

Western University

**Planning & Budgeting  
for the Next 3-Year Cycle  
2023-24 to 2025-26**

**Town Hall Meeting  
February 1<sup>st</sup>, 2023**

# Budget Planning at Western

- Operating Budget, Sources of Revenue, and Environment
- Our Enrolments
- Strategic Plan Priorities
- Planning and Budget Objectives
- Budget Approach & Structure
- Academic Outcome Metrics

# Funding Sources and Environment

## Where the **Operating Budget** Money Comes From

Money comes from:

- Government Grants
- Student Tuition
- Research Overheads
- Royalties and Licenses
- Ancillary Units – for space and admin support

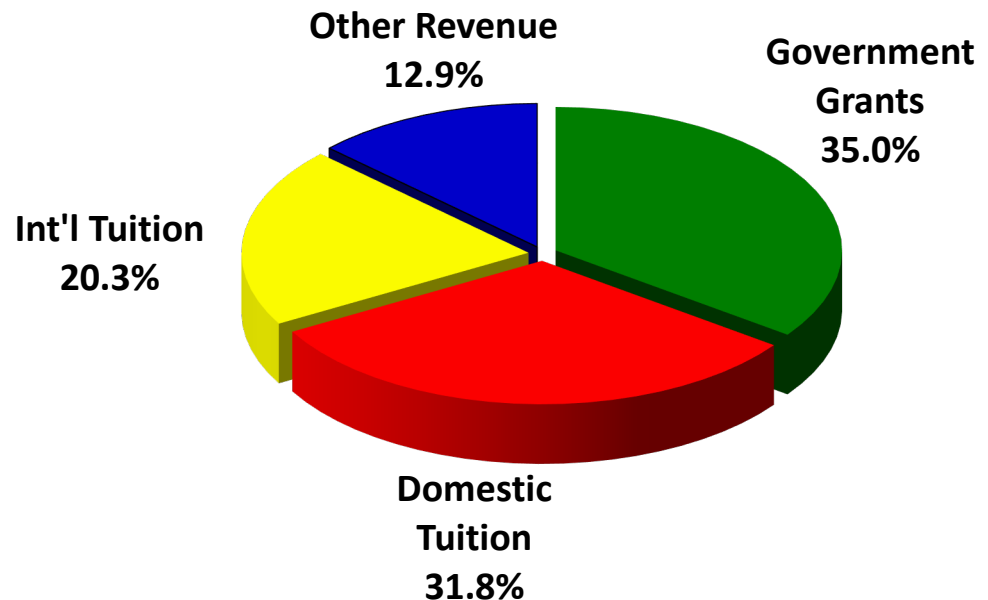
Pays for:

- Teaching and Indirect Costs of Research
- Services and Infrastructure
- Administrative Support
- Student Financial Aid

Operating Fund does not pay for:

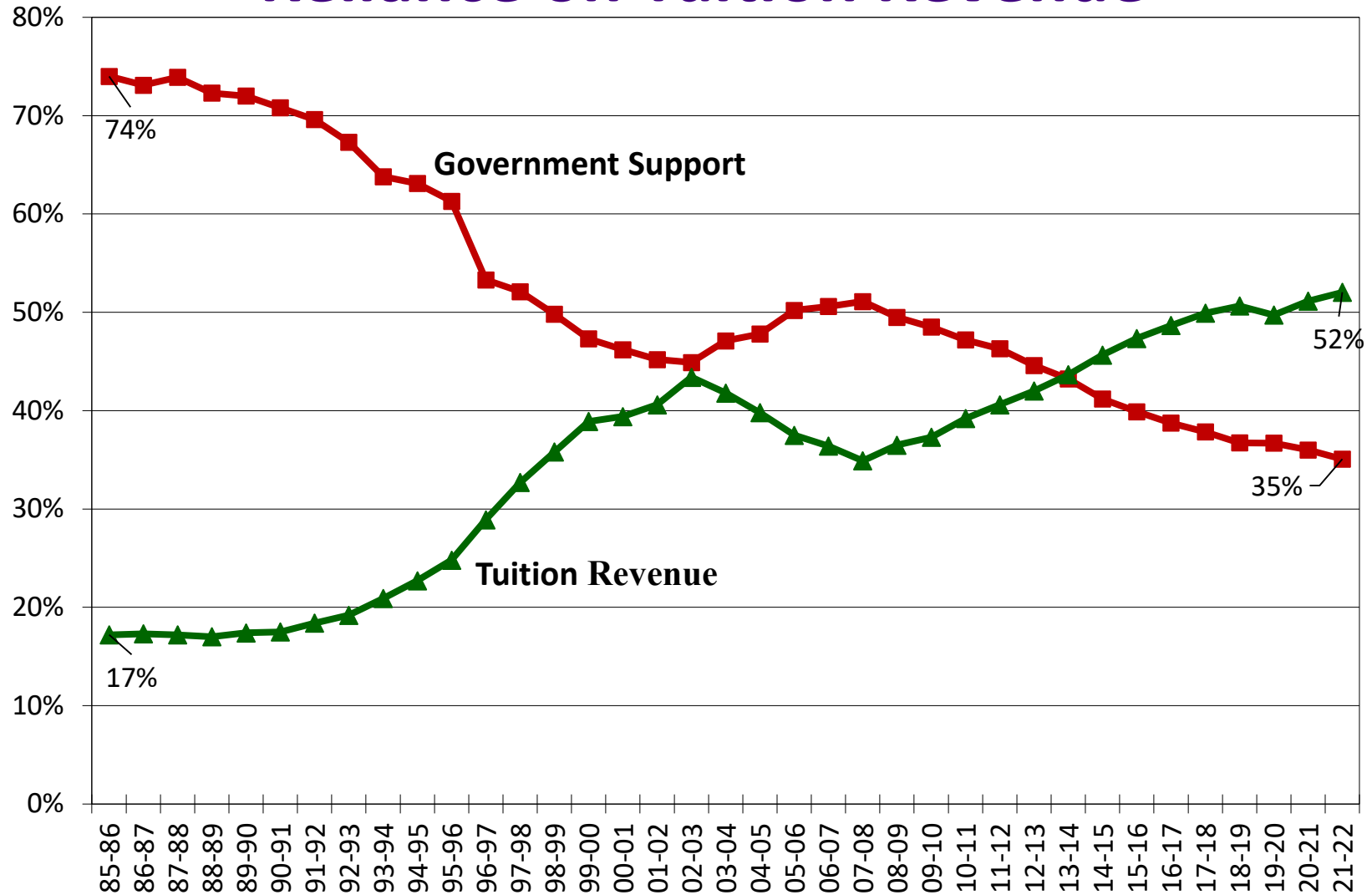
- Housing
- Ancillary Services
  - Food Services
  - Research park
- Direct Costs of Research
  - Equipment, Staffing

**2021-22**



**Total = \$857.0 Million**

# Declining Government Support and Increased Reliance on Tuition Revenue



# Funding Sources and Environment

## Where the **Operating Budget** Money Goes

### 63.3 cents of each dollar goes to the Faculties

- E.g., Salaries and Benefits, Instructional Equipment, Academic Counselling and Graduate Student Funding

### 17.0 cents of each dollar goes to Support Services

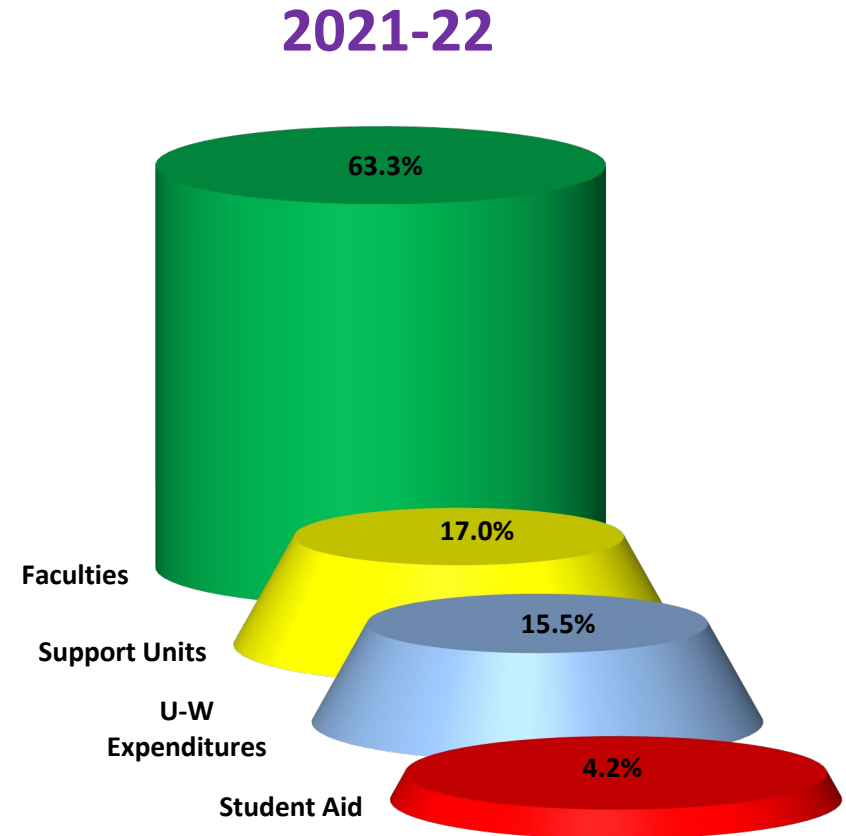
- E.g., Libraries, Central I.T, Student Services, Fundraising and Communication Activities

### 15.5 cents of each dollar goes to University-Wide Expenditures

- E.g., Utilities, transfers to capital, and I.T. Infrastructure

### 4.2 cents of each dollar goes to Centrally-Funded Student Aid

- Includes Undergraduate Scholarships and Needs-based Student Support



# Western's Operating Revenues

- Nearly 87% of our operating revenues are based on enrolments
  - Government operating grants (35%) and tuition fees (52%)
- Province controls 2/3<sup>rd</sup>s of our operating revenue
  - Operating grants and domestic tuition
- Universities have (at present) full control over international tuition and self-funded program tuition

# Current Fiscal Environment in Ontario

- Grants frozen at 2016-17 levels – with no incremental grant funding for incremental domestic enrolments
- Domestic tuition rolled back 10% in 2019-20 and held constant up to 2022-23
  - No word on future framework
- We need to operate/manage with these revenue parameters and while accommodating inflationary cost pressures

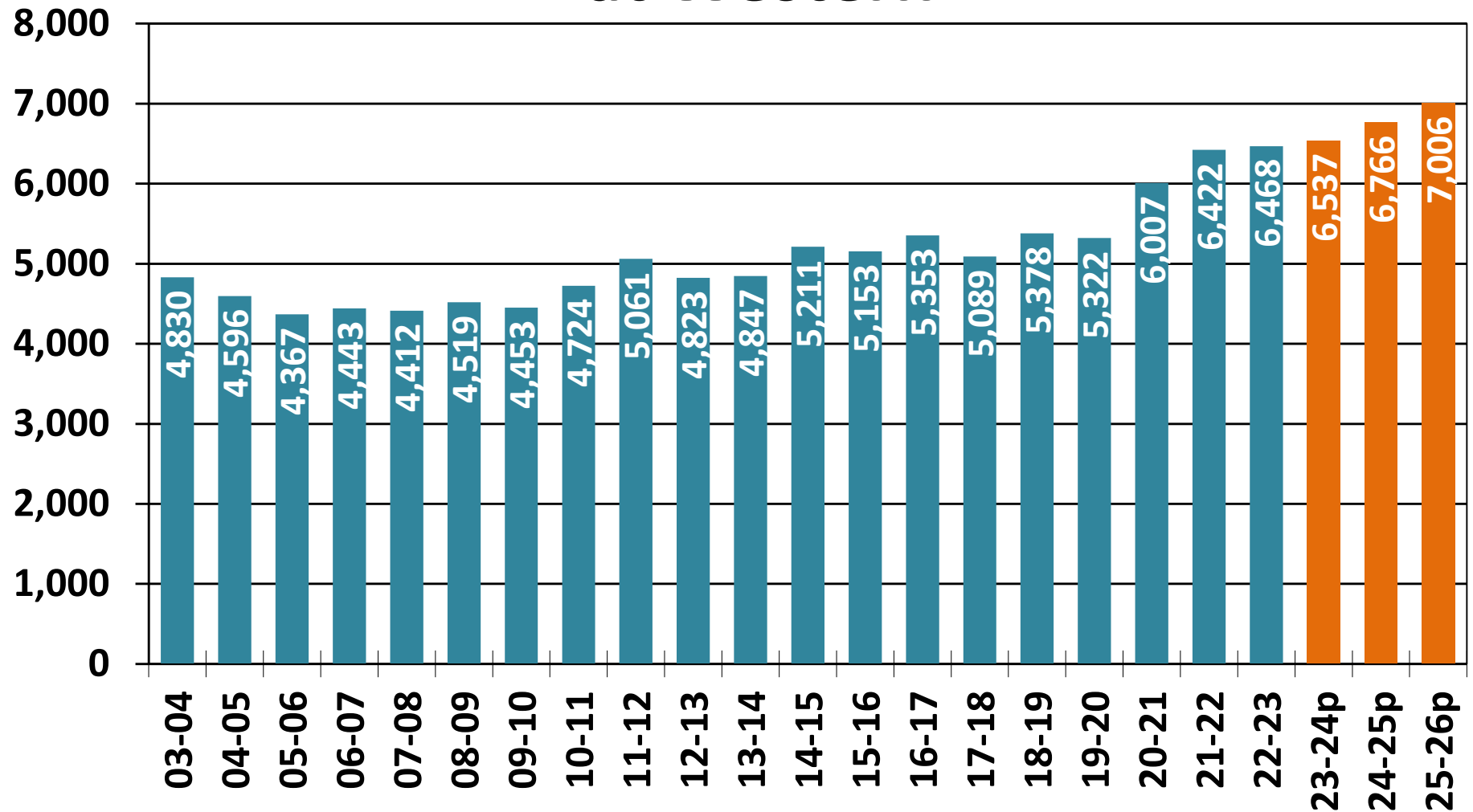




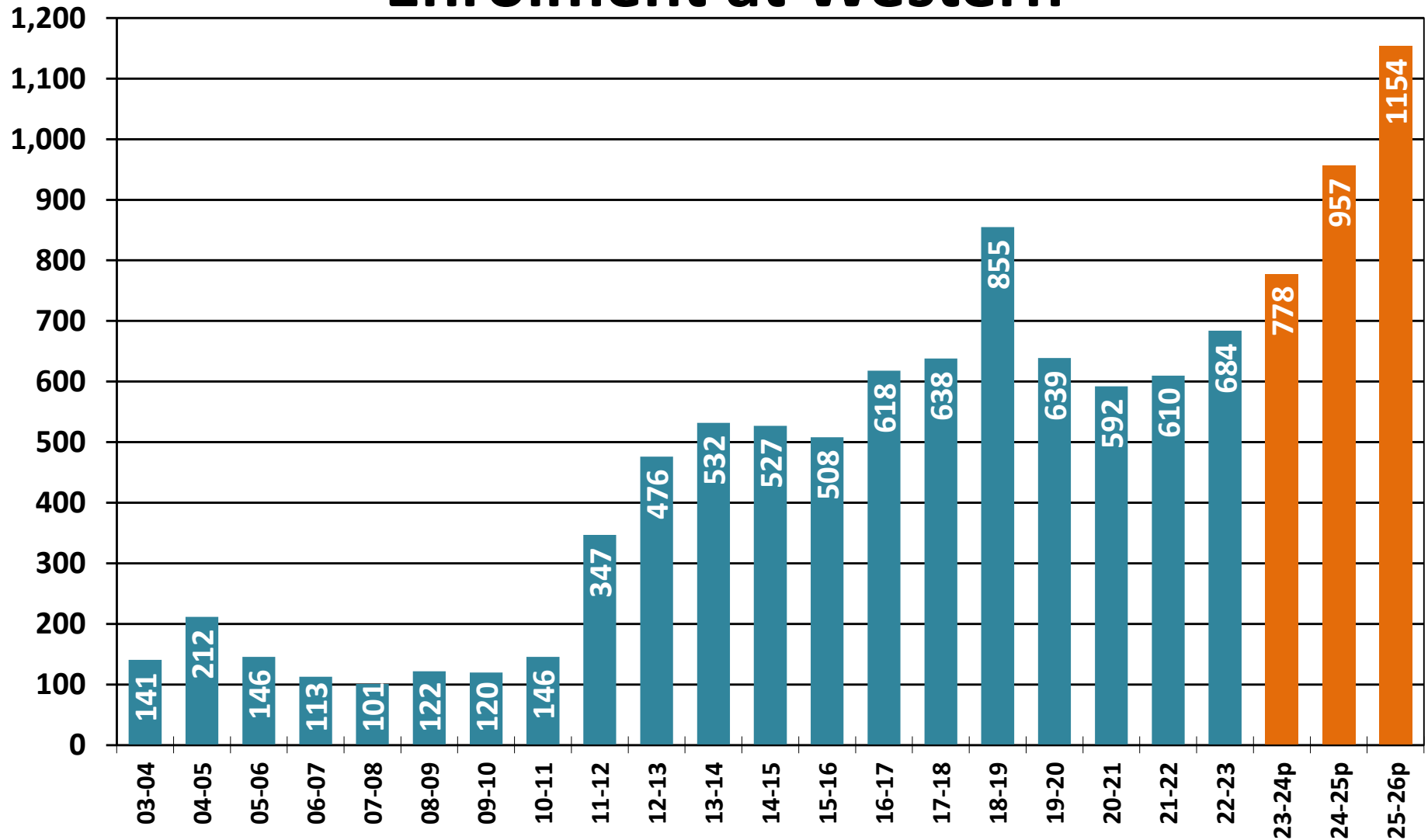
# Our Enrolments



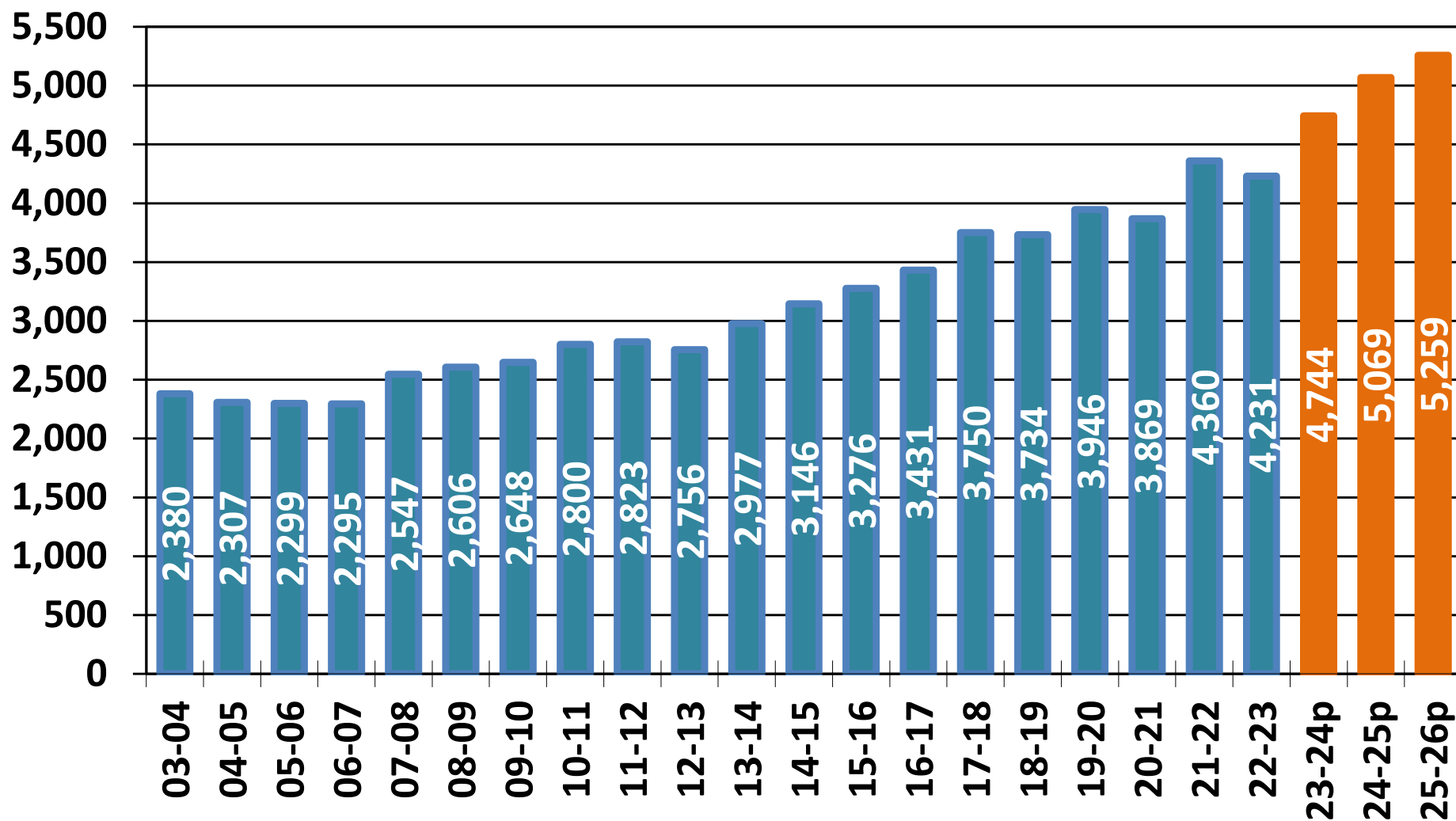
# Total Full-Time Year 1 Undergraduate at Western



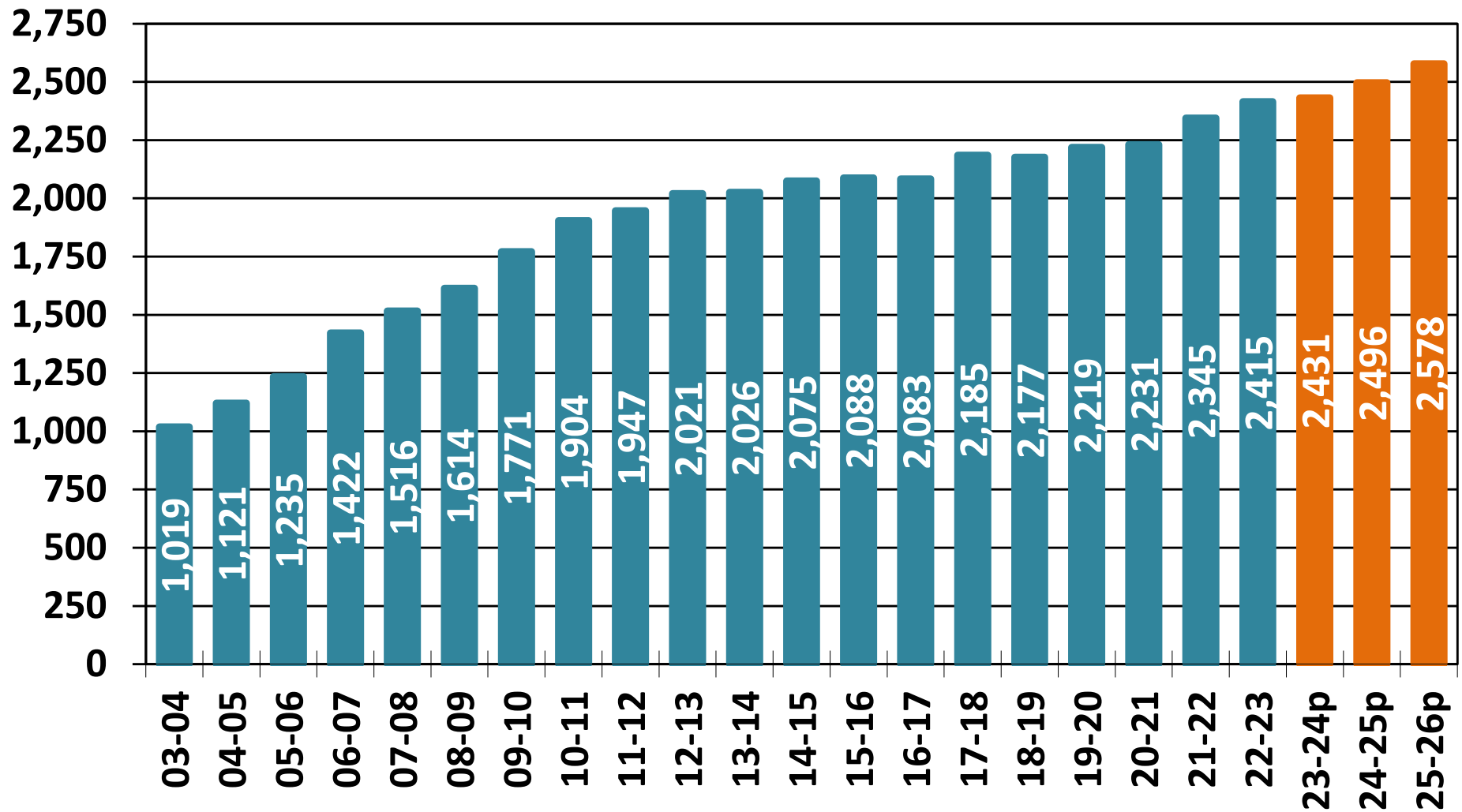
# Full-Time International Year 1 Undergraduate Enrolment at Western



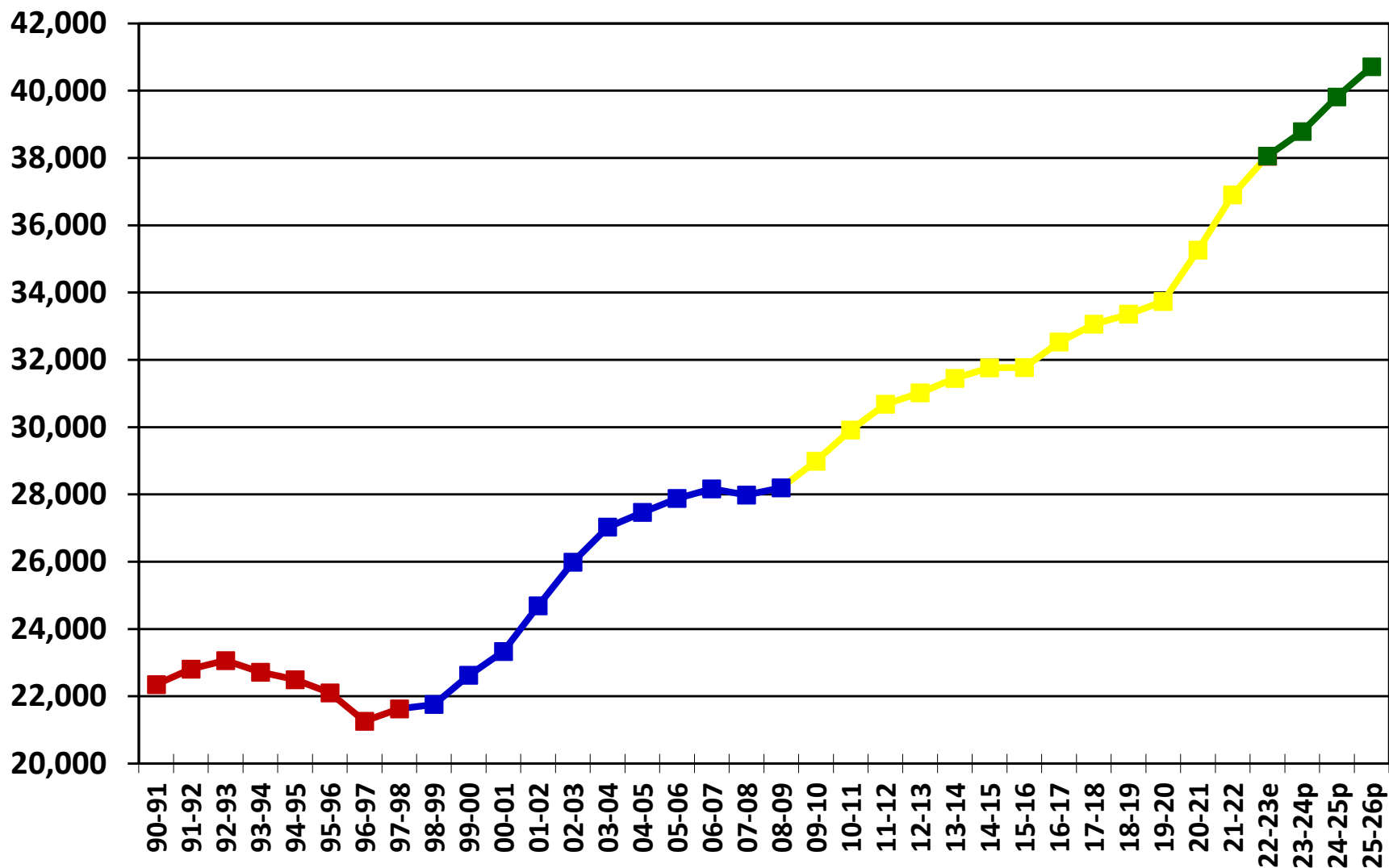
# Total Full-Time Masters Enrolment at Western



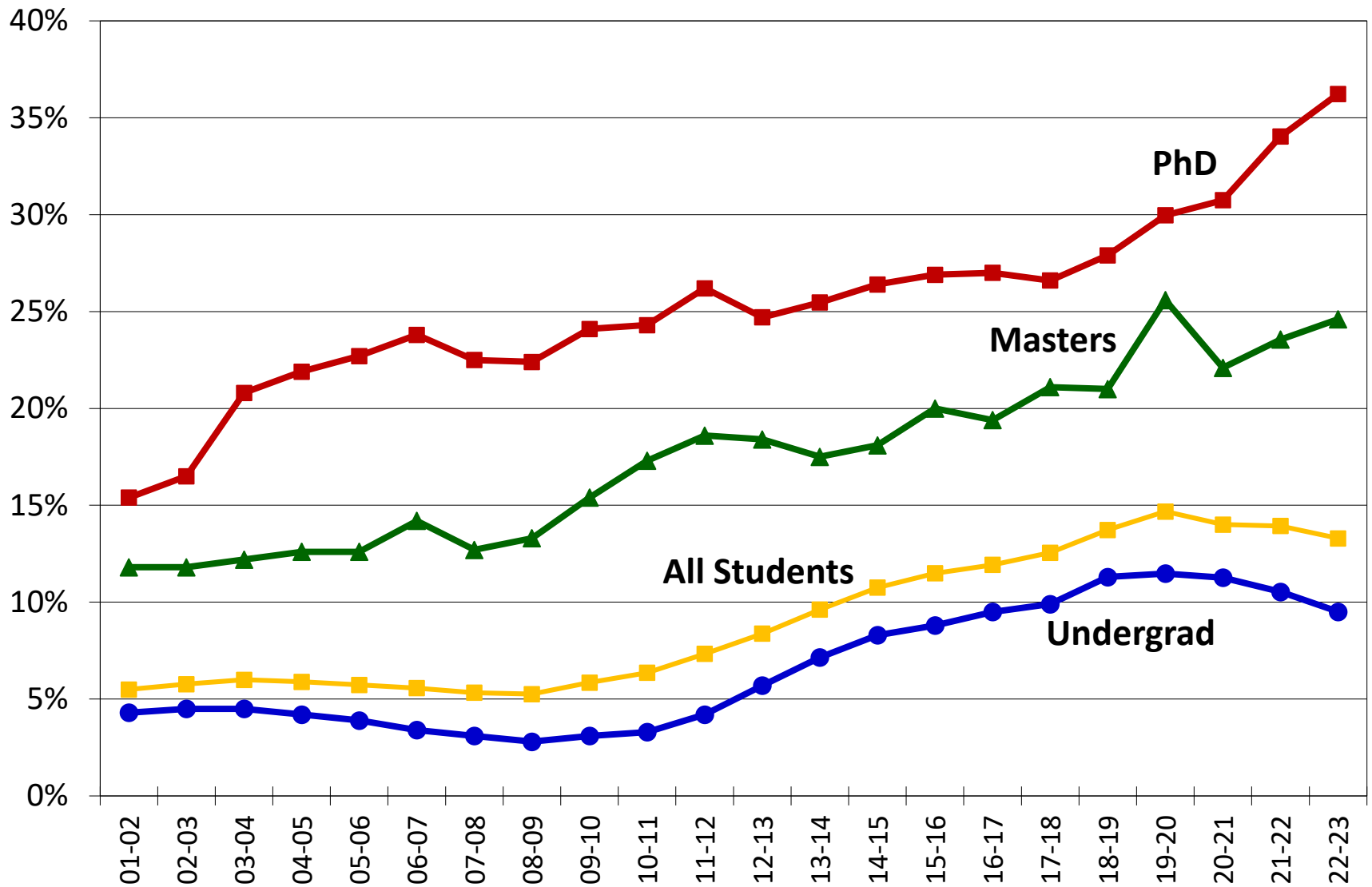
# Total Full-Time Doctoral Enrolment at Western



# Constituent University **Total FTE Enrolment**



# Full-Time Enrolments at Western: % International





# Towards Western at 150

“The world needs the very best from its universities. Generations are depending on it. And so, we must take seriously our role in serving the public good.”



# Strategic Plan Priorities and Commitments

## Greater Impact:

- Grow Strategically
  - Expand student enrolment
  - Increase faculty and staff complements as needed
  - Secure resources and build infrastructure
- Stimulate our research, scholarship, and creative activity
- Promote teaching and learning for the future
- Enrich the student experience

## People, Community, and Culture:

- Advance Reconciliation with Indigenous Communities
- Create a more equitable and inclusive Western
- Thriving through belonging

# Strategic Plan Priorities and Commitments

## Western's Place in the World

- Concentrate on place, right here in London
  - Strengthen our relationships with nearby communities, agencies and services
- Engage the World
  - Increase international student population to 20-25%
  - Double the # of int'l experiences for our students
  - Offer learning experiences around the world
- Sustainability, an imperative
  - Achieve net-zero emissions by 2050

# Investments in the Most Recent Budget (2022-23)

## (aligned to Strategic Plan Priorities)

- **Greater Impact: Growth**

- Enrolments
  - Engineering Expansion
  - Funding Program to support PhD enrolment growth
- Faculty and Staff Complements
  - Cluster hire Initiative → 6 Black Scholars & 3 Indigenous Scholars
  - Endowed Chairs Matching Program (\$15M added)
  - Unit plans → Growth of 127 faculty and 219 staff
- Space/Facilities/Infrastructure
  - Student spaces in SSC, Weldon Modernization, Bio-convergence Centre, new Engineering Building



# Investments in the Most Recent Budget (2022-23)

(aligned to Strategic Plan Priorities)

- **Greater Impact: Enhancing our Scholarship/Research Profile**
  - Expansion of Clinical Research Facilities
  - Post-Doc Fellowship Program
- **Greater Impact: Enhancing the Learning Experience**
  - Undergraduate Summer Research Internship Program
  - Renewal of campus-wide I.T. Infrastructure

# Investments in the Most Recent Budget (2022-23)

(aligned to Strategic Plan Priorities)

- **People, Community, and Cultures**
  - Cluster Hire Initiative → 6 Black Scholars & 3 Indigenous Scholars
  - Funding to support programming in the Office of Indigenous Initiatives and the EDI Office
  - Scholarships aimed at recruiting Black and Indigenous Students
- **Western's Place in the World**
  - Support for Long Range Space Plan – facilities expansions
  - New facility in Downtown London – 450 Talbot Street
  - Campus-wide Sustainability Initiatives



An aerial photograph of a university campus during the "golden hour" of sunset. The sun is low on the horizon, casting a warm, orange glow over the scene. Several large, multi-story university buildings are visible, some with stone facades and others with more modern architectural styles. A central courtyard or plaza area is visible, with some trees and pathways. The overall atmosphere is serene and academic.

# Planning and Budget Objectives for the Upcoming 3-Year Cycle

# Planning Objectives and Budget Priorities

- **Continue to align resources with Strategic Plan priorities**
- Enrolment Growth in areas of demand and societal need – with a focus on internationalization
- Grow our faculty and staff complements as needed
- Maintain services to support a growing student body
- Enhance our Scholarship/Research Profile
- Expand physical and I.T. infrastructure to support growth
- Support other Revenue Generation Initiatives
  - *Continuing Education, Fundraising → Campaign*

# Space/Facilities to Support Growth and Impact

- **Major Projects – underway**
  - Weldon Library Modernization
  - Biomedical Research Facility
  - Entrepreneurship and Innovation Centre
  - New Engineering Building
  - Downtown Facility – 450 Talbot
  - Open Space Strategy → Pedestrian-friendly Campus

# Space/Facilities to Support Growth and Impact

- **Major Projects – in Planning Stages**
  - Interdisciplinary Bio-convergence Centre
  - University Gathering Hub
  - Multi-Sport Field House – with Parking Garage
  - Student Spaces in the Social Science Centre
  - Undergraduate and Graduate Residence Expansion
  - Space to consolidate Faculty of Education Clinics
  - Space to support Faculty of Health Sciences growth
  - Research Facilities supported through Government Funding Programs



The background of the slide is a dark brown color. It features a dense, colorful pattern of small triangles in various shades including blue, green, yellow, red, and purple. These triangles are arranged to form a silhouette of a city skyline with several tall, jagged peaks. The text 'Budget Structure' is centered over this pattern.

# Budget Structure

# Budget Elements: Faculties

- Inflationary Budget Adjustment (IBA)
- Enrolment-growth-related Revenue Sharing
- Funding to support PhD Enrolment Growth
- Multi-year funding commitments to support Black and Indigenous Faculty hires
- Academic Priorities Fund (APF) – envelope TBD
- Space/Facilities and Capital Needs



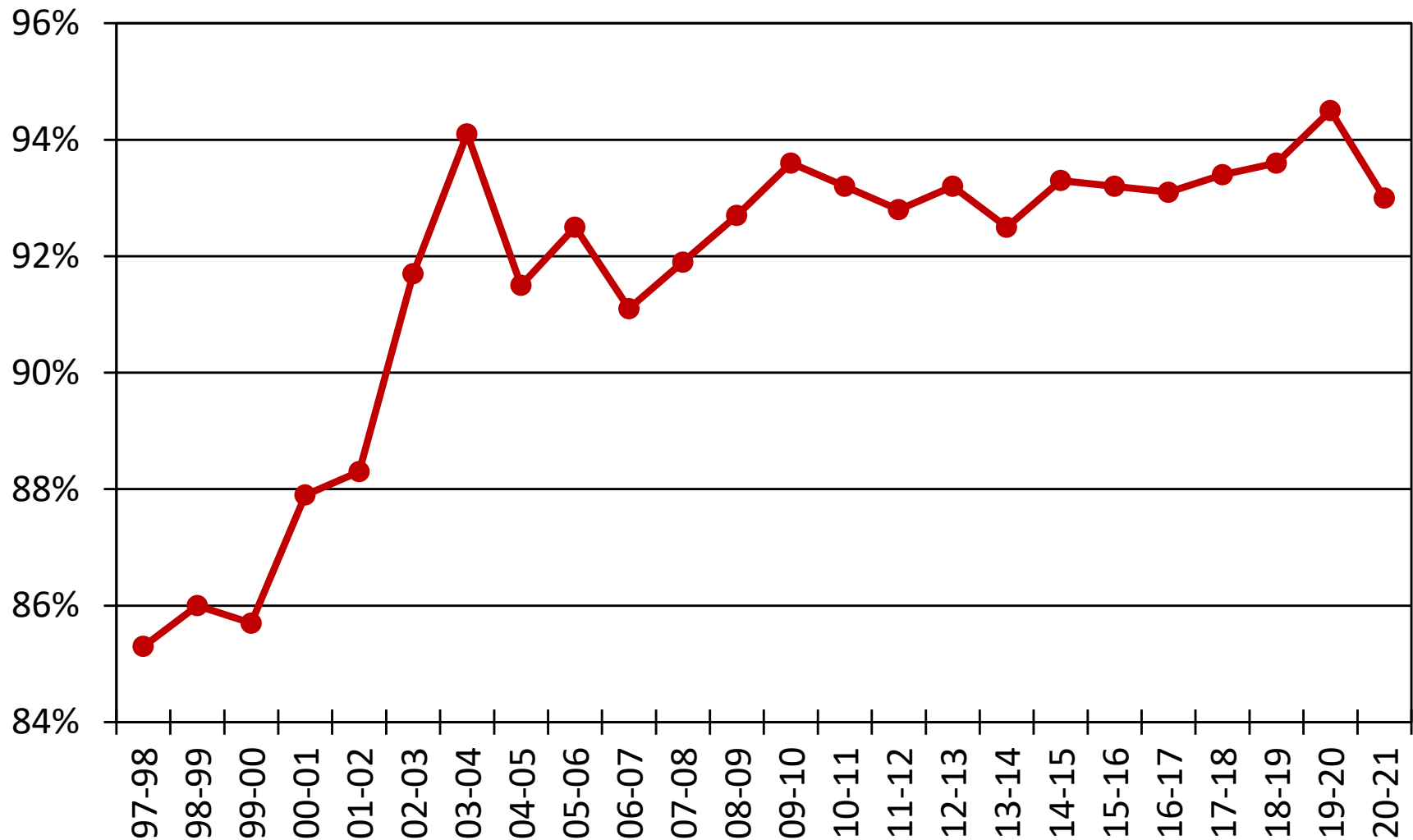
# Budget Elements: Support Units

- Inflationary Budget Adjustment (IBA)
- Base Funding to maintain services
- Support Units Priorities Fund (SUPF)
  - Base and One-Time
  - Envelopes TBD
- Space/Facilities and Capital Needs

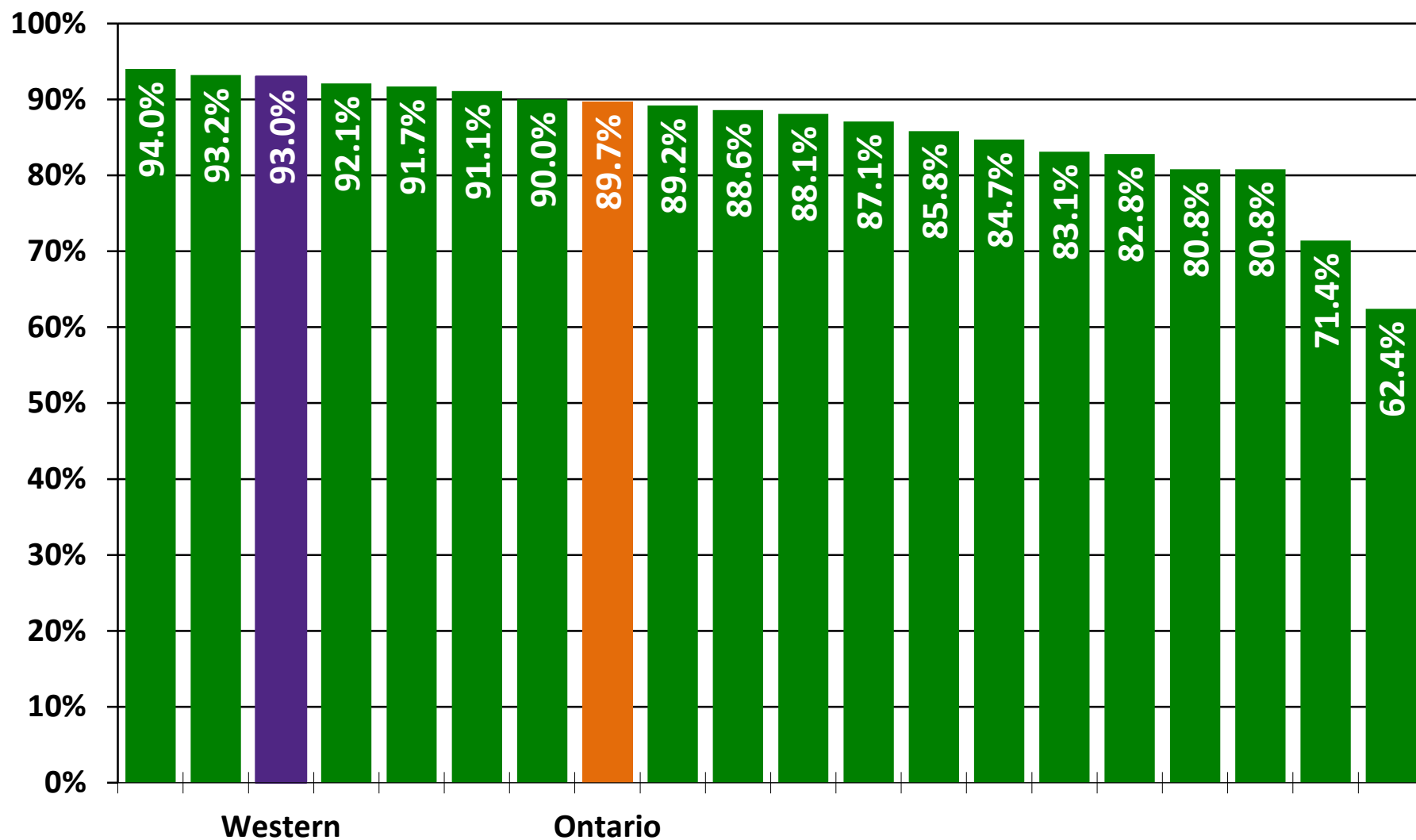


# Outcomes of our Budget Approach

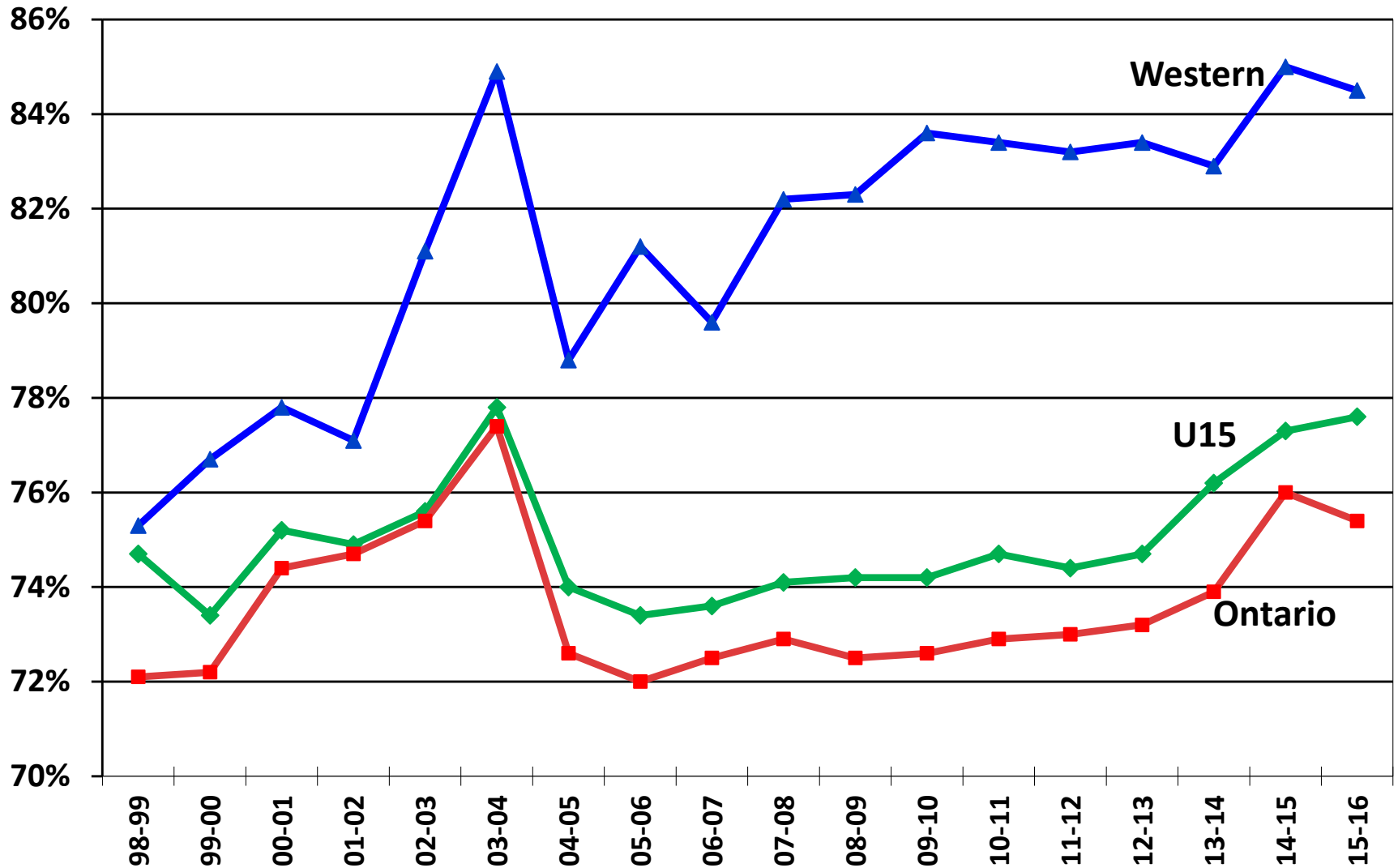
# Western: Year 1 to Year 2 Retention Rates 1997-98 to 2020-21 Entering Cohorts



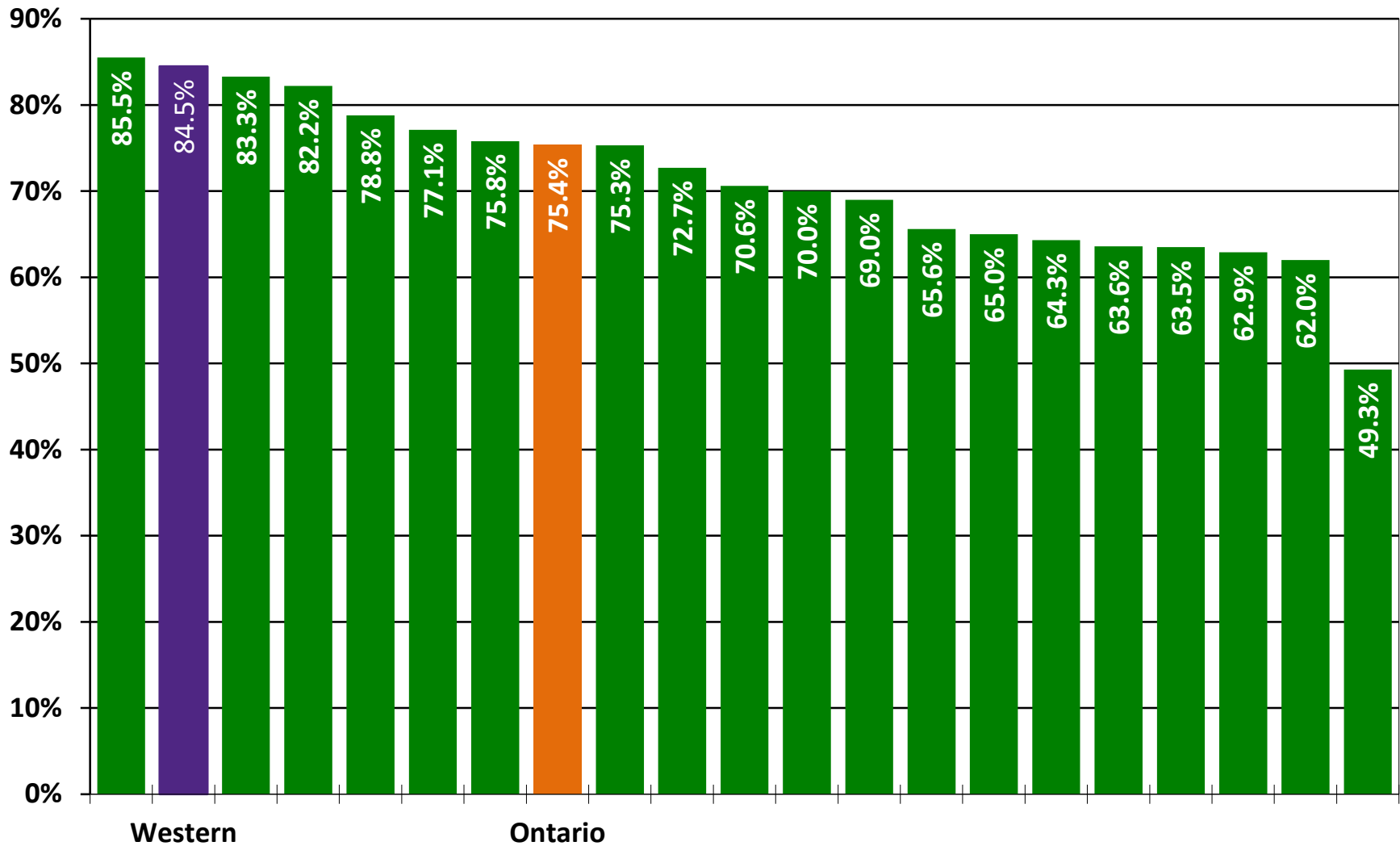
# Ontario: Year 1 to Year 2 Retention Rates 2020-21 Cohort



# 6-Year Graduation Rates



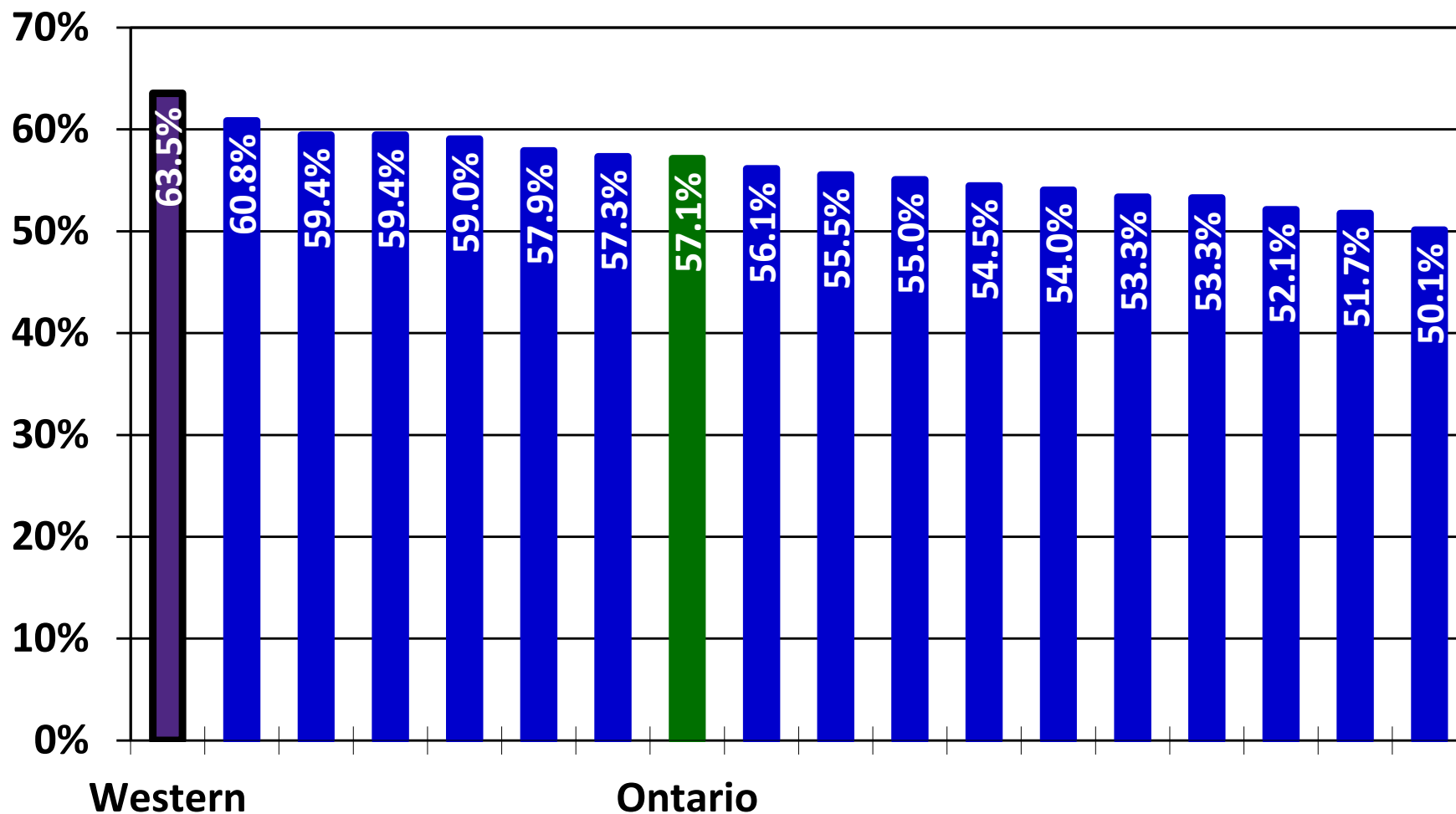
# Ontario: 6-Year Graduation Rates 2015-16 Cohort





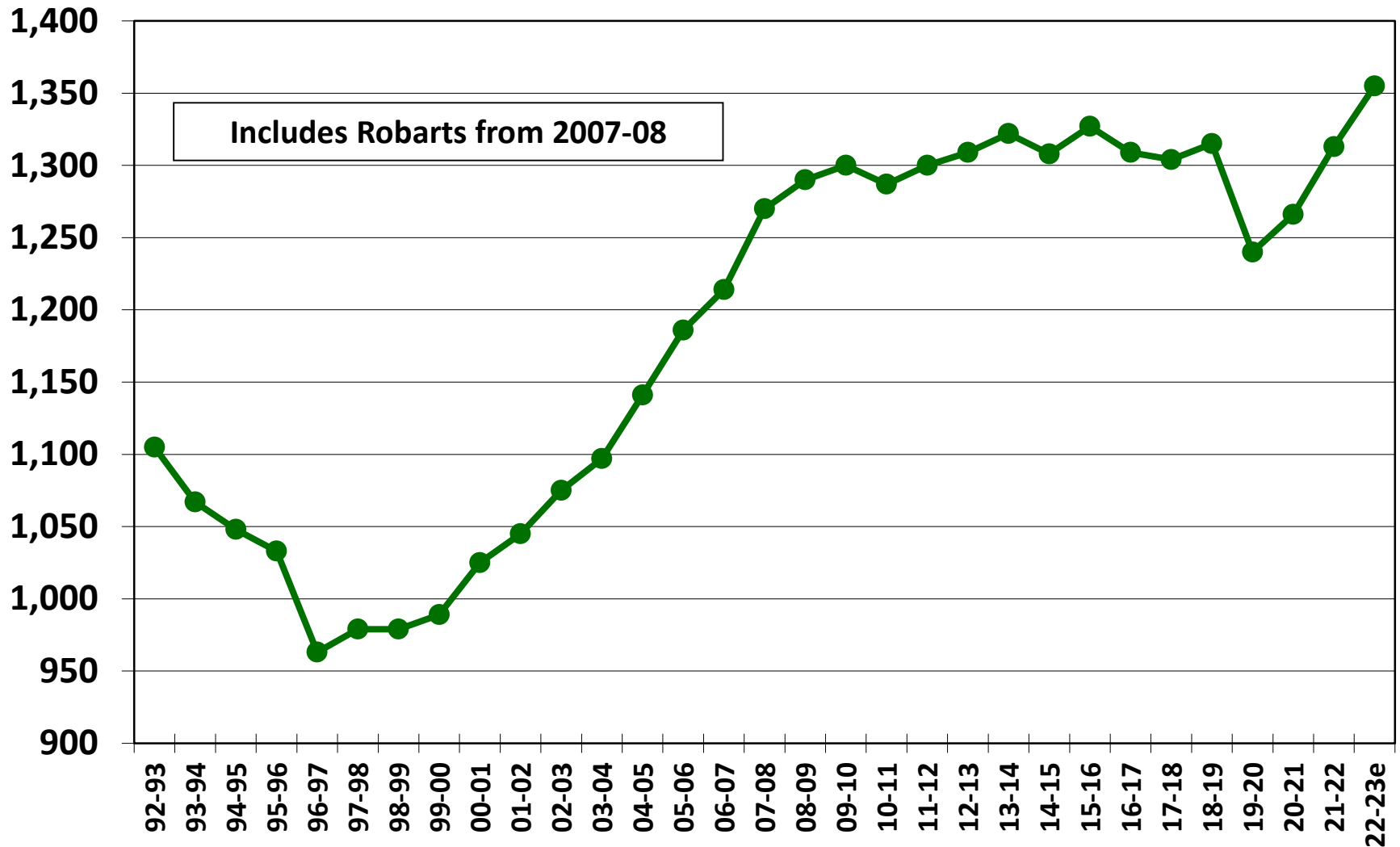
# Instructional & Research Expenditures as a % of Total Operating Expenditures

Ontario Universities -- 2020-21 (Source: COFO Reports)

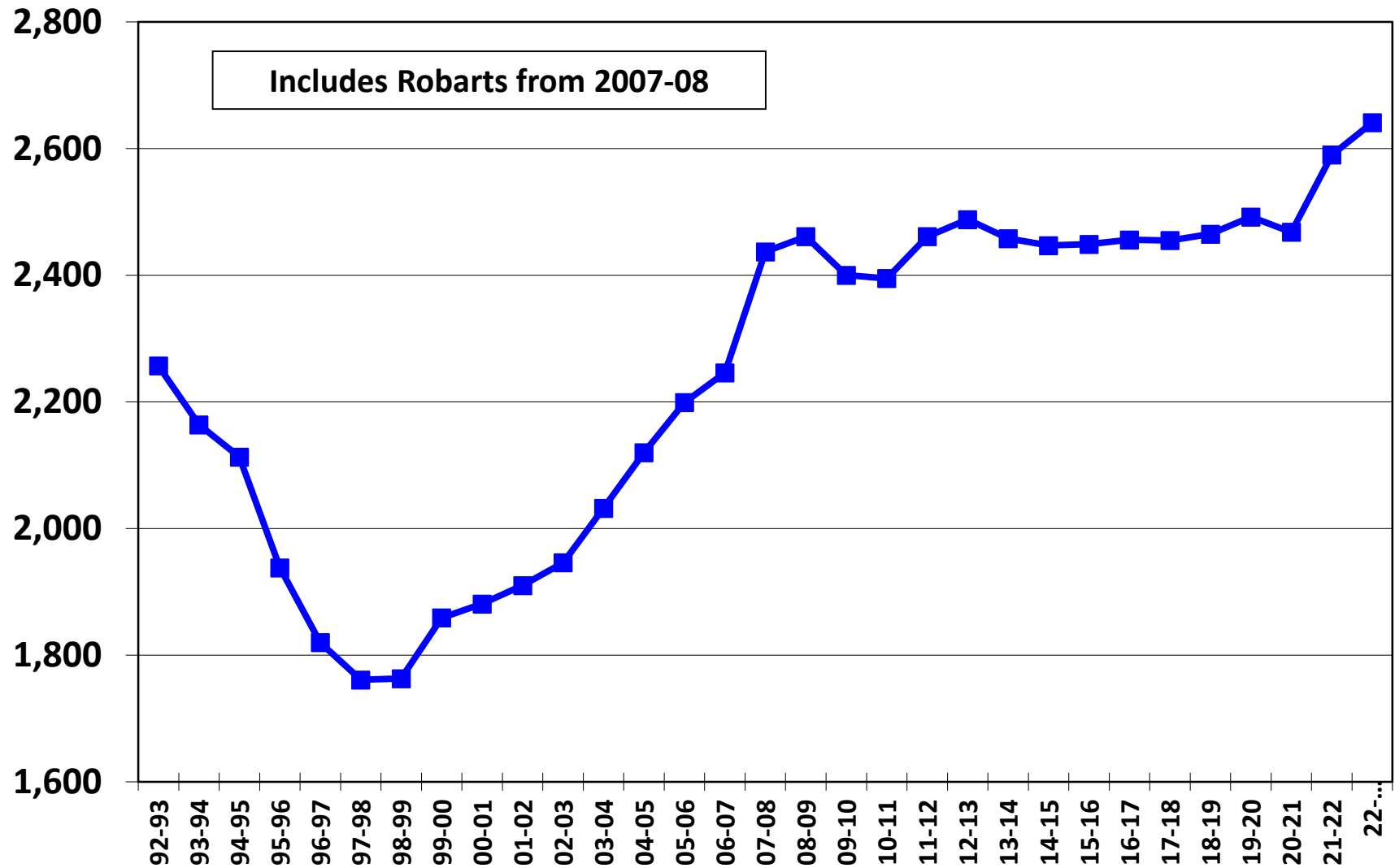


# Full-Time Faculty at Western

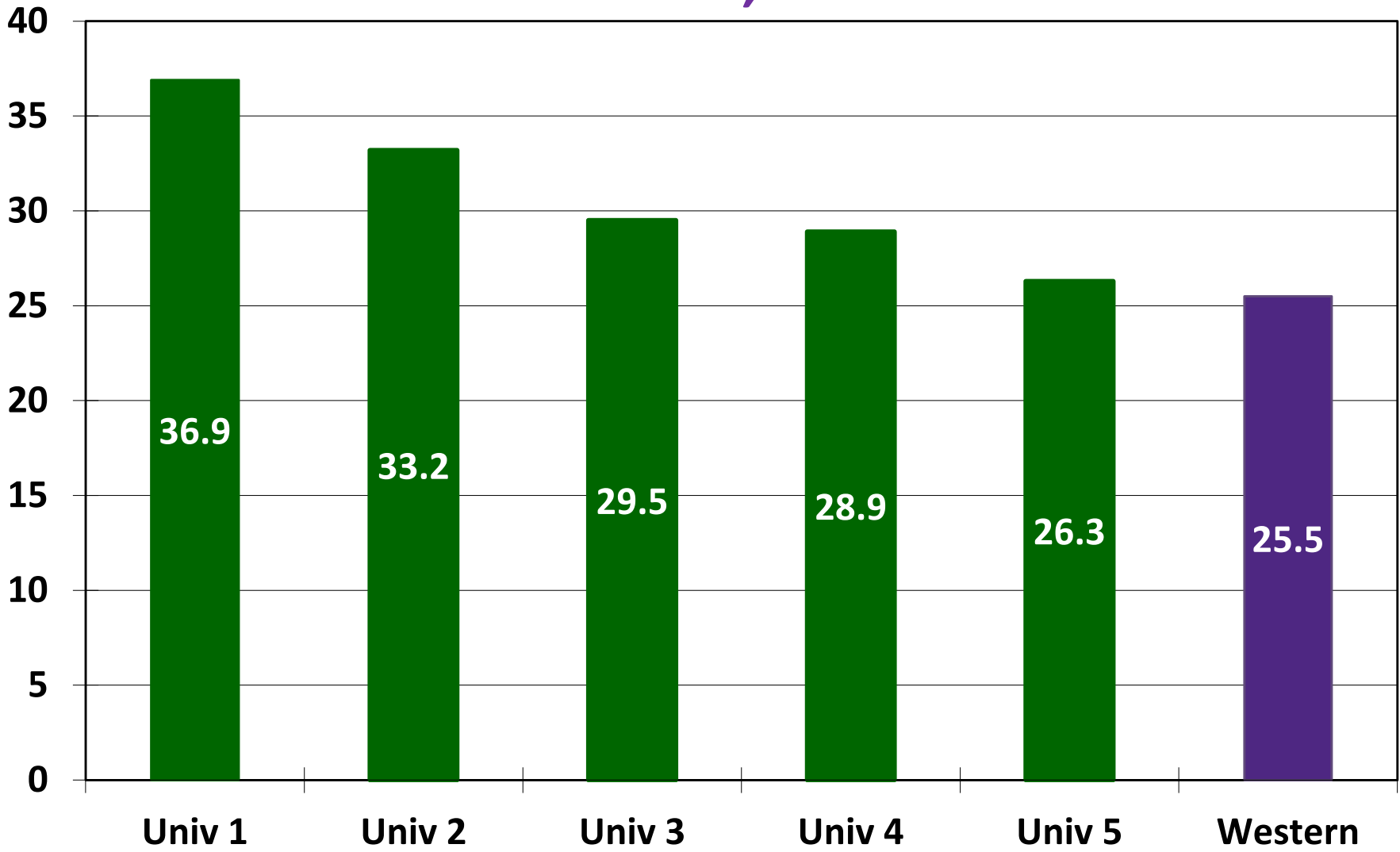
(excludes Clinical Faculty)



# Full-Time Non-Academic Staff at Western



# 2021-22: Full-Time Student to Full-Time Faculty Ratio, U6



A photograph of a long, brightly lit library aisle. Two people, seen from behind, are walking away from the camera down the center of the aisle. The aisle is flanked by tall, metal bookshelves with orange-colored dividers. The shelves are filled with books, and some have white labels at the top. The floor is a light-colored, polished surface that reflects the overhead lights. The perspective is from the end of the aisle, looking down its length towards a bright opening at the far end.

# Planning Process Timeline

# Planning Process

- 3-Year Cycle: 2023-24 through 2025-26
- Guided by our Strategic Plan
- Steps and Timeline:
  - Provost's Retreat August 28-29, 2022
  - Planning Guidelines released September 28, 2022
  - Units developed Plans Oct. - Nov. 2022
  - Planning Meetings Nov. - Dec. 2022
  - Revenue Forecasts January 2023
  - Provost's Recommendations February 2023
  - University Budget Preparation March - April 2023



# Discussion

