



STFX UNIVERSITY BUDGET

2017-2018

STFX UNIVERSITY BUDGET

2017-2018

Table of Contents

	<u>Page</u>
Letter from Dr. Kent MacDonald, President	3
Letter from Dr. Kevin Wamsley, Academic Vice-President & Provost	5
2017-2018 Priorities Framework	7
2017-2018 Proposed Budget	24
Appendix A	28
Appendix B	36
Appendix C	37



ST. FRANCIS XAVIER UNIVERSITY

February 16, 2017

Dear Colleagues,

I am pleased to present the 2017-18 Annual Budget. This budget is the result of many months of planning and consultation. We have carefully examined our operations and our employees have worked hard to identify areas where we can create efficiencies, increase revenues and reduce expenses. I thank them for their effort.

It is important to note that the fiscal health of the university continues to be of concern. The 2017-18 Annual Budget reflects another operating deficit and the debt accumulated over the past decade is too large. The university community must continue to make difficult decisions in order to reduce operating costs while more effectively increasing non-traditional revenues. Although it is important to understand the days ahead will be challenging, it is equally important to recognize the investments being made in this budget are important ones and that in time they will be the foundation upon which StFX returns to financial health.

To prepare the 2017-18 budget we were guided by our new Strategic Plan (2017-2022). In addition, this budget is guided by a very detailed business plan we have called our Priorities Framework. Therein we provide very clear objectives, targets and measures that will guide our efforts throughout the coming year. These efforts take into account changing student expectations, shrinking government funding, shifting demographics, and an increase in competition. To address these realities this budget provides the resources to enhance our academic program mix, diversify our academic community, increase our endowment and invest in critical learning infrastructure. One particular area of focus in this budget is the need to stabilize student recruitment and retention.

StFX is like many universities. We do face challenges, yet the year ahead will also bring many exciting developments. We will begin the construction of the Mulroney Hall in April. This will be the largest investment in academic infrastructure in the 165 year history of StFX. We will also invest in our fundraising efforts so that the university becomes less reliant on government funding. We have also increased our spending in areas that will increase student engagement and I believe we have invested in ways that will attract much needed non-traditional funding to the university.

To prepare for this budget we needed support from our employee groups. If there is one area that I am most proud it is likely the fact that our four employee groups have understood the fiscal challenges facing StFX. To that end, we now have collective bargaining agreements in place for all four union groups and I thank our union leadership for their belief that there will be brighter days ahead.



The willingness to have a positive working relationship with the university is not limited to our employee groups. I want to acknowledge the Government of Nova Scotia and the ongoing effort to engage and support the university. This year StFX received a one percent increase in our operating grant along with flexibility in establishing tuition levels that balance affordability with the need to invest in our students. We appreciate this positive working relationship and as the province's fiscal health improves we look forward to a day where more public support for StFX is provided.

StFX continues to be challenged financially. However, I believe the 2017-18 Annual Budget provides resources that will help StFX position itself for long-term sustainability. Please join me in thanking all those who have worked so diligently on our behalf. They have my sincere appreciation.

Hail and Heath,

A handwritten signature in blue ink, appearing to read 'K. MacDonald', with a stylized flourish at the end.

Dr. Kent MacDonald
President and Vice Chancellor





February 24, 2017

Dear Members of the Board of Governors, StFX University,

The submitted documents include the Academic portion of the 2017-2018 budget and the Priorities Framework document. The increased expenditures shown on the bottom line of the Academic budget primarily account for faculty/staff salaries and benefits to meet the requirements of the new Collective Agreement and, particularly, the adjustments related to the salary grid should be evident in the figures. Annual increases in the Collective Agreement, Economic Adjustment and Progression through the Ranks, equate to 3-5% salary and benefits adjustments. The fact that Academic budgeted expenditures are only increasing by approximately 2% demonstrates that we are in a position of declining resources which can be directed towards enhancing the core of our university's mission - academic excellence.

Unfortunately, there are few resources to invest into department and program budgets and research. I draw your attention to the significant effort undertaken to manage travel, supplies, and academic spending, not clearly evident in the budget numbers. Also not evident are the ongoing, widespread efforts to manage annual costs related to hiring, equipment renewal, library resources, and teaching and research space. To make the best use of our financial resources, we have cut courses with limited enrolment, delayed hiring of tenure-track professors for purposes of cost savings and strategic planning, and limited sabbatical and LTA hiring. At the same time, as any university should, we have been fully engaged in curriculum review – introducing new courses and deleting older courses – establishing new academic programs, reviewing, adjusting, and closing under-enrolled programs, and reallocating tenure-track positions to areas of high enrolment. Our faculty and staff members have worked diligently to respond to the needs of our students, to manage the workloads of departments and programs, and have participated in a team effort to ensure that the university is fiscally responsible.

Until recently the university has been operating in the absence of a university strategic plan, faculty and unit strategic plans, an enrolment plan, a retention plan, a domestic, international, and under-represented groups recruitment plan, and a resource-strategic academic plan, *it is with great optimism that we submit the Strategic Priorities Framework*. This document issues a way forward – a roadmap to achieving an environment of data-driven decision-making. Setting a long-term enrolment figure which balances student demand, university marketability, infrastructural capacity, and guided by a carefully-applied retention projection framework, will provide StFX with more accurate data to inform our budget

processes. And it will provide a guide for the assessment of faculty and staff complement, the size and capacity of our academic programs, and the resources necessary to drive these programs. It has also become clearly evident that our current funding model does not adequately address our resource needs for the future. It has been a hard lesson but one that will force us to take appropriate actions to manage and invest in our operations. I am confident that, with such planning processes in place, we will be a much more efficient and responsive institution, one that will be sustainable well into the future.

Sincerely,

A handwritten signature in black ink, reading "K. B. Wamsley". The signature is written in a cursive style with a large, sweeping loop at the end.

Kevin B. Wamsley, PhD
Academic Vice-President & Provost






2017-2018




PRIORITIES FRAMEWORK




#1 ACADEMIC EXCELLENCE

Student learning is at the core of our mission. Our immersive learning environment reflects the principles of liberal education: we provide rich learning experiences and opportunities that promote intellectual and personal development. Faculty research is integral to and informs teaching and the learning experience. Inspired by dedicated faculty and staff, our students develop into analytical, creative, and critical thinkers – global citizens who adapt and engage in an ever-changing world with integrity and curiosity.

Goal	Objective	Initiative	Target	Status
1. Deliver high quality, innovative, and relevant academic programs that meet the needs and aspirations of a diverse student body.	1. Develop new academic programs to attract additional students to StFX, including programs in health and public policy & governance.	<ul style="list-style-type: none"> a. Refine the annual process to develop and review new academic programs. b. Develop new academic programs for Senate approval. c. Launch new academic programs. d. Coady Institute develops new educational programs that can be delivered on or off campus. 	<ul style="list-style-type: none"> i. Revised annual process presented to Senate for approval. i. 2 new programs presented to Senate for approval. i. 2 new programs launched. i. 2 new programs developed. 	
	2. Ensure regular ongoing review of existing programs through Committee on Academic Review and subsequent annual reporting.	<ul style="list-style-type: none"> a. Review quality assurance processes to ensure existing academic programs achieve Committee on Academic Review (CAR) quality specifications and external accreditation standards. b. Review Coady Institute educational programs. c. Review academic approval process for Coady Institute and StFX Extension Department programs. d. Review student needs and departmental approaches to the timetabling process. 	<ul style="list-style-type: none"> i. Existing academic programs will achieve 100 percent compliance. ii. 100% of relevant academic programs will achieve accreditation. i. Review completed. i. Senate receives annual Coady Institute and StFX Extension Department program report. i. Recommendations for timetabling process presented to APP and Senate. 	

Goal	Objective	Initiative	Target	Status
	3. Improve and increase opportunities for collaboration on academic program delivery across the institution, including offering select Coady Institute and / or Extension courses for credit in undergraduate degree programs.	<ul style="list-style-type: none"> a. Establish formal academic collaboration agreement with NSCC and at least two other Canadian colleges. b. Develop academic programs that bridge between at least two or more faculties and departments. 	<ul style="list-style-type: none"> i. 2 academic programs under development in collaboration with NSCC. ii. 2 MOUs signed with Canadian colleges allowing for credit recognition and student transfer to StFX. i. 3 academic programs developed. 	
	4. Embed experiential learning opportunities, including service learning across a wider range of departments and programs.	<ul style="list-style-type: none"> a. Increase the number of academic programs offering Service Learning experiences. 	<ul style="list-style-type: none"> i. Programs offering Service Learning experiences increased by 5%. 	
	5. Increase the number and selection of online or blended delivery courses	<ul style="list-style-type: none"> a. Create baseline report of existing online and/or blended delivery courses. b. Develop new online courses that meet student needs. c. Increase the number of departments offering online courses 	<ul style="list-style-type: none"> i. An inventory of StFX and Coady Institute online and/or blended delivery courses completed. i. Student needs to support the full online student lifecycle (pre, during and post enrolment) identified. ii. Number of StFX online undergraduate courses increased by 7% (2,791 student-3 credit courses). i. Number of departments offering online courses increased by 5%. ii. Coady Institute's on-line / blended learning strategy completed. 	

Goal	Objective	Initiative	Target	Status
2. Enrich our culture of teaching excellence in an inclusive learning environment.	1. Create a Centre for Teaching and Learning with a mandate to promote excellence and innovation in teaching practice.	a. Develop an operational plan to establish a Centre for Teaching and Learning.	i. Operational plan completed.	
	2. Offer an increased range of professional development opportunities on teaching practice in higher education.	a. Provide relevant professional development sessions to faculty and staff.	i. 2 staff development retreats related to teaching practice completed. ii. Faculty participation increased by 20% over a similar retreat offered in 2016/17. iii. University teaching award applications increased by 5%. iv. Faculty professional development activities increased by 5%. v. 2 professional development opportunities related to teaching and research within the Coady Institute and Extension Department delivered.	
	3. Develop a peer-led teaching mentorship program for faculty members.	a. Create a peer-led teaching mentorship program to support faculty.	i. Peer mentoring program concept paper completed.	

Goal	Objective	Initiative	Target	Status
	4. Provide specific supports for faculty members to support the need for a diverse range of students.	<ul style="list-style-type: none"> a. Provide diversity training for faculty members. b. Provide Positive Space Training Workshops for StFX employees. 	<ul style="list-style-type: none"> i. Diversity training provided for all new faculty during their orientation program. ii. 2 diversity and inclusive classroom training sessions provided. i. 2 Level I and 2 Level II Positive Space Training Workshops delivered. 	
3. Advance a culture of faculty success and student involvement in research.	1. Develop and launch several major research institutes and related research centres in priority areas such as public policy and government; climate and environment; health; and community-based research.	<ul style="list-style-type: none"> a. Develop a policy framework for research institutes, related research centres, and university chairs and professorships. b. Develop an operational plan for the Mulronev Institute of Government (MIG). 	<ul style="list-style-type: none"> i. Potential research institutes and centres identified based upon research needs and opportunities. ii. Terms of Reference for research institutes and centres created. iii. Policies and procedures for the creation and appointment of research and teaching chairs created. i. Operational plan including staffing and governance framework developed for the MIG. 	
	2. Increase the number and diversity of undergraduate students involved in research through expansion of undergraduate student research awards and creation of a Summer Research Institute.	<ul style="list-style-type: none"> a. Establish baseline to determine number of undergraduate students engaged in research and diversity of those students. b. Increase the number and diversity of undergraduate students engaged in research. 	<ul style="list-style-type: none"> i. Baseline reports completed. i. Research opportunities for students and diversity of students engaged in research increased by 5%. 	

Goal	Objective	Initiative	Target	Status
	3. Establish a new program of graduate student research scholarships.	a. Establish a new funding model for graduate students.	i. A new funding model developed.	◆◆◆
	4. Revise and increase funding available through the University Council for Research (UCR) to strengthen faculty opportunities to seek external research funding and develop new mechanisms to reward exceptionally productive researchers with additional time for research.	a. Review support mechanisms available through the University Council for Research (UCR) and revise to strengthen faculty opportunities and reward research productivity. b. Continue professional development and workshops aimed at increasing external research funding. c. Create a plan for the optimal distribution of library resources.	i. Research support mechanisms reviewed and a revised approach for UCR funding developed. ii. External research funding increased by 10%. i. 2 external research funding workshops hosted. i. Optimization plan developed.	◆◆◆
	5. Increase faculty and student research recognition by establishing an annual report on research, holding an annual recognition event, establishing a new mechanism to advance faculty nominations for external research rewards and developing a new research website.	a. Collect baseline data related to research and scholarship activities. b. Celebrate faculty research and other publications through research recognition events. c. Advance faculty nominations for external awards. d. Promote faculty and student research through an enhanced Research website.	i. Annual report related to research and scholarship developed. i. 2 faculty research recognition events planned and hosted. i. 2 new faculty external award nominations submitted (e.g. Royal Society of Canada). i. New research website on StFX website completed.	◆◆◆

#2 STUDENT EXPERIENCE & OPPORTUNITY

Our unique campus environment, rooted in strong tradition, is centered on social engagement and fosters a sense of purpose, community, and active citizenship. Immersion in the StFX culture creates leaders who have unparalleled access to and support from passionate faculty and staff. After graduation, our students become part of a strong network of inspired alumni bound by their Xaverian experiences.

Goal	Objective	Initiative	Target	Status
1. Support the academic success, persistence, and timely graduation of all students.	1. Collaborate across Academic and Student Life areas to create a Centre for Student Success that consolidates a diverse range of student supports in one location.	<ul style="list-style-type: none"> a. Relocate Accessible Learning Centre to the Library. b. Working with the Student Success Centre, enhance the current Tutoring Program for Student Athletics. 	<ul style="list-style-type: none"> i. Relocation completed. i. Tutoring Program for Student Athletes is enhanced to accommodate four teams. 	◆◆◆
	2. Implement a holistic 1 st year experience program to help new students develop skills to support a successful transition from high school.	<ul style="list-style-type: none"> a. Develop and implement Phase 1 of a holistic 1st year student experience program. 	<ul style="list-style-type: none"> i. Phase I developed for implementation in 2018/19. ii. Two 1st Year orientation program initiatives developed with one taking place prior to students' arrival at StFX. 	◆◆◆
	3. Create events and programs that forge connections between academic and campus life and encourage faculty and students to connect outside of the classroom.	<ul style="list-style-type: none"> a. Conduct a Residence Life review through an external party. b. Develop a multi-year action plan to address recommendations from Residence Life Review and start implementation. c. Develop a faculty/staff in-residence program for possible implementation in 2018-19. d. Enhance opportunities for faculty and staff to interact with students. 	<ul style="list-style-type: none"> i. Residence life review completed. i. Multi-year action plan developed and implementation commenced. i. Program developed. i. Faculty and staff - student interaction area established and program launched. ii. Faculty lecture series in-residence established. iii. 2 Presidents Colloquia delivered. 	◆◆◆



















Goal	Objective	Initiative	Target	Status
	4. Increase programming and supports that will enable the success of under-represented groups of students.	a. Develop an action plan to support the success of underrepresented and marginalized students.	i. Action plan developed. ii. Student Advisor team augmented by part-time LGBTQ advisor.	◆◆◆
	5. Enhance the Accessible Learning Center to increase capacity and support for students with disabilities.	a. Review factors impeding the success of students with disabilities at StFX and develop plan to address. b. Review online capacity of the Accessible Learning Centre.	i. Plan developed. ii. Online capacity review completed.	◆◆◆
2. Optimize student health and wellness through relevant and innovative programming and services, and by promoting a student culture grounded in pride in learning, pride of place, and personal responsibility.	1. Enhance the culture of student safety and personal responsibility through an increase in best practice programs and workshops that promote healthy behavior.	a. Develop a comprehensive program to promote the “Xaverian Commitment” from orientation to graduation. b. Improve alignment between Residence Life and Student Life through development of common objectives. c. Create a policy to align with the Government of Canada's pending legislation to legalize, regulate and restrict access to cannabis. d. Develop programs and incentives to increase the return of positive student role models in residences.	i. Program developed. i. Joint objectives developed and implementation commenced. i. Policy developed and awareness programs launched. i. 1800 students in residence. ii. Residence occupancy 91%. iii. Program developed to increase number of 3rd and 4th year students in residence (5% increase by 2018-19). iv. The number of 3rd and 4th year students in residence staff positions increased by 10.	◆◆◆

Goal	Objective	Initiative	Target	Status
	2. Increase the number and range of programs and events that promote mental health awareness.	<ul style="list-style-type: none"> a. Complete an inventory of the current committees, services and events related to mental health. b. Establish a university-wide Committee to oversee mental health awareness activities. 	<ul style="list-style-type: none"> i. Inventory completed and duplicate events aligned. i. A university-wide Committee is established. 	
	3. Increase the number and diversity of club sports and other recreational activities, including a co-curricular outdoor recreation program.	<ul style="list-style-type: none"> a. Conduct an operational review of the Fitness and Recreation Programs and develop action plan for improvement. b. Conduct an operational review of Sports Club Programming. c. Broaden recreation opportunities through outdoor recreation activities. 	<ul style="list-style-type: none"> i. Operational review completed. i. Operational review completed. i. Outdoor recreation program developed. ii. Outdoor recreation program implemented with at least 175 participants. 	
3. Engage our students in transformative experiences to support their development as effective leaders, ambassadors and global citizens.	1. Collaborate across the university to enhance and integrate leadership development opportunities for our students.	<ul style="list-style-type: none"> a. Develop a campus-wide action plan in response to recommendations from leadership summit. 	<ul style="list-style-type: none"> i. Leadership action plan developed and implementation commenced. 	
	2. Create a leadership program for first year students.	<ul style="list-style-type: none"> a. To be addressed as part of action plan associated with leadership summit (see 3.1.a above) 	<ul style="list-style-type: none"> i. See 3.1.a.i above 	
	3. Expand opportunities, including international, for students to interact with diverse people, cultures, ideas and perspectives.	<ul style="list-style-type: none"> a. Conduct a review of the X-Project program and develop recommendations for renewal. 	<ul style="list-style-type: none"> i. X-Project program review completed and implementation of recommendations commenced. 	

#3 SOCIAL RESPONSIBILITY & INNOVATION













We, as local and global leaders, collaborate meaningfully and use skill and determination to foster active citizenship and enact positive change. Service is central to our collective identity; in serving others, we continue the very best traditions of the university. We draw upon our substantial human resources to bridge theory with social, cultural, and economic innovation, enterprise, and practice.

Goal	Objective	Initiative	Target	Status
1. Re-imagine and operationalize StFX's commitment to social justice, social responsibility and active 'local to global' citizenship.	1. Articulate a reinvigorated and renewed Antigonish Movement (AM) that includes a plan for its implementation across StFX and the communities we serve.	a. Develop a strategy and implementation plan that renews StFX investment in social justice, social responsibility and active 'local to global' citizenship.	i. Strategy developed. ii. Plans developed to commemorate the 100th anniversary of AM, including commemoration of StFX Extension Department's 90 th year in 2018.	◆◆◆
	2. Integrate concepts of social justice, social responsibility and activity local to global citizenship into undergraduate and graduate courses and programs.	a. Draft a concept paper that aligns the theories of social justice, social responsibility and active local to global citizenship to inform academic programming.	i. Concept paper in development.	◆◆◆
	3. Re-design StFX orientation programs to include content on StFX's commitment to social justice, social responsibility and active 'local to global' citizenship.	a. Defer to 2018-19.	i. Defer to 2018-19.	◆◆◆
2. Engender an integrated 'one StFX' approach to social responsibility and innovation.	1. Develop a university – wide concept and framework of social responsibility.	a. Design and launch a research competition as Phase 1 of a university wide social responsibility plan.	i. Research plan developed and launched.	◆◆◆
	2. Create a mechanism to align StFX local to global initiatives and develop a plan to guide implementation.	a. Develop a framework that identifies and aligns 'local to global' initiatives, beginning with Coady Institute, Extension, McKenna Center for Leadership and Service Learning.	i. Framework in development.	◆◆◆

Goal	Objective	Initiative	Target	Status
	3. Identify strategic partnerships with local to global community-based players to anchor and build social engagement and innovation opportunities.	a. Develop an inventory of the key strategic 'local to global' partners, beginning with Coady Institute, Extension, McKenna Center for Leadership and Service Learning.	i. Initial inventory developed.	  
3. Foster theory, culture and practice of entrepreneurship and social innovation across the Xaverian community, and beyond	1. Develop a university-wide concept and framework of social entrepreneurship and create a plan for its implementation and monitoring.	a. Defer to 2018-19.	i. Defer to 2018-19.	  
	2. Support research initiatives that clearly articulate social, cultural and environmental goals and priorities central to entrepreneurial and innovation initiatives.	a. StFX Extension Department establishes and launches the Center for Employment Innovation (CEI).	i. Centre for Employment Innovation established and launched.	  
	3. Collaborate across the institution to create an interdisciplinary program (undergraduate and or masters) on entrepreneurship, social innovation and community resilience.	a. Launch a call across all faculties for ideas on new academic programs related to entrepreneurship, social and community resilience.	i. Potential undergraduate and graduate program concepts presented to Academic Planning and Priorities.	  
	4. Create incentives for faculty and staff to be engaged in community-based entrepreneurship, enterprise development and social innovation initiatives.	a. Defer to 2018-19.	i. Defer to 2018-19.	  
	5. Develop a StFX entrepreneurship and social innovation strategy, grounded in social responsibility.	a. Develop a proposal to advance a StFX community-wide social enterprise initiative.	i. Proposal developed and canvassed with provincial government and key stakeholders.	  

#4 EQUITY & INCLUSION

We are a welcoming community, reflective of the diversity of the modern world and strengthened by our differences. We respect and support the needs and aspirations of our students, faculty, and staff by being creative, adaptable, and inclusive in our practice and policies. We provide opportunities to members of all communities to participate, engage, and belong.

Goal	Objective	Initiative	Target	Status
1. Create and sustain a campus climate where all campus community members feel welcomed, supported, included, and valued by the university and each other.	1. Create a shared definition of equity that can be integrated into all aspects of university operations and program delivery.	a. Conduct a review to identify equity related issues in the delivery of university operations and programs.	i. Equity review initiated.	  
	2. Review and revise existing policies and practices to promote respectful, equitable interactions within the university Community.	a. Review and revise StFX's University's Harassment and Discrimination Policy.	i. Revised Policy developed.	  
	3. Create clearly identified and ongoing supports for the integration of equitable pedagogical practice across all disciplines.	a. Initiate collaborative planning with local indigenous communities to develop actions towards campus-wide reconciliation and indigenization framework.	i. Action plan developed.	  
	4. Promote research on equity, inclusion and diversity, making contributions to scholarship as well as the campus and society.	a. Defer to 2018-19.	i. Defer to 2018-19.	  



Goal	Objective	Initiative	Target	Status
2. Create a critical mass of talented students, faculty, and staff that reflects the wider Canadian and global community.	1. Develop student recruitment strategies specific to individual communities.	a. Develop and operationalize a 5-year Enrolment Plan (domestic and international).	<ul style="list-style-type: none"> i. Five-year enrolment plan presented to President's Council and Senate. ii. Implement Phase 1 of International Enrolment Plan. iii. Increase full-time international student enrolment by 5%. iv. Baselines and projections developed for First Nations and African NS. 	◆◆◆
	2. Review and revise student entrance and assessment criteria to reflect principles of equity and inclusion.	a. Explore alternative admission and scholarship requirements to reflect principles of equity and inclusion.	<ul style="list-style-type: none"> i. Complete Academic Priorities and Planning report on alternative entrance requirements. ii. Review of scholarship criteria completed. 	◆◆◆
	3. Review and revise faculty/staff recruitment and assessment processes to reflect principles of equity and inclusion.	a. Defer to 2018-19 (pending completion of equity review).	i. Defer to 2018-19.	◆◆◆
3. Enhance academic support services to give all students the opportunity to achieve their potential.	1. Create a Centre for Student Success to assist all students to achieve their potential.	a. Evaluate effectiveness of the Student Success Centre services.	i. Evaluation completed.	◆◆◆
	2. Expand services for international students, including English as a second language programming.	a. Enhance English language programming on campus for international students.	i. Enhanced language program and academic services delivered.	◆◆◆
	3. Expand services for under-represented students, including African Nova Scotia, Indigenous, and students with low income.	<ul style="list-style-type: none"> a. Employ First Nation and African Nova Scotia Learning Skills Instructors in the Student Success Centre. b. Develop a plan to support student refugees. 	<ul style="list-style-type: none"> i. Instructors employed. i. Plan developed. 	◆◆◆

#5 SUSTAINABILITY & STEWARDSHIP

We use sound assessment and careful planning to allocate resources to best meet the broader goals of the university. We are purposeful stewards of our resources, considerate of our impact on the environment and our long-term resilience. And, we draw on the power of our people: we draw on their knowledge and energy, and support their growth.

Goal	Objective	Initiative	Target	Status
1. Develop the capacity for transparent, evidence-based decision making to inform all areas of university operations.	1. Implement a university-wide financial performance metrics data collection, verification, and reporting system.	<ul style="list-style-type: none"> a. Academic area to develop the integrated budget and planning model. b. Identify 8 key organizational metrics to monitor the overall health of the university. c. Each Faculty to develop and implement a strategic plan 	<ul style="list-style-type: none"> i. Integrated budget and planning reports presented to AVP&P. i. A dashboard created to reflect progress related to health metrics. i. Faculty of Education completes Strategic Plan. ii. Faculties of Arts, Science, and Business commence implementation of respective Strategic Plans. 	
	2. Identify collect and share data from each area of the university to inform decision-making. This may include data related to demand, performance/quality, environmental impact, risk management and productivity.	<ul style="list-style-type: none"> a. Identify the critical information required to inform decision making. 	<ul style="list-style-type: none"> i. A critical information dashboard created. 	
2. Align the use, construction, renovation and/or enhancement of physical and digital space with the university's strategic priorities, while adhering to principles of smart growth and sustainability.	1. Develop a Campus Master Plan that reflects the strategic vision for the future physical and digital development of campus.	<ul style="list-style-type: none"> a. Develop a plan to guide future physical and digital development of campus. b. Construct Mulroney Hall. 	<ul style="list-style-type: none"> i. Plan and implementation schedule completed. i. Construction underway and on track with project timeline. 	

Goal	Objective	Initiative	Target	Status
	2. Develop a Campus Sustainability Plan that explores and exemplifies economic, environmental, and social sustainability principles.	a. Commence development of a Campus Sustainability Plan.	i. Development of plan in progress.	◆◆◆
	3. Develop an Information Technology Strategy that promotes innovative practices and enhances self-service capabilities.	a. Establish a university-wide IT strategy and supporting 5-year implementation schedule.	i. Plan and implementation schedule completed.	◆◆◆
3. Increase operating revenues and contain costs to achieve a balanced operating budget.	1. Develop a strategic enrolment management plan.	a. Develop a 5-year plan to guide and align university enrolment.	i. Plan developed.	◆◆◆
		b. Develop a framework to more effectively predict enrolment.	i. Evidence-based model for enrolment projections implemented.	
	c. Develop a 5-year enrolment plan to guide the Coady Institute's marketing and recruitment strategy.	i. A marketing and recruitment strategy developed for the Coady Institute.		
	d. Increase overall university full-time enrolment over 2016-17.	i. Full time enrolment increased by at least 50 students in 17/18.		
	2. Develop a comprehensive strategy aimed at improving student retention rates.	a. Develop a comprehensive retention framework.	i. Framework developed and implementation commenced. ii. Year I to Year II overall retention rate increased 1%.	◆◆◆
	3. Explore and develop alternative revenue streams.	a. Develop an alternative revenue strategy that includes at least 3 new revenue growth opportunities.	i. Secure at least \$1 million in alternative provincial and / or federal government funding. ii. Increase Ancillary Services net revenue by \$200,000 per year commencing in 2017/18.	◆◆◆

Goal	Objective	Initiative	Target	Status
	4. Increase donor support for endowment and scholarships.	<ul style="list-style-type: none"> a. Development of comprehensive campaign plan for the university. b. Create a comprehensive Development Office plan and supporting 5-year implementation schedule. c. Review and enhance the Development Office operations to align with university fundraising objectives. d. Comprehensive athletics fundraising plan developed. 	<ul style="list-style-type: none"> i. Plan developed and submit to board for approval February 2018. i. Plan created and implementation schedule completed. i. Development operations review completed. ii. \$15 million raised for the Xaverian Fund. iii. \$5 million raised for other university endowments. iv. Increase endowment and scholarship funds for Coady Institute by 10%. v. Annual Giving donations increase by 50%. vi. Number Planned Gift expectancies increase by 40%. vii. Increase the percent of alumni who give to the university to 12%. i. Comprehensive athletics fundraising plan complete. ii. 12 Sport - 1 Team fundraising campaign raises \$150 000. 	
	5. Review operating costs on an ongoing basis to improve efficiency and reduce redundancy.	<ul style="list-style-type: none"> a. Academic Program Planning in place to improve efficiency and reduce redundancy. b. Develop a plan that will result in the permanent elimination of a minimum of 10 programs, services and /or facilities. 	<ul style="list-style-type: none"> i. All academic units submit annual planning documents as part of the Integrated Budgeted and Planning process. i. A business case study completed for 10 programs, services and/or facilities identified for elimination. 	

Goal	Objective	Initiative	Target	Status
4. Enhance the sense of pride & belonging amongst faculty and staff by investing in professional development opportunities and by promoting a university culture that is transparent and trusting.	1. Complete skills inventories within each unit to identify needs, gaps, and opportunities for investment in staff and faculty development.	<ul style="list-style-type: none"> a. Develop a faculty and staff skills inventory for each department. b. Subject to any existing collective agreement, develop a performance management system for employees. 	<ul style="list-style-type: none"> i. A skills inventory methodology developed. ii. Approved skills inventory methodology initiated. i. Performance management system developed. 	
	2. Develop a clear, consistent, and coherent internal communications plan.	<ul style="list-style-type: none"> a. Develop a comprehensive marketing & communications plan. 	<ul style="list-style-type: none"> i. Plan and implementation framework completed. 	
	3. Develop and offer a range of professional development workshops and events.	<ul style="list-style-type: none"> a. Develop a university-wide inventory of existing professional development activities. 	<ul style="list-style-type: none"> i. Inventory completed. 	

St. Francis Xavier University

2017-2018 PROPOSED BUDGET

Background:

Over the past two years there has been a focus on building a stronger and more sustainable financial future for the University. The 2017-18 Operating Budget continues to build on this, in the context of the University's recently approved Strategic Plan. Specifically, a priorities framework has been developed which translates the goals and objectives of the Strategic Plan in to initiatives that will be undertaken in the 2017-18 fiscal period.

The budget being presented to the Board is a financial representation of these plans.

2017-18 Budget:

The 2017-18 Budget calls for a deficit of \$749,000. Details related to the Budget can be found in Appendix A.

The University's Board of Governors had established a goal of returning the University to a balanced budget by the 2017-18 fiscal year. The multi-year impact of missing enrolment targets during the 2016-17 fiscal year has resulted in the proposed budget for 2017-18 falling short of this goal.

The University's financial picture remains precarious in that there is very little flexibility in the budget to deal with unforeseen circumstances. Moving forward attention needs to continue to be focused on recruitment and retention efforts, increasing endowment funds, debt reduction and cost reduction so that greater flexibility can be achieved.

The following commentary provides more detail on specific budget provisions.

Revenue:

1. Provincial funding:
 - It has been assumed that operational funding provided by the Province will increase by 1%.
2. Student Fees:
 - It is proposed that Tuition Fees be increased by 6%. Details on the proposed fees are attached as Appendix B.
 - It is has also been assumed that overall student enrolment will increase by 50 students.
3. Endowment & Other:
 - Revenue from Athletics has been increased by \$236,000 consisting of:

- \$40,000 expected growth in endowment income
- \$40,000 from sponsorship opportunities
- \$156,000 increase in fundraising targets
- Awards & Bursary Donations have been increased by \$100,000 to reflect increases in donations made to endowment accounts.
- Other revenue has been increased by \$206,000 because of revenue amounts drawn from unrestricted endowment accounts.

Expenditures:

1. Academic:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$46,083,500	\$47,392,000	\$1,308,500	2.84%

- Faculty members' salaries increase annually by about 4-5%. This is due to: annual economic adjustment as provided in the Collective Agreement and progression through the ranks, an annual step adjustment as detailed in the Collective Agreement.
- The increase in Academic expenditures has been kept below the 4-5% level as a result of a number of cost reduction efforts including:
 - decreased allotment of Limited Term Appointments (LTAs) to replace probationary and tenure track members who retired or are on leave (not sabbatical) - \$240,000
 - decreased allotment of LTAs for sabbatical replacements - \$300,000
 - decreased money designated for program investment - \$130,000
 - decreased library acquisitions budget - \$130,000
 - decreased Part-Time salaries - \$80,000
 - reduced funding for Antigonish Review - \$10,000
 - eliminated Me to We 'recruitment' funding - \$82,000

2. Student Services:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$7,799,000	\$7,950,000	\$151,000	1.94%

- Scholarship expense up \$170,000 because of growth in endowment funds available to fund scholarships and bursaries.

3. Advancement:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$2,274,000	\$2,567,000	\$293,000	12.88%

- New position added in the Communications Department to deal with capital project communications. Position will be partially funded through capital funds.
- Development Budget increased by \$183,000 because of position added in 2016-17 to lead the Xaverian Fund. This position is being funded through monies raised for the Fund.

4. Finance & Administration:

- Facilities Management:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$10,259,600	\$9,708,400	(\$551,200)	(5.37%)

- Reduction in energy costs due to low commodity prices and reduction in overall consumption on Campus. This is as a result of energy reduction initiatives undertaken over the past 3-5 years energy consumption on Campus has been reduced by approximately 30%.
- IT Services:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$3,145,000	\$3,224,000	\$79,000	2.51%

- Increase is due to annual salary adjustments, impact of US Exchange and rising costs associated with maintenance/licensing contract costs
- Administration and General:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$5,101,000	\$5,306,000	\$205,000	4.02%

- Increase is a result of annual salary adjustments and funding provided for participation in Maple League.

5. Restricted & Non-Discretionary:

2016-17 Budget	2017-18 Budget	Difference	Percent Increase
\$2,749,000	\$2,633,600	(\$115,400)	(4.20%)

- Decrease in funding provided to Extension Department
- Decrease in funding provided to Coady International Institute (partially as a result of decrease in operating costs associated with facilities)

Ancillary Services:

The budget for ancillary operations calls for a deficit of \$331,000. Proposed fees for Room and Board can be found in Appendix B.

Residence occupancy has been budgeted at 88% to reflect actual experience in 2016-17.

Debt payments associated with Residence Services have increased by \$736,000. This is due to a full year of financing costs associated with the Mount Saint Bernard renovations.

A number of initiatives in the Priorities Framework are focused on improving the financial performance of Ancillary Services over the next several years.

Long-Term Financial Outlook:

Pro-forma budget forecasts for the next three years are currently being developed and will be presented to the Board in June.

There are a number of areas where the funding allocated in the proposed 2017-18 Budget falls short of requirements to properly support the University's operations. Some of the significant challenges include:

- Funding for deferred maintenance. Only \$500,000 is available in the budget, the annual requirement is in the range of \$3-5,000,000.
- Funding for IT projects – we are increasingly dependent on IT to support our operations. The funding provided for IT projects is \$1-2,000,000 less than required to meet operational needs
- Debt Reduction – additional annual funding of \$1,000,000 is required to reduce unfunded debt/accumulated deficits
- Small Equipment Replacement - \$1-200,000 per year is required to fund replacement of lab equipment and other small equipment used throughout academic areas.

The multi-year plan being developed will attempt to identify ways to address these funding shortfalls while at the same time supporting on-going operational requirements.

Respectfully submitted,



Andrew P. Beckett MA CPA CA
Vice President Finance & Administration

**ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18**

	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N TO 3/31/2017 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
GOVERNMENT GRANTS						
Provincial Grant - Operations	\$ 29,057,700	\$ 29,346,400	\$ 29,346,400	\$ 29,638,000	\$ 291,600	\$ 291,600
Provincial Grant - Nursing	2,400,000	2,400,000	2,400,000	2,400,000	-	-
Federal Grant - Indirect Research	735,911	735,900	702,000	702,000	(33,900)	-
	<u>\$ 32,193,611</u>	<u>\$ 32,482,300</u>	<u>\$ 32,448,400</u>	<u>\$ 32,740,000</u>	<u>\$ 257,700</u>	<u>\$ 291,600</u>
TUITION & FEES						
Full-time Credit courses and Provincial Tuition Bursary	\$ 28,587,081	\$ 31,453,600	\$ 30,360,000	\$ 32,662,000	\$ 1,208,400	\$ 2,302,000
Part-time Credit courses	2,657,757	2,297,000	2,805,000	2,367,000	70,000	(438,000)
Summer School & Intersession Credit courses	1,588,429	1,451,000	1,750,000	1,545,000	94,000	(205,000)
Continuing Ed & Training & Development	526,454	505,000	408,000	534,000	29,000	126,000
Information & Technology fee	1,553,537	1,623,000	1,600,000	1,657,000	34,000	57,000
Recreational Fee	196,072	212,000	201,000	214,000	2,000	13,000
Facilities Renewal Fee	753,018	785,000	779,000	807,000	22,000	28,000
Other fees	868,217	748,000	681,000	653,000	(95,000)	(28,000)
	<u>\$ 36,730,565</u>	<u>\$ 39,074,600</u>	<u>\$ 38,584,000</u>	<u>\$ 40,439,000</u>	<u>\$ 1,364,400</u>	<u>\$ 1,855,000</u>
ENDOWMENT & OTHER						
Scholarship & Bursary Endowments	\$ 2,249,362	\$ 2,300,000	\$ 2,200,000	\$ 2,200,000	\$ (100,000)	\$ -
Special Purpose Endowments	754,223	982,500	986,000	925,000	(57,500)	(61,000)
Awards & Bursary Donations	466,856	250,000	400,000	350,000	100,000	(50,000)
Athletic Donations, Gate and Endowments	665,969	562,000	530,000	798,000	236,000	268,000
Other	607,033	420,000	608,000	626,000	206,000	18,000
Annual Giving	363,390	275,000	275,000	285,000	10,000	10,000
	<u>\$ 5,106,833</u>	<u>\$ 4,789,500</u>	<u>\$ 4,999,000</u>	<u>\$ 5,184,000</u>	<u>\$ 394,500</u>	<u>\$ 185,000</u>
TOTAL OPERATING REVENUE	<u>\$ 74,031,009</u>	<u>\$ 76,346,400</u>	<u>\$ 76,031,400</u>	<u>\$ 78,363,000</u>	<u>\$ 2,016,600</u>	<u>\$ 2,331,600</u>
					2.64%	2.98%

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N TO 3/31/2017 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
ACADEMIC:						
INSTRUCTION & NON-SPONSORED RESEARCH						
Salaries - Instruction & Research	\$ 29,152,121	\$ 29,110,000	\$ 28,862,000	\$ 29,652,000	\$ 542,000	\$ 790,000
Salaries - Support & Other	5,551,405	5,489,100	5,909,000	5,964,000	474,900	55,000
Fringe benefits	4,980,928	5,050,000	4,973,000	5,221,000	171,000	248,000
Operational Supplies & expense	2,077,313	2,040,000	2,089,000	2,045,000	5,000	(44,000)
Travel	635,323	630,500	640,000	623,000	(7,500)	(17,000)
Chairs of Study	373,323	306,000	306,000	486,000	180,000	180,000
	<u>\$ 42,770,413</u>	<u>\$ 42,625,600</u>	<u>\$ 42,779,000</u>	<u>\$ 43,991,000</u>	<u>\$ 1,365,400</u>	<u>\$ 1,212,000</u>
					3.20%	2.83%
CONTINUING ED, TRAINING & DEVELOPMENT						
Salaries	\$ 196,074	\$ 188,500	\$ 190,000	\$ 198,000	\$ 9,500	\$ 8,000
Fringe Benefits	34,331	33,500	33,000	37,000	3,500	4,000
Outside services	57,529	65,000	41,000	62,000	(3,000)	21,000
Operational supplies & expenses	121,902	145,000	106,000	144,000	(1,000)	38,000
Travel	68,125	70,000	57,000	70,000	-	13,000
	<u>\$ 477,961</u>	<u>\$ 502,000</u>	<u>\$ 427,000</u>	<u>\$ 511,000</u>	<u>\$ 9,000</u>	<u>\$ 84,000</u>
					1.79%	17.57%
LIBRARY						
Salaries	\$ 1,551,252	\$ 1,271,600	\$ 1,269,000	\$ 1,295,000	\$ 23,400	\$ 26,000
Fringe benefits	268,362	235,300	224,000	224,000	(11,300)	-
Library Acquisitions	1,261,951	1,400,000	1,322,000	1,326,000	(74,000)	4,000
Operational Supplies & expense	23,511	44,000	40,000	40,000	(4,000)	-
Travel	2,183	5,000	6,000	5,000	-	(1,000)
	<u>\$ 3,107,259</u>	<u>\$ 2,955,900</u>	<u>\$ 2,861,000</u>	<u>\$ 2,890,000</u>	<u>\$ (65,900)</u>	<u>\$ 29,000</u>
					-2.23%	0.93%
Employee Future Benefits	\$ (224,700)	\$ -	\$ -	\$ -	\$ -	\$ -
TOTAL ACADEMIC	<u>\$ 46,130,933</u>	<u>\$ 46,083,500</u>	<u>\$ 46,067,000</u>	<u>\$ 47,392,000</u>	<u>\$ 1,308,500</u>	<u>\$ 1,325,000</u>
					2.84%	2.88%

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N TO 3/31/2017 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
STUDENT SERVICES:						
Administration (VP Office)	\$ 76,412	\$ 74,000	\$ 70,000	\$ 81,000	\$ 7,000	\$ 11,000
Student Support Services	1,189,355	1,464,000	1,405,000	1,439,000	(25,000)	34,000
Athletics	2,184,140	2,185,000	2,383,000	2,182,000	(3,000)	(201,000)
Athletic Financial Awards	515,979	600,000	639,000	600,000	-	(39,000)
Financial Aid Office	50,216	55,000	55,000	57,000	2,000	2,000
Transfer to Fit and Rec (Student Access)	143,000	143,000	143,000	143,000	-	-
Scholarships	3,310,559	3,278,000	3,313,000	3,448,000	170,000	135,000
TOTAL STUDENT SERVICES	\$ 7,469,661	\$ 7,799,000	\$ 8,008,000	\$ 7,950,000	\$ 151,000 1.94%	\$ (58,000) -0.72%
ADVANCEMENT:						
Vice President Advancement Office	\$ 256,854	\$ 342,000	\$ 362,000	\$ 352,000	\$ 10,000	\$ (10,000)
Alumni	470,161	550,000	500,000	555,000	5,000	55,000
Communications	556,608	602,000	707,000	685,000	83,000	(22,000)
Development	705,395	633,000	759,000	819,000	186,000	60,000
Convocation	117,470	147,000	147,000	156,000	9,000	9,000
TOTAL ADVANCEMENT	\$ 2,106,488	\$ 2,274,000	\$ 2,475,000	\$ 2,567,000	\$ 293,000 12.88%	\$ 92,000 3.72%

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N TO 3/31/2017 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
FINANCE & ADMINISTRATION:						
FACILITIES MANAGEMENT						
Administration	\$ 641,447	\$ 643,700	\$ 618,100	\$ 655,600	\$ 11,900	\$ 37,500
Energy & Utilities	1,261,906	1,344,800	1,308,120	1,354,800	10,000	46,680
Grounds & Transport	996,458	948,100	938,800	938,600	(9,500)	(200)
Buildings	783,379	958,200	859,000	965,700	7,500	106,700
Central Heating Plant	636,171	728,000	702,000	728,000	-	26,000
Aquatic Centre	44,722	62,000	58,000	62,000	-	4,000
Safety & Security	955,181	921,800	970,610	921,500	(300)	(49,110)
Cleaning	3,440,213	3,590,000	3,657,000	3,590,000	-	(67,000)
Transfer to KMC	165,000	165,000	165,000	165,000	-	-
Pension Adjustment	(71,144)	62,000	66,000	66,000	4,000	-
Utilities	3,998,865	5,185,000	4,242,480	4,128,200	(1,056,800)	(114,280)
Energy Project	-	560,000	560,000	670,000	110,000	110,000
Repairs & Maintenance (Projects)	915,437	500,000	1,110,000	500,000	-	(610,000)
Furnishings & Equipment	39,215	45,000	45,000	45,000	-	-
FM Allocation of Charges to Ancillary	(4,448,704)	(5,454,000)	(5,032,900)	(5,082,000)	372,000	(49,100)
	<u>\$ 9,358,146</u>	<u>\$ 10,259,600</u>	<u>\$ 10,267,210</u>	<u>\$ 9,708,400</u>	<u>\$ (551,200)</u>	<u>\$ (558,810)</u>
					-5.37%	-5.44%
INFORMATION TECHNOLOGY						
Desktop Support	\$ 558,976	\$ 268,000	\$ 282,000	\$ 284,000	\$ 16,000	\$ 2,000
Infrastructure	1,125,897	934,000	734,000	717,000	(217,000)	(17,000)
MIS	328,384	414,000	326,000	387,000	(27,000)	61,000
Academic Tech Support	32,273	67,000	-	-	(67,000)	-
Audio Visual	222,021	276,000	270,000	274,000	(2,000)	4,000
IT Services		417,000	351,000	427,000	10,000	76,000
IT Administration		164,000	230,000	171,000	7,000	(59,000)
Tech Fee Projects	570,264	605,000	932,000	964,000	359,000	32,000
	<u>\$ 2,837,815</u>	<u>\$ 3,145,000</u>	<u>\$ 3,125,000</u>	<u>\$ 3,224,000</u>	<u>\$ 79,000</u>	<u>\$ 99,000</u>
					2.51%	3.17%

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N TO 3/31/2017 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
ADMINISTRATION & GENERAL						
Academic Vice President Office	\$ 382,368	\$ 413,000	\$ 439,000	\$ 428,000	\$ 15,000	\$ (11,000)
President's Office	938,666	890,000	922,000	874,000	(16,000)	(48,000)
VP Finance Office	-	-	-	318,500	318,500	318,500
Finance Functions	1,340,641	1,372,000	1,369,000	1,073,000	(299,000)	(296,000)
Procurement	352,296	352,000	361,000	362,000	10,000	1,000
Human Resources & Payroll	656,805	615,000	623,000	650,500	35,500	27,500
Post Office	69,698	79,000	79,000	83,000	4,000	4,000
Institutional Dues/Legal/Audit/Other	1,286,033	1,380,000	1,693,000	1,517,000	137,000	(176,000)
	<u>\$ 5,026,507</u>	<u>\$ 5,101,000</u>	<u>\$ 5,486,000</u>	<u>\$ 5,306,000</u>	<u>\$ 205,000</u>	<u>\$ (180,000)</u>
					4.02%	-3.28%
TOTAL FINANCE & ADMINISTRATION	\$ 17,222,468	\$ 18,505,600	\$ 18,878,210	\$ 18,238,400	\$ (267,200)	\$ (639,810)
					-1.44%	-3.71%
RESTRICTED & NON-DISCRETIONARY						
Interest Costs	1,024,171	1,149,000	1,149,000	1,150,000	1,000	1,000
Internal Debt Payment	500,000	500,000	500,000	500,000	-	-
Insurance	278,496	321,000	335,000	321,000	-	(14,000)
Coady Institute (\$200K transfer plus costs)	521,776	529,000	500,890	462,600	(66,400)	(38,290)
Extension Dept.	50,000	50,000	-	-	(50,000)	-
Contingency	5,031,951	200,000	-	200,000	-	200,000
TOTAL RESTRICTED/NON-DISCRETIONARY	\$ 7,406,394	\$ 2,749,000	\$ 2,484,890	\$ 2,633,600	\$ (115,400)	\$ 148,710
					-4.20%	5.98%
TOTAL EXPENDITURES	\$ 80,335,944	\$ 77,411,100	\$ 77,913,100	\$ 78,781,000	\$ 1,369,900	\$ 867,900
					1.77%	1.11%
NET OPERATING SURPLUS (DEFICIT)	\$ (6,304,935)	\$ (1,064,700)	\$ (1,881,700)	\$ (418,000)	\$ 646,700	\$ 1,463,700
ANCILLARY SURPLUS (DEFICIT)	\$ 878,572	\$ 328,000	\$ (367,000)	\$ (331,000)	(659,000)	\$ 36,000
CONSOLIDATED SURPLUS (DEFICIT)	\$ (5,426,363)	\$ (736,700)	\$ (2,248,700)	\$ (749,000)	\$ (12,300)	\$ 1,499,700

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

ANCILLARY ENTERPRISES	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N to 03/31/17 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
REVENUE						
Residence Fees	\$ 12,325,239	\$ 13,799,000	\$ 12,522,000	\$ 13,030,000	\$ (769,000)	\$ 508,000
Food Service	9,456,360	9,962,000	9,876,000	9,844,000	(118,000)	(32,000)
Campus Store	2,553,322	2,634,000	2,567,000	2,787,000	153,000	220,000
Keating Centre	657,949	631,000	622,000	665,000	34,000	43,000
Fitness and Recreation	585,108	540,000	532,000	553,000	13,000	21,000
Conference Services	1,366,852	1,465,000	1,290,000	1,365,000	(100,000)	75,000
Other Ancillary Services (Bus, Liquor Services)	393,077	371,000	401,000	375,000	4,000	(26,000)
TOTAL REVENUE	\$ 27,337,907	\$ 29,402,000	\$ 27,810,000	\$ 28,619,000	\$ (783,000)	\$ 809,000
EXPENDITURES						
Residence Expenses	\$11,765,546	\$13,615,000	\$12,756,000	\$13,410,000	\$ (205,000)	654,000
Food Service Expenses	8,641,150	9,178,000	9,205,000	9,138,000	(40,000)	(67,000)
Campus Store Expenses	2,463,173	2,345,000	2,309,000	2,404,000	59,000	95,000
Keating Centre	1,105,813	1,319,000	1,321,000	1,328,000	9,000	7,000
Fitness and Recreation	595,530	636,000	618,000	647,000	11,000	29,000
Conference Services	1,237,296	1,351,000	1,302,000	1,211,000	(140,000)	(91,000)
Other Ancillary Services (Bus, Liquor Services)	489,435	459,000	496,000	461,000	2,000	(35,000)
Director of Ancillary Office	161,392	171,000	170,000	351,000	180,000	181,000
TOTAL EXPENDITURES	\$ 26,459,335	\$ 29,074,000	\$ 28,177,000	\$ 28,950,000	\$ (124,000)	\$ 773,000
SURPLUS (DEFICIT)	\$ 878,572	\$ 328,000	\$ (367,000)	\$ (331,000)	\$ (659,000)	\$ 36,000
Principal Payments Incl in Residence Expenses	\$ 3,706,000	\$ 3,877,000	\$ 3,877,000	\$ 4,613,000	\$ 736,000	\$ 736,000

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

COADY INTERNATIONAL INSTITUTE	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N to 03/31/17 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
REVENUE						
DFATD	\$ 2,400,117	\$ 2,770,000	\$ 2,770,000	\$ 2,761,000	\$ (9,000)	\$ (9,000)
Contract Projects	3,490,479	2,648,000	2,641,000	1,916,000	(732,000)	(725,000)
Antigonish Movement Fund	11,071	11,000	11,000	11,000	-	-
General Revenue-facility & tuition, room and board	467,897	885,000	656,000	708,000	(177,000)	52,000
Other Grants & Donations	1,086,738	993,000	838,000	1,279,000	286,000	441,000
Endowments	177,530	187,000	189,000	198,000	11,000	9,000
	<u>\$ 7,633,832</u>	<u>\$ 7,494,000</u>	<u>\$ 7,105,000</u>	<u>\$ 6,873,000</u>	<u>\$ (621,000)</u>	<u>\$ (232,000)</u>
University Contribution	521,776	529,000	500,890	462,600	(66,400)	(38,290)
TOTAL	<u>\$ 8,155,608</u>	<u>\$ 8,023,000</u>	<u>\$ 7,605,890</u>	<u>\$ 7,335,600</u>	<u>\$ (687,400)</u>	<u>\$ (270,290)</u>
EXPENDITURES						
Salaries	\$ 2,819,875	\$ 2,578,000	\$ 2,604,000	\$ 2,547,000	\$ (31,000)	\$ (57,000)
Fringe Benefits	429,777	342,000	395,000	346,000	4,000	(49,000)
Operational Supplies & Expenses	567,158	276,000	330,000	239,000	(37,000)	(91,000)
Travel - Staff (Overseas Seminars, etc.)	569,840	861,000	388,000	890,000	29,000	502,000
Library Acquisitions	22,523	26,000	18,000	26,000	-	8,000
Room & Board	465,332	889,000	876,000	945,000	56,000	69,000
Facilities & Services	601,582	581,000	529,890	514,600	(66,400)	(15,290)
Contract Projects	2,679,521	2,470,000	2,465,000	1,828,000	(642,000)	(637,000)
TOTAL	<u>\$ 8,155,608</u>	<u>\$ 8,023,000</u>	<u>\$ 7,605,890</u>	<u>\$ 7,335,600</u>	<u>\$ (687,400)</u>	<u>\$ (270,290)</u>

ST. FRANCIS XAVIER UNIVERSITY
Draft Budget 2017-18

EXTENSION DEPARTMENT	ACTUAL FY 15/16	BUDGET FY 16/17	PROJ'N to 03/31/17 AS AT 12/16	DETAIL DRAFT BUDGET FY 2017/18	Compared to Budget FY 2016/17	Compared to Forecast FY 2016/17
REVENUE						
Cape Breton Endowment	\$ 92,230	\$ 87,000	\$ 94,000	\$ 87,000	\$ -	\$ (7,000)
Murphy Endowment	75,573	70,000	45,000	70,000	-	25,000
Antigonish Movement Fund	11,071	11,000	11,000	11,000	-	-
Other Grants and Donations	210,822	265,000	372,000	950,000	685,000	578,000
	<u>\$ 389,696</u>	<u>\$ 433,000</u>	<u>\$ 522,000</u>	<u>\$ 1,118,000</u>	<u>\$ 685,000</u>	<u>\$ 596,000</u>
University Contribution	50,000	50,000	-	-	(50,000)	-
TOTAL	<u><u>\$ 439,696</u></u>	<u><u>\$ 483,000</u></u>	<u><u>\$ 522,000</u></u>	<u><u>\$ 1,118,000</u></u>	<u><u>\$ 635,000</u></u>	<u><u>\$ 596,000</u></u>
EXPENDITURES						
Salaries	\$ 344,810	\$ 342,000	\$ 391,000	\$ 573,000	\$ 231,000	\$ 182,000
Fringe Benefits	57,491	54,000	66,000	83,000	29,000	17,000
Operational Supplies & Expenses	30,431	62,000	48,000	250,000	188,000	202,000
Outside Services (Consultants)	-	-	5,000	162,000	162,000	157,000
Travel & Off Campus Expenses	6,964	25,000	12,000	50,000	25,000	38,000
	<u>\$ 439,696</u>	<u>\$ 483,000</u>	<u>\$ 522,000</u>	<u>\$ 1,118,000</u>	<u>\$ 635,000</u>	<u>\$ 596,000</u>
TOTAL	<u><u>\$ 439,696</u></u>	<u><u>\$ 483,000</u></u>	<u><u>\$ 522,000</u></u>	<u><u>\$ 1,118,000</u></u>	<u><u>\$ 635,000</u></u>	<u><u>\$ 596,000</u></u>

APPENDIX B 2017-18 Fee Schedule

PROPOSED TUITION FEE SCHEDULE

	2016-17	% Increase	2017-18	% Increase
Full-time Tuition	\$ 7,626	6%	\$ 8,084	6%
Tuition Bursary - NS Students*	\$ (1,283)	0%	\$ (1,283)	0%
Net Tuition - NS Students	<u>\$ 6,343</u>	7%	<u>\$ 6,801</u>	7%
Net Tuition - Canadian Students outside NS	\$ 7,626	6%	\$ 8,084	6%
Nursing Program Tuition	\$ 7,920	8%	\$ 8,395	6%
B Ed Tuition	\$ 7,626	6%	\$ 8,084	6%
Travel Fee - BEd Students	\$ 270	2%	\$ 275	2%
	<u>\$ 7,896</u>	6%	<u>\$ 8,359</u>	6%
Extra Course (Overload - once above 30 credits)	\$ 1,463	6%	\$ 1,551	6%
Part-time Courses (M. Education, Distance Ed./Nursing)	\$ 1,610	6%	\$ 1,707	6%
Diploma in Adult Education - Modules 1-5	\$ 865	0%	\$ 895	3%
Diploma in Adult Education - Module 6	\$ 500	0%	\$ 500	0%
Graduate Programs - M.Ad.Ed.	\$ 10,000	29%	\$ 10,600	6%
Graduate Programs - Other (Science/Arts)	\$ 7,692	6%	\$ 8,153	6%
Information & Technology Fee	\$ 371	3%	\$ 382	3%
Fitness & Recreational Facilities Fee	\$ 106	3%	\$ 109	3%
Facilities Renewal Fee	\$ 180	3%	\$ 186	3%
International Student Fee - differential	\$ 7,626	6%	\$ 8,084	6%
Continuation Fee for all Graduate Programs (equivalent of a three credit course)	\$ 805	6%	\$ 853	6%
PHD Program	\$ 9,854	3%	\$ 10,150	3%
Continuation Fee for PHD Programs	\$ 2,814	3%	\$ 2,897	3%

*NS Tuition Bursary will be applied to in accordance with the number of credits taken: \$42.77 per credit for NS Students

APPENDIX C 2017-18 Room & Board Rates

Proposed Fee Schedule - Room & Board

Room Rates:	Units	Approved Rates 2016-17			Proposed Rates 2017-18		
		Rate	\$ Inc	%	Rate	\$ Inc	%
<u>Traditional Residence:</u>							
Single Room	35	\$ 6,555	67	1.0%	6,655	\$ 100	1.53%
Double Room	532	\$ 5,455	53	1.0%	5,540	\$ 85	1.56%
Single Room - Bishops	170	\$ 6,845	70	1.0%	6,950	\$ 105	1.53%
Double Room - Bishops	34	\$ 5,705	62	1.1%	5,790	\$ 85	1.49%
Single - Lane	269	\$ 6,245	64	1.0%	6,245	\$ -	0.00%
Double -Lane	12	\$ 5,210	54	1.1%	5,290	\$ 80	1.54%
MSB-Single	226	\$ 6,555			6,755	\$ 200	3.05%
	1278						
<u>Other Units:</u>							
West St. Apartments	17	\$ 6,365	\$ 61	1.0%	6,460	\$ 95	1.49%
Power/Somers	208	\$ 7,245	\$ 75	1.0%	7,355	\$ 110	1.52%
Governors - Private	161	\$ 8,235	\$ 86	1.1%	8,360	\$ 125	1.52%
Governors - Semi-Private	64	\$ 7,865	\$ 80	1.0%	7,985	\$ 120	1.53%
O'Regan Hall & Riley Hall - Single	225	\$ 8,235	\$ 86	1.1%	8,360	\$ 125	1.52%
O'Regan Hall & Riley Hall - Double	92	\$ 7,865	\$ 80	1.0%	7,985	\$ 120	1.53%
	767						
Total Units	2045						

Meal Plans							
10 Meal - \$250 DCB		\$ 4,497	\$ 152	3.5%	4,573	\$ 76	1.69%
14 Meal - \$300 DCB		\$ 4,910	\$ 165	3.5%	4,992	\$ 82	1.67%
17 Meal - \$250 DCB		\$ 5,249	\$ 174	3.4%	5,333	\$ 84	1.60%
315 Block + \$250		\$ 4,616	\$ 156	3.5%	4,694	\$ 78	1.69%
415 Block + \$300		\$ 5,356	\$ 171	3.3%	5,438	\$ 82	1.53%
515 Block + \$250		\$ 5,449	\$ 194	3.7%	5,549	\$ 100	1.84%
155 Meals + 600 DCB (O'Regan/Riley)					2,598 (plus hst)		
Power/Somers		\$ 525	\$ -	0.0%	525	\$ -	0.0%
Governors		\$ 730	\$ -	0.0%	730	\$ -	0.0%