



Western
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**Student Fee-Funded Units, Ancillaries,
Academic Support Units, and Associated
Companies 2017-18 Budgets**

March 30, 2017

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

2017-18 Budget and Ancillary Fees

Summary of Unit Budgets

Table 1 includes a summary of the 2016-17 projected results and 2017-18 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 2016-17 financial projections, 2017-18 budgets, and forecasted unit reserve positions.

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 2017-18 are discussed at the end of this report.

Sports and Recreation Services (SRS): Campus Recreation (line 2) – The 2016-17 projected deficit (\$56,900) is primarily due to higher travel costs for competitive sport clubs. The budgeted deficit (\$69,800) for 2017-18 is attributed to program cost increases and a plan to fill two positions that remained vacant throughout 2016-17. The operating reserve for this unit is above the target level and is sufficient to cover the shortfalls.

Sports and Recreation Services (SRS): Intercollegiate Athletics (line 3) – The deficit budgeted for Intercollegiate Athletics in 2017-18 is primarily due to plans to fill a position that remained vacant throughout 2016-17. The deficit will result in a cumulative shortfall in the operating reserve for this unit. The SRS budget situation will be fully reviewed this summer, when the new incoming SRS Director is in place.

Sports and Recreation Services (SRS): Thompson Recreation & Athletic Centre (line 4) – The deficit projected for 2016-17 (\$22,000) is primarily due to higher utility rates. The operating reserve is above the target level and is sufficient to cover this shortfall.

Student Success Centre (line 10) – The 2016-17 projected surplus (\$106,700) is primarily due to salary and benefit savings resulting from various full-time staff away on temporary leave arrangements. The deficit (\$118,500) budgeted for 2017-18 is attributed to one-time initiatives and the overlap of contract positions that covered temporary leave arrangements. The operating reserve level for this unit is above the target level and is more than sufficient to cover the resulting shortfall.

Student Health Services (line 11) – The deficit projected for 2016-17 (\$89,600) and the budgeted deficit for 2017-18 (\$97,200) are primarily due to contributions to the newly established Wellness Education Centre located in the University Community Centre. These contributions will help cover startup costs for this new initiative. The reserve level for the 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 2016-17 (\$2,918,300) is attributed to the deferral of certain major maintenance projects into 2017-18, a lower than expected vacancy rate, and higher than anticipated food sales. The deficit budgeted for 2017-18 (\$2,060,000) is the result of major maintenance work carried over from the previous summer and a more conservative vacancy rate. The reserve level for this unit is well above the target level and is sufficient to cover the shortfall.

Parking Services (line 18) – The deficit budgeted for 2016-17 (\$242,300) 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 deficit budgeted for 2017-18 (\$233,800) is primarily attributed capital amortization charges associated with the replacement of the unit vehicle, new pay and display machines, and resurfacing of certain lots. The reserve level for this unit is above the target level and is sufficient to cover the shortfalls.

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 deficits budgeted for 2016-17 (\$67,000) and 2017-18 (\$60,200) are the result of conservative estimates for per-diem care revenue.

Fraunhofer Project Centre (line 25) – The Fraunhofer Project Centre is forecasting consecutive surplus positions for 2016-17 (\$241,400) and 2017-18 (\$218,000). These positive results will significantly reduce the negative carryforward reserve position for this unit.

Continuing Studies at Western (line 27) – The deficit forecasted for 2016-17 is primarily due to lower than anticipated revenue from post-degree programs and custom corporate training.

D. Associated Companies

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

Western Research Parks (line 30) – The deficits forecasted for 2016-17 (\$184,800) and 2017-18 (\$137,300) are primarily due to low occupancy for the Windermere Manor hotel operation and difficulty renting vacant commercial space at the Advanced Manufacturing Park. Strategic capital investments to refresh the appearance of hotel rooms has been approved by the Research Park Board in an effort to boost occupancy levels. Efforts will continue to market the vacant commercial space at the Advanced Manufacturing Park.

Richard Ivey School of Business Foundation (line 31) – The surplus for the Richard Ivey School of Business Foundation in 2017-18 is forecasted to be approximately \$805,000 lower than the prior year due to more conservative conference centre revenue projections and plans to fill positions that were vacant throughout 2016-17.

Richard Ivey School of Business – Asia (line 32) – The annual deficit from Ivey Asia has been reduced significantly over the past two years. In 2017-18 Ivey Asia will focus on several new key strategic initiatives which are expected to continue the path towards sustainability in the region.

Recommended 2017-18 Ancillary Fees

A listing of Western's proposed 2017-18 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 (except for the Student Development Centre).

The base fee increase for the ***Student Development Centre*** was limited to 1% to maintain room in the overall \$4.00 fee increase cap (as mandated by the Student Services Committee Protocol) for a \$3.11 unit specific adjustment to fund a masters-level Peer Educator position. The funding approved by the SSC for this new position will support the work involved in the selection, resource development, training, and supervision of students who take on the role of peer support for undergraduate and graduate students.

The SSC also approved a \$3.11 unit specific increase for the *Indigenous Services* unit to hire a full-time Campus Enhancement Coordinator who will be responsible for creating a more enriched, diverse, and indigenizing learning space for Indigenous and non-Indigenous students alike.

Table 1
Western University
Student Fee-Funded Units, Ancillary Units, Academic Support Units, and Associated Companies
2017-18 Budget (\$ 000)

		2016-17 Projected			2017-18 Budget			% Change		Budgeted Reserves at April 30, 2018	
		Revenues	Expenses	Rev-Exp	Revenues	Expenses	Rev-Exp	Revenues	Expenses	Operating	Capital
1	A - Student Fee-Funded Units										
2	SRS: Campus Recreation	5,738.0	5,794.9	-56.9	5,851.9	5,921.7	-69.8	1.99%	2.19%	531.5	479.7
3	SRS: Intercollegiate Athletics	6,268.1	6,260.8	7.3	6,329.9	6,373.3	-43.4	0.99%	1.80%	-34.6	
4	SRS: Thompson Recreation & Athletic Centre	1,203.5	1,225.5	-22.0	1,251.2	1,221.8	29.4	3.96%	-0.30%	307.9	119.3
5	Financial Aid Office	1,101.0	1,102.3	-1.3	1,113.4	1,113.4	0.0	1.13%	1.01%	52.6	
6	International Student Services	453.0	453.1	-0.1	457.5	457.4	0.1	71.19%	71.15%	-0.3	
7	Indigenous Services	700.8	701.3	-0.5	775.5	775.5	0.0	-34.45%	-34.59%	52.5	
8	Services for Students with Disabilities	454.9	454.8	0.1	459.4	458.7	0.7	0.99%	0.86%	23.2	74.2
9	Student Development Centre	2,479.7	2,479.7	0.0	2,585.6	2,585.6	0.0	4.27%	4.27%	301.9	
10	Student Success Centre	1,591.6	1,484.9	106.7	1,605.7	1,724.2	-118.5	0.89%	16.12%	199.2	
11	Student Health Services	4,163.1	4,252.7	-89.6	4,486.2	4,583.4	-97.2	7.76%	7.78%	514.5	500.0
12	Off-Campus Housing & Housing Mediation Svcs	448.4	455.5	-7.1	455.6	458.7	-3.1	1.61%	0.70%	121.4	
13	Western Foot Patrol	182.3	182.2	0.1	192.2	192.2	0.0	5.43%	5.49%	25.2	38.0
14	Sub-Total	24,784.4	24,847.7	-63.3	25,564.1	25,865.9	-301.8	3.15%	4.10%	2,095.0	1,211.2
15	B - Ancillary Units										
16	Family Practice Clinic and Workplace Health Svcs	534.3	515.5	18.8	539.9	530.6	9.3	1.05%	2.93%	168.8	
17	Housing Services	73,136.2	70,217.9	2,918.3	73,219.1	75,279.1	-2,060.0	0.11%	7.21%	48,766.4	
18	Parking Services	5,345.7	5,588.0	-242.3	5,552.0	5,785.8	-233.8	3.86%	3.54%	4,331.1	
19	Retail Services	33,609.1	33,635.3	-26.2	33,815.1	33,815.0	0.1	0.61%	0.53%	1,422.5	
20	Sub-Total	112,625.3	109,956.7	2,668.6	113,126.1	115,410.5	-2,284.4	0.44%	4.96%	54,688.8	0.0
21	C - Academic Support Units										
22	Animal Care & Veterinary Services	4,135.4	4,202.4	-67.0	4,376.9	4,437.1	-60.2	5.84%	5.58%	11.2	
23	Boundary Layer Wind Tunnel	2,350.1	2,316.1	34.0	2,400.0	2,348.5	51.5	2.12%	1.40%	551.3	300.0
24	University Machine Services	1,954.0	1,888.0	66.0	2,025.3	1,933.8	91.5	3.65%	2.43%	456.9	
25	Fraunhofer Project Centre	1,399.9	1,158.5	241.4	1,574.5	1,356.5	218.0	12.47%	17.09%	-538.8	91.1
26	Surface Science Western	1,863.2	1,845.2	18.0	1,759.2	1,766.0	-6.8	-5.58%	-4.29%	279.7	424.6
27	Continuing Studies at Western	2,396.6	2,620.1	-223.5	2,665.5	2,665.5	0.0	11.22%	1.73%	204.2	
28	Sub-Total	14,099.2	14,030.3	68.9	14,801.4	14,507.4	294.0	4.98%	3.40%	964.5	815.7
29	D - Associated Companies										
30	Western Research Parks (incl. Windermere Manor & AMP)	7,659.6	7,844.4	-184.8	7,809.1	7,946.4	-137.3	1.95%	1.30%	-14,045.5	
31	Richard Ivey School of Business Foundation	26,154.0	23,252.0	2,902.0	27,647.0	25,550.0	2,097.0	5.71%	9.88%	14,660.7	
32	Richard Ivey School of Business - Asia	3,433.0	3,663.0	-230.0	4,121.0	4,387.0	-266.0	20.04%	19.77%	-6,641.5	
33	Sub-Total	37,246.6	34,759.4	2,487.2	39,577.1	37,883.4	1,693.7	6.26%	8.99%	-6,026.3	0.0
34	Grand Total	188,755.5	183,594.1	5,161.4	193,068.7	193,667.2	-598.5	2.29%	5.49%	51,722.0	2,026.9

Table 2
Western University
Recommended 2017-18 Ancillary Fees for Full-Time Students (\$ 000)

	Full-Time Undergraduate				Full-Time Graduate - Three Terms				Full-Time MBA				
	Actual 2016-17	<a> Proposed 2017-18	\$ Change	% Change	Actual 2016-17	<a> Proposed 2017-18	\$ Change	% Change	Actual 2016-17	<a> Proposed 2017-18	\$ Change	% Change	
1	Student Organization Fees												
2	Organization Fee 	135.60	125.61 	-9.99	-7.4%	96.93	98.76	1.83	1.9%	550.00	600.00 <c>	50.00	9.1%
3	Health Plan (and Dental Plan for Graduates only)	127.39	133.80	6.41	5.0%	530.79	635.19	104.40	19.7%	145.02	145.04 <d>	0.02	0.0%
4	USC Dental Plan	130.37	136.72	6.35	4.9%								
5	LTC 12-Month Bus Pass	224.88	229.88	5.00	2.2%	224.10	229.14	5.04	2.2%				
6	Ombudsperson	3.31	3.31	0.00	0.0%	3.31	3.31	0.00	0.0%				
7	Community Legal Services	5.42	5.52	0.10	1.8%	5.42	5.52	0.10	1.8%				
8	Late Night Busing Service	12.93	10.40	-2.53	-19.6%								
9	World University Services of Canada Fee	0.83	0.83	0.00	0.0%								
10	Orientation Week Fee <first year students only>	90.00	90.00	0.00	0.0%								
11	Marching Band Fee	0.50	0.52	0.02	3.8%								
12	USC Capital/Facility Fee	32.34	32.92	0.58	1.8%								
13	USC Operating Fee	66.68	60.00	-6.68	-10.0%	31.33	31.89	0.56	1.8%	100.02	90.00	-10.02	-10.0%
14	Sub-Total	830.25	829.51	-0.74	-0.1%	891.88	1,003.81	111.93	12.5%	795.04	835.04	40.00	5.0%
15	Building and Student-Aid Endowment Fees												
16	Student Recreation Centre Fund	76.01	78.29	2.28	3.0%	76.01	78.29	2.28	3.0%	76.01	78.29	2.28	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	126.01	128.29	2.28	1.8%	126.01	128.29	2.28	1.8%	126.01	128.29	2.28	1.8%
19	Western Student Ancillary Fees												
20	SRS: Campus Recreation	99.26	101.25	1.99	2.0%	126.38	128.91	2.53	2.0%	126.38	128.91	2.53	2.0%
21	SRS: Intercollegiate Athletics	87.61	89.36	1.75	2.0%	87.61	89.36	1.75	2.0%	87.61	89.36	1.75	2.0%
22	SRS: Thompson Recreation & Athletic Centre	19.20	19.58	0.38	2.0%	19.20	19.58	0.38	2.0%	19.20	19.58	0.38	2.0%
23	Financial Aid Office	37.89	38.65	0.76	2.0%	37.89	38.65	0.76	2.0%	37.89	38.65	0.76	2.0%
24	International Student Services	13.89	14.17	0.28	2.0%	13.89	14.17	0.28	2.0%	13.89	14.17	0.28	2.0%
25	Indigenous Services	8.86	12.15	3.29	37.1%	8.86	12.15	3.29	37.1%	8.86	12.15	3.29	37.1%
26	Services for Students with Disabilities	13.12	13.38	0.26	2.0%	13.12	13.38	0.26	2.0%	13.12	13.38	0.26	2.0%
27	Student Development Centre	75.94	79.94	4.00	5.3%	75.94	79.94	4.00	5.3%	75.94	79.94	4.00	5.3%
28	Student Success Centre	47.82	48.78	0.96	2.0%	30.98	31.60	0.62	2.0%	30.98	31.60	0.62	2.0%
29	Student Health Services	49.77	50.77	1.00	2.0%	49.77	50.77	1.00	2.0%	49.77	50.77	1.00	2.0%
30	Off-Campus Housing & Housing Mediation Svcs	8.82	9.00	0.18	2.0%	8.82	9.00	0.18	2.0%	8.82	9.00	0.18	2.0%
31	Western Foot Patrol	4.66	4.75	0.09	1.9%	4.66	4.75	0.09	1.9%	4.66	4.75	0.09	1.9%
32	Sub-Total	466.84	481.78	14.94	3.2%	477.12	492.26	15.14	3.2%	477.12	492.26	15.14	3.2%
33	Grand Total	1,423.10	1,439.58	16.48	1.2%	1,495.01	1,624.36	129.35	8.7%	1,398.17	1,455.59	57.42	4.1%

<a> The proposed rates are effective September 1, 2017, except for the Student recreation Centre fee which increases on May 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 will be collected from Accelerated MBA students on behalf of the MBA Society starting with the July 2018 cohort (\$400 July 2017 cohort). This is in place of the full \$600 MBA fee starting with the March 2018 cohort (\$550 March 2017 cohort).

<d> The MBA health plan is administered by the USC and provides coverage to MBA students for a 13 month period.

Table 3
Western University
Recommended 2017-18 Ancillary Fees for Part-Time Students (\$ 000)

		Part-Time Undergrad - per full course				Undergrad: Summer - per full course				Part-Time Graduate - per term			
		Actual	Proposed	\$	%	Actual	Proposed	\$	%	Actual	Proposed	\$	%
		2016-17	2017-18	Change	Change	2016-17	2017-18	Change	Change	2016-17	2017-18	Change	Change
1	Student Organization Fees												
2	Organization Fee	27.12	25.12	-2.00	-7.4%	13.56	12.56	-1.00	-7.4%	19.06	19.43	0.37	1.9%
3	Ombudsperson	0.66	0.66	0.00	0.0%	0.33	0.33	0.00	0.0%				
4	Community Legal Services	1.08	1.10	0.02	1.9%	0.54	0.55	0.01	1.9%				
5	Late Night Busing Service	2.59	2.08	-0.51	-19.7%								
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	6.47	6.58	0.11	1.7%	3.24	3.29	0.05	1.5%				
8	USC Operating Fee	13.34	12.00	-1.34	-10.0%	6.67	6.00	-0.67	-10.0%				
9	Sub-Total	51.36	47.64	-3.72	-7.2%	24.39	22.78	-1.61	-6.6%	19.06	19.43	0.37	1.9%
10	Building and Student-Aid Endowment Fees												
11	Student Recreation Centre Fund	15.20	15.66	0.46	3.0%	7.85	8.09	0.24	3.1%	12.67	13.05	0.38	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	25.20	25.66	0.46	1.8%	12.85	13.09	0.24	1.9%	21.00	21.38	0.38	1.8%
14	Western Student Ancillary Fees												
15	SRS: Campus Recreation	19.85	20.25	0.40	2.0%	9.93	10.13	0.20	2.0%				
16	SRS: Intercollegiate Athletics	17.52	17.87	0.35	2.0%	8.76	8.94	0.18	2.1%				
17	SRS: Thompson Recreation & Athletic Centre	3.84	3.92	0.08	2.1%	1.92	1.96	0.04	2.1%				
18	Financial Aid Office	7.58	7.73	0.15	2.0%	3.79	3.87	0.08	2.1%	6.32	6.44	0.12	1.9%
19	International Student Services	2.78	2.83	0.05	1.8%	1.39	1.42	0.03	2.2%	2.32	2.36	0.04	1.7%
20	Indigenous Services	1.77	2.43	0.66	37.3%	0.89	1.22	0.33	37.1%	1.48	2.03	0.55	37.2%
21	Services for Students with Disabilities	2.62	2.68	0.06	2.3%	1.31	1.34	0.03	2.3%				
22	Student Development Centre	15.19	15.99	0.80	5.3%	7.59	7.99	0.40	5.3%	12.66	13.32	0.66	5.2%
23	Student Success Centre	9.56	9.76	0.20	2.1%	4.78	4.88	0.10	2.1%	5.16	5.27	0.11	2.1%
24	Student Health Services	9.95	10.15	0.20	2.0%	4.98	5.08	0.10	2.0%				
25	Off-Campus Housing & Housing Mediation Svcs	1.76	1.80	0.04	2.3%	0.88	0.90	0.02	2.3%				
26	Western Foot Patrol	0.93	0.95	0.02	2.2%	0.47	0.48	0.01	2.1%	0.78	0.79	0.01	1.3%
27	Sub-Total	93.35	96.36	3.01	3.2%	46.69	48.21	1.52	3.3%	28.72	30.21	1.49	5.2%
28	Grand Total	169.91	169.66	-0.25	-0.1%	83.93	84.08	0.15	0.2%	68.78	71.02	2.24	3.3%