

The University of Western Ontario

**2001-02 Annual Planning Process
Guidelines and Issues**

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Planning for 2001-02

- 2000-01 Budget Update
- Budget Outlook for 2001-02
- Planning Issues

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2000-01 Budget Update

- Uncertainty re: Accessibility Fund (\$1.4M)
 - Hoping for change in Eligibility Criterion
- New Research Performance Fund (\$1.1M)
- Lower Tuition (\$600K)
 - 175 fewer than projected
- Non-Salary Cost of UWOFA Settlement (\$1M)
 - Professional Allowance, Start-up Grant

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Budget Outlook for 2001-02

- No Announcement on Government Grants
 - Assume modest increase
 - Small reduction in P.I. Funding
 - due to proposed changes in methodology
- Tuition Fees
 - 2% limit on regulated programs
 - Only 1.4%, net of tuition set-aside
 - 2% increase in enrolments projected

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Budget Outlook for 2001-02 (cont'd)

- Investment Income
 - \$2.5M lower than 2000-01
- Turnover Recovery Begins
- Student Aid
 - 30% set-aside from tuition
- Employee Salaries

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Budget Outlook for 2001-02 (cont'd)

- Other Priorities
 - Student Recruitment
 - Deferred Maintenance (+ \$750K)
 - Library Acquisitions
 - CFI/OIT Support, Research Development
 - Classroom Enhancements
- Budget Reduction to be Modeled = 3%

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Planning Issues

- Faculty Priorities
 - Relationship between Budget Plan and Faculty Priorities
- Planning Indicators
 - Centrally Generated and Unit Provided
- Comprehensive Budget Model
 - Line-by-Line Budget
 - Provision for Non-Salary Items

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Planning Issues (cont'd)

- Faculty and Staff Complement Plan
- First-Year Course Guarantee
- Enrolment Contingent Fund (ECF)
 - 2 Changes Proposed
 - Incorporation of Distance Studies Courses
 - Equal weighting for all undergraduate courses
- Space, Facilities, and Capital Planning
 - Detailed Review of Space

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Planning Issues (cont'd)

- Provost's Academic Support Fund (PASF)
 - One-time Funding for Academic Initiatives
 - equipment upgrading, I.T. initiatives, faculty development, course/program development
- CFI/OIT
 - Review of New Proposals
- Canada Research Chairs (CRC)
 - Process for Allocation of Future Chairs

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Planning Process Timeline

- Planning Guidelines Issued Early October
- Pre-planning meetings
 - Deans/AO's and IPB (October)
- Planning Meetings begin mid-November
- Provost's 2001-02 Recommendations released in January

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