



Faculty Council Update 2016: Faculty of Health

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HIGHER EDUCATION TRENDS



Enrolment Update

Enrolment

- SEM strategy to improve confirmations and conversions to stabilize enrolment for 2016 – 2017 in highly competitive market
- Projections for the year (as of November 7, 2016):
 - eligible undergraduate trending above university budget target by 299.1, and -482.1 below enrolment contract targets
 - international undergraduate 525.2 FFTEs above university budget target and 285.6 FFTEs above enrolment contract targets
 - Masters – 321.0 FTEs below the Ministry target
 - Doctoral 22.3 FTEs above the Ministry target
- Comprehensive 10 year (2015-2025) enrolment plan for university developed to inform internal budgeting and integrated planning processes as well as SMA negotiations with MAESD

University Funding Formula Review

University Funding Formula Reform - Design

Design work for a new funding formula has begun with three core elements:

❑ **Enrolment Elements:**

- Delivered in a corridor
- Equalization of per-student funding
- Based on negotiated enrolment numbers

Funding will come from existing BOG, as well as undergraduate access and grad expansion funds.

❑ **Differentiation / Student Success Elements**

- Distributed based on outcomes
- Transitional / balancing elements
- A portion at risk at maturity

Funding may come from declining enrolment; existing quality and performance funds; research supports; and mission-and institution-related grants and other existing SPGs.

❑ **Special Purpose Grants**

- Reflects broad government priorities for all institutions
- May be restricted in use
- Reviewing SPGs for ease of reporting, length and simplification

Funding will be remaining SPGs that fit criteria.

University Funding Formula - Transition

The following principles have been established for transition:

- ❑ **Principle One:** No redistribution through the transition
- ❑ **Principle Two:** However, it is expected that the new model will put some grants at risk **in the future**
- ❑ **Principle Three:** Multi-year transition
 - Full transition to a new funding model will occur through second and third round SMA
- ❑ **Principle Four:** Options for transition will be explicitly developed through the development process during summer 2016

Budget Update

Context for Budget Planning

- In Fall 2014, the University confirmed its Transition Plan to the new SHARP (Shared Accountability Resource Plan) Model effective fiscal 2017-18.
- The presentation format for the SHARP Budget Model will be considerably different under SHARP and will provide an increased level of detail.
- For illustrative purposes, the numbers for 2017-18 and 2018-19 are being provided to demonstrate the impacts of budget assumptions for that fiscal year. Approval was not requested in June for these years.
- Recent decision of the new Markham Campus has not been incorporated into the 2016 Budget Plan. Budget Plan impacts are anticipated to occur beyond the June 2016 budget planning horizon.

2015-2018 Budget Plan - Approved June 2015

<u>(\$ Millions)</u>	<u>2015-16</u>	<u>2016-17</u>	<u>2017-18</u>
Revenue	753.8	778.5	789.7
Expense	781.7	793.2	797.8
Annual Surplus/(Deficit)	(27.8)	(14.6)	(8.1)
Carryforward Surplus/(Deficit)	(18.2)	(46.0)	(60.6)
Cumulative Surplus/(Deficit)	(46.0)	(60.6)	(68.7)
Budget Cut	3.0%	2.5%	TBD

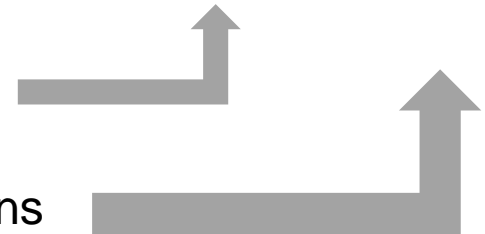
Divisional Carryforward Positions - 2015-16

Budget vs. Actual Results

Division	Opening Cumulative Position	Approved Budget In-year Surplus (Deficit)	Actual In-Year Surplus (Deficit)	Variance to Approved Budget Surplus (Deficit)	Actual Ending Cumulative Position
President's	1.25	(0.43)	0.52	0.95	1.77
VP Advancement	1.51	(2.64)	0.20	2.84	1.71
VP Academic					
Faculties & Libraries	(70.73)	(18.88)	(8.05)	10.83	(78.78)
VPA&P	31.07	(2.32)	3.65	5.97	34.72
Vice Provost Students	7.32	(0.55)	(0.30)	0.25	7.02
VP Academic Total	(32.34)	(21.75)	(4.70)	17.05	(37.04)
VP Finance & Administration	9.24	(3.51)	2.74	6.25	11.98
VP Research	2.29	(1.00)	0.08	1.08	2.37
Total All Divisions	(18.05)	(29.33)	(1.16)	28.17	(19.21)

2015/16 Year End Results Positive to Last Year's Plan

.... But a Significant Deficit Remains



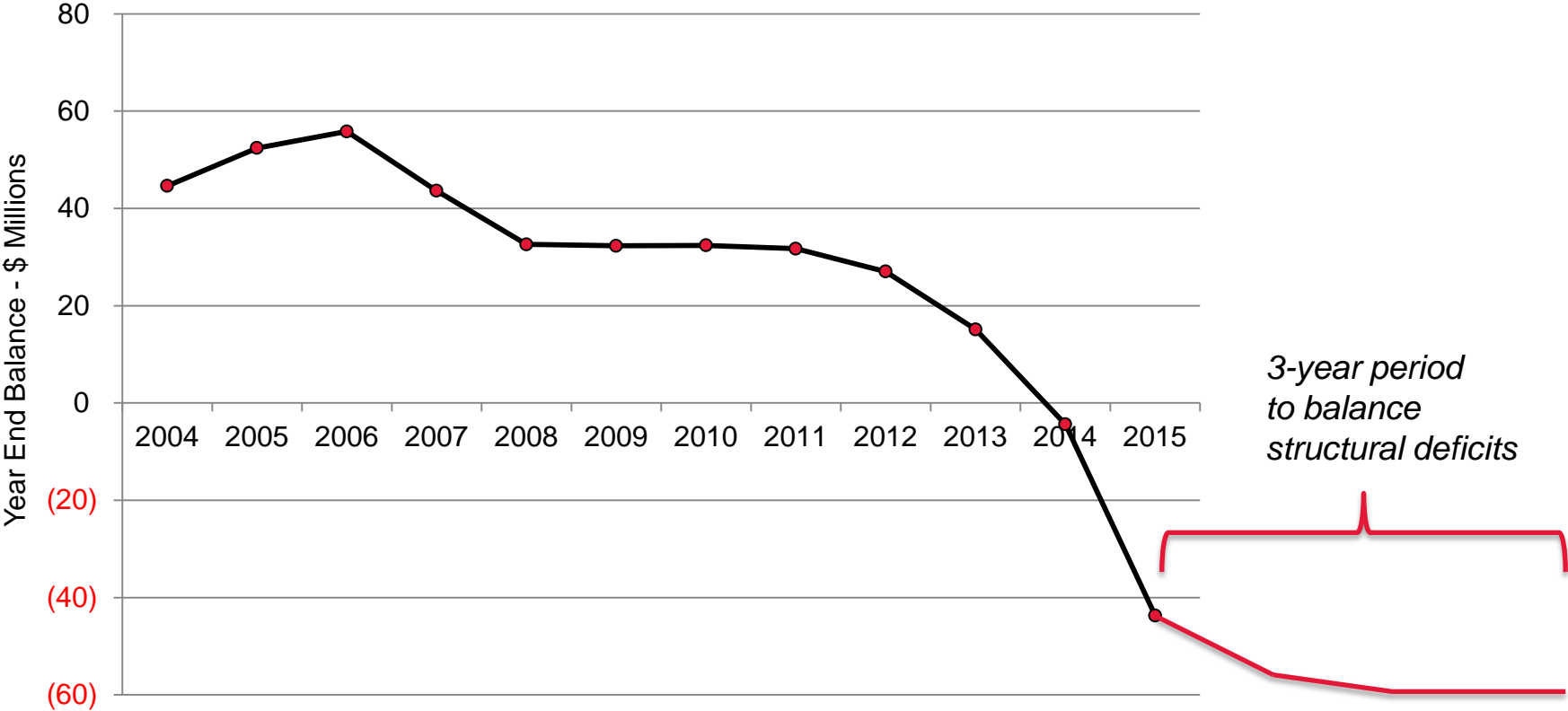
2016-2019 Budget Plan - Approved June 2016

OPERATING BUDGET PLAN SUMMARY
2016-17 to 2018-19
(\$ millions)

	<u>Illustrative</u>		
	<u>2016-17</u>	<u>2017-18</u>	<u>2018-19</u>
Revenue	778.5	789.7	799.7
Expenses	801.0	804.4	795.5
Annual Surplus/Deficit	(22.4)	(14.7)	4.1
Carryforward Surplus/(Deficit) Balances	<u>(19.2)</u>	<u>(41.6)</u>	<u>(56.3)</u>
Cumulative Balance (including Divisional Deficit Positions)	<u>(41.6)</u>	<u>(56.3)</u>	<u>(52.2)</u>
Budget Cuts as per Plan	2.50%	TBD	TBD

Faculty/Divisional Carryforward Balances – History and 2015 Budget Projection

Challenge – to balance in year structural deficits



Key Budget Planning Assumptions and Emerging Budget Risks

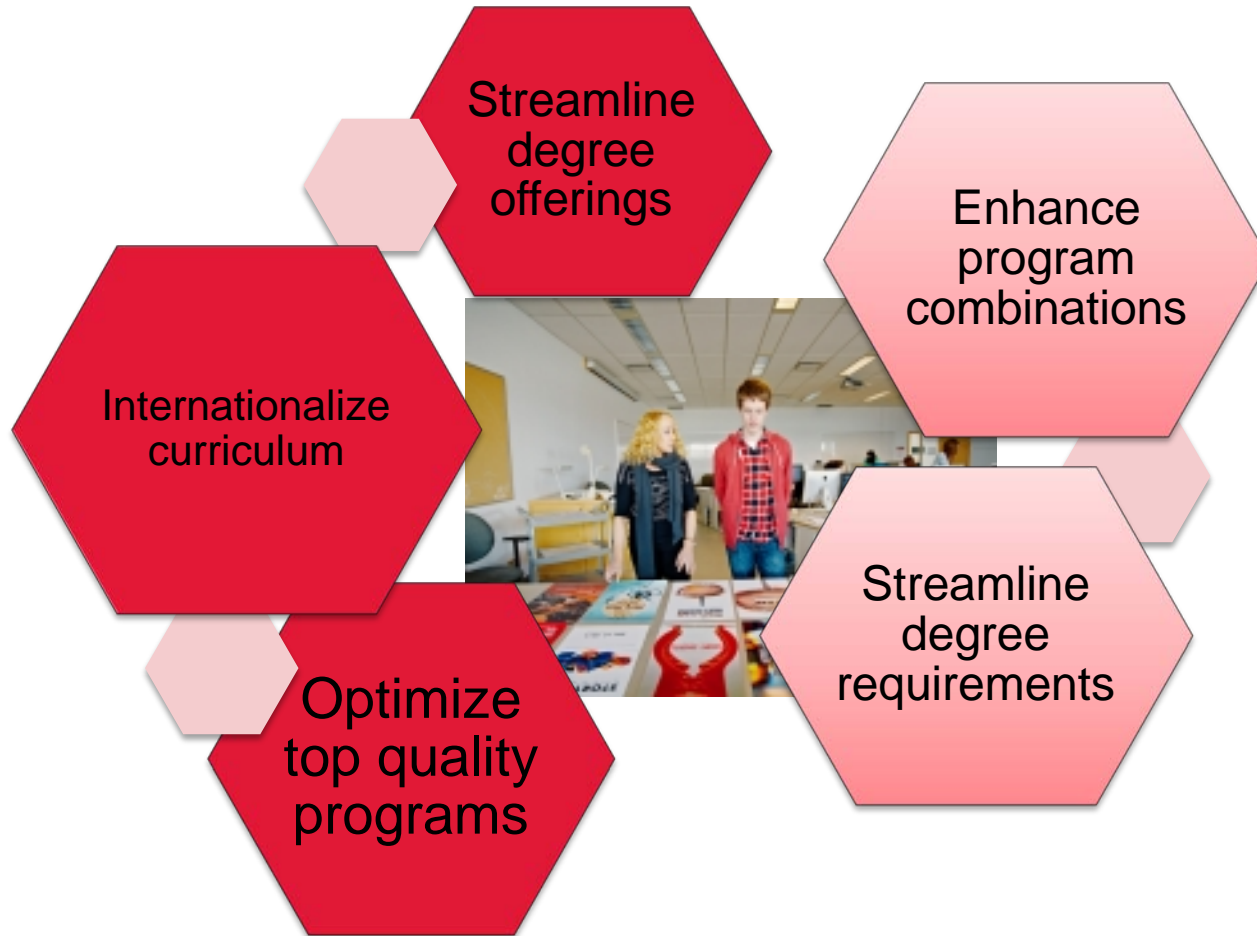
- ❑ Achievement of Enrolment Plan in light of applications and impact education flattening of demand for post secondary undergraduate
- ❑ Tuition Fee Framework beyond 2017
- ❑ Divisional Deficit Positions
- ❑ Impact of IIRP on Divisional/Faculty Budget Management
- ❑ Government Grant Rebased Risk (Undergraduate and Graduate)
- ❑ Provincial Government University Funding Formula Review
- ❑ Actual Pension Solvency Deficit – December 31, 2016 Valuation

Institutional Integrated Resource Plan

IIRP: Background and Consultations

- Objectives of IIRP: advance quality and financial sustainability and align resources to academic priorities (UAP)
- IIRP (endorsed by Senate, September 2015) identified institutional level priorities complementing local level plans
- IIRP working group recommendations to advance priorities
- Community consultations informing development of IIRP Implementation Plan:
 - Identification of recommendations/initiatives with greatest potential for impact for implementation
 - Process for implementation
 - Challenges to implementation
 - Implications of recommendations for Faculties/units

High Quality Cutting Edge Academic Programs



Teaching and Learning Excellence



Experiential Education

Teaching
innovation

EE
opportunity
in every
program



Technology Enhanced Learning

Blended
learning

Fully
online
courses &
programs

Enhancing
learning
through
technology



Research Intensification - PIER



Revision Graduate Studies

FGS
oversight,
advocacy
role

Integrate
graduate
programs in
resource
Faculties



Enhanced
graduate
learning
experience

Student Centric University: Advising

Pan-
university,
coordinated,
student
centric
academic
advising

Clarify
roles: VPS,
Faculties,
Colleges

Academic
advising
efficient and
high quality

Strengthen
technology
to support
student
services



Quality Administrative Services

“Shared
service”
model

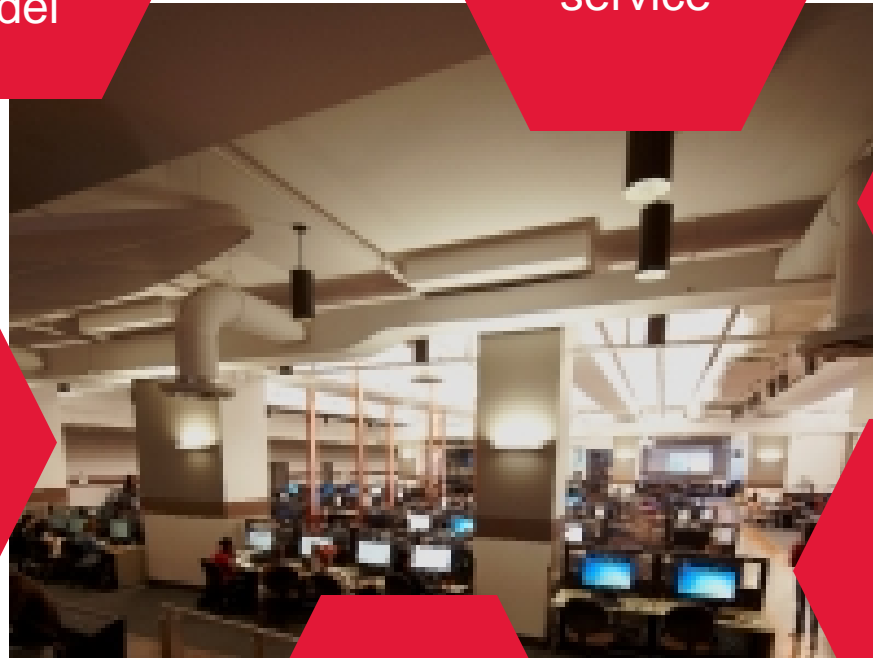
Enhanced
service

Cost
effective

Service
agreements

Technology,
skills
support

Pilot
test
model



Improving Campus Experience



IIRP Next Steps Timeline Fall/Winter 2016-17

September 2016

- Final Working Group Reports Released to Community
- IR Plan Call to community
 - Aligning with new UAP and IIRP Framework
- IIRP Process Update to Board Committees

October-November 2016

- Working Group Report Community Feedback Sessions
- PVP Retreat
- Faculty Councils (11)
- APPRC Sponsored Community Sessions (2) – Global Cafe
- President's Town Hall (October)
- Senate

December 2016

- IIRP Implementation Plan Drafted
- Working Group Co-Chair review
- Division/Faculty/Unit Integrated Resource Plans due

January 2017

- PVP Retreat Follow-up
- IIRP Investments (new resources)
- Local IIRP resource alignment (existing resources)

2017 - 2020

- IIRP Implementation continues
- Evaluation and accountability
- Performance against plan
- Metrics of success

- Working group reports:

<https://yulink-new.yorku.ca/group/iirp/working-groups>