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OFFICE OF THE VICE-PRESIDENT AND PROVOST

TO: University Affairs Board

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DATE: January 10, 2003 for January 21, 2003

AGENDA ITEM: #4

ITEM IDENTIFICATION:

Policy for Compulsory Non-Academic Incidental Fees – Proposed Revisions

JURISDICTIONAL INFORMATION:

The Board is responsible for consideration of policy of a non-academic nature including policies concerning University operated student services and those related to representative student committees, student societies and campus organizations.

Compulsory non-academic incidental fees for student services, representative student committees and student societies are approved by the Board.

PREVIOUS ACTION TAKEN:

The *Policy for Compulsory Non-Academic Incidental Fees* was approved by the Governing Council on April 21, 1977. The *Policy* was last amended on November 25, 1997 by the University Affairs Board.

On February 23, 1999, the administration reported to the Board on the long-standing issue of the disproportionate burden of incidental fees on part-time students taking only one course, or even one half course in a session. At the time, there was no consensus to proceed with a plan to realign the fees to make them fairer for low course load part-time students. Therefore, the administration did not proceed with any of the four models under discussion at the time.

HIGHLIGHTS:

From time to time, various concerns have been raised about the relative equity of the manner in which the University charges compulsory non-academic incidental fees:

- a) some have noted that the summer session incidental fees seem very high in proportion to the fall/winter incidental fees, and may not relate well to the access many part-time student have to the services in the summer and to the relatively short length of the summer session.

- b) some have noted that the fall/winter academic period part-time fees for persons taking nearly a full-time course load (e.g. students taking 3.0 or 3.5 FCE in the fall/winter period) are only 30% of the fees paid by a full-time student, taking only a slightly higher course load, even though the students may be in virtually the same position with respect to access to services and time spent on campus.

In 1999, the administration presented the University Affairs Board with a report on various discussions undertaken concerning several models for realigning fees to make the system more fair to part-time students. The administration did not proceed at that time, in part because none of the models under consideration received broad support. Notwithstanding this, the administration has continued to examine the issues related to part-time student fees and has developed new models to address the inequities of the current system.

More recently, the University of Toronto at Scarborough reported that it would begin registering full-time students in the Summer Session (as part of a general plan to move to a trimester academic calendar) and, as such, wished to charge full-time student fees in the summer. At present, the *Policy* assumes that all students registered in a Summer Session are part-time students and provides that only the part-time fees may be charged in the Summer.

In addition, while many students in other divisions enroll in courses which may span the entire fall/winter academic period, registration is largely an activity which occurs in each of the three “sessions” each year (i.e., Fall, Winter, and Summer). The *Policy* refers to the combined Fall Session and Winter Session using the old terminology. Through the students records system, ROSI, the University charges incidental fees on a sessional basis (at present, incidental fees are approved fees applicable in the “fall/winter academic period,” which is 2 sessions).

The *Policy for Compulsory Non-Academic Incidental Fees* assumes that full-time students are those students designated as full-time by a division. In the arts and science divisions, such students have until now been those enrolled in a course load of 80% or more. The arts and science divisions are redefining full-time study as a 60% or greater course load (which is consistent with the federal and provincial governments’ definition of full-time study for education tax credits and for student aid). The revised *Policy* reflects the new definitions, which enables a realignment of the current student services fees which is revenue neutral for the University and results in lower student services fees for part-time students and slightly lower fees for full-time students. The reductions in fees, while maintaining revenue neutrality, is achieved through a shift in the numbers of part-time and full-time students in arts and science programs.

While the planned realignment of the student services fees will be revenue neutral for the University student services, the changes in the definition of full-time study will have some effect on student societies which include members from arts and science divisions (especially some societies which charge only a full-time student fee, which are anticipated to receive additional fee revenue, or those which charge only a part-time student fee, which are anticipated to receive less fee revenue). The administration plans to work with and assist the societies during this transition.

A number of minor revisions and housekeeping changes to the *Policy* are also required.

The proposed amendments address the following needs:

- a) the charging of full-time compulsory non-academic incidental fees to students designated by an academic division as “full-time” in the summer (e.g., the University of Toronto at Scarborough);
- b) the charging of incidental fees on a sessional basis;

- c) the charging of lower fees to low course load students in arts and science programs;
and
- d) the clarification and enhancement of some procedures and requirements for student societies

FINANCIAL AND/OR PLANNING IMPLICATIONS:

The revisions to the *Policy* would enable a realignment of fees for University student services. The realigned fees will be revenue neutral to the University's student services and will be presented for approval with the 2003-04 operating plans and fees for the services later in the spring.

It is anticipated that the new realigned full-time fees will be slightly lower than current full-time fees and that the new part-time fees will be significantly lower than the current part-time fees.

RECOMMENDATION:

It is recommended that the University Affairs Board recommend to the Governing Council:

THAT the amendments to the *Policy for Compulsory Non-Academic Incidental Fees* as outlined in the January 10 proposal included in Appendix "B" attached hereto be approved, to be effective 1 May 2003.



University of Toronto

Proposed Amendments to the
Policy for Compulsory
Non-Academic Incidental Fees

January 10, 2003



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Proposed Amendments to the *Policy for Compulsory
Non-Academic Incidental Fees*
January 10, 2003

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Proposed Amendments to the *Policy for Compulsory Non-Academic Incidental Fees*

January 10, 2003

Recommendations

- Recommendation 1: In order to meet the needs of trimestering at the University of Toronto at Scarborough the *Policy* should be amended to enable the charging of applicable full-time fees to students registered as “full-time” (as designated by the academic division) in any session (fall, winter, or summer).
- Recommendation 2: In order to reflect the current nature of registration at the University and to meet the needs of trimestering at the University of Toronto at Scarborough, all fees should be reported and approved as amounts applicable in any session (fall, winter or summer). Fees should no longer be reported and approved in amounts applicable in a “fall/winter academic period” (which is 2 sessions). All current fees should now be described in the applicable sessional amounts.¹
- Recommendation 3: Part-time students as designated by the academic divisions (currently proposed to be students enrolled in less than 60% course load in arts and science programs and other students designated as part-time by the division) should pay a lower fee compared to the current part-time fees.
- Recommendation 4: Pursuant to Recommendation 3, full-time and part-time non-academic incidental fees currently charged by the University for campus services should be realigned in a manner which is revenue neutral for the University. It is proposed that the realignment will result in full-time fees which are slightly lower than those currently charged and part-time fees charged at a rate of 20% of the full-time fee (instead of the 30% currently charged).
- Recommendation 5: Some clarity should be provided concerning the types of fees addressed by the *Policy*.
- Recommendation 6: The provisions in the *Policy* concerning student society fees should be reorganized for clarity. Section A of the proposed *Policy* includes all of the provisions explicitly applicable to student society fees. A definition of a “student society” is also included.

¹ This would not change the University's practice of assessing fees for registration in the the fall/winter academic period.

- Recommendation 7: The conditions for eligibility for granting an exemption from the audit requirement for small student societies should be updated to account for inflation.
- Recommendation 8: The *Policy's* provisions for granting an exemption from the audit requirement should be updated to reflect current practices.
- Recommendation 9: In order to enhance the mechanisms for accountability to members paying student society fees (which often include amounts designated for other organizations), in addition to the current requirement that societies receive annual financial statements related to the use of portions of society fees designated for other groups, each society should be required to report annually on the receipt of these financial statements.
- Recommendation 10: In order to reflect current practice with respect to increases to the health plan fees for the student governments, the *Policy* should provide options for cost of living increases of amounts other than those linked to the Ontario Consumer Price Index.

Proposed Policy

Policy for Compulsory Non-Academic Incidental Fees

<i>Current Policy</i>	<i>Proposed Policy</i>
<p>Preamble</p> <p>The aim of this policy is to regulate the compulsory non-academic incidental fees in the campus services and student societies areas for which the University Affairs Board has responsibility: Athletics, Hart House, Health Service, Student Services Fees and various campus-wide and divisional student governments.</p> <p>In recognition of their differing kinds and levels of service, activity, and need, divisions and organizations on whose behalf such incidental fees are collected shall have the initiating authority to establish such fees, subject to approval by the University Affairs Board and the Governing Council. Requests to cancel or to change an existing fee, or to introduce a new levy, will be reviewed by the Office of the Vice-President & Provost which will, according to the guidelines, bring the requests with recommendations to the University Affairs Board.</p> <p>Where facilities or services are open to the campus as a whole, the fee structure shall include all groups of tuition-paying potential users. However, if there seem to be valid reasons for differentials, as for example in the case of students at Erindale and Scarborough Colleges, these will be recognized where possible.</p> <p>The University administration shall pursue ways and means of ensuring that information relating to incidental fees is clearly presented and readily available, particularly to newly-admitted students.</p>	<p>Preamble</p> <p>The aim of this policy is to regulate the compulsory non-academic incidental fees in the campus services and student societies areas for which the University Affairs Board has responsibility: Athletics, Hart House, Health Service, Student Services Fees and various campus-wide and divisional student societies. <i>Purpose</i></p> <p>In recognition of their differing kinds and levels of service, activity, and need, divisions and organizations on whose behalf such incidental fees are collected shall have the initiating authority to establish such fees, subject to approval by the University Affairs Board of the Governing Council. Requests to cancel or to change an existing fee, or to introduce a new levy, will be reviewed by the Office of the Vice-President & Provost which will, according to the guidelines, bring the requests with recommendations to the University Affairs Board. <i>Responsibility</i></p> <p>Where facilities or services are open to the campus as a whole, the fee structure shall include all groups of tuition-paying potential users. However, if there seem to be valid reasons for differentials, as for example in the case of students at the University of Toronto at Mississauga and the University of Toronto at Scarborough, these will be recognized where possible. <i>Applicability</i></p> <p>The University administration shall pursue ways and means of ensuring that information relating to incidental fees is clearly presented and readily available, particularly to newly-admitted students. <i>Information Concerning Fees</i></p> <p>This policy shall apply to compulsory non-academic incidental fees charged to students for <i>Fees Addressed</i></p>

<i>Current Policy</i>	<i>Proposed Policy</i>
Policy	<p data-bbox="737 296 1260 428">campus and student services, student societies, and specific, limited projects within the University including those for academic purposes.</p> <p data-bbox="737 495 818 527">Policy</p> <p data-bbox="737 562 883 594">A. General</p> <p data-bbox="737 636 1268 905">1. All applicable compulsory non-academic incidental fees shall be charged to all students who are liable for academic fees except those categories of students noted in A.1.(b) below and those categories of students designated by the University Affairs Board as exempt from such fees on the recommendation of the senior assessor.</p> <p data-bbox="1325 636 1446 684"><i>Assessment of Fees</i></p> <p data-bbox="786 947 1276 1115">(a) Categories of students exempted from such fee shall not have access to campus services for which compulsory non-academic incidental fees are normally charged.</p> <p data-bbox="786 1157 1260 1419">(b) Students registered in the School of Continuing Studies and students registered in the Additional Qualification Program of the Ontario Institute for Studies in Education/University of Toronto shall not be charged compulsory non-academic incidental fees.</p> <p data-bbox="737 1461 1268 1692">2. Compulsory non-academic incidental fees shall be reported and approved as amounts to be charged to registered students on a sessional basis. Those fees which are not applicable in any particular session (summer, fall or winter) shall explicitly be described as such.</p> <p data-bbox="1325 1461 1406 1509"><i>Sessional Amounts</i></p> <p data-bbox="737 1734 1268 1902">3. All full-time students as designated by the academic divisions shall be charged the normal fees as described in A.3.(a) below and all part-time students as designated by the academic divisions shall be charged fees</p> <p data-bbox="1325 1734 1446 1835"><i>Charging of Fees to Full-time and Part-time Students</i></p>

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4. ~~All full-time students shall normally be assessed compulsory non-academic incidental fees on the same basis.~~

5. ~~Part-time students shall be assessed compulsory non-academic incidental fees at a rate of approximately 30% of the fee paid by full-time students. This policy will not apply to student society fees.~~

6. There shall not be fee differentials based on sex.

7. Compulsory non-academic incidental fees shall not be charged to students registered in Arts and Science programs who are 65 years of age or older.

8. ~~In all academic divisions other than the School of Graduate Studies, students who register in the summer session shall be assessed compulsory non-academic incidental fees at the same level as those paid by part-time undergraduate students in the winter session, with the exception of students in the Faculty of Education summer session who do not currently pay incidental fees.~~

9. ~~Students in the School of Graduate Studies who register in the summer session on the St. George Campus and who are liable for academic fees for that session shall be assessed compulsory non-academic incidental fees at the same level as those paid by part-time graduate students in the winter session.~~

as described in A.3.(b) below.

- (a) **All full-time students on any campus in any session (fall, winter or summer) shall be charged the normal compulsory non-academic incidental fees applicable in that session.** *Normal Fees*

- (b) **All part-time students on any campus in any session (fall, winter or summer) shall be charged compulsory non-academic incidental fees at a rate of 20% of the normal compulsory non-academic incidental fees applicable in that session. This provision will not necessarily apply to student society fees.** *Part-time Fees*

4. There shall not be fee differentials based on sex. *Sex*

5. Compulsory non-academic incidental fees shall not be charged to students registered in Arts and Science programs who are 65 years of age or older. **Such students shall have access to campus services for which compulsory non-academic incidental fees are normally charged.** *Persons Over 65*

[delete]

[delete]

<i>Current Policy</i>	<i>Proposed Policy</i>
<p>10. Students, who are registered on a full-time basis on the St. George Campus during only one of the two winter terms, shall be assessed one-half the regular winter session compulsory nonacademic incidental fees paid by full-time students in the academic division concerned.</p>	<p>[delete]</p>
<p>11. With the exception of those noted in (10) above, all students, undergraduate and graduate, who register for credit on the St. George Campus for what is designated or considered by the academic division concerned to be less than a full-time program in that division shall be assessed compulsory non-academic incidental fees at the same level as those paid by part-time students (undergraduate and graduate respectively) in the winter session.</p>	<p>[delete]</p>
<p>12. Students who pay post program fees in the School of Graduate Studies shall be assessed fees for the Department of Athletics and Recreation, Hart House, the Health Service, and the Student Services Fee at the same level as part-time graduate students in the winter session, and be assessed fees for the Graduate Students' Union at the full-time student level.</p>	<p>[delete]</p>
	<p>6. The establishment of compulsory non-academic incidental fees or increases to fees charged for campus services shall be subject to terms and conditions of the <i>Memorandum of Agreement Between The University of Toronto, The Students' Administrative Council, The Graduate Students' Union and The Association of Part-Time Undergraduate Students For a Long-Term Protocol on the Increase or Introduction of Compulsory Non-Tuition Related Fees</i> while it is in effect, and/or other applicable agreements and policies.</p> <p style="text-align: right;"><i>Protocol on Non-Tuition Fees</i></p>
<p>13. The foregoing does not limit or restrict the Governing Council from authorizing the collection of compulsory non-academic incidental fees for organizations, purposes, or</p>	<p>7. With respect to fees for student societies, the foregoing does not limit or restrict the Governing Council from authorizing the collection of compulsory non-academic</p> <p style="text-align: right;"><i>Other Fees</i></p>

Current Policy

activities other than those referred to above, provided always that any such fees have been duly initiated in accordance with the by-laws of the organization affected, and are handled in a manner consistent with the policies and procedures relating to student societies' fees. However, fees will not normally be collected on behalf of organizations other than student societies except when such fees are included in the student society fee for the constituency concerned.

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incidental fees for organizations, purposes, or activities other than those referred to above, provided always that any such fees have been duly initiated in accordance with the by-laws of the organization affected, and are handled in a manner consistent with the policies and procedures relating to student societies' fees. However, fees will not normally be collected on behalf of organizations other than student societies except when such fees are included in the student society fee for the constituency concerned.

B. Student Societies

A student society is an organization on whose behalf the University collects a compulsory non-academic incidental fee, in which membership is automatic and determined by registration and status in a particular division or program, or in one of a number of divisions or programs of the University of Toronto. In the case of a residence student society, membership is determined by residency in a particular University residence.

Definition of Student Society

1. In order to encourage greater awareness and participation on the part of their constituents and to minimize some of the problems which can arise when office-holders change each year, student societies must have constitutions which provide for the orderly and democratic governance of the society. These constitutions must include specific provisions which fulfill the following requirements:

1. In order to encourage greater awareness and participation on the part of their constituents and to minimize some of the problems which can arise when office-holders change each year, student societies must have constitutions **and/or by-laws** which provide for the orderly and democratic governance of the society. These constitutions **and/or by-laws** must include specific provisions which fulfill the following requirements:

Constitutions of Student Societies

(a) that a report be made on a regular basis (preferably monthly) to the executive and council of the society's financial position including:

(a) that a report be made on a regular basis (preferably monthly) to the executive and council **or board of directors** of the society's financial position including:

Regular Financial Reports

- a comparison of year-to-date actual income and expense to budget;
- a statement of expected income and expense for the balance of the fiscal year (or a "cash flow forecast" to the

- a comparison of year-to-date actual income and expense to budget;
- a statement of expected income and expense for the balance of the fiscal year (or a "cash flow forecast" to the

<i>Current Policy</i>	<i>Proposed Policy</i>
end of the year);	end of the year);
(b) that auditors be appointed to conduct an annual audit of the society’s financial statements, and that the audited financial statements and the auditor’s report thereon be approved by the executive and presented to the members, including through such means as a general meeting of the society’s membership as early as possible in the subsequent academic session, publication in campus media, etc.;	(b) that auditors be appointed to conduct an annual audit of the society’s financial statements, and that the audited financial statements and the auditor’s report thereon be approved by the executive and presented to the members, including through such means as a general meeting of the society’s membership as early as possible in the subsequent academic session, publication in campus media, etc.;
(c) that, in addition to (b) above, all financial records, budgets, auditor’s reports, council minutes and minutes of council committees, commissions, or other subsidiary bodies of the society be available for examination by any member of the constituency concerned;	(c) that, in addition to B.1.(b) above, all financial records, budgets, auditor’s reports, council minutes and minutes of council committees, commissions, or other subsidiary bodies of the society be available for examination by any member of the constituency concerned;
(d) that appropriate guidelines be adhered to for accounting and financial procedures consistent with the directions outlined in the <i>Handbook for Student Societies</i> (published annually by the Office of the Vice-President & Provost);	(d) that appropriate guidelines be adhered to for accounting and financial procedures consistent with the directions outlined in the <i>Handbook for Student Societies</i> (published annually by the Office of the Vice-President & Provost);
(e) a description of the procedure to be followed in order to request a change in the society’s fee;	(e) a description of the procedure to be followed in order to request a change in the society’s fee;
(f) a description of a procedure which provides for the expeditious consideration of complaints from members of the society that the society is not following its constitution or is failing in some other way to manage its affairs properly;	(f) a description of a procedure which provides for the expeditious consideration of complaints from members of the society that the society is not following its constitution or is failing in some other way to manage its affairs properly;
(g) Where a portion of the student society fee is designated for another organization, the student society must obtain, by December 31st, from the organization that receives the designated portion of the fee, financial statements audited by a public accountant. Where the total amount of the fee remitted	[section moved – see below]

Annual Audit

Availability of Records

Accounting and Financial Procedures

Procedures to Request a Change in Fee

Complaints from Members

Current Policy

annually falls below that amount specified in this Policy for waiving of the requirement of an audit, the student society has the discretion to waive the audit on the same basis the Internal Audit Department would waive the requirement of Audit.

Each student society on whose behalf the University collects a compulsory fee shall deposit a copy of its constitution, and of any amendments thereto which may be approved from time to time, ~~both~~ with the head of the ~~college, faculty, school or other~~ division in which the society is located, and with the Office of the Vice-President & Provost. (Three societies, the Association of Part-time Undergraduate Students, the Students' Administrative Council, and *The Varsity*, draw their membership from more than one academic division and need file a copy of their constitution only with the Office of the Vice-President & Provost.)

(~~It~~) If student societies disburse funds to other organizations, including course unions and clubs, they shall require a statement of expenditures, covering the amount of funds disbursed, prepared and signed by the appropriate official from the receiving course union, club or other organization.

2. The University shall continue to collect fees on behalf of student societies only so long as the individual societies operate in an open, accessible and democratic fashion, following the terms of their constitutions, and submit evidence, in the form of an annual report from an independent auditor licensed under the *Public Accountancy Act*, that adequate financial records are being maintained and that funds collected are being properly accounted for.

Exemptions from the above audit requirement may be granted by the University's Internal Auditor provided that the following conditions

Proposed Policy

Each student society on whose behalf the University collects a compulsory fee shall deposit a copy of its constitution **and/or by-laws**, and of any amendments thereto which may be approved from time to time, with the head of the division **or program** in which the society is located, **with the Office of the Governing Council**, and with the Office of the Vice-President & Provost. (Three societies, the Association of Part-time Undergraduate Students, the Students' Administrative Council, and *The Varsity*, draw their membership from more than one academic division and need file a copy of their constitution only **with the Office of the Governing Council and** with the Office of the Vice-President & Provost.)

Copies of Constitution Deposited with University

[section moved – see below]

2. The University shall continue to collect fees on behalf of student societies only so long as the individual societies operate in an open, accessible and democratic fashion, following the terms of their constitutions, and submit evidence, in the form of an annual report from an independent auditor licensed under the *Public Accountancy Act*, that adequate financial records are being maintained and that funds collected are being properly accounted for.

Conditions on Collection of Fee (Audit Requirement)

(a) Exemptions from the above audit requirement may be granted by the University's Internal Auditor provided that

Exemption from Audit Requirement

Current Policy

are fulfilled:

- (a) incidental fees collected by the University on behalf of the student society concerned amount to less than \$30,000 in the fiscal year, and the total amount of other income, not including fees, does not exceed ~~\$5,000~~ in the fiscal year. (These amounts may be changed from time to time by the Office of the Vice-President & Provost acting in consultation with the Internal Auditor. Student Societies shall be notified of changes in the *Handbook for Student Societies*);
- (b) the request is made ~~prior to the midpoint of~~ the fiscal year concerned and is supported by two-thirds of the full membership of the ~~council or board of directors~~ of the society;
- (c) the Internal Auditor is satisfied that the society is maintaining proper books of accounts and supporting documentation.

If an exemption is granted, ~~at the end of the society's fiscal year~~, unaudited financial statements must be prepared by a public accountant or by the student society, and submitted for review and acceptance by the Internal Auditor. The student society will reimburse the Internal Audit Department for the cost incurred in reviewing the society's financial information. At the discretion of the student society, the student society may appoint an independent public accountant to provide a Review Engagement Report instead of the review by the Internal Audit Department.

Proposed Policy

all the following conditions are fulfilled:

- (i) incidental fees collected by the University on behalf of the student society concerned amount to less than \$30,000 in the fiscal year, and the total amount of other income, not including fees, does not exceed **\$7,500** in the fiscal year. (These amounts may be changed from time to time by the Office of the Vice-President & Provost acting in consultation with the Internal Auditor. Student Societies shall be notified of changes in the *Handbook for Student Societies*);
- (ii) the request is made **no later than October 31 following the end of** the fiscal year concerned and is supported by two-thirds of the full membership of the **executive** of the society; **and**
- (iii) the Internal Auditor is satisfied that the society is maintaining proper books of accounts and supporting documentation.

If an exemption is granted, unaudited financial statements must be prepared by a public accountant or by the student society, and submitted for review and acceptance by the Internal Auditor. **The specific documentation required for this review shall be described in the *Handbook for Student Societies* and must be submitted no later than December 31 following the end of the fiscal year.**

The student society will reimburse the Internal Audit Department for the cost incurred in reviewing the society's financial information. At the discretion of the student society, the student society may appoint an independent public accountant to provide a Review Engagement Report instead of the review by the Internal Audit

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If an auditor’s report is required, and is not received by December 31, or if there is a denial of audit opinion or other qualification which in the view of the University’s Internal Auditor requires special attention, the Office of the Vice-President & Provost may, in consultation with the Internal Auditor, withhold further instalments of the fees collected until it is satisfied that the problems or questions which were identified have been resolved satisfactorily.

[original section 1. (g)]

[original section 1. (h)]

If the Office of the Vice-President & Provost has reason to believe that a student society is

Department.

- (b) If an auditor’s report is required, and is not received by December 31, or if there is a denial of audit opinion or other qualification which in the view of the University’s Internal Auditor requires special attention, the Office of the Vice-President & Provost may, in consultation with the Internal Auditor, withhold further instalments of the fees collected until it is satisfied that the problems or questions which were identified have been resolved satisfactorily.

Withholding of Fee Instalments

- (c) Where a portion of the student society fee is designated for another organization, the student society must obtain, by December 31, from the organization that receives the designated portion of the fee, financial statements audited by a public accountant. Where the total amount of the fee remitted annually falls below that amount specified in this *Policy* for waiving of the requirement of an audit, the student society has the discretion to waive the audit on the same basis the Internal Audit Department would waive the requirement of Audit.

Portions of Fee Designated for Affiliates of Student Societies

Student societies shall report annually on the receipt of audited financial statements and/or exemptions granted related to organizations that receive designated portions of student society fees.

- (d) If student societies disburse funds to other organizations, including course unions and clubs, they shall require a statement of expenditures, covering the amount of funds disbursed, prepared and signed by the appropriate official from the receiving course union, club or other organization.

Disbursement of Funds to Other Organizations

- 3. If the Office of the Vice-President & Provost has reason to believe that a student society is

Procedures to Address Allegations of

Current Policy

not operating in an open, accessible and democratic fashion and following the terms of its constitution, it shall inform the society of this in writing along with details of whatever inadequacies in the society's conduct of its affairs are alleged to exist. In the case of a divisional student society, the division head should similarly be informed. The Office of the Vice-President & Provost should ensure that the society's internal complaint procedure had been exhausted before it proceeds further unless there are compelling reasons for doing otherwise, in which case this should be reported to the University Affairs Board. If the Office of the Vice-President & Provost intends to proceed further, the student society should be given the opportunity to comment upon the allegations that have been made. If the Office of the Vice-President & Provost continues to have reason to believe that significant constitutional or procedural irregularities exist, further instalments of fees may be withheld.

Whenever funds are withheld from a student society, the Office of the Vice-President & Provost shall so inform the next meeting of the University Affairs Board. A decision to withhold funds may be appealed by the student society involved to the University Affairs Board.

Requests to change the fee collected on behalf of a student society and requests for new fees shall be approved only when evidence has been presented that the request has been authorized by due constitutional process in the organization.

Where the amount of an increase in the fee charged is not greater than the year-over-year change in consumer prices for Ontario as measured by Statistics Canada (December-over-December) as of December 31 of the

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not operating in an open, accessible and democratic fashion and following the terms of its constitution, it shall inform the society of this in writing along with details of whatever inadequacies in the society's conduct of its affairs are alleged to exist. In the case of a divisional student society, the division head should similarly be informed. The Office of the Vice-President & Provost should ensure that the society's internal complaint procedure had been exhausted before it proceeds further unless there are compelling reasons for doing otherwise, in which case this should be reported to the University Affairs Board. If the Office of the Vice-President & Provost intends to proceed further, the student society should be given the opportunity to comment upon the allegations that have been made. If the Office of the Vice-President & Provost continues to have reason to believe that significant constitutional or procedural irregularities exist, further instalments of fees may be withheld.

Whenever funds are withheld from a student society, the Office of the Vice-President & Provost shall so inform the next meeting of the University Affairs Board. A decision to withhold funds may be appealed by the student society involved to the University Affairs Board.

4. Requests to change the fee collected on behalf of a student society and requests for new fees shall be approved only when evidence has been presented that the request has been authorized by due constitutional process in the organization. **The procedures to request approval of a new fee or an increase to an existing fee shall be published in the Handbook for Student Societies.**

- (a) Where the amount of an increase in the fee charged is not greater than the year-over-year change in consumer prices for Ontario as measured by Statistics Canada (December-over-December) as of

Irregularities

Report of Fees Withheld

Requests to Change Fees

Cost of Living Increases

Current Policy

previous year, the request must be supported by the results of a previous referendum approving the principle of a cost-of-living adjustment.

Where the amount of an increase in the fee charged is greater than the year-over-year change in consumer prices, the request must be supported by the majority of the society's members voting in a recent referendum.

- 3. Student society fees may include levies for specific, limited projects, within the University including those for academic purposes. Such levies shall:
 - (a) be approved by whatever process is required by the student society's constitution for consideration of a fee increase, and by a referendum;
 - (b) be in effect for a limited time period or include provision for periodic review;
 - (c) be treated as part of the student society fee but be specifically listed ~~in the Schedule of Fees~~;
 - (d) be paid by the ~~Fees Department~~ directly to the student society or to a restricted account for the purposes designated by the student society.

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December 31 of the previous year, the request must be supported by the results of a previous referendum approving the principle of a cost-of-living adjustment.

In special circumstances (e.g., when a portion of a student society fee is designated for a health plan or capital project), other inflation indexes or predetermined inflation factors may be used, provided that the request is supported by the results of a previous referendum approving the use of the specific inflation index or predetermined inflation factor.

- (b) Where the amount of an increase in the fee charged is greater than the year-over-year change in consumer prices, the request must be supported by the majority of the society's members voting in a recent referendum. *Referendum Requirement*

- 5. Student society fees may include levies for specific, limited projects, within the University including those for academic purposes. Such levies shall: *Special Levies*
 - (a) be approved by whatever process is required by the student society's constitution for consideration of a fee increase, and by a referendum;
 - (b) be in effect for a limited time period or include provision for periodic review;
 - (c) be treated as part of the student society fee but be specifically listed **on students' accounts**;
 - (d) be paid by the **Student Accounts office** directly to the student society or to a restricted account for the purposes designated **in writing** by the student society. **Such a designation must be approved by the council or board or**

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directors of the society.

- 6. Notwithstanding the provisions outlined in A.3. and A.4. above, student society fees may be charged in a manner explicitly authorized by the members of the society voting in a referendum.**

*Assessment of
Student Society
Fees*

Amendments

Sections 1(a), (b) and (c) amended by the Governing Council, December 21, 1978
Sections 9-13 added by the Governing Council, April 19, 1979
Sections 4 and 9 amended and 14 added by Governing Council, March 20, 1980
Sections 1, 2 and 12 amended by the Governing Council, January 19, 1984
Section 4 amended by the Governing Council, April 19, 1984
Preamble and Sections 1 and 2 amended by the Committee on Campus and Community Affairs, September 18, 1984
Section 3 added by the Committee on Campus and Community Affairs, December 9, 1987
Names of Boards amended by Governing Council, October 20, 1988
Section 2 amended by Governing Council, December 21, 1989
Sections 2 and 5 amended by University Affairs Board, April 3, 1990
Section 1(g) added to the Policy by the University Affairs Board, April 28, 1992
Section 2 paragraphs three and four amended by the University Affairs Board, March 16, 1993
Section 1(h) added to the Policy by the University Affairs Board, September 28, 1993
Preamble and Section 12 amended by the University Affairs Board, November 30, 1993
Section 7 amended by the University Affairs Board, April 26th, 1994
Sections 1(d), 1(g) and 2(a) amended by the University Affairs Board, November 25, 1997