.00	0.00	0.0%
18 Sub-Total	123.80	126.01	2.21	1.8%	123.80	126.01	2.21	1.8%	123.80	126.01	2.21	1.8%
19 Western Student Ancillary Fees												
20 SRS: Campus Recreation	97.31	99.26	1.95	2.0%	123.90	126.38	2.48	2.0%	123.90	126.38	2.48	2.0%
21 SRS: Intercollegiate Athletics	85.89	87.61	1.72	2.0%	85.89	87.61	1.72	2.0%	85.89	87.61	1.72	2.0%
22 SRS: Thompson Recreation & Athletic Centre	18.82	19.20	0.38	2.0%	18.82	19.20	0.38	2.0%	18.82	19.20	0.38	2.0%
23 Financial Aid Office	37.15	37.89	0.74	2.0%	37.15	37.89	0.74	2.0%	37.15	37.89	0.74	2.0%
24 International Student Services	13.62	13.89	0.27	2.0%	13.62	13.89	0.27	2.0%	13.62	13.89	0.27	2.0%
25 Indigenous Services	7.96	8.86	0.90	11.3%	7.96	8.86	0.90	11.3%	7.96	8.86	0.90	11.3%
26 Services for Students with Disabilities	12.86	13.12	0.26	2.0%	12.86	13.12	0.26	2.0%	12.86	13.12	0.26	2.0%
27 Student Development Centre	71.94	75.94	4.00	5.6%	71.94	75.94	4.00	5.6%	71.94	75.94	4.00	5.6%
28 Student Success Centre	44.27	47.82	3.55	8.0%	27.76	30.98	3.22	11.6%	27.76	30.98	3.22	11.6%
29 Student Health Services	46.48	49.77	3.29	7.1%	46.48	49.77	3.29	7.1%	46.48	49.77	3.29	7.1%
30 Off-Campus Housing & Housing Mediation Svcs	8.65	8.82	0.17	2.0%	8.65	8.82	0.17	2.0%	8.65	8.82	0.17	2.0%
31 Western Foot Patrol	4.57	4.66	0.09	2.0%	4.57	4.66	0.09	2.0%	4.57	4.66	0.09	2.0%
32 Sub-Total	449.52	466.84	17.32	3.9%	459.60	477.12	17.52	3.8%	459.60	477.12	17.52	3.8%
33 Grand Total	1,372.74	1,423.10	50.36	3.7%	1,466.45	1,495.01	28.56	1.9%	1,400.66	1,398.17	-2.49	-0.2%

<a> The proposed rates are effective September 1, 2016, except for the Student recreation Centre fee which increases on May 1, 2015 and the MBA fee which reduces to \$550 on March 1, 2017.

 In addition to the basic USC organization fee, an additional \$400.00 fee will be collected on behalf of the HBA Association from HBA students entering the first year of the program. The \$400 fee covers both years of the HBA program.

<c> A \$450 fee (\$400 effective March 1, 2017) will be collected from Accelerated MBA students on behalf of the MBA Society in place of the full \$600 MBA fee (\$550 effective March 1, 2017).

Table 3
Western University
Recommended 2016-17 Ancillary Fees for Part-Time Students

		Part-Time Undergrad - per full course				Undergrad: Summer - per full course				Part-Time Graduate - per term			
		Actual 2015-16	Proposed 2016-17	\$ Change	% Change	Actual 2015-16	Proposed 2016-17	\$ Change	% Change	Actual 2015-16	Proposed 2016-17	\$ Change	% Change
1	Student Organization Fees												
2	Organization Fee	25.52	27.12	1.60	6.3%	12.76	13.56	0.80	6.3%	18.02	19.06	1.04	5.8%
3	Ombudsperson	0.65	0.66	0.01	1.5%	0.33	0.33	0.00	0.0%				
4	Community Legal Services	1.06	1.08	0.02	1.9%	0.53	0.54	0.01	1.9%				
5	Late Night Busing Service	2.59	2.59	0.00	0.0%								
6	Marching Band Fee	0.10	0.10	0.00	0.0%	0.05	0.05	0.00	0.0%				
7	USC Capital/Facility Fee	6.37	6.47	0.10	1.6%	3.19	3.24	0.05	1.6%				
8	USC Operating Fee	12.70	13.34	0.64	5.0%	6.35	6.67	0.32	5.0%				
9	Sub-Total	48.99	51.36	2.37	4.8%	23.21	24.39	1.18	5.1%	18.02	19.06	1.04	5.8%
10	Building and Student-Aid Endowment Fees												
11	Student Recreation Centre Fund	14.76	15.20	0.44	3.0%	7.62	7.85	0.23	3.0%	12.30	12.67	0.37	3.0%
12	Student Aid Endowment Fund	10.00	10.00	0.00	0.0%	5.00	5.00	0.00	0.0%	8.33	8.33	0.00	0.0%
13	Sub-Total	24.76	25.20	0.44	1.8%	12.62	12.85	0.23	1.8%	20.63	21.00	0.37	1.8%
14	Western Student Ancillary Fees												
15	SRS: Campus Recreation	19.46	19.85	0.39	2.0%	9.73	9.93	0.20	2.1%				
16	SRS: Intercollegiate Athletics	17.18	17.52	0.34	2.0%	8.59	8.76	0.17	2.0%				
17	SRS: Thompson Recreation & Athletic Centre	3.76	3.84	0.08	2.1%	1.88	1.92	0.04	2.1%				
18	Financial Aid Office	7.43	7.58	0.15	2.0%	3.72	3.79	0.07	1.9%	6.19	6.32	0.13	2.1%
19	International Student Services	2.72	2.78	0.06	2.2%	1.36	1.39	0.03	2.2%	2.27	2.32	0.05	2.2%
20	Indigenous Services	1.59	1.77	0.18	11.3%	0.80	0.89	0.09	11.3%	1.33	1.48	0.15	11.3%
21	Services for Students with Disabilities	2.57	2.62	0.05	1.9%	1.29	1.31	0.02	1.6%				
22	Student Development Centre	14.39	15.19	0.80	5.6%	7.19	7.59	0.40	5.6%	11.99	12.66	0.67	5.6%
23	Student Success Centre	8.85	9.56	0.71	8.0%	4.43	4.78	0.35	7.9%	4.63	5.16	0.53	11.4%
24	Student Health Services	9.30	9.95	0.65	7.0%	4.65	4.98	0.33	7.1%				
25	Off-Campus Housing & Housing Mediation Svcs	1.73	1.76	0.03	1.7%	0.87	0.88	0.01	1.1%				
26	Western Foot Patrol	0.91	0.93	0.02	2.2%	0.46	0.47	0.01	2.2%	0.76	0.78	0.02	2.6%
27	Sub-Total	89.89	93.35	3.46	3.8%	44.97	46.69	1.72	3.8%	27.17	28.72	1.55	5.7%
28	Grand Total	163.64	169.91	6.27	3.8%	80.80	83.93	3.13	3.9%	65.82	68.78	2.96	4.5%