UBC Vancouver Budget Retreat January 11/12 2016



UBC100

THE UNIVERSITY OF BRITISH COLUMBIA



Agenda

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- Retreat Objectives
- Timeline
- Funding Outlook Operating and Consolidated
- Operating Fund Updates
- Operating Funds Available for Allocation





Objectives of This Retreat

- Provide an opportunity for University leadership to share their successes, issues and financial challenges
- Provide an overall understanding of the state of the University's finances
- To broaden and deepen the understanding of key planning and resource needs
- Identify key institutional risks and opportunities (parts and sum of the parts)
- To share and discuss proposals for major new strategic initiatives and activities





Timeline - UBCV

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Preliminary Budget Reviews	2015 Nov - Dec
Budget Retreat	2016 Jan 11-12
Executive Updates	Weekly Jan-Feb
Council of Senates Budget Sub- Committee	Jan 20
Deans' Review	Jan 27, Feb 24
Preliminary Board of Governors Review	Feb 2
Final Executive Review	Mar 1
Final Board of Governors Approval	Apr 2



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UBC Vancouver Operating Fund (\$millions)

UBC100

	Forecast	Plan	Increase/
	<u>2015/16</u>	<u>2016/17</u>	(Decrease)
Revenues			
Provincial government	519	519	-
Undergraduate credit domestic tuition	182	188	6
International undergraduate domestic tuition	168	201	33
Graduate tuition	60	60	-
Research revenues	45	45	-
Business revenues	23	26	3
Investment income	38	39	1
Faculty revenues	168	168	-
Central support unit revenues	132	132	-
Land proceeds	16	18	2
Total Operating revenues	1,351	1,396	45



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UBC Vancouver Operating Fund (\$millions)

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	Forecast	Plan	Increase/
	<u>2015/16</u>	2016/17	(Decrease)
Allocations and unit revenues			
Faculties	781	802	21.0
Student Financial Aid	62	65	3.0
Library	39	39	-
IT	69	68	(1.0)
Provost	74	74	(0.3)
VP Finance & Admin	145	145	(0.3)
VP Research and International	42	42	(0.2)
VP Students	31	31	(0.3)
VP Development & Alumni	26	26	(0.4)
VP HR	19	19	
VP External & Communications	15	15	(0.1)
President's portfolio	8	8	-
Campus wide expenses (centrally funded internal loans and ICP share to hospitals)	23	23	-
Commitments against land proceeds	14	14	-
Strategic Investment Fund		6	6.0
Funds available for allocation	3	21	17.6
Total Allocations and unit revenues	1,351	1,396	45.0

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Note:

2016/17 allocations are assumed to equal 2015/16 allocations except for changes forecast to flow formulaically through the tuition model plus the 2018/15 6 impact of 2015/16 budget reprioritizations.

Consolidated Statement of Operations (\$millions)

	Forecast 2015/16 2	Plan 2016/17
Revenues		
Government grants and contracts		
Government of Canada	331	335
Province of British Columbia	757	766
Other governments	20	20
Other contributions	119	120
Student fees	564	613
Investment income	67	61
Sales and services	316	339
Amortization of deferred capital contributions	81	80
Total Revenues	2,254	2,333
Expenses		
Salaries & benefits	1,380	1,415
Operating costs - other	405	419
Capital asset amortization	187	195
Cost of goods sold	36	39
Grants to third parties	206	210
Debt service costs	19	19
Total Expenses	2,233	2,297
Excess of revenue over expenses	21	36

Notes:

The Excess of Revenue Over expenses in the Consolidated figures represents an accounting surplus only, and is not available for spending. It includes:

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- i. deferred land sales, which are endowed on receipt, but which are allocated to revenue over 99 years for accounting purposes (\$7m);
- ii. 2% set aside to endowment principal on the TREK endowment (\$4m);
- iii. excess spent on capitalized assets over depreciation (\$29m);
- iv. surpluses in central support units of \$3m,

and is offset by Operating drawdowns by faculties (\$5m).



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Operating Fund Challenges

- Remain in a very constrained environment.
- No funding to support merit or non-GWI salary costs borne by the Central support units.
- Faculties with limited or no access to International students are struggling with managing PTR costs.
- International rate increases will provide some much needed strategic funding, starting next year, but will take a few years to be fully realised.





Funding Outlook

Some good news, not directly reflected in our operating outlook, on the financial front:

- 3 years of new Provincial capital renewal funding for UBCV totalling \$142m, with a UBC match requirement of \$47m (25% of total)
- Improved access to debt to help support our capital plan without having to establish a separate Government Business Enterprise.
 These will not have immediate direct impact on the operating budget, though capital maintenance funding should mitigate the need for future operating commitments to capital maintenance





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Ongoing Efficiencies

- Attention was given in 2015/16 process to apply reductions in the central units to support strengthening of the Academic enterprise.
 These funds were allocated on a one-time basis for 2015/16 and are included in the operating budget for 2016/17
- We will continue to work towards identifying opportunities for operational efficiencies, though these will be developed throughout the breadth of the institution in both the Centre and the Faculties.
- Benchmarking study will be undertaken to help identify areas of opportunity.



UBC Vancouver UBC 100 Operating Funds Available for Allocation

• Projections show \$21m in operating funds available for allocation

	2015/16	2016/17	
2016/17 Unallocated operating revenues	\$ -	\$ 13m	
Reprioritization implemented in 2015/16	1m	4m	
Land proceeds	2m	4m	
Funds available for allocation	\$3m	\$ 21m	

- Funding requests totalling \$36m, including a \$3m contingency, were identified through the budget review process
- These include approximately \$7m in pre-commitments and other unavoidable costs and \$4m for unfunded PTR in certain second entry programs
- We have compiled a list of approximately 80 individual requests, the majority of which will be presented by their proponents
- We will be taking notes of the comments by the group made over these 2 days





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2016/17 Budget Workshop Allard School of Law

January 12, 2016



PETER A. ALLARD SCHOOL OF LAW

Presentation Topics

- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- Strategic Proposals/New Activities
- People
- Finance



PETER A. ALLARD SCHOOL OF LAW

Strategic Overview

Vision/Mission (2010)

The Allard School of Law is committed to being one of the world's great centres for legal education and research.

Goals (2010)

- Provide an exceptional and inspiring legal education that enables students to excel in professional practice and serving society.
- Engage in research that produces outstanding scholarship with local, national and global impact.
- Foster a collegial, collaborative environment in which faculty, staff and students participate in a supportive and respectful community that values a range of contributions.
- Build and nurture relationships with alumni, the profession, government and civil society to enhance the quality and broader impact of our teaching, research, and service.



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Strategic Overview

Current Situation

Strengths

- Students
 - JD = 555.6 FTE
 - International = 10.6 FTE (13 Headcount)
- Faculty/renewal
- New program gift of \$22.5M to be donated by Peter A. Allard over 10 years, starting in 2015/16.
 - Funds cannot be used to offset deficit.
 - \$15M is front loaded over the first 3 years at \$5M per year.
 - The total endowment will be split to support 3 areas:
 - faculty recruitment and retention (\$13.5M)
 - student support (\$5M)
 - experiential learning (\$4M)





Strategic Overview

Current Situation

Weaknesses

- Revenue: <u>tuition</u> + funding allocation
 - 38% of Law's operating revenue of \$13.4M is derived from tuition fees, which attract 2% in tuition fee increases, while 86% of Law's operating expenses are tied in salary and benefit costs.
 - Annual salary increases exceed incremental tuition revenue resulting in a structural deficit.
 - Law does not have the ability to increase international enrollment to assist with the structural deficit.
- Faculty complement (<u>External Review Report</u>)
 - Full complement has traditionally been 45 FTE
 - Currently we have 10 faculty who are on some form of leave (study, medical, parental),
 - 4 vacancies created this year and 2 new hires
- Student financial aid (administration and SFA budget shortfall)



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* Based on 1L tuition

Domestic JD tuition, 2015 vs. 2019 (with trend lines)



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2014 External Review Final Report

- Identified significant risks with current faculty complement:
 - ➢ Research
 - Retention
 - Faculty burn-out (high teaching loads + sustained and productive research agenda + service loads)
 - Adequate delivery of accredited curriculum
 - Community engagement and service

Review Committee:

- Dr. Gillian Lester, Dean, Columbia Law School
- Dr. Mayo Moran, Professor of Law and Provost, Trinity College, University of Toronto





Law School Survey of Student Engagement 2015

In your experience at law school, how satisfied are you with **financial aid advising?**



- Percentage responding "Very satisfied" or "Satisfied" of those who have used the service
- Percentage using the service

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Student Financial Aid

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	2011/12	2012/13	2013/14	2014/15	2015/16
Applications	286	229	212	216	245
Percentage of JD students	53%	42%	39%	40%	45%
Students receiving bursaries	146	139	132	145	159
Percentage of applications	51%	61%	62%	67%	65%
Total assessed unmet need	\$1,116,637	\$1,177,621	\$1,047,997	\$1,252,132	\$1,314,598
Deductible per term	\$1,300	\$1,050	\$625	\$1,620	\$940
Total assessed unmet need met	\$685,759	\$675,025	\$698,550	\$792,750	\$987,775
Remaining unmet need	\$430,887	\$502,596	\$349,447	\$459,382	\$326,823 000021

Strategic Overview

Outlook

- structural deficit growing
- tuition level: change is inevitable
- program innovation
- using the Allard gift



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Law School Survey of Student Engagement 2015

In your experience at law school, how satisfied are you with **personal counselling?**



 Percentage responding "Very satisfied" or "Satisfied" of those who have used the service

Percentage using the service

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UBC100 Critical Issues & Opportunities

Key areas of focus

- financial stability
- 2016 strategic plan
- experiential learning program: expansion & sustainability
- <u>Allard endowment</u> & matching campaign

Threats/Risks

- tuition cap
- faculty retention
- SFA
- <u>student counselling</u>



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UBC100 Critical Issues & Opportunities

New Activities

- LLM Common Law
- LLM Tax
- distance learning
- LLB/JD degree partnership agreement (Tsinghua University)
- JD/LLM degree partnership agreement (Melbourne University)

Discontinued activities

- JD/MAAPPS
- selective student mobility programs
- Dispute Resolution Centre
- pre-2015 curriculum



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UBC100 Critical Issues & Opportunities

Opportunities

- new program possibilities?
- class size?
- student fee?
- student counselling

Operational Efficiencies

• FMS Certification for on-line processing



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Allard Gift Spending amount by Endowment



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Strategic Proposals

Key proposals

- strengthen research profile
- enhance & secure experiential learning (incl. clinics)
- build cross-campus initiatives
- role of Allard gift
- bridge funding
- \$400K to help offset the structural deficit in 16/17



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People – Faculty

Rank	FTE	Headcount
Professor (incl. Dean)	20	20
Associate Professor	13	13
Assistant Professor	7.75	8
Vacancies	4	4
Total tenure/tenure- track positions	44.75	45
Lecturer (incl. p/t)	6.95	9
Adjunct Professor	-	~ 100



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People - Staff

Staff (15/16)	FTE	HEADCOUNT
Management and Professional	17.55	24.0
Management & Professional (UBC IT Staff)	2.65	3.0
CUPE 2950 *	12.0	12.0
Excluded (Indigenous Community Legal Clinic)	1.6	2.0
Development & Alumni	2.95	6.0
TOTAL STAFF	36.80	47.0
CUPE 2278 – Teaching Assistants	9.0	9.0

 In 16/17 Law plans to hire 2 part-time CUPE 2950 staff to support the Student Services and Administration Offices.



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People

Issues & opportunities:

- clinical Lecturers
- tenure-track Instructor stream
- faculty/adjunct mix
- external review assessment

Future profile (connected to strategic direction)

Strategic hiring: 5 Year Hiring Plan (Faculty)





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Finance - Prior Year, Current Year, Next Year

Revenue (in thousands)	Prior Year Actuals 14/15	Current Year Forecast 15/16	Next Year's Budget 16/17
Tuition Revenue	5,741	5,080	5,369
Indirect Cost of Research	36	38	44
Complement	1,593	1,593	1,593
Operating Grant	4,495	5,986	5,677
Other Operating Revenues	718	721	818
TOTAL OPERATING REVENUE	12,583	13,418	13,501
Expenses (in thousands)			
Faculty compensation	7,700	7,772	8,029
Staff compensation	2,424	2,469	2,561
Benefits	1,503	1,552	1,577
Non-salary expenses	1,570	1,907	1,998
TOTAL OPERATING EXPENSES	13,197	13,700	14,165
SURPLUS/DEFICIT	(614)	(282)	(664)
Carry forward (beginning)	1,284	670	388
Carry forward (ending)	670	388	(276)



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Finance

- Prior financial results (14/15)
 - Ended the year with an operating deficit of \$614k in 14/15.
 - The structural deficit is a result of salary increases outpacing incremental tuition fee revenues.
 - The year-end deficit was absorbed by using our carry forward funds. However, the ending balance in the carry forward is insufficient to cover future operating deficits.



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Finance

Current year update (15/16)

- Original plan indicated that we would have a deficit of \$1.6M; Law received \$1M (\$600K recurring & \$400k one-time) in funding from the VP Academic Office to help offset the structural deficit.
- The forecasted year-end deficit is expected to be \$282K. The deficit is slightly lower than expected because of the unusually large number of faculty (10) who are on leave which has resulted in some cost savings.
- The new gift from Peter Allard can not be used to fund existing operational costs.
- \$474k of tuition revenue was transferred to SFA and to keep the faculties "whole" the same amount of funding was allocated to the Operating Grant.



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Finance

- 16/17 Budget Proposal
 - JD Program 2% tuition increase; no growth (555.6 FTE)
 - ISI 15% tuition increase; no growth (10.6 FTE; 13 headcount)
 - Graduate Programs 2% tuition increase
 - <u>Graduate FTEs</u> are expected to increase from 109 to 125 by 2020/21
 - Distance Learning growth is attributed to the introduction of 2 new courses in the program.
 - LLM Taxation program was established in 2014/15 with 7 FTEs and enrollment is expected to reach "steady-state" in 2020/21 with 18 FTEs.



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Graduate Program - FTEs

Graduate tuition increase: 2%

15/16	16/17	17/18	18/19	19/20	20/21
23	30	30	30	30	30
20	25	25	25	25	25
8	10	12	12	12	12
50	45	40	40	40	40
<u>8</u>	<u>10</u>	<u>12</u>	<u>15</u>	<u>15</u>	<u>18</u>
109	120	119	122	122	125
	11	-1	3	0	3
	23 20 8 50 <u>8</u>	23 30 20 25 8 10 50 45 8 10	23 30 30 20 25 25 8 10 12 50 45 40 8 10 12 109 120 119	$\begin{array}{c ccccccccccccccccccccccccccccccccccc$	$\begin{array}{c ccccccccccccccccccccccccccccccccccc$



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Finance – Endowment Fund

Spending Allocation Assumptions:

- Current endowment spending increases by 2% for inflation
- The Allard endowment spending allocation is based on a 3 year rolling average of the donation (not market value) multiplied by 3.5%

-	15/16	16/17	17/18	18/19	19/20	20/21
Current spending	357	364	372	379	387	395
Allard Fac Recruit/Retention	35	140	174	218	295	345
Allard Student Support	13	52	65	81	109	128
Allard-Experiential learning	<u>10</u>	<u>42</u>	<u>52</u>	<u>64</u>	<u>87</u>	<u>102</u>
Total Spending	415	598	663	742	878	970
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Finance – Specific Purpose (Donations)

Majority of the donations come from:

- \$372K Allard Prize for International Integrity
- \$309K Law Foundation of BC
 - \$174.5K to support ICLC
 - \$50K Innocence Project
 - \$45K Community Placement Project
 - \$40K Public Interest Awards
- \$200K Franklin Lew Funds
 - Sept. 2012 \$2M donation over 10 years = \$200,000 per year
- \$140K Centre for Business Law receives various donations



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Finance – Specific Purpose (Donations)

Expenses from donations (Restricted):

- Sessional salaries: include the salaries of 2 part-time Clinic Directors at the ICLC.
- Staff salaries: includes the salary of the CBL Director.
- Non-salary expenses include:
 - Allard Prize in International Integrity costs
 - 17/18 onwards the expenses exceed revenue
 - Development team is working with Peter A. Allard to obtain a funding commitment for the costs associated with the Prize
 - \$200K in non-recurring new initiatives funded by the Lew grant
 - Indigenous Community Legal Clinic expenses
 - Innocence Project
 - Public Interest Awards
 - Centre for business law expenses
 - Moot expenses



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Questions

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Faculty of Applied Science

Marc Parlange



- Background
- Vision
- Current achievements
- Future focus areas
- Operational efficiencies
- People
- Financials



BACKGROUND



Ten Departments & Schools Mechanical, Civil & Environmental, Materials, Electrical, Computer, Chemical & Biological, Mining (Biomedical in prep.)

Schools: Nursing, Planning, Architecture & Landscape Architecture

UBC Okanagan School of Engineering (Electrical, Civil, Mechanical)



8,000 Students320 Professors900 Staff



Elizabeth Croft, Education and Professional Development



Marc Parlange Dean



Carol Jaeger Academic

Faculty of Applied Science, Associate Deans, Spectacular team

James Olson, Research & Industrial Partnerships



Sally Thorne, Faculty Affairs



Debbie Woo, Alumni and Develo<u>pment</u>







STRATEGIC PLAN

Our Mission is to create positive change in the world through the generation, professional embodiment, and innovative application of new knowledge

Our Vision is to provide unparalleled research and learning environment in which creative minds work together to address today's greatest challenges in service to society



OUR VALUES

CONNECTION We engage one another with respect and scholarly generosity within an open and inclusive culture.

LEADERSHIP We are a Faculty of leaders. We take the initiative. We are defined by our integrity, excellence, innovative mindset, and passionate spirit of engagement. IMPACT Our choices and actions reflect our common purpose: transformative change.

A CULTURE OF VALUING PEOPLE

The Faculty provides a values-driven culture, creating an environment that fully supports passionate engagement in scholarly activity and attracts and retains world-class students, staff, and faculty from around the globe.



A FOCUSED RESEARCH ENTERPRISE

The Faculty defines and hones its exceptional research strengths, assumes global leadership, expands the boundaries of professional practice, and accelerates knowledge mobilization to benefit society.



A DISTINCTIVE LEARNING ENVIRONMENT

The Faculty provides a superb student experience: outward facing, research driven, hands on, and grounded in core fundamentals, sustainability, and integrity.



AN ENGAGED COMMUNITY

The Faculty partners with its communities to advance the wellbeing of society by addressing social, economic, cultural, and ecological challenges.





CURRENT ACHIEVEMENTS

CURRENT ACHIEVEMENTS Engaged students, faculty, staff and community



IRON PIN CEREMONY

ventureLAB

Mentoring | Partnering | Connecting

connecting

s where talented entrepreneurs roven tools, expert mentors oport to grow their innovative,

GLOBAL IMPACT AWARD-Entrepreneurship program – Business School & Engineering team 60057

Deloitte

COORDINATED INTERNATIONAL EXPERIENCES -

Danish TU
EPFL, ETHZ, TU Delft Glasgow, TU Munich

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FUTURE CIES

National Taiwan University
NTU, NUS; Univ. Queensland
Tokyo Institute of Technolog 900059

UBC SAILBOT TEAM

The Challenge Attempting to be the first autonomous sailing vessel capable of crossing the Atlantic Ocean.





UBC BEST

BIOMEDICAL ENGINEEERING STUDENT TEAM The International Medical Device Initiative





TURKEY 2K TROT

October, 2015 Student, staff & faculty health

ENGINEERING EXCELLENCE





- Women in Engineering, Goldcorp Chair
- Sixth and Seventh Grade Teacher Program
- Grade nine and ten high school weekends
- Summer elementary/high school programs and afterschool clubs – Geering up



- 50% Women by 2020
- Industry leaders agree that access to talent has become the most significant barrier to productivity



Humanitarians · Entrepreneurs Visionaries · Innovators · Pioneers

UBC Engineering OPEN HOUSE UBC 100

OPEN HOUSE

November 28, 2015

AFFILIATE PROGRAMS

- Create engaged network of industry partners
- Leverage industry network for major grant success



• Focused Research

Pipeline Integrity Institute NEWLY ESTABLISHED AFFILIATE PROGRAM Co-Directors – Dr. Akram Alfantazi

- Dr. Dharma Wijewickreme



- Qualified engineers and graduates
- Applied outcome research and technology solutions towards zero pipeline incident rate
- Inform design/construction practices and regulatory framework
- Disseminate factual information

Advanced Materials Manufacturing Institute

The digital factory

- We are at the limit of what the physical factory can do
- Developing a digital factory to simulate the fundamental processes at work
- Profound scientific challenge to understand all the materials transformations from raw material to end product

Institute of Forest BioProducts





Walter Merida

Clean Energy Research Institute

 To lead and aggregate provincial effort around the transportation agenda







TRANSPORTATION FUTURES: Topologies Infrastructure Energy Resilience




APPLIED SCIENCE PROFESSIONAL PROGRAMS

A YEAR can CHANGE EVERYTHING

Master of Engineering Leadership



Master of Health Leadership and Polizs

Master of Engineering Leadership



Capstone

PROFESSIONAL PROGRAM PLATEORM

Technical Courses



FUTURE FOCUS AREAS



FUTURE FOCUS AREAS

New Biomedical Engineering Program

FUTURE FOCUS AREAS

New Research Clusters





First Nations and Natural Resources (Partnership with the Faculty of Forestry & Business School)

September 2015 – launch of a dedicated research cluster

Brings together:

- Foresters
- Integrated Land Use specialists
- Planners
- Hydrologists
- Mining Engineers
- Social Scientists
- Architects
- Nurses
- •

FUTURE FOCUS AREAS Engineering Expansion





British Columbia Technology **Report Card**

2014 Edition

Bordering on the big play: taking our tech sector to the next level

ipmg.ca/tml



DOUBLING CAPACITY OF OUR FACULTY

- Need to close ulletinnovation gap in BC
- Need to increase ulletgraduate students
- Need to increase \bullet teaching and lab space

COMPARISON WITH PEER PROVINCES BACHELOR DEGREES GRANTED

 BC Lags all peer provinces in number of Engineering Bachelor degrees granted



Canadian Engineers for Tomorrow

Trends in Engineering Enrolment and Degrees Awarded 2010-2014



COMPARISON WITH PEER PROVINCES MASTERS DEGREES GRANTED

- BC lags all peer provinces in Masters degree
- Ontario and Quebec are graduate more than 250% more engineers per capital than BC.
- Number of Master
 Engineers is decreasing
 in BC while accelerating
 in QC and On.



COMPARISON WITH PEER PROVINCES PHD DEGREES GRANTED

- BC Lags all provinces in number of Engineering Bachelor degrees granted
- BC Graduates half the number of PhD students as Quebec and Alberta
- Quebec and Alberta have dramatically increased
 PhD graduates over last 5



years



INNOVATION COMPARISON WITH PEER PROVINCES

- Highest entrepreneurial ambition
- Lowest amount of *Public* R&D (less than half Ontario and Quebec)
- Lowest number of researchers
- Lowest business investment in researchers
- Lowest number of patents

http://www.conferenceboard.ca/hcp/provincial/innovation.aspx

Ontario, Quebec, and British Columbia Are the Top-Ranked Provinces



NUMBER OF PATENTS AWARDED

 BC lags all other Provinces in terms of total number and per capital patents awarded





INTERNATIONAL INNOVATION RANKINGS

- BC Ranks as one of the lowest jurisdictions in the world in terms of PhD degrees per capital awarded.
- Canada ranks lowest in comparison with OECD countries
- BC brings downs Canada's average





INTERNATIONAL INNOVATION RANKINGS

 Canada is ranked last in terms of 'Private sector capacity for innovation' and 'business spending on R&D'

Canada is ranked 26th by WEF Canadian business productivity is Canadian business spending on R&D ranks 22nd among OECD on private sector capacity for ranked 17th among OECD countries--innovation-a major factor in our countries (% of GDP) almost 30% lower productivity levels overall declining competitiveness than US business Luxembourg 124 Switzerland Israel United States 123 Norway Korea Israel 2.7 United States Finland 115 Germany Japan 2.6 Ireland 109 Finland 5.6 Sweden 2.3 Sweden Belgium 5.5 97 Switzerland 5.4 21 lapan Australia 89 Denmark Denmark 2.1 Switzerland 89 Luxemborg Germany 1.9 Sweden 89 United Kingdom United States 19 France 88 Netherlands 5.2 Austria 1.9 5.2 Qatar Denmark 85 Slovenia 1.8 Malaysia 5.2 Austria 85 Belgium 5.2 Iceland 1.6 Spain 83 New Zealand Estonia 1.5 Netherlands 83 Norway France 1.4 Ireland Finland 82 China 1.4 Singapore Italy 82 Belgium 1.4 Austria 5.0 Germany Puerto Rico Australia 1.3 Canada France 81 Ireland 1.2 Indonesia United Kingdom Czech Republic 80 1.1 Taiwan, China United Kingdom Iceland 71 1.1 Korea, Rep. Luxembourg 1.0 Greece 70 UAE Canada 0.9 70 Canada lapan Source: World Economic Forum Source: OECD Source: OECD

ENGINEERING LABOUR MARKET PROJECTIONS

- "BC has the tightest engineering labour markets across the coming decade..."
- "Graduates from postsecondary programs are rising and peak in 2017. These additions are not sufficient to cover demands."



BC has the strongest predicted Employment growth for Engineers



DEMAND FOR ENGINEERING

- Domestic and international demand for Engineering has seen unprecedented growth
- Demand for UBC
 Engineering has grown
 by 100% since 2009
- UBC has 5 qualified applicants for every seat



PLAN TO EXPAND EXISTING PROGRAMS

- UBC Existing
 Engineering
 Programs
- With added faculty and adequate teaching and lab space, intake in these programs could increase 50%

Biomedical Geological Chemical & Biological Integrated Engineering Civil Materials Electrical and Computer Mechanical Engineering Physics Mining Environmental UBC Okanagan Programs (Civil, Electrical and Mechanical)

NEW STANDALONE PROGRAMS

- Leverage UBC's comprehensive faculties to develop a suite programs that meet the emerging diverse industry needs
 - Environmental Engineering
 - Bioengineering
 - Natural Resources Engineering (at UBCO)
 - Engineering math, science, chemistry
 - Entrepreneurship (option)
 - Urban system engineering
 - Architectural engineering
- New Engineering graduate programs with direct links to industry
- These additional programs will provide 25% growth

PARTNERSHIPS

- Create and deliver a distributed engineering program in partnership with UNBC. The program would also increase the number of First Nations students entering the profession
- Leverage UBC's comprehensive faculties of Medicine, Land and Food Systems, Forestry, and Business to create and deliver Bioengineering, Agricultural Engineering, Forestry Engineering, Manufacture & Production Engineering
- Partnerships with other BC Post-secondary schools
- Increase transfer across all BC colleges and universities
- The target number of students for these new programs could be 350-450, or 25% of the doubling target.

OPERATIONAL EFFICIENCIES

OPERATIONAL EFFICIENCIES

- Communications
- Research support (partner with SPARC)
- Industry engagement
- HR
- Development



PEOPLEFaculty Profile

Rank	#
Professor	108
Associate professor	59
Assistant professor	27
Instructor	24

Age	2015	2007
Under 40	13%	23%
40-55	52%	55%
56-65	28%	22%
Over 65	7%	-

PEOPLE Faculty hires



PEOPLE Staff hires

17



Overall operating surplus

* before one-time capital contribution to QMI building of \$3m

		\$'000
į	2014/15	1,173
100	2015/16 (forecast)	1,062
100	2016/17 (budget)	818*



- Key Assumptions
 - Domestic undergraduate FTE decline 2% (although intake now flat)
 - International undergraduate FTE growth 10%, slowing to 5% as 30% target expected in 2020
 - Graduate growth increasing from professional programs

- Challenged programs (deficits)
 - Schools with low proportion of funding from tuition
 - Nursing
 - Planning (SCARP)
 - Architecture (SALA)

Engineering typically ~50% from tuition,
 Schools at ~20%

APSC EXPANSION

- Objective to double number of engineering students
- Additional 4,250 UG students and 1,250 grad students
- \$113m of tuition revenue and \$57m of Provincial grant
- 175 new faculty and 85 staff
- \$500m for new buildings



QUESTIONS?

2016/17 Budget & Academic Plan Faculty of Arts, December 2015

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Presentation Topics

- Introduction to the Faculty of Arts
- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- Strategic Proposals/New Activities
- People
- Finance



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Introduction: Units in Arts

- 15 Departments in the Social Sciences, Humanities, and Creative Arts
- 5 Schools (professional degrees, advisories, professional orientation)
 - Vancouver School of Economics, SLAIS (the iSchool), Music, Journalism, Social Work
 - Proposal to create a School of Creative Writing
- 4 Institutes (oriented toward research, research mobilization, and policy; cross-campus membership and advisories)
 - The Liu Institute for Global Issues; Institute of Asian Research; Institute for Gender, Race, Sexuality, and Social Justice; and the Institute for Critical Indigenous Studies
- 3 arts & culture venues (without academic programs):
 - Museum of Anthropology (MOA), The Chan Centre for the Performing Arts, The Morris and Helen Belkin Art Gallery
- 17 Interdisciplinary Programs



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Introduction: Arts Facilities



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Arts units and their program enrolments 2008 and 2014



Number of final-year Arts students by major,







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000110 ⁶

Strategic Overview—Vision/Mission

We strive to be the best faculty of our kind in Canada, providing transformational education for our students and returning value to the Province, the nation and the world in research that makes an impact. Our mission statement, *A Place and Promise for Arts*, mirrors UBC's social commitments to international engagement, intercultural education, and Aboriginal engagement, and community engagement.



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Strategic Overview—Goals

- We are and will continue to be *Canada's most international Faculty of Arts*, with global issues (especially Asian expertise) represented in every one of our programs
- The Faculty of Arts aspires to be internationally recognized for an exceptional learning environment with innovative, experiential and student-focused pedagogical practices
- We will enhance the quality and impact of research and scholarship in Arts; build areas/clusters of research strength, and further mobilize and translate our research. The ability to address interdisciplinary problems in research and teaching should be accessible to all faculty and students.
- We will increase intercultural aptitude and a capacity for intercultural dialogue among our students through study, reflection, debate and action.



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Strategic overview—Current strengths

- First (tied, ARWU) or close second (THES) in Social Sciences in Canada (while being only half the size of UofT's Social Sciences) – most research intensive based on per capita SSHRC funding
- 3rd in Canada in Humanities behind McGill
- 5 departments in top global 25 (QR)*: Geography, English, Psychology, Economics*, Linguistics. If ranked, Asian Studies would be in this category
- Media hits consistently lead the University by a large margin
- A Canadian leader in innovative pedagogy
- International recruitment on target, meeting domestic targets. Only Arts faculty in Canada in this position



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Domestic, international, and total full-time-equivalent students in the Faculty of Arts, 2008-2019



Actual

Projected

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International undergraduate recruitment, 2008-2014, broken down by region of student origin.



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Strategic overview—Current weaknesses

- ISI recruitment is currently too heavily weighted towards students from Greater China
- Too large number of units, some units of too small a size
- Pockets of underperforming units (on quality, leadership, climate)
- Demographic decline in BC and weaker Humanities recruitment globally argue for some pull-back in enrolments, unless we develop a more vigorous national strategy with (or without) differentiated tuition
- External climate is increasingly hostile to Arts research and its graduate enterprise



Critical Issues/Opportunities—Key focal areas 1

Successful new degrees

- Launched MMPGA in 2015-16; building a UBC Policy School, hired a CRC Tier 1 (with Science/IRES)
- New direct entry degrees (BIE, BMS, dual degree) all very popular, following up with direct entry BFA
- Minor in Asian-Canadian Studies and Asian Migration
- Minor in Archeology

New Arts Narrative

- Completed preliminary program outcomes in all departments
- Launched a 4-year career planning initiative with a TLEF grant in collaboration with the VP-S, building career identities
- Designing a retention program with Science, based on successful prototype carried out elsewhere



Critical Issues/Opportunities—Career surveys



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Critical Issues/Opportunities—Key focal areas 2

VSE

- Completed renovations to the Iona Building
- Successfully recruited the Canada Excellence Research Chair in computational economics
- Planning for a Master of Applied Economics
- On our way to a significant climb in global rankings

Highly successful special programs

- Vancouver Summer Program courses
- Optional residency (distance) program in Creative Writing

Completed *start an evolution* with over \$100M raised for Arts plus 88,000 alumni contacts (10,000 contacts per year at end)





Critical Issues/Opportunities—Key focal areas 3

Arts & Culture Quarter

Soft-launched Arts Culture District New ticketing system, New webpage Traveling ticket and promotional cart Hired a Coordinator

Research

New Dean of Arts awards and other competitive awards Flowed all the additional CRC funds to chairholders for research CERC

CIRDI transfer to Arts with new director/staff, mission renewal Increased attention to nominating and celebrating research awards





Critical Issues—Discontinued activities

- We closed five underperforming interdisciplinary programs in the last 2 years
- We've encouraged departments, successfully in a few cases, to diminish and simplify separate programs. These two initiatives are largely for clarity and focus – they have probably not saved more that \$40,000.
- Selective disinvestment in declining-enrolment programs, resourcing growth elsewhere
- We're holding back on approvals for searches that simply reproduce existing areas of specialization—we require a second round of rationales to authorize searches.





Critical Issues—Response to risks & threats

Every one of our strategic initiatives is simultaneously a response to threats and an effort to take advantage of opportunities

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Operational Efficiencies 1—Update

Existing activities, brought forward from 2015/16

- Completed creation of the Finance Hub, hired team, a possible model for centralized-distributed staffing in the Faculty, and a model of finance operations across the university
- Merged First Nations Languages and First Nations Studies into an Institute of Critical Indigenous Studies



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Operational Efficiencies 2: New opportunities

- Unit mergers
 - School of Journalism and SLAIS/iSchool
 - CENES / FHIS
 - Creation of an Institute for Pedagogical Innovation to bring together First-Year Programs (Arts One, CAP and ASRW) and other teaching initiatives
- Humanities Tower with shared public spaces, digital humanities initiative,
- Digitalization of Humanities Tower departmental archives, reduction of storage space needs, optimization of space

17

• We are considering building on the finance hubs idea to incorporate other kinds of administrative hubs and other forms of staffing efficiencies



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Strategic Proposals — Key proposals

- UBC Policy School, will go through consultation and governance approval
- Career planning effort joint with the VP-S
- Retention initiative joint with Science
- Redesign the unit structure of First-Year programs
- Renovate our degree requirements
 - 17
- Propose a Master's of Museums, Curatorship, and Heritage





Strategic proposals requiring additional support

13, 17

- Launch of the Arts & Culture Quarter: question of sources of financial support (student levy, Public Realm-like funding, provincially supported fees) and support for signage, lighting and bannering
- Presidential, Provostial, and VP-DAE support for Iona fundraising effort
- Better support of graduate funding examine impact of funding formula

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Contribute infrastructural funding to help renovate BuTo (50+ years old)



People— Current profile of Faculty

- 550 tenure-track faculty members across both research and educational in both streams, including 10 joint appointees with home units outside Arts
- In the research stream, 106 are at the rank of Assistant Professor, 194 at Associate Professor, and 216 at the Professor rank.
- In the Educational Leadership stream, 25 are at the rank of Instructor I, 18 at rank of Senior Instructor, and 1 at the Professor of Teaching rank.
- We have over 200 sessionals teaching at least one section
- From 2006 to 2014, 44% of new research faculty hires have been women and 26% of new research faculty are visible minorities.
- 12 aboriginal scholars have been hired in the past decade, eight with funding from the Provost's office



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People: Faculty retirements



- Average # of retirements 2004-2008 (end of mandatory retirement) = 12
- Average # of retirements 2009-2015 = 7.5



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People— Current profile of Staff

	AAPS M&P		CUPE 2950 Clerical		CUPE 116 Technical		Non Union Research Tech		Total FTE
	male	female	male	female	male	female	male	female	
Dean's Office & Faculty Support Units	18.9	42.3	2.0	7.8	3.0	1.0	1.0	0.0	
Subtotal (Dean's Office etc)		61.2		9.8		4.0		1.0	76.0
Departments, Schools, Institutes, Programs, Museums	40.4	98.3	17.5	88.0	14.7	11.2	7.3	3.0	
Subtotal Departments etc.		138.7		105.5		25.9		10.3	280.4
Grand Total		199.9		115.3		29.9		11.3	356.4

The 2012 Strategic Employment Systems Review of faculty and staff provides a baseline on which our progress in staff satisfaction can be measured, . We were the only faculty to have taken on this voluntary Review, which we will repeat at regular intervals.



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People: 5 Year Hiring Plan

- Resource growth with new faculty searches, and a carefully calibrated ratio of research stream, educational leadership stream, and 12-month lecturers
- Grow staffing to accommodate growth in international tuition
- Build key research clusters with mid-stream and senior hires



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Finance—Budgetary 3-year comparison

2014/15

- Operating revenues of \$131 M vs. expenses of \$131.1M
- Cumulative reserves of \$9.1M
- 21% of total operating revenues generated from ISI tuition

2015/16 (based on Q2 forecast)

- Operating revenues of \$139.9M vs. expenses of \$139.3M
- Cumulative reserves of \$9.5M, structural operating surplus \$900K
- 29% of total operating revenues generated from ISI tuition

2016/17 Projections

- Operating revenues of \$147.3 MIL vs. expenses of \$142.8M
- Faculty operating budget structurally balanced.
- Investments over 2-3 years in instruction, staffing, learning & research
- 31% of total operating revenues generated from ISI tuition.



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Finance-**Revenues** by source

(constant dollars, Base Year 2009)



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Finance—Opportunities & challenges: revenues

Opportunities

- Benchmarking international UG student tuition rates against peers Growing market-tuition professional masters degree programs
- Expansion of summer programs (ie VSP)

Challenges

- Fundraising challenge with Iona Building and VSE
- De-intensification of student course selection in Arts
- Long-term decrease in Humanities enrolments
- Limit of 2% increases in domestic tuition
- Lack of growth (plus cuts) in Provincial operating grant
- Reductions to Arts' GSI funding



Finance — Opportunities & challenges: costs

Opportunities

- Amalgamation of academic units
- Review of administrative staffing levels in departments (note: lowest percent spending on GPO staff admin expenses within GPO fund across all Faculties per PAIR 2013/14 data)

Challenges

- Faculty demographics and marginal growth in turnover savings due to deferment of retirement and less stripdown from exit salaries
- Uncertainty of compensation decision in upcoming interest arbitration process (1% unfunded salary escalation would cost FoA \$900K)



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Faculty of Dentistry 2016/17 Budget Workshop

January 11, 2016 Dr. Charles Shuler, Dean



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Topics

- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- New Activities
- People
- Finance



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Strategic Overview

"To advance oral health through outstanding education, research, and community service."



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Key Goals

- Maintain ranking as #1 Dental School in Canada and move to top 5 in North America
- Develop multi-site clinical environments to optimize learning opportunities
- Improve services to disadvantaged population groups
- Enhance research and scholarly activity
- Expand the international presence
- Develop and maintain outstanding facilities
- ✓ Become a leader in new dental technologies





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Nobel Biocare Oral Health Centre

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DEBT SERVICE AS A % OF FACULTY OPERATING FUNDS (2014/15)



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Community Outreach

Community outreach programs are valuable opportunities for education; while students learn prevention and management of oral disease and develop skills, they also develop a strong sense of social responsibility as oral health care professionals.





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Critical Issues & Opportunities

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Financial Impropriety

- Lawsuit from Federal Government over alleged misuse of Health Canada funds
 - Management of Haida Gwaii dental clinics transferred to the First Nations Health Authority
 - Reduced the General Practice Residency (GPR) training program
 - Adopted the Finance integrated-distributed model and centralized financial processing


New Graduate Specialty Clinic

- Project cost: \$2.7M
- 20 new operatories





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Fundraising for a Mobile Community Dental Clinic

• Outreach to Lower Mainland + remote

communities in the summer





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Opportunity with Kuwait Gov't

- 5 students/year funded by Kuwait government
- Students would take 4 years of undergraduate studies at UBC and then enter dental school
- Minimal incremental costs for Years 1 & 2
- No incremental costs for Years 3 & 4 would fill gap in the declining pool of candidates in the IDDCP program
- At steady state would bring in ~\$1.5M tuition/year
- Potential opportunities with Malaysia and Saudi Arabia as well



UBC1C

Operational Efficiencies



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Clinic Operations

- Student enrolment is limited by # of operatories

 1 DMD student = ~\$60K
 (tuition + clinic fees + patient fee revenue)

 1 IDDCP student = ~\$80K
- Could increase enrolment and patient fee revenue by moving from 2 to 3 clinic sessions per day without an increase in capital costs
- Need to improve inventory controls



Developed Metrics for Specialty

Programs

Graduate Specialty Programs:

- Endodontics
- Pediatric dentistry
- Periodontics
- Prosthodontics
- Orthodontics





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New Activities



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DMD Curriculum Renewal

Opportunities:

- Earlier clinical training (Year 1 vs. 2)
- Meaningful interprofessional education
- More dentally-relevant medical content
 Challenges:
- Risk that costs exceed tuition revenues
- Engaging tenured faculty in teaching



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Increased GAP Skills Training Revenue

\$10,416

2014/15

Program for foreign trained specialty dentists to assess and train to Canadian standards \$132,247

2015/16



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Continuing Education Opportunity

 Partnership with the College to administer a Continuing Education program for dentists returning to practice



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People



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Faculty Demographics

- ~500 Unsalaried Clinical Faculty
- 41 Clinical Educators
- 40 Tenured/Tenure-track Faculty





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UBC100 Tenured/Tenure-Track Faculty Rank Distribution



UBC100 Clinical Educator Faculty Rank Distribution



Faculty Renewal

• 15% of research faculty retiring in 2 years

Year	Re	ecruitment Area	
2016/17			
		17	
2017/18			
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Finance





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OPERATING GRANT AS A % OF UNRESTRICTED OPERATING REVENUE (2015/16 FORECAST)



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Unrestricted Operating Revenues

	15/16	16/17
Tuition	6,696	7,069
ICR	136	136
Operating Grant	7,808	8,074
Student Clinic Fees	9,306	9,597
Patient Revenue	3,880	3,957
Other Operating Revenue	2,025	2,066
TOTAL REVENUE	29,851	30,899

Unrestricted Operating Expenses

	15/16	16/17
Faculty Compensation	9,612	10,223
Admin Compensation	6,486	6,666
Benefits	2,590	2,694
Travel	486	495
Professional Fees	1,914	1,953
Capital Costs	1,942	2,038
Other Operating Expenses	6,206	6,331
TOTAL EXPENSES	29,236	30,400

The Bottom Line

	15/16	16/17
Total revenue	29,851	30,899
Total expenses	29,236	30,400
SURPLUS/DEFICIT	615	499
One-time exceptional revenue	205	
One-time exceptional expenses	600	400
SURPLUS/DEFICIT (Incl. exceptional items)	220	99
Carryforward, beginning	3,945	4,165
Carryforward, ending	4,165 00	⁰¹⁶ 4,264

Looking Ahead

- Oral Health Centre mortgage & ongoing capital renewal challenging
- Growth in enrolment is best strategy to manage cost pressures
- Faculty renewal = large research start-up costs
- Opportunity to be a leader in new dental technologies
- Expanded Continuing Education
- Continued community outreach and alumni engagement



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FACULTY OF EDUCATION 2016/17 BUDGET WORKSHOP

Monday, January 11, 2016

Dr. Blye Frank Dr. Mary Bryson

Ms. Clara Ng

Dean & Professor Senior Associate Dean, Administration & Innovation Director Finance



STRATEGIC OVERVIEW: FROM GOOD TO BEST



STRATEGIC OVERVIEW: FROM GOOD TO BEST

STRATEGIC OVERVIEW: MISSION

Our mission is to advance education's role in the well-being of people and communities.

As one of the leading faculties of education in the world, we advance educational research and understanding of teaching and learning in a way that celebrates diversity, equity, and innovation, and welcomes international collaboration in an increasingly borderless globe.







GLOBAL CONTEXT

UBC's Faculty of Education moved from a rank of **24**th **to 18**th by QS Top Universities for 2015/16.





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CANADIAN CONTEXT

QS Top Universities Canadian rankings for 2015/16:

- UBC's Faculty of Education ranked 2nd in Canada; overall score: 81.0
- University of Toronto OISE ranked 1st in Canada; overall score: 81.3





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Faculty of Education People & Places at a Glance

- 161 tenure stream faculty members, including 80 full professors
- 312 term faculty
- 31 12-month lecturers
- 3 faculty w/o review
- 123 staff
- 2,280 undergraduate students
- 1,467 graduate students
- 4 departments, 1 school
- 12 centres and institutes
- 6 academic, administrative & support units





"Just-In-Time" Strategic Trajectory: **UBC1** Short-Term Academic Planning Initiative: 2015-2016

"The objective is not to eliminate risk but to increase the odds of success." HBR

- Leverage the *External Review* to engage all academic units directly to build on and enhance fiscal know-how and capacity.
- Invest in innovation, maximize revenue opportunities and identify operational efficiencies.
- Direct engagement by Heads/Director in short-term academic planning with concrete action plans and rapid cycle of implementation.
- Focused on: (1) Professional Programs, (2) Graduate Programs and (3) Teacher Education/Undergraduate Programs:
 - e.g., Professional Programs. New model that aligns cost recovery initiatives and support services with targets for sustainable innovation and revenue diversification.
 - e.g., Graduate Programs. Solution-oriented review of academic program enrolment data, metrics and program costs within and across Departments & School designed to result in new model.
- Design of investment plans for revenues.
- Redesign of critical centralized infrastructure (e.g., Learning Technologies, Communications).
- Prioritize communication concerning academic planning, metrics and fiscal know-how.



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Critical Issues

Opportunities

- Revenue diversification (e.g., TELP 2015 and KIN Master's in Coaching).
- Averaging 25% ROI on all external to Faculty activities.
- New internal system to monitor sessional hiring and Dept. FTE allocations.
- Continued operational efficiencies in course offerings and program prioritization through short-term academic planning.

Challenges

- Carry forward diminished by FY 16/17.
- Limited funds for strategic hires and start up for new initiatives.
- Limited UG international revenue opportunities in Education sector (e.g., BEd.).
- Reduction in staff complement is a constraint for capacity to support innovation.
- Containing costs to reach savings targets also risks containing innovation and capacity.



Finance – Operational Efficiencies

The Faculty has been aggressively reducing the deficit through several cost containment strategies implemented in **FY14/15** and **FY 15/16** including:

- Hiring freeze for faculty and staff effective November 2014
- Increased external buy-out rates (from \$7,500 to \$10,000)
- Wind down of Pacific Education Press (PEP), closed on October 31, 2015
- Staffing reduction (20) and streamlining of staff duties
- 25% reduction non-tenured department instruction costs
- 10% reduction in operating expenses
- Centralized finance function in the Faculty
- Design and implementation of new cost recovery model for all off-campus graduate programmatic initiatives.

Significant financial changes for FY16/17:

- Financing a 30 year mortgage for Ponderosa Commons building (\$310k/year)
- Changes to the Tuition Allocation Budget Model (Centrals' overhead from 24.75% to 29.5%)







Faculty of Education Consolidated Deficit Over Past 3 Years



Finance- Education

Operating Funds Planning Scenarios (In \$000s)		13/14 Actuals	14/15 Actuals	15/16 Forecast	16/17	17/18	18/19
	Prior 3 year		Current Year	Budget Proposal		sal	
REVENUE							
TOTAL REVENUE	43,442	43,927	44,441	44,129	45,080	46,701	48,129
EXPENSES							
Salary - Faculty Compensation	25,266	27,502	26,997	27,920	29,291	29,710	30,201
Faculty (incl PTR)	18,428	19,828	19,300	20,196	21,807	22,368	23,002
Sessional Lecturers	6,838	7,674	7,697	7,724	7,484	7,343	7,199
Salary - Staff & Students (Administration Compensation)	8,157	8,666	8,576	7,039	6,853	6,724	6,838
Benefits	5,212	5,546	5,362	5,073	5,208	5,254	5,352
Travel	728	735	889	714	728	743	758
Professional Fees	453	897	823	700	500	510	520
Capital Costs (incl. Furniture, equipment, computer, debt servicing)	773	459	324	405	670	677	685
Capital Costs	745	459	324	353	360	367	375
Debt Servicing	28			52	310	310	310
Other Operating Expenses	2,785	2,729	3,116	3,607	3,475	3,545	3,616
Transfers	- 1,265	171	440				
TOTAL EXPENSES	42,109	46,705	46,527	45,458	46,726	47,164	47,969
		_					
SURPLUS / DEFICIT	1,333	(2,778)	(2,086)	(1,329)	(1,646)	(463)	161
Carry Forward - Unrestricted Operating (Beginning)	8,182	11,559	8,798	6,691	5,362	3,716	3,253
Carry Forward - Unrestricted Operating (Ending)	9,536	8,768	6,691	5,362	3,716	3,253	3,413

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Quéstions?

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2016/17 Budget Presentation

Faculty of Forestry


Agenda

- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- Strategic Proposals/New Activities
- People
- Finance

Faculty of Forestry "Forestry: it's more than you think"

2015 Successes

- Continued growth in undergraduate enrolment
- Launch of MIF (professional master program)
- UBC approval of MGEM (professional master program)
- ✓ Launch of UFOR (undergraduate program)
- ✓ New Senior Management Team
- ✓ External review
- ✓ All departments are now on OPT

2015 Challenges

- Space
- Decrease in total research funding
- Low enrolment in professional master programs
- High u/g dropout rate between 1st and 2nd year
- Delay in central A/P processing
- Communication (all levels)

S.W.O.T.

Strengths	 Strong faculty Quality of student services Vibrant undergrad & grad programs Steady growth in ISI enrolment Worldwide employment opportunities & high employment rate
Weaknesses	 Small faculty within UBC Conservative industry 30-40% drop out rate from 1st to 2nd year undergraduates
Opportunities	 New academic programs for emerging topics in the Forestry world Career advancement training for professionals Domestic & international collaborations/partnerships 37 of 55 faculty members (67%) are >50 years old
Threats	 Complacency Competition for student recruitment (internal and external) Government policies Balance between domestic & ISI students
Forestry's Response	 Diversification of revenue sources Progressive increase in academic standards International marketing campaign 000183

Operational Efficiencies

- Reduce/eliminate barriers for collaboration (internal & external)
- Streamline and encourage more transparent communication on decision-making and other major issues
- Simplification and standardization of key business processes

BUT 'you can take a horse to water...'

Strategic Proposals

- New Aboriginal project ("Tsawalk" three faculties, research & business relationship building)
- Centre for Forestry Excellence
- Online Forestry Master's program
- Integrated first-year program (Land One)
- Curriculum tweak CONS 370 to be a pre-requisite for all capstone courses in the Faculty
- New Building

Faculty & Staff Profile

Faculty







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People

Issues

Opportunities

- Faculty: gender & culture imbalance
- Faculty: gap between current knowledge profile and emerging forestry, wood product & conservation topics
- Faculty: performance expectation & management
- Staff: performance expectation & management
- Communication



 Close working relationship with central HR and Faculty Relations

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5-Year Hiring Plan (Faculty)

Year /	16/17		17/18		18/19		19/20		20/21	
Department	New Hire	Retire -ment								
FRM				-	-	-	-	-	-	
FCS	17, 22			-	-	-	-	-	-	
WOOD				-	-	-	-	-	-	
TOTAL (NET)					-		-		-	

Note: this slide is fairly meaningless, as we don't control retirements.

Financial Performance

OPER FUND	14/15 (in \$1000s)	15/16 (in \$1000s)	16/17 (in \$1000s)
Revenues	16,632	17,400	18,414
Expenses	15,648	17,327	18,303
Surplus/(Deficit)	591	73	111
One-time Items	(687)	(79)	(400)
Surplus/(Deficit) (Incl. one-time items)	(96)	(6)	(289)

Key Financial Assumptions

Category	16/17	17/18	18/19	19/20	20/21
Domestic Undergrad tuition rate increase	2%	2%	2%	2%	2%
Domestic Undergrad enrolment growth	0%	0%	0%	0%	0%
Domestic Grad tuition rate increase	2%	2%	2%	2%	2%
Domestic Grad enrolment growth	2%	2%	2%	2%	2%
ISI Undergrad tuition rate increase	4%	4%	5%	5%	5%
ISI Undergrad enrolment growth	5%	5%	5%	5%	5%
Vancouver Summer Program	120	150	160	170	180
Annual non-salary expense increase	1%	1%	1%	1%	1%

Opportunities & Challenges

	Opportunities	Challenges
Revenue	 Expansion of the Vancouver Summer Program Establishment of new academic programs (undergraduate & graduate) Partnership with internal & external organizations 	 Uncertainty over the impact of ISI tuition rate increases Reliance on ISI growth Approval process for new revenue opportunities
Cost	 Risk management Retirements Cost sharing with other units 	 Increasing administrative expenses downloaded by central Increased resources needed to support ISI/ESL students Space

Thank you





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Land and Food Systems

THE FACULTY OF LAND AND FOOD SYSTEMS

Rickey Yada, Dean Stuart Mackenzie, Director of Finance January 11, 2016

www.landfood.ubc.ca GROUNDED IN SCIENCE I GLOBAL IN SCOPE







Agenda

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- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- Strategic Proposals/New Activities
- Faculty and Staff
- Financial Plan
- Discussion



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Strategic Overview

- Teaching, Student Learning and Engagement
- Research Innovation and Excellence
- Community Engagement
- Outstanding Work Environment
- LFS Action Plan
 - www.landfood.ubc.ca/actionplan



Teaching, Student Learning and Engagement

- Enhance the quality and impact of teaching and programs for all students
- Strengthen efforts to promote and support student success
- Recruit top students and improve student retention rates
- Support student well-being, personal development and outstanding campus life

Research Innovation and Excellence

- Build and capitalize on the strength of our researchers as well as our research and teaching centres
- Support and enhance grant funding competitiveness and success
- Foster greater inter-LFS collaboration among faculty members as well as collaborations with UBC, Canadian and International researchers
- Build Faculty capacity through infrastructure development

Community Engagement

- Build sustainable alumni and community engagement and commitment to LFS by expanding opportunities for lifelong engagement
- Establish a sustainable fundraising program for annual goals and build strong development partnerships
- Increase understanding and awareness of the Faculty of Land and Food Systems



Outstanding Work Environment

- Ensure a work environment that fulfils employees needs for continual learning and growth leading to increased employee satisfaction (eg. LFS Research Café)
- Recognize and reward outstanding staff and faculty members (eg. Bright Ideas program, Random Acts of Recognition)
- Create a strong team of staff to support Faculty goals
- Streamline committees and reporting systems, and establish LFS policies and procedures



Critical Issues & Opportunities

- Small Faculty = limited resources
- Faculty succession plan
- Bridge funding for faculty positions
- Support for UBC Farm & other facilities
- Learning Technologies: Focus on providing tools to support larger class sizes, and improved professor and student experience, experiential learning.

Operational Efficiencies

- Designed and launched Faculty Action Plan
- Faculty hire greater focus in strategic areas
- Reduce staff turnover and keep human capital
- Benchmark with other units and find best practices.

Strategic Proposals/New Activities

- Define LFS Strategic objectives and Core values
- Invest to recruit the best students and faculty
- Faculty recruitment
- Implement Faculty Action Plan
- Review of Centres and Facilities to determine value

Faculty and Staff

- Faculty members: 50
- Staff members: 73
- Issues and Opportunities
 - Link faculty member's performance review with corresponding area in action plan.
 - Conduct staff review to determine efficiencies.
- 5 Year Hiring Plan



Faculty 5 Year Hiring Plan

Year	Retirement/ Resignation	Hires	Net FTE change
15/16			
16/17			
17/18			
18/19		17	
19/20			
20/21			

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Financial Plan

- **Prior financial results** FY14/15's surplus of \$485k
- Current year update Forecasted surplus of \$545k
- 2016/17 budget proposal Projected surplus of \$459k
- Assumptions:
 - Undergraduate Domestic: 2% rate increase; 2% FTE increase
 - International: 4.5% rate increase; 10% FTE increase
 - **Graduate** 3% rate increase; 5% FTE increase



Financial Plan

Opportunities and challenges

• Revenue

- Target higher enrolment
- Achieve financial sustainability for the Centres
- Diversify revenue streams
- Costs
 - Optimize utilization of resources (Faculty teaching/ Admin support)
 - Shared resources and knowledge with other units on campus



Discussion



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2016/17 Budget Workshop Faculty of Medicine

Overview for Executive Team and Committee of Deans January 2016

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Strategic Overview

- Vision/Mission
 - Teaching Excellence
 - Research Excellence
 - Translation Excellence
- Goals
 - Best in Canada
 - Top 10 in the world





Strategic Overview

- Strengths
 - Pre-eminence in cancer, neuroscience, heart & lung and HIV / infectious diseases
 - Emerging strengths in precision medicine, global health
 - Integrated and effective plan for medical education across a distributed model
 - Provincial mandate



Strategic Overview

- Weaknesses
 - Financial instability
 - Fragmentation
 - Organizational silos
 - Underdeveloped relationship with healthcare partners
 - Sub-optimal / duplicative research structures (IT, grant facilitation, project mgmt)
 - Process duplication (Department, Faculty, UBC, partners)



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UBC100 What makes a successful medical faculty?

- Focus
- Excellence
- Quality
- Patients
- Healthcare system integration
- Translation
- Innovation
- Strategy



The Road to Resilience



Strategic Planning Process

- Aiming for implementation summer 2016
- Expected Outcomes
 - Definition of Medical Faculty role in Society
 - Focused excellence
 - Development of translational capabilities
 - Disruption in education
 - Implementation strategy for real outputs
 - Investment for success





People

- Issues and Opportunities
 - Faculty renewal
 - Performance management
 - Gender and diversity

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People



FT faculty members by age range

Faculty renewal is critical In the last 10 years:

- Growth of over-65 cohort has come at the expense of junior faculty (under-40)
- Cost in lost turnover savings: estimated \$3.1M annually.
- Over 65
 Between 56 and 65
 Between 40 and 55
 Under 40



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Finance

- Significant cost containment efforts have been made → \$7.5M recurring included in five year plan
- Cost containment and revenue growth efforts continue in earnest

 New sources of revenue are being explored – new programs, international, philanthropy

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Difficult questions are being asked, particularly in light of strategic planning





Finance

- Some factors are outside Faculty control
 - Unfunded PTR/merit/CPI creates a cumulative budget challenge
 - Structural factors exist that limit the degree to which the Faculty can respond
 - The current budget model limits flexibility
- Structural changes will be required to bring the

Faculty to financial stability

- People management and faculty renewal
- Tuition adjustments
- Provincial support



2016/17 Planned Revenue (millions)



Notes:

- 1. Faculty of Medicine has oversight from 2 Ministries: AVED for the Operating Fund and MoH for Postgraduate medical program support under Specific Purpose funding.
- 2. Research revenue projected based on 2014/15 actual expenditures, assumed constant
- 3. Research (partner) refers to research revenue raised by FoM faculty members and supported through faculty resources though implemented in partner institutions. This is based on RISe data. Without partner research, planned revenue, all funds total \$603M



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Composition of funds for operations



- Fee for Service; delivers minimal net revenue 1.

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- Billbacks; funds flow through to support salaries under contract 2.
- PGME: residents salaries (\$90M), faculty salaries and transfers 3.
- Expansion: grants to other universities (\$13M) and faculty salaries 4.
- **Operating: faculty salaries** 5.

Restricted flexibility funds include:

- PGME: requires negotiation with MOH 1.
- Expansion: requires negotiation with AVED 2. Flexible funds include:
- Staff salaries across all units in the operating fund 1.
- 2. Operational expenses, especially for programs, MedIT and facilities



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Notes:

- 1. Targeted grants represent Ministry funding specified for expansion of programs including MDUG (\$52M before transfers), transfers in from PGME, and IEM, SLP funding from MoH
- 2. Tuition forms 2,9% of total revenue. A capped increase of 2% of tuition generates income equivalent to less than 0.4% of faculty salary expense, and below the level of a 1% reduction in grant.
- 3. ICR/ICP revenue is below 1% of research revenue.

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Five Year Outlook: change factors

	<u>14/15A 15/16</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>	20/21
		showing cur	nulative imp	act		
Positive factors						Assumptions
Net domestic tuition impacts	0.	2 0.2	0.6	1.0	1.4	1.9 Tuition capped at 2% increase; Dentistry withdrawal from MDUG; SFA impact on tuition above base
International tuition	0.	1 0.1	0.1	0.1	0.1	0.2 small increases projected without significant impact
Provincial grant	0.	0 0.0	0.0	0.0	0.0	0.0 assumed constant
Additional grant	2.	2 2.2	2.2	2.2	2.2	2.2 no increase assumed.
New program revenue		0.5	1.0	1.50	1.50	1.50 VSP; new programs resulting from PBMA
Recurring PBMA cost containment	1	5 5.5	6.0	6.0	6.0	6.0
Savings from reduced faculty replacement			1.0	1.4	2.8	2.3 Temporary savings to be offset by future investment
Cumulative positive impact	4	0 8.5	10.9	12.2	14.0	14.0
Negative factors						
Ongoing expansion SMP		(1.0)	(2.0)	(2.4)	(3.4)	(4.2) to be funded through the expansion reserve
Misc one-time and programmatic impacts	(1.	5) (0.4)				net across programs
Planned PBMA investment		(2.2)	(2.2)	(2.2)	(2.2)	(2.2)
Unfunded PTR/Merit/CPI	(3.0) (6.1)	(9.1)	(12.1)	(15.1)	(18.2) assuming retirements are insufficient to cover
Cumulative negative impact	(4.!	5) (9.7)	(13.3)	(16.7)	(20.7)	(24.6)
Cumulative net impact on five year plan	(0.0	5) (1.2)	(2.4)	(4.5)	(6.7)	(10.5)

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Five Year Outlook: net impact on deficit

	<u>14/15A</u>	<u>15/16F</u>	<u>16/17</u>	<u>17/18</u>	<u>18/19</u>	<u>19/20</u>	<u>20/21</u>	
Cumulative positive impact		4.0	showing cur 8.5	mulative im 10.9	12.2	14.0	14.0	
Cumulative negative impact		(4.5)	(9.7)	(13.3)	(16.7)	(20.7)	(24.6)	
Cumulative net impact on five year plan		(0.6)	(1.2)	(2.4)	(4.5)	(6.7)	(10.6)	from previous slide
2014/15 surplus	1.4							
Less one-time impacts:	(2.5)							
Provost support to SPPH One-time transfers of expense to partners	(2.5)							
Delayed implementation end of year	(2.6) (2.2)							
One-time transfer from research	(2.2)							
Estimated structural deficit, year-end	(0.7) (6.6)							
Resulting forecast surplus/(deficit)		(7.2)	(7.8)	(9.0)	(11.1)	(13.3)	(17.2)	As per the 5-year plan
Additional scenario factors								
Faculty salaries 0.5% above mandate		(0.6)	(1.1)	(1.6)	(2.1)	(2.6)	(3.1)	There is an additional \$.42M risk in non-operating funds not shown. Cumulative \$2.4M by 2020/21.
Essential investment in faculty renewal and research support				(5.0)	(10.0)	(10.0)	(10.0)	\$5m/year for two years
Tuition increases, professional programs						2.5	5.0	Market adjustments to all tuition, net of SFA/central portion, assuming applied by cohort; approx \$10M on full implementation
Resulting surplus/(deficit)		(7.7)	(8.8)	(15.6)	(23.2)	(23.3)	(25.2)	



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Five Year Objectives

- Financially buoyant faculty
- International leadership in our focused areas
- Strong partnerships across the University
- Integrated planning with our health partners
- Societal contribution through health care delivery and economic benefit







Questions

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2016/17 Budget Workshop January 12, 2015

Dr. Michael Coughtrie, Dean

Strategic Overview

UBC Pharm Sci

Vision

"To achieve global leadership in pharmacy education,

research and practice."

Pharm Sci 2012-2017 Strategic Plan.

- UBC goal = be best university in Canada
- JUBC Pharm Sci needs to be best in Canada

- Probably means being in top 10 Schools worldwide...

UBC Pharm Sci

What will it take to achieve this?

- Portfolio of top quality academic program offerings attracting learners at all career stages. Essential for revenue generation.
- Well-funded research teams of critical mass doing world-class interdisciplinary work that:
 - Aligns with UBC priorities, and has clearly demonstrable impact
 - Is consistently published in top journals
- Driving change in clinical practice and healthcare policy
- Size
- Partnerships and visibility
 - Internal and External
- More money
- Great people (Reputation)
 UBC Pharm Sci

Where are we now?

- #29 in 2015 *QS World University Rankings Pharmacy & Pharmacology* (UBC overall is #50). #1 in Canada
- 2 new programs launching
 - Increased revenue, but very expensive to deliver
- Pharmacists Clinic
 - Unique facility, already doing great things; massive potential
- Research income increasing (but not from Tri-councils)
- Strong focus on recruitment

UBC Pharm Sci

Building Critical Mass in Key Research Areas

Health Outcomes	Nanomedicine & Drug Delivery
Pharmacology:	Genomics /
Molecules to	Individualized
Systems	Therapy

Scholarship of Teaching & Learning

UBC Pharm Sci

Context

Ambitions:

- Transformative learning experience for students
- International excellence in key research areas
- Conducting research with Impact
- Influencing clinical practice / health policy



External Pressures:

- Government grant cap
- Tuition cap once set (2%)
- Competition for students
- No international UGs
- Minimal research overhead recovery
- Research funding climate
- Difficulties interacting with industry
- Fundraising challenging

UBC Pharm Sci

Critical Issues and Opportunities

NOVY/

UBC Pharm Sci

Building Mortgage

• Principal as of March 31, 2016: \$18.9M

• Years remaining: 27.5

• Annual debt service payment: **\$1.35M**

• Close to 10% of operating budget

UBC Pharm Sci

DEBT SERVICE AS A PERCENT OF FACULTY OPERATING FUNDS (2014/15)



Tuition Shortfall from Domestic Student Financial Aid (SFA) Adjustment to Budget Model

- SFA adjustment made after new program in progress and hiring nearly complete
- Approx. \$250K tuition shortfall for 15/16
- Over \$1M recurring tuition shortfall once the program reaches steady state over 4 years

UBC Pharm Sci

New Activities

Academic Program Changes

- New programs:
 - 15/16: Entry-to-Practice Doctor of Pharmacy
 - 16/17: Flexible Doctor of Pharmacy
- Programs closing:
 - 18/19: B.Sc. (Pharmacy)
 - 18/19: Graduate Doctor of Pharmacy

UBC Pharm Sci

New Entry-to-Practice Doctor of Pharmacy Program

224 Students per year – began Sept 2015

	E2P PharmD	BSc Pharm old
4-Year program tuition	\$66K	\$38K
Program practice fee	\$4,000	\$295
% of credits taught within Faculty	100%	77%

UBC Pharm Sci

PharmD Programs -Challenges:

- Complexity
- Cost of delivery
- Providing sufficient experiential sites/preceptors
- Faculty members adapting to new teaching modalities
- Management of teaching loads for new and current (BSc (Pharm)) programs & Flex PharmD
- Flex PharmD program not AVED approved yet!

UBC Pharm Sci

Diversification of Academic Programs – Options?

- BSc in Pharmaceutical Sciences
- Continuing Professional Development
- Professional Masters
 - Modular
 - Residency Program
- Joint Degree Programs (PharmD/MM; PharmD/PhD; Bioengineering stream w/in BSc Applied Sciences etc.)
- Direct Entry Stream
- Distributed Program
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UBC Pharm Sci

Operational Efficiencies





Opportunities for Efficiencies

UBC Health

- Centralized Standardized Patient Program
- Centralized grant facilitation with agency specialists (e.g. SPARC model)
- Student practicum/residency placements
- Common curriculum mapping software

Across UBC

• Research IT expertise

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People

UBC Pharm Sci

Research Faculty Rank Demographics



UBC Pharm Sci

Research Faculty Age Demographics



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Faculty Renewal

- •
- Start-up costs a large challenge •

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Major opportunities for collaboration internally and externally • particularly private sector

Fiscal Year	Recruitment area
2015/16	
2016/17	
	17
	17
2017-2021	
BC Pharm So	000250

Finance

UBC Pharm Sci

Unrestricted Operating Revenue

	15/16	16/17	17/18	18/19
Domestic Tuition	7,419	8,679	9,984	11,187
International Tuition	0	0	0	0
ICR	203	182	182	183
Operating Grant	8,933	8,977	9,036	9,175
Other Operating Revenue	1,360	1,091	801	809
TOTAL REVENUE	17,915	18,929	20,003	21,354

UBC Pharm Sci
Unrestricted Operating Expenses

	15/16	16/17	17/18	18/19
Faculty Compensation	8,402	9,746	10,671	11,217
Admin Compensation	3,270	3,392	3,500	3,581
Benefits	1,856	2,084	2,184	2,280
Travel	253	241	245	250
Professional Fees	765	739	754	769
Capital Costs	1,436	1,417	1,418	1,419
Other Operating Expenses	1,322	1,292	1,318	1,344
TOTAL EXPENSES	17,304	18,911	20,090	20,860 00253

The Bottom Line

	15/16	16/17	17/18	18/19
Total revenue	17,915	18,929	20,003	21,354
Total expenses	17,304	18,911	20,090	20,860
SURPLUS/DEFICIT	611	18	(87)	494
One-time exceptional revenue	560			
One-time exceptional expenses	1,539	1,010	1,285	1,360
SURPLUS/DEFICIT (Incl. exceptional items)	(368)	(992)	(1,372)	(866)
Carry forward – Operating, beginning	371	3	(989)	(2,361)
Carry forward – Operating, ending	3	(989)	(2,361)	(3,227)
Carry forward – Capital, beginning	4,756	4,191	4,195	4,200
Carry forward – Capital, ending	4,191	4,195	4,200	4,204
Carry forward – TOTAL, beginning	5,127	4,194	3,206	1,839
Carry forward – TOTAL, ending	4,194	3,206	1,839	977
UBC Pharm Sci			000)254

Support Priorities

- Repayment of building loan
- Relief from revised domestic SFA allocation
- Research start-up funds to support new hires
- Ministry approval for Flexible Doctor of Pharmacy program
- Complement adjustment to proceed with new BSc in Pharmaceutical Sciences program

UBC Pharm Sci

Discussion



2016/17 Budget Workshop Sauder School of Business

Overview for Executive Team and Committee of Deans January 2016



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Agenda

- Strategic Overview
- Critical Issues and Opportunities
- Operational Efficiencies
- Strategic Proposals/New Activities
- People
- Finance



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Strategic Overview



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Vision

To become Canada's most influential, globally recognized business school through the impact of our research and our graduates

Pillars

- Extend the influence and impact of research and
- graduates
- Build a stronger global presence
- Build the Sauder reputation and brand
- Enhance the network of relationships that supports
- the strategy



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Strategic Goals

- The #1 business school in research in Canada
- Top ten school in research in the world in several significant areas of business, e.g., finance, marketing (behavioural sciences), analytics
- Recognized for excellence in the student experience
- Recognized as the top Canadian business school in China
- Recognized for emphasis on ethics and values in business education: rigor, respect and responsibility
- Recognized as a collaborator across campus and as a facilitator of careers for UBC



Priorities

- Attracting the best students from British Columbia, Canada and the rest of the world
- Attracting and retaining world-class faculty
- Advancing student learning, especially blended and experiential activities
- Expanding research and research support
- Enhancing student services, especially career and personal development
- Building reputation, locally, nationally and internationally
- Creating and maintaining a world-class physical learning environment



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Critical Issues and Opportunities



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Key Strengths

- Currently #1 or #2 in Canada in research; internationally recognized for research excellence
- High quality students, especially at the undergraduate level
- Strong demand for business education
- Highly engaged alumni
- Strong outreach in the community
- Successful revenue generating programs (professional, executive and continuing studies)
- Strong engagement and reputation globally especially in Asia



Key Challenges

- Highly competitive market for faculty, with low Canadian dollar and high cost of living in Vancouver
- Domestic tuition well below market
- Professional programs susceptible to cyclical trends (especially in real estate) and limited by Vancouver's economic structure
- Aging physical infrastructure at Robson Square undermines client experience in certain programs
- Space constraints in Henry Angus limit program and enrolment expansion (and looming seismic upgrades)
- Reliance on aging legacy IT platforms and technologies
- The Canada fixed effect in MBA rankings and student recruitment
- UBC leadership transitions



UBC1CO Opportunities - Recent and New Activities Teaching and Learning

- Dual UBC Bachelor's + Master of Management
- Specialized Masters (business analytics, perhaps finance)
- Dual Master's Degree with Yale University
- Growth of summer programs
- Potential expansion of professional education (e.g., certificates in business)
- Expansion of experiential learning activities (co-ops; internships; international activities; Global Immersion Experience)
- Integration of video interviews in undergraduate admissions
- Emphasis on ethics and values in curriculum and student experience; expansion of career services to include focus on personal development
- Integration of Aboriginal business content into core undergraduate curriculum



UBC100 Opportunities - Recent and New Activities Faculty and Research

- Launch of new Centre of Business Ethics
- Faculty hires in areas of social good, Aboriginal business, entrepreneurship, big data
- Larger stipends and guaranteed 5th year funding in PhD program

Other Initiatives

- Refresh of school's brand (UBC Sauder) and website
- Enhanced external engagement: Dean's speaker series, Dine and Discover, Family Legacy Series gala
- Enhanced alumni activities: Sauder Square, alumni clubs
- Planned launch of new development strategy (Sauder Society annual giving program) and planning for new campaign
- Operational efficiencies in IT, finance and purchasing
- Improvements to physical space at Robson Square?





PEOPLE



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THE UNIVERSITY OF BRITISH COLUMBIA

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People

Faculty

• Total (full- and part-time): 224

17

17

Staff

•

•

• Total (full- and part-time): 210





FINANCE

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Finance – Budget Revenue



The University of British Columbia Faculty 15/16 Projection and 5 Year Plan

Name of Faculty		SAUDER				
Operating Funds Planning Scenarios (In \$000s)	15/16 Forecast	16/17	17/18	18/19	19/20	20/21
REVENUE						
Tuition	53,934	57,502	61,445	63,840	64,988	66,522
Domestic Credit Tuition	8,818	8,995	9,174	9,358	9,545	9,736
ISI Credit Tuition (including Vantage transfers)	18,676	20,527	23,323	24,489	25,224	25,981
Non-Credit Tuition	18,360	17,988	17,628	17,804	17,804	18,162
Exchange Students Differentiated Fee to Teaching Faculty	146	150	157	164	172	180
CO-OP Tuition	163	168	174	181	188	192
Graduate Tuition to Administering Faculty	6,246	6,371	6,498	6,628	6,761	6,896
Vancouver Summer Programs	932	1,186	1,248	1,248	1,248	1,248
New Domestic Programs (flow through Faculty Allocation Model)						
Masters of Management Dual Degreee Program	593	2,118	3,240	3,966	4,046	4,127
Institutional Costs of Research (ICR)	130	130	130	130	130	130
ICP	130	130	130	130	130	130
Indirect Cost Recovery						
Operating Grant	15,694	16,300	17,071	17,880	17,880	17,880
Incremental Government Funding						
Complement	8,154	8,154	8,154	8,154	8,154	8,154
Incremental Space Chargeback						
Base Faculty Operating Grant	7,419	7,419	7,419	7,419	7,419	7,419
GWI Funding (Projected Central Funding - Faculty & Staff)	121	727	1,497	2,306	2,306	2,306
Less budget reduction						
Other Operating Revenues	3,561	3,597	3,633	3,669	3,706	3,743
TOTAL REVENUE	73,319	77,529	82,278	85,519	86,704	88,275
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Finance – Budget Expense

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EXPENSES						
Salary - Faculty Compensation	28,529	30,000	31,544	33,107	33,930	34,775
Faculty (incl PTR)	19,216	20,192	21,183	22,185	22,844	23,523
Sessional Lecturers	9,313	9,808	10,361	10,922	11,086	11,252
Salary - Administration Compensation	16,538	17,782	18,612	19,249	19,438	19,644
AAPS (incl merit and unfunded wage incr.)	11,613	12,560	13,212	13,696	13,833	13,971
CUPE 2950 (incl step increases)	3,020	3,248	3,378	3,469	3,469	3,469
CUPE 116	<u> </u>					
Students	1,159	1,217	1,253	1,304	1,356	1,424
CUPE 2278	745	757	768	779	779	779
Overtime						
Benefits	6,833	7,197	7,557	7,882	8,045	8,194
Travel	2,091	2,175	2,262	2,329	2,399	2,471
Professional Fees	5,247	5,457	5,675	5,846	6,021	6,202
Capital Costs (incl. Furniture, equipment, computer, debt servicing)	1,714	1,910	1,639	1,653	1,667	1,681
Capital Costs	525	721	450	463	477	492
Debt Servicing	1,189	1,189	1,189	1,189	1,189	1,189
Other Operating Expenses	10,750	11,180	11,627	11,976	12,335	12,705
TOTAL EXPENSES	71,702	75,700	78,915	82,042	83,835	85,672
SURPLUS / DEFICIT	1,617	1,829	3,363	3,477	2,869	2,604
Exceptional Items						
One-time Exceptional Revenue	175	190	100	100	100	100
One-time Exceptional Expenses						
SURPLUS / DEFICIT (Incl. Exceptional Items)	1,792	2,019	3,463	3,577	2,969	2,704
Carry Forward - Unrestricted Operating (Beginning)	6,849	8,641	10,659	14,122	17,699	20,668
Carry Forward - Unrestricted Operating (Ending)	8,641	10,659	14,122	17,699	20,668	23,371

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UBC Faculty of Science

Budget Workshop, January 12, 2016 - Simon Peacock, Dean



Quantum Matter Institute





Undergraduate Life Sciences Teaching Lab Building

2015 UBC Science Review https://www.youtube.com/watch? v=F4mA9pcu3tc&feature=youtu.be

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UBC Faculty of Science's Strategic Plan -Advancing Science

Vision: Advancing education and research at the frontiers of science Mission: To nurture an exceptional scientific learning and research environment for the people of British Columbia,	Core focus areas	Undergraduate Education and Student Learning	Graduate Education and Post-Doctoral Development	Research	Community Engagement
Canada, and the world	Cross-cutting initiatives	Alashowa	riginal Engagen national Engag		
	Foundations	Susta Peop	ainability Ile		
		Phys	ical Infrastructu	re	



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UBC Faculty of Science, by the numbers:

FY14-15 Budget: UBC GPO = \$110M Research = \$88M Development = \$25M

7,784 B.Sc. and B.C.S. students (6,699 domestic, 1,085 international) ↑ 4.5% 8,323 course FTEs taught (6,638 domestic, 1,685 int'l) ↑ 3.3% (projection)
1,439 graduate students: 533 MSc and 906 PhD ↓ 1.6%
256 post-doctoral scholars + 97 research associates ↓ 4.3%
421 tenured, tenure-track faculty (361 professors, 60 instructors) ↑ 2.3%
485 administrative and technical staff ↓ 1.6%

Nine academic departments: Botany, Chemistry, Computer Science, Earth Ocean Atmos, Mathematics, Microbiology & Immunology, Physics & Astronomy, Statistics, Zoology Three interdisciplinary academic units: MSL, IRES, Fisheries and Oceans Four major interdisciplinary research centres: LSI, AMPEL/QMI, Biodiversity, ICICS Three major public venues: Beaty Biodiversity Museum, Botanical Gardens, PME





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Current Situation – Strengths and Challenges

Strengths

Very strong student demand (domestic and international) – ave. GPA > 92% Success at securing external research funding (QMI CFREF = \$66.5M) North American leader in *transforming* undergraduate science education Rapid growth in Science Co-op, with 1,755 placements in 14-15 (up 24%) Two major building projects underway (QMI, Life Sciences Teaching) GPO budget balanced for FY15-16 (vs. \$5M deficit in FY13-14) Successfully completed UBC Campaign – Science = \$176M, > 7,000 alumni

Challenges

Meeting unprecedented demand for Computer Science Hiring new faculty in a time of few retirements Supporting research excellence (top 10-20%) and positioning for grant success Adapting to shifting external research funding priorities (CIHR, BCKDF, translation)



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Critical Issues and Opportunities

Support research excellence in Science and beyond

- Position existing/emerging research clusters for grant success (Biodiversity, HCI, Bioprod,...)
- Launch Data Science Institute (and link with Advanced Research Computing)
- Grow Institute for the Oceans and Fisheries
- Deploy CRCs strategically
- Help defray operating costs of shared research facilities



Promote global leadership in Science Teaching and Learning

- Build permanent funding for Science Teaching and Learning fellows (post CWSEI)
- Develop Faculty and University communications strategy

Meet demand for Computer Science at all levels (ugrad, grad, research)

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- Launch Master of Data Science (Fall 2016); Data Science Institute
- Launch new Introductory Computational Thinking course



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Strategic Proposals, New Activities

Data Science Initiatives

Prof. Masters of Data Science (launch Fall 2016), modules for Business Analytics Data Science Institute to support UBC big data initiatives (see next slide)

Strategic Initiatives Fund

Develop broad guidelines for use, balancing "strategic" with "opportunistic" Support Research Excellence

Position excellent research clusters (top 10-20%) for success in securing external grants

Hiring star faculty (start-up funding, housing)

Biodiversity, Human-Computer Interaction, Forest Bioproducts, Astronomy, ...

Support Teaching Excellence

Focused transformation of undergrad teaching in other Faculties?

Building renewal / replacement (Current Science mortgage debt = \$14M)

Chemistry teaching labs (B- and C-blocks) Physics teaching labs (Hebb) – detailed planning underway! Chemistry and Physics research – Chem/Phys, Hennings Mathematics building





Data Science Institute

Designed to showcase and accelerate UBC as an international centre of data science research across a broad spectrum of research domains and real-world applications. Led by the Faculty of Science, on behalf of UBC.



Facilitate interdisciplinary data science research and development teams \rightarrow successfully compete for grants

Provide specialized training for postdocs and general modules for professional programs (MDS, MBAn)

Enable a network of organizations to develop solutions for their data-rich applications

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Financial Overview

Background: \$4.9M structural deficit in 13/14 → balanced in 15/16



* No "new" revenue. Accounting changes resulted in \$3.8M in revenue *and* \$3.8M in expenses being transferred to FoS budget (SFA, ICICS, ...). Also includes \$0.8M in GWI funding and -\$1.2M in budget cuts.



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Statement of Revenues and Expenses - GPO Prior Year Actuals, Current Year Forecast, Next Year's Plan

	Actual	Forecast	Plan	15/16
	14/15	15/16	16/17	% of tota
Domestic Tuition	22,464	22,780	23,189	19%
International Tuition	14.536	19,113	22.263	16N
Co-op Tultion	1.044	1.157	1,239	2%
Graduate Tuition	4.233	4.099	4.181	3%
Tuition Total	42,277	47,149	50,873	40%
Institutional Costs of Research (ICR.ICP)	3.847	3.899	4,013	3%
Undergraduate Complement	17.973	17.973	17,973	15%
Operating Grant and Onetime GPO	36.942	37,369	38.596	32%
Operating Revenues (FFS, donations) *	8.169	10,014	10,007	9%
Interfund Transfers In (mainly Royalties)	913	810	810	1%
TOTAL REVENUE	110,122	117,214	122.271	100%
Faculty Salaries	50,110	\$2,485	55,004	45N
Sessional Salaries	4,254	4.356	4,421	4%
Staff Salaries *	21,204	22,555	23.371	19%
Student Salaries	8,939	9.033	9.267	8%
Benefita	13,125	13,338	14,123	11N
Salaries & Benefits Total	97,632	101.766	106.185	87%
Non Salary Costs *	10.446	11,805	11.591	10%
Interfund Transfers Out (Start Up. Research Support)	3.140	3,685	3.700	3%
TOTAL EXPENSES	111.218	117.257	121.476	100%
Fiscal Surplus/Deficit	(1,096)	(43)	795	
Exceptional onetime items	266	(499)	(587)	
Opening Carryforward	6.882	6.052	5.510	
Ending Carryforward	6,052	5.510	5,718	

Faculty of Science budget is projected to be structural balanced this fiscal year.

Several Science Departments are <u>not</u> structurally balanced (e.g., PHAS).

 Operating Revenues include \$6.5M Fee-For-Service charges to Research Grants that recover costs such as staff salaries and supplies.





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Operational Efficiencies

Science Department budgets are managed at the macro level (single Dept budget) Faculty of Science approves all faculty and staff hiring Faculty of Science funds faculty (PTR) salary increases and absorbs budget cuts Empowers Heads and drives Department-level efficiencies Limited Department budget rebalancing proportional to: Undergraduate students taught = 50% Undergraduate students enrolled in programs = 20% Graduate students (MSc, PhD) = 10% Research funding (Tri-Council) = 20% Optimizing shared research and teaching facilities Botany/Zool stores closed → Chem, Chem + Phys shop synergies FINDER (Level 3 animal care facility) budget balanced Merging of Michael Smith Labs and Centre for High-Throughput Biology Implementing centralized financial support for smaller units Ongoing external and internal program reviews





Faculty Profile

Headcount of Research Faculty by Age and Gender

Assistant Professor, Associate Professor, Full Professor *



354 faculty members: 76 female (21%) + 278 male (79%)
34 faculty members are 65 or older (9.6%). Almost all male.

* Faculty members with home department in Science



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Staff Profile (CUPE 2950 + M&P) 454 salaried staff: 336 GPO + 118 Research funded Annual Salaries: \$21.3M GPO + \$6.0M Research funded



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5 Year Hiring Plan

FACULTY 2015-16

11 faculty searches underway (including 3 CRC-2 searches) 8 Research faculty (CS-4, EOAS, MATH, PHAS, ZOOL) 3 Instructors (CS-2, PHAS)

Next 5 years

STAFF Next 5 years 17



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2016/17 Budget Workshop Faculty of Graduate and Postdoctoral Studies Presenter: Susan Porter, Dean and Vice Provost G+PS



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People – G+PS



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Issues

- Staff salary increases > budget growth over the next 5 years
- Unfunded salary increases for Associate Deans
- One time PSI funding source depleted by 2017

Opportunities

- Increase Work-Learn
- Fundraising, grants, gov't support

Permanent staff - Group	FTE	% of FTEs
Dean, Assoc Dean	2.4	6%
CUPE 2950	20	52%
AAPS	16	42%
Total	38.4	

+ 4 Assoc Deans (1.4 FTE)

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- + 3.25 FTE funded by GRASP temporary
- + 1 FTE funded by PSI temporary

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Strategic Initiatives/New Activities

- Graduate Admissions project (GRASP) complete first wave
- Reimagining the PhD
 - Continue dialogue; complete first year of Public Scholars Initiative, launch second; generate academic assessment guidelines; identify funding sources
- Enhance graduate supervision
 - Establish Community of Practice; draft improved guidelines for tenure and promotion assessment; complete document on graduate supervision pedagogy; create guidelines for handling graduate supervision problems
- Enhance understanding of and preparation for graduate career outcomes
 - Complete PhD tracking project; sustain graduate career support (previously TLEF-funded)
- Assess feasibility of a minimum stipend policy





Strategic Proposals/New Activities

Future additional financial support

- Graduate career support (shared with Career Services) -\$45K (formerly funded through TLEF)
- Public Scholars Initiative (from 2017 on) \$400K
- Graduate admissions if required program support is beyond current capacity
- (If strategic direction for graduate recruitment includes enhanced support by G+PS, then 1 additional person)
- 4-Year Fellowship fund requires a 2% (~\$300K) compounding increase to allow a COL adjustment and maintain numbers



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Finance – Graduate and Postdoctoral Studies

	14/15 Actuals Fiscal	2015/16 Forecast Working	2016/17 Plan Annual	2016/17 Plan	2017/18 Plan	2018/19 Plan
		Fiscal	Fiscal	Recurring	Recurring	Recurring
UNRESTRICTED OPERATING REVENUES	6	1. And 1.	3	6		
OPERATING FUNDING ALLOCATION (ALOGPO)	2,140,861	2,270,602	2,300,302	2,300,302	2,298,650	2,331,008
APPLICATION FEES	1,012,249	1,051,000	1,072,020	1,072,020	1,082,740	1,104,395
GENERAL WAGE INCREASES	0	0	11,394	11,394	32,358	33,167
RESTRICTED OPERATING REVENUES	255,220	276,810	218,294	40,000	40,000	40,000
REVENUES	3,408,330	3,598,412	3,602,010	3,423,716	3,453,748	3,508,569
SALARIES	2		2	1	200000000	-
ACADEMIC SALARIES	363,381	343,374	344,000	344,000	344,000	344,000
STAFF SALARIES	2,093,871	2,290,859	2,278,728	2,134,093	2,157,196	2,211,126
STUDENT SALARIES	29,803	29,391	25,000	25,000	15,000	15,000
BENEFITS	491,974	526,902	523,757	495,147	503,239	514,025
TRAVEL	35,853	42,546	43,500	43,500	44,370	45,257
PROFFESIONAL FEES	113,183	102,221	35,000	35,000	35,000	35,000
CAPITAL EXPENDITURES	8,575	20,673	15,000	15,000	15,000	15,000
OTHER EXPENSES	1,206,555	312,809	573,561	305,000	303,909	306,948
EXPENSES	4,343,195	3,668,775	3,838,546	3,396,740	3,417,714	3,486,357
INTERFUND TRANSFERS		4,000	2 June 1	a manual	2 Contractor	Conservation of the local distribution of th
Surplus (Deficit)	-934,865	-74,363	-236,536	26,976	36,033	22,213
CFWD OPERATING - BEGINNING	1,116,824	181,959	107,596	0	-128,940	-92,907
CFWD OPERATING - ENDING	181,959	107,596	-128,940		-92,907	-70,694



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