

Helping All Ontarians to Reach Higher

Submission to the Standing Committee on Finance and Economic Affairs

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HELPING ALL ONTARIANS REACH HIGHER: EXECUTIVE SUMMARY

In this submission to the Standing Committee on Finance and Economic Affairs, the Ontario Undergraduate Student Alliance (OUSA) recommends targeted investments in three priority areas for the upcoming provincial budget.

The primary overarching recommendation is that the Ontario government must deliver on the funding promised by the 2005 budget. Most of the priorities discussed below do not require new funding commitments from the provincial government, but rather are means of most effectively utilizing the funds promised in the 2005 budget.

PRIORITY ONE: TUITION AND STUDENT FINANCIAL ASSISTANCE

In order to make tuition affordable and increase the accessibility of Ontario's universities to all qualified students, the provincial government can:

- Commit to a timetable to institute a system of responsible cost-sharing, where students must not contribute more than 30 per cent of the total operating cost of the university system;
- Deliver the \$732 million in increased operating grants promised to post-secondary institutions for 2006/07 in the 2005 budget speech, and \$932 million in 2007/08;
- Increase operating grants to universities to 13 per cent over 2004/05 levels starting in 2008/09;
- Remove unfair ineligibilities from the financial aid system, such as the exclusion of part-time students;
- Improve the OSAP website for \$2 million;
- Implement early intervention programs to encourage future participation in post-secondary education in five Ontario communities for \$2.5 million;
- Create an entrance merit scholarship for high school students with an academic average of 85 per cent or higher for \$22.3 million; and
- Eliminate the tuition tax credit, generating additional revenue of \$300 million to re-invest in grant-based student assistance.

PRIORITY TWO: ACCOUNTABILITY

The provincial government can promote accountability at Ontario's universities by:

- Creating multi-year plans with post-secondary institutions, governing issues of funding, quality, accessibility, accountability, and tuition regulation;
- Creating the proposed Higher Education Quality Council of Ontario, for an estimated cost of \$8 million; and
- Increasing the level of student representation on university governing bodies.

PRIORITY THREE: A PAN-CANADIAN COMMITMENT TO POST-SECONDARY EDUCATION

The provincial government can work towards greater federal contribution to post-secondary education by:

- Joining students, faculty and institutions to aggressively lobby the federal government for a dedicated post-secondary transfer;
- Pushing for a dedicated transfer totaling \$4 billion, which would be adjusted annually for inflation and demographic shifts.

INTRODUCTION

Higher education is a wise public investment. It is one of the key building blocks in the socio-economic development of individual Ontarians and our province as a whole. Strategic public funding for post-secondary education must be a centerpiece of the province's strategy to increase our capacity, competitiveness, and quality of life for all its citizens.

Higher education must remain a top priority

“We are not really just talking about improving the average income for Ontario. We are talking about strengthening the very fibre of our society. It is making us a stronger people, a more skilled people. We are going to compete on our ability to be the most innovative, the most creative, the most efficient, the most productive people on the continent.”

— Greg Sorbara speaking about the 2005 Budget¹

The past few years have seen a marked shift in Ontario, where post-secondary education is increasingly being recognized as a governmental priority. The \$6.2 billion public investment dedicated in the 2005 budget announcement has been universally lauded as a step toward the rehabilitation of the post-secondary system.

However, it would be premature to sit back and conclude that the task of renewing Ontario's post-secondary system is complete. The government must ensure that the landmark investments committed in the 2005 budget are allocated wisely and for the greatest effect. In this submission, the Ontario Undergraduate Student Alliance (OUSA) will outline the importance of higher education on the list of governmental priorities and suggest educated solutions on how the government should manage the post-secondary sector and utilize public funding to maximum benefit for Ontario's students and universities.

PART I: A BRIGHT FUTURE DEPENDS ON HIGHER EDUCATION

Higher education holds a unique status amongst government responsibilities. Unlike other sectors or industries, it is difficult for universities to produce the immediate returns and measurable results that often drive our political system. However, higher education is a very strategic public investment, as it pays both economic and social dividends for decades to come.

Higher Education is Key to our Future Economic Growth

“Ontario workers are well-trained. That simple explanation was cited as a main reason why Toyota turned its back on hundreds of millions of dollars in subsidies offered from several American states in favour of building a second Ontario plant.”

— Canadian Press story on June 30, 2005, about the new Toyota plant in Woodstock²

More than infrastructural investments, business subsidies, or tax cuts, a highly-educated population is the primary vehicle for driving economic growth and prosperity. By creating better employment opportunities for graduates, post-secondary education has a broader economic effect of raising graduates' wages, lowering unemployment rates, and increasing the tax base. Statistics Canada's Survey of Labour and Income Dynamics examined 15,000 families in 2002, and found that university graduates made up slightly more than 15 per cent of the total population, but paid almost 35 per cent of total income taxes, and received only 8 per cent of government transfers.³ Clearly, post-secondary graduates drive Ontario's economy.

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There are numerous other economic and social benefits from post-secondary education, as listed in *Figure 1*.

Figure 1: The Economic and Social Benefits of Post-Secondary Education⁴

Public Benefits of Higher Education	
Economic	Increased tax revenues Greater productivity Increased consumption Increased workforce flexibility Decreased dependence on government financial support
Social	Reduced crime rates Increased civic engagement Stronger social cohesion and appreciation for diversity Improved ability to adapt to new and emerging technologies Less reliance on health care system

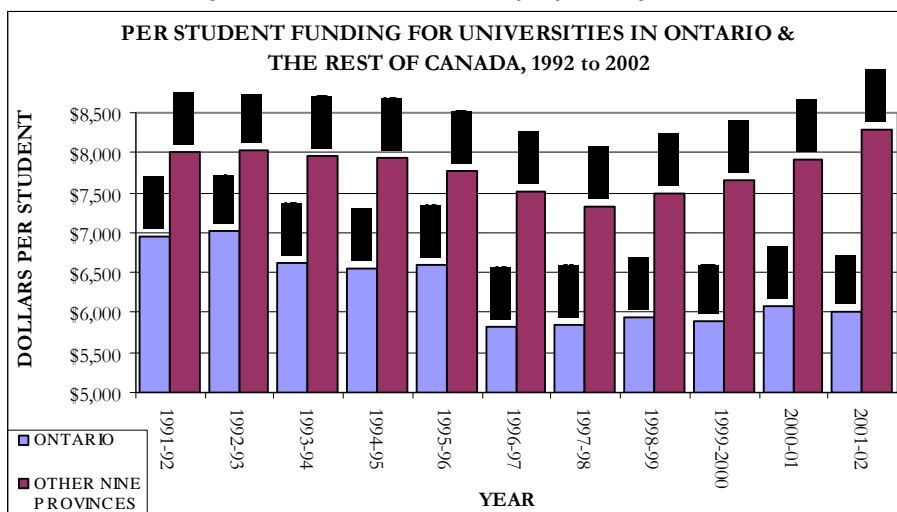
Post-Secondary Funding Needs to Remain Strong

“Why is our productivity lagging? We continue to conclude that Ontarians have consistently under invested for future prosperity. First, we under invest in ourselves. Individuals, businesses, and governments spend less on education than those in our peer states. This under investment is particularly acute at the post secondary levels.”

— Roger Martin (Rotman School of Business Dean), Task Force on Competitiveness, Productivity and Economic Progress, 2005 Annual Report⁵

Despite the significant funding allocated to post-secondary education in the 2005 budget, these financial contributions only go part way to repairing the system. Through the 1990s, higher education faced major funding cuts alongside growing enrolment, stretching the system to the brink. As shown in *Figure 2*, per-student provincial operating grants to Ontario universities were significantly lower than those in other provinces from 1991 to 2001 (the most recent data available).

Figure 2: Provincial University Operating Grants⁶



The Ontario government’s Task Force on Competitiveness, Productivity and Economic Progress argues that in the long term, this under-investment in higher education has led to Ontario lagging behind its former peers in vital

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economic measures such as per capita GDP. The Task Force was created by the provincial government in 2001 with a mandate to monitor Ontario's competitiveness, and is chaired by the dean of the Rotman School of Business, Roger Martin.

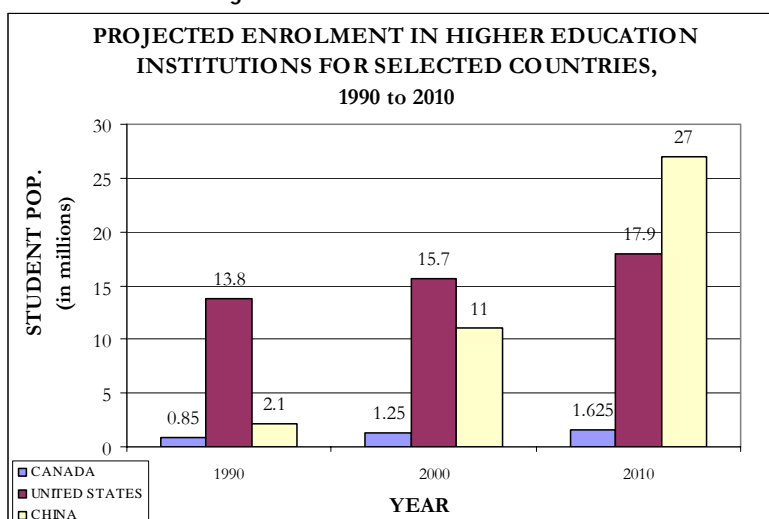
The task force notes that Ontario and Massachusetts were peers in their levels of prosperity in 1977. However, the two jurisdictions diverged in their growth strategies in intervening years, with Massachusetts out-investing Ontario in post-secondary education at rate of three times per capita. In 2004, Massachusetts' GDP per capita had moved ahead of Ontario's by \$19,100 (or 46 per cent). By strategically investing in post-secondary education, the state has become, as the Task Force describes, "the richest jurisdiction of meaningful size on the planet." In order to shift the province's current economic path and invest in future generations, the Task Force recommends first and foremost that investments in post-secondary education should be raised. They argue this is essential to increase Ontario's productivity and prosperity.⁷

Ontario is at risk of lagging behind

Another threat on the economic horizon is the growing pack of countries that are making higher education a national priority. Numerous former 'developing' nations are poised to leap-frog their western counterparts by building top-quality post-secondary systems and enrolling massive numbers of students.

The primary such challenger is China, which now has the largest and fastest-growing university population in the world. According to government sources, 11 million students enrolled in post-secondary institutions in 2000, and this grew to over 16 million in 2002.⁸ By 2010, the country expects that they will have 27 million students enrolled in post-secondary education. While the country already is home to numerous top universities, China is also working to build 100 world-class institutions in the 21st century in an initiative called 'Project 211'.⁹ This intensive focus on higher education could vault China into the position of a global higher education leader, and indeed, most likely an economic and political leader as well. The growth of China's graduate population is dramatic, even after acknowledging the country's huge population, as demonstrated in *Figure 3* below. Whereas in 1990 China had a little over twice the number of university students as in Canada, by 2010 the country projects its enrolment to be almost the size of Canada's entire population.

Figure 3: Projected Enrolment in Higher Education Institutions for Selected Countries, 1990 to 2010¹⁰



Countries without the vast populations of China or India are also poised to become higher education leaders through strategic investments in their post-secondary systems. In Singapore, the government recognized the country's lack of natural resources and the threat of lower-cost workforces in nearby countries, and decided to pursue higher education as its primary vehicle for economic growth.¹¹ In a project dubbed 'Global Schoolhouse', the Singaporean government has been devoting extensive public funding to transform the country into an international education hub for students from across Asia, Australia and beyond. Numerous internationally renowned universities have been drawn to establish campuses in the city, including MIT, Johns Hopkins University, Stanford University, the University of Pennsylvania's Wharton School of Business, France's INSEAD business school, and Shanghai Jiao Tong University.¹² The Singaporean government forecasts that their Global Schoolhouse strategy will result in a tripling of international students to 150,000 people by 2012, and allow Singapore to capture a greater share of the international education market, which they estimate at a value of \$2.2-trillion.¹³

Both of these nations recognize the strategic importance of building strong higher education system and educating their populace as routes to future growth. As Ontario seeks to compete in this global marketplace, we must keep our eye on these and other challenges looming on the horizon.

Given the strengths, opportunities and challenges described above, Ontario must continue on its course of strong targeted support for higher education. The following sections outline key issues related to post-secondary funding, provide OUSA's recommendations on how funding should be allocated, and estimate costs of proposed initiatives.

PART II RESPONSIBLE COST-SHARING: A PRINCIPLE FOR THE GOVERNANCE OF POST-SECONDARY EDUCATION

OUSA's approach to the funding of the post-secondary system is guided by a principle of **Responsible Cost Sharing**. This principle is that the costs of funding higher education should be distributed to the parties that stand to benefit from the system. The notion of cost-sharing assigns a broad social responsibility for the maintenance of the university system to individuals and their families, as well as the provincial and federal governments (and by extension, the public), without forcing any of those parties to bear the full costs and responsibilities for the system.

Individuals stand to benefit significantly from post-secondary education, on intellectual as well as financial terms. In the 2001 census, the median household income of families where the primary earner had a university degree was 51 per cent greater than in families whose primary earner only had a high school diploma.¹⁴ Governments at both the provincial and federal levels also stand to benefit from an educated populace, and reap significant returns through income taxes, increased consumption and therefore sales tax revenues, economic growth and job creation.

Universities' operating funding, as envisioned in such a system, would consist of provincial governments providing the majority of operating revenue to the university system, complemented by a fair and affordable student contribution, and a financial aid system that ensures that all qualified students are able to attend higher education without incurring a punitive level of debt. In order to have a fair higher education system for all, the level of student contribution must never be allowed to compromise the accessibility of the system.

OUSA uses this principle of shared responsibilities to guide our approach to key elements of the post-secondary system discussed below, including tuition, accountability, and the federal role in funding post-secondary. In each of these cases, we advocate for a fair and equitable distribution of costs and responsibilities to relevant parties, whether it be around financing universities' operating costs, or decision-making processes on university governing bodies.

PART III RESPONSIBLE COST-SHARING IN PRACTICE: THREE PRIORITIES

After the system-wide review conducted through the Rae Review, 2006 is a year for focusing on a few key priorities to make best use of the announced funding, rather than a laundry list of various reforms. As such, OUSA's members have set three priority areas they recommend should receive attention in the upcoming provincial budget. In each of the three priority areas, OUSA advocates an approach involving the responsible sharing of costs and responsibilities amongst affected parties.

PRIORITY ONE: TUITION AND STUDENT FINANCIAL ASSISTANCE

One of the provincial government's main roles in the post-secondary field is the setting of tuition rates, by establishing a maximum rate by which tuition can increase each year. OUSA's foremost recommendation for Ontario's tuition framework is that tuition should not be examined in isolation, but rather in tandem with student financial assistance. This approach will recognize that any changes to tuition fees in the short or long term must be balanced by concomitant investments in student financial assistance, and that this responsiveness must be embedded in the design of the financial aid system.

At the end of the current 2005/06 academic year, the two-year tuition freeze instituted by the McGuinty government is set to expire. Ontario students are awaiting the announcement from the Ministry of Training, Colleges and Universities on the tuition policy for the coming 2006/07 academic year, which has been under development since early summer 2005 and is expected to be announced in February 2006. OUSA has made numerous submissions to the Ministry of Training, Colleges and Universities, and has also participated in stakeholder roundtable sessions along with representatives from the universities and colleges sector, and other student organizations.

The summary below provides an outline of OUSA's suggestions for a student-centric policy on tuition and student financial assistance, particularly those related to provincial funding, alongside cost estimates for our recommendations. For OUSA's full tuition policy, please see our submission to the Ministry of Training, Colleges and Universities, entitled *Ending the Endless Debate: Recommendations for a new Ontario tuition policy*, which outlines our ideal tuition structure, current problems in the system and the concrete steps needed to achieve our long-term goals. The policy paper can be obtained from our website (www.ousa.ca) or by contacting us at info@ousa.on.ca.

The Current Situation: Ontario students face high tuition and debt, and receive insufficient financial aid

Before examining our recommendations for future policy and funding, it is important to briefly review the current situation relating to tuition:

- Average undergraduate tuition fees in Ontario have **almost doubled** in the past 15 years, rising from \$1,680 in 1990 to \$4,881 in 2005/06.¹⁵
- In deregulated programs, including graduate programs and professional degrees (such as engineering, social work, law, physical therapy and medicine), **tuition rose by an average of 261 per cent** between 1993/94 and 2002/03;¹⁶ in certain programs this was much higher. Between 1995/96 and 2001/02, tuition in Ontario for medical school rose by 241 per cent, dentistry rose by 315 per cent, and law rose by 141 per cent.¹⁷

- Students in deregulated programs paid an average of \$7,500 in tuition in 2002/03, with some students paying significantly more. For example, the average tuition for dentistry students at Ontario universities that year was \$17,087.¹⁸
- A recent Statistics Canada study concluded that students from **middle-income families have been hit hardest** by fee hikes through deregulation, as their likelihood of attending professional programs such as law or medicine has declined.¹⁹
- After being frozen for ten years at \$9,350, the maximum OSAP loan amount finally rose in 2005 to \$11,200.²⁰ While this increased loan limit was welcomed by students, it **still does not cover the costs** of many students, particularly those in professional programs.
- The high costs of tuition and living expenses mean that many students must take out loans in order to finance their education. Over 40 per cent of Ontario graduates have government student loan debts upon graduation, carrying an **average debt of \$22,700.**²¹ While these figures are significant, they do not include the large number of students who take out private loans in order to finance their education.

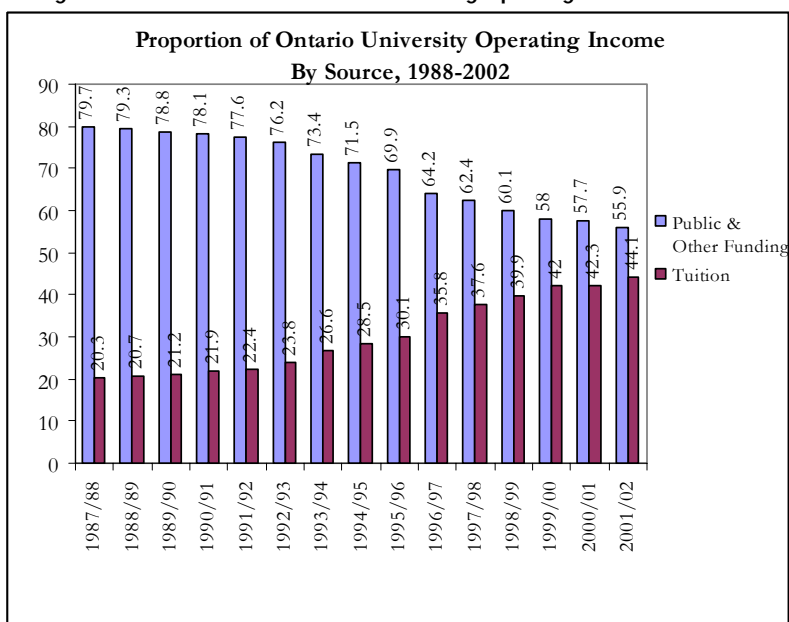
With these facts in mind, we turn to our consideration of responsible cost-sharing between students and the government in higher education.

A. Institute a System of Responsible Cost Sharing

In order to promote fairness and predictability in student tuition fees, OUSA recommends that students and their families should contribute no more than 30 per cent of the costs of their education, and the government should fund the remaining 70 per cent. This ratio should be enshrined in legislation, in order to ensure that as costs change due to inflation and other factors, the proportional division of costs borne by students and the government would remain constant. This will also allow tuition fee levels to respond to financial changes in the post-secondary sector, without needing to regularly re-open the highly contentious debate about the setting of fees.

Over the course of the 1990s and into this decade, students had been asked to bear an ever-increasing share of the costs of the university system. In 1990, students paid about 21.2 per cent of the cost of their education, while government operating grants and other funding sources (including bequests, donations, and investment income) made up the remaining 78.8 per cent. In 2003/04 (the most recent figures available), students' tuition and fees in Ontario comprised 44.7 per cent of university operating income, while government funds and other income sources made up the remaining 55.3 per cent.²² Clearly, the recent trend has been towards shifting costs onto students and their families, as demonstrated in *Figure 4*.

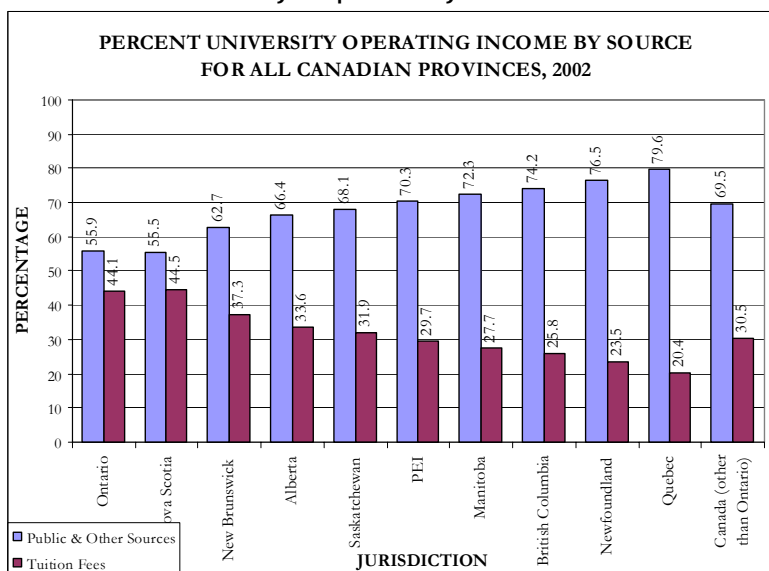
Figure 4: Ontario students have making up for government cuts²³



As *Figure 4* demonstrates, over about the past ten years, provincial governments in Ontario have been reducing the proportion of funding they contribute to the university system, and forcing students to shoulder the balance through increased tuition fees and debt.

OUSA's recommendation of instituting a 30 per cent cap on student contributions would make up for some of the shifting of responsibilities. Ontario students stood at the 30 per cent target as recently as the mid-1990s, prior to a major shift in policy direction that offloaded the responsibility of funding post-secondary education to students and their families.²⁴ The 30 per cent target would also bring Ontario in line with other Canadian provinces, where students paid about 30.5 per cent of the costs of their education in 2001/02, as illustrated in *Figure 5*.

Figure 5: Ontario Students Pay Proportionally More than Most Other Provinces²⁵



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To bring tuition costs in line with the 30 per cent ratio, the provincial government could either cut tuition back sharply, or increase government operating grants while keeping tuition levels constant. As the first option would likely result in a reduction in funds available in the university system, OUSA has recommended that a progressive injection of government funding should be coupled with a cap on tuition levels, at the rate of the consumer price index. This would hold students' costs in check at a predictable level, while allowing increased provincial operating grants to fund improvements in the system and catch up with the increases in cost borne by students through the 1990s.

In order to address these issues around funding and tuition, OUSA makes a set of inter-related recommendations around tuition, government funding and student financial aid, which collectively will help to create a post-secondary system that is both high-quality and accessible to all.

Recommendation One: The provincial government must institute a system of responsible cost-sharing in Ontario, where students must not pay for more than 30 per cent of the total operating cost of the university system.

Recommendation Two: All tuition in Ontario must be regulated by the provincial government.

Recommendation Three: The provincial government must institute a robust, flexible and effective financial aid system consisting of both loans and grants.

Recommendation Four: The provincial government must increase university operating grants by 13 per cent per year in 2008-2009 to redress the current imbalance in student and public contribution.

While the Ontario government's commitment of \$6.2-billion dollars in the 2005 budget was a very significant step forward, after a long period of cuts and neglect this funding only begins to repair the post-secondary system. Under the budget plan the government will increase university operating grants by an average of six per cent per year until 2009/10.²⁶ However, in order to build a system of responsible cost-sharing by 2011 (the timeframe set out by the provincial government's plan), OUSA recommends that operating grants be boosted by 13 per cent per year starting in 2008/09, allowing the 30/70 target to be reached by 2011 at a total cost of \$2.3-billion. If operating grants are increased by the planned six per cent annually, the 30/70 target will not be reached until 2024, and at a much higher total cost of \$4.4-billion in additional funds.

ALLOCATION OF FUNDING

The steps required to meet OUSA's long-term funding plan are simple. For 2006 and 2007, the Ontario government would be requested to follow through on its promise in the 2005 budget, and deliver the 6 per cent increase in operating funding dedicated in that plan, estimated at \$732-million in 2006, and \$932-million in 2007. Starting in 2008, OUSA recommends that this funding be increased to 13 per cent in order to reach the 30/70 target in a shorter timeframe and at a lower total cost.

For the 2006 budget there are no additional costs for this initiative.

Implement an Effective System of Student Financial Assistance

In tandem with the tuition policy outlined above, OUSA recommends that the Ontario government ensure that the student financial aid system:

1. **Adequately meets student need.** The financial aid package must be large enough to account for all reasonable higher education expenses, and is responsive to tuition policy.
2. **Is available to all students in need.** Through accurate testing of student need, reasonable parent and student contribution requirements, elimination of unfair categorical ineligibilities and an extensive and transparent appeals process, the financial aid system must be open to all individuals who have legitimate unmet need and require assistance to access the higher education system.
3. **Minimizes graduate debt.** Through a progressive balance of non-repayable (grant) and repayable (loan) assistance, the financial aid system must seek to reduce the amount of debt a student owes upon graduation. Non-repayable assistance should be provided both up-front as targeted aid to financially vulnerable individuals and groups, and as back-end debt remittance for all individuals who have borrowed from OSAP.
4. **Protects graduates.** The student financial aid system requires some flexibility in loan repayments for the students who encounter major financial difficulties. To prevent the serious consequences of loan default, the financial aid system must allow individuals to make partial monthly repayments as needed and allow graduates in serious financial difficulty access to robust interest relief and debt forgiveness programs.
5. **Provides clear information to students.** One persistent complaint about OSAP is the lack of information provided to students and their families. Information about both the application process and students' individual cases should be easily accessible to students, and students should easily be able to have questions answered by telephone or electronically.

There are a few concrete steps that can be taken to achieve these principles in the student financial aid system.

B. Change OSAP Qualifications

Students welcomed changes that were made to OSAP qualification policies in the 2005 budget that reduced the expected parental financial contributions and recognized the cost of computers in needs calculations. However, long-standing unfair qualifications remain within the system, which block many students in need from receiving financial aid and thereby reducing their likelihood of enrolling in post-secondary education. Despite significant increases in enrolment, the number of students receiving OSAP loans has actually decreased in the past decade, falling from 212,189 in 1995 to about 135,000 in 2005.²⁷

One significant remaining inequity in the OSAP qualification system is the ineligibility of part-time students from receiving financial assistance. The provincial government has the same obligation to support part-time students as it does for students studying full-time, and it is unfair for these individuals to be excluded from the system.

Students who seek to study on a part-time basis tend to do so because of certain life circumstances, such as the need to continue working, family demands, and their available finances. By allowing these students to obtain financial assistance, the government could better encourage these students to attend post-secondary education and thereby improve their career prospects.

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While many full- and part-time students hold employment, in many cases these earnings do not adequately cover academic and living expenses, particularly if the student supports dependant family members. The OSAP needs qualification could easily be adjusted to take into account a part-time student's employment earnings and living expenses to produce a needs calculation for financial aid.

Small changes in the student financial aid system will have a significant effect in the lives of students. The difference of a small sum of money in loan qualifications may tip the balance in a student's decision whether or not they can afford to attend post-secondary education, and can affect the rest of their lives.

Recommendation Five: The provincial government should continue to remove unfair ineligibilities and qualifications from the financial aid system, such as the exclusion of part-time students.

C. Make Online Infrastructure Improvements for OSAP

It is a daunting task just to apply for university, and for many students, it is even more difficult to understand the OSAP system and apply for financial assistance. At present, OSAP is not making the best use of its internet presence, either in student outreach or program administration. The website is difficult to navigate, lacks any interactivity, and is not effectively integrated with on-campus and external financial aid resources. This deficiency has widely been recognized, in the Rae Review and by students and other stakeholders at recent tuition consultations. At a very basic level, the current OSAP website does not even provide a phone number or any other contact information for students with questions not answered by the website.

Recommendation Six: The provincial government should invest in an effective online presence which allows students to access all the information they need on the financial aid system, provides powerful tools to help students plan their finances, and allows for online applications.

The OSAP website should be redeveloped for maximum student ease-of-use. This would involve at least three major areas of development. First, the new online presence would maximize individual-client interactivity, though features such as query boxes or real-time online support, effective search engines, regular site updates (indicating new programs, upcoming deadlines, award announcements, account balances and so on), and a personal online estimation tool. Second, the site should be integrated with on- and off-campus resources for financial assistance. This characteristic could be developed alongside items such as personalized pages, which could include links to on-campus resources and off-campus resources at each institution. Third, the site should focus on content development that ensures students are able to easily complete the application process and manage their relationship with OSAP online until their loans have been completely paid off. For example, students may wish to see a sample timeline of how the OSAP application process works from entry to after graduation.

Students should be intimately involved in any re-development process for beta testing and focus groups. It is also recommended that any changes should be done in collaboration with the federal government and canlearn.ca.

ALLOCATION OF FUNDING

Funding would be needed to be allocated for development, testing and maintenance of a re-designed online presence. Given the number of students who would access the site, and the complexity of the system, it is estimated that it would cost about \$2 million to complete over a one to two year period.

The estimated cost of this initiative would be approximately \$2 million.

D. Create Early Intervention Programs

Promoting increased access to post-secondary education must reach further than students who have already applied to university. In order to target those young people who do not even consider post-secondary education as an option, due to costs, lack of interest, or other reasons, the provincial government must implement targeted early intervention programs to encourage these people to consider attending university. This is particularly needed for so-called 'first-generation students' whose parents or family members have no experience of post-secondary education, and therefore need to gain familiarity with the benefits, costs, and academic preparation needed for higher education.

Recommendation Seven: The provincial government should implement early intervention programs to encourage future participation in all levels of higher education.

Early intervention programs such as the Pathways to Education Program in Toronto's Regent Park neighbourhood target students who otherwise would not consider attending university and who have elevated dropout rates in high school. These programs encourage students who are both educationally and economically disadvantaged to gain the information and perform the steps needed to enter 'post-secondary education pipeline', by providing tutoring, career mentoring, support workers who act as a bridge between the community, parents, students, schools and programs.²⁸

ALLOCATION OF FUNDING

The Pathways to Education program currently costs \$2.9 million a year to operate.²⁹ New programs in Ontario could be modeled after this initiative, but would only require start-up funding in their first year. Furthermore, the Pathways program currently attracts extensive financial support from donors, thus offsetting costs. It is estimated that grants of \$500,000 could be offered to establish programs in communities in need across the province (e.g. in Hamilton, Kitchener, Scarborough, etc.). This funding would support salaries, programs, overhead and infrastructure.

The estimated cost of this initiative would be approximately \$2.5 million. This funding would allow for the creation of start-up programs in five large communities in need.

E. Create an Entrance Merit Scholarship

Besides the early intervention programs discussed above, entrance merit scholarships are another means of encouraging at-risk youth in secondary school to envision a path to higher education. One such program is the Alexander Rutherford Scholarship in Alberta, which begins to target students in Grade 10 and offers an award up to \$2,500 to students who achieve an 80 per cent academic average over their high school career. By offering financial assistance to certain students *before* they apply for university or college, the provincial government can raise the participation rate of high-achieving students who otherwise might not consider post-secondary education.

Recommendation Eight: The provincial government should implement an up-front, merit-based scholarship program.

ALLOCATION OF FUNDING

In 2003, out of a confirmed first year class of 69,851 students: 35,240 (50.5 per cent) had an average between 80 and 89 per cent, while 10,377 (14.9 per cent) had an average greater than 90 per cent.³⁰ If we assume two thirds of the 80 to 89 per cent group have averages between 80 to 85 per cent and one third are at 85 per cent and above,

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then 32 per cent, or approximately 22,350 students, would be eligible for the merit scholarship. If the award was set at a minimum level of \$1,000, then the program would cost \$22.3 million per year.

The estimated cost of this initiative would be approximately \$22.3 million.

F. Eliminate the Tuition Tax Credit

In Canada, all individuals paying tuition and associated education fees are eligible for a tax credit of \$400 a month while a student is in-study. These credits can be used in one of three ways:

1. Employ them to reduce a student's own income-tax liability;
2. A student may transfer credits to a parent, guardian, spouse or grandparent to reduce current tax liability; or
3. A student may carry forward the value of any unused tax credits to reduce their tax liability in subsequent years.

While they generate a definite financial benefit for students and their families, this program is not a particularly effective way to distribute student aid. First, tax credits are expensive. Canadian governments collectively spend almost 40 per cent of funds allocated to student financial aid through education-related tax-credits. Furthermore, tax credits are not distributed on the basis of need. Much of the money goes to students from higher income families, as lower income families either lack the tax obligations required to take advantage of the benefits, or at best, receive no more assistance than higher income families. In fact, 60 per cent of all education and tuition tax credits go to families with incomes above the national median.³¹ This is an unfortunate reality which is pulling valuable and scarce funding away from assistance for lower-income and otherwise disadvantaged groups.

Recommendation Nine: The provincial government should eliminate the tuition tax credit, and use the money to fund other student financial aid programs.

By eliminating this tax credit, a significant sum of money for student financial aid could be diverted to programs that will have a greater effect in expanding access to post-secondary education, and reduce debt loads for middle-income students through enhanced grants and loan forgiveness.

OUSA estimates the elimination of the tuition tax credit would generate an additional \$300 million in revenue for Ontario.

PRIORITY 2: ACCOUNTABILITY

Besides setting tuition policy, a second responsibility of the provincial government in post-secondary education is to ensure the post-secondary sector is accountable to both Ontarians and students. In recent years, there has been demand by both governments and the public for greater accountability in exchange for the public funds that are allocated to universities. As holder of the purse strings, the government can mandate universities to comply with various means of reporting, and request universities to reach performance targets. However, the challenge facing decision-makers is how to strike the appropriate balance between setting targets that will improve the post-secondary system and provide accountability for public funds, without creating a system with onerous reporting requirements or irrelevant metrics for gauging the relative quality of universities.

Responsible Cost-Sharing and Accountability

OUSA believes that the government should take a clear and consistent approach to students as partners in the post-secondary system. Just as students are seen as partners that help fund the post-secondary system, so too they should be seen as partners in governing their universities. As a consequence, OUSA's recommendations around accountability include proposals to increase the level of student representation on university governing bodies, and the active participation in the creation of any long-term institutional plans and agreements, amongst other things.

Students are stakeholders who know their universities at an intimate and first-hand level, as pupils in the classrooms, residents in university dormitories, and active participants in university life. They also are the stakeholders who stand to be the most affected by any changes. In order for them to contribute their perspectives and have meaningful input in how their institutions are governed, students must have a seat at the table in determining the future direction of their institutions.

A. Create Multi-Year Plans

In the final report of his Postsecondary Review, Bob Rae recommended the creation of multi-year plans negotiated bi-laterally with each university as the main framework for accountability in the post-secondary sector. These plans would be long-term agreements that would amalgamate the various agreements and policies currently in place between the government and post-secondary institutions, and would set out a broad set of policies including the institution's mission and program focus, enrolment targets, commitments to access, tuition guarantees, planned improvements in quality, credit transfers, funding requirements and sources, and measures to demonstrate how the institution is meeting its targets.³² The multi-year plans would simplify these agreements and policies into a single plan that would incorporate accountability into the heart of the relationship between the government and institutions.

Recommendation Ten: Multi-year plans must be developed between the province and institutions to ensure quality in the delivery of education from institutions, while keeping government accountable for funding levels.

OUSA supports the creation of multi-year plans, as they have the potential to offer longer planning timelines and greater financial predictability for institutions, the government and students. Each of these parties could benefit significantly from longer-term planning horizons, for example universities could better plan faculty hiring, program expansion, and the maintenance or construction of facilities. Similarly, multi-year plans could potentially allow students to know the cost of tuition for the duration of their program, which would allow students to better save and pay for their education and prevent some from being forced to drop out mid-degree due to lack of funds. Furthermore, by examining funding, tuition, quality and accessibility together, multi-year plans acknowledge that all of these elements are interlinked, and incorporates this idea into long-term planning.

While multi-year plans were one of Bob Rae's main recommendations in the Postsecondary Review, they have yet to be implemented. For the 2005/06 academic year, the Ministry of Training, Colleges and Universities is making interim accountability agreements with each institution, where the Ministry is requiring that certain targets be met as a condition for receiving their operating grants. However, these agreements began to be announced several months into the 2005/06 academic year, and still have not been completed for all of the province's institutions. As a consequence, many universities still do not yet know their level of provincial operating funding for the current academic year.

In meetings at Queen's Park where the issue of multi-year plans was discussed, some MPPs suggested that it would be difficult to create funding agreements that would stretch beyond the mandate of that government. However, OUSA counters that these types of funding plans are regularly created by governments through budgets. For example, the

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McGuinty government's *Reaching Higher* plan for post-secondary education outlines funding from 2004/05 to 2009/10, well beyond the end of the current government in 2007. While there are no absolute guarantees that this funding plan would be maintained by a different governing party, multi-year plans would help provide guidelines for universities to conduct longer-term planning.

In order to gain the maximum benefit from multi-year plans, OUSA recommends that multi-year plans examine a broad set of issues beyond simply funding.

Recommendation Eleven: Multi-year plans must examine issues of accessibility, quality, funding, accountability, and tuition regulation.

Recommendation Twelve: Tuition fees must be predictable and regulated by the government, so that students can plan and save for their education.

Recommendation Thirteen: Representative student organizations at the campus level must play an active role in the preparation of multi-year plans.

ALLOCATION OF FUNDS

Creating multi-year plans will not require funding beyond what has already been planned for post-secondary institutions, as they simply incorporate funding commitments as part of broader agreements around the operations of the province's universities. While the negotiating process to develop multi-year plans will likely be more extensive than current negotiations for operating grants, the longer-term agreements will reduce the level of work required in future years, and they do not require additional operating funds.

There are no additional costs estimated for this initiative.

B. Create the Higher Education Quality Council of Ontario (HEQCO)

In the 2005 budget, the government announced its intention to create a body called the Higher Education Quality Council of Ontario, intended to be an arm's-length organization that would develop and make recommendations to the Minister of Training, Colleges and Universities on targets for post-secondary education and performance measures, evaluate post-secondary institutions, and conduct research on related topics. According to the *Higher Education Quality Council of Ontario Act 2005*, which was part of the 2005 budget bill, the organization will consist of five to seven individuals on its Board of Directors, one of whom would be a chair. The Council would be responsible for producing a yearly report on its activities, as well as any other reports requested by the Minister.³³

The budget bill was approved in the Ontario legislature in November 2005; however the Council has yet to be created, and a timeline for creation is unclear at this time.³⁴ Recognizing the important role the Council will play in advising the government regarding the deployment of resources, OUSA recommends that concrete steps must be taken to make the Higher Education Quality Council of Ontario a reality as soon as possible.

Recommendation Fourteen: The Higher Education Quality Council of Ontario must be created in order to provide current and independent data on the province's post-secondary institutions and the system at large.

Current and accurate data on access to post-secondary institutions and the quality of the education is crucial to building a strong university system. However, at present, there are significant gaps in the information available, at both institutional and system-wide levels. Even where certain reports are required by the Ministry of Training,

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Colleges and Universities to be made publicly available, that data is either unavailable, difficult to obtain, or is significantly out of date.³⁵ There are also problems with the consistency of the information and the methods used to collect or report information. Another problem is that the major source of information and data on institutions is the Council of Ontario Universities, which is an advocacy body for the province's universities. This represents a clear conflict of interest in the provision of information, particularly if any data or information might contradict with the priorities of the organization or its members.

In order for the government to successfully introduce better accountability and governance frameworks at the post-secondary level, an organization like the proposed Higher Education Quality Council of Ontario will be required. Not only could this Council produce independent data on the province's post-secondary institutions, it could also ensure that this information could be effectively used to gauge the quality of education, identify areas for improvement, and make this information easily available to stakeholders.

Recommendation Fifteen: The provincial government must expand the mandate of the Higher Education Quality Council of Ontario to include system accessibility.

While the Council in its proposed form is urgently needed, OUSA believes that one vital element is missing from its mandate, namely examining access to the post-secondary system. Whether or not members of various under-represented groups are enrolling and succeeding in our universities is arguably one of the most important measures that must be monitored by the government. At present, there are few if any government research bodies that regularly and systematically examine the success of our universities at increasing participation from under-represented groups, and there is a serious lack of current and independent data on these issues. The research branch of the Canadian Millennium Scholarship Foundation is one of the few organizations that regularly conducts such research, however its focus is spread over the entire country, and its mandate is set to expire by the end of 2009.

Because of these problems and the vital importance of increasing access to higher education, OUSA has recommended to the Ministry of Training, Colleges and Universities that the mandate of the Higher Education Quality Council of Ontario be expanded to examine access to the post-secondary system.

ALLOCATION OF FUNDING

Based on the description of the Council and its proposed activities, OUSA estimates that it would require funding for a small staff, a five to seven person Board of Directors, as well as associated overhead. Specific funds would be required for data collection tools, data acquisition and special projects such as conferences or best practice manuals. According to cost estimates in the Rae Review the creation of the proposed Council on Higher Education would cost roughly \$8 million.³⁶

The estimated cost for this initiative would be approximately \$8 million.

C. Increase Student Involvement in Governing Bodies

A final but crucial recommendation around the governance of Ontario's universities is that students must be meaningfully engaged as partners in the post-secondary system. Just as students have been asked by their governments and universities to help share in the costs of funding their education through their tuition fees, students are asking that they must also be able to participate in determining the direction of their institutions.

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The involvement of all stakeholders, including students, faculty, staff, industry, and the public at large, is integral to creating a university system sensitive to the needs of these groups. Those individuals most affected by changes to the quality of the learning experience at Ontario's universities may be best equipped to assist in the system's improvement.

However, at present, university governing bodies largely have few student voices or voting members involved in the institutions' planning and governance, as illustrated in *Figure 6*. In many cases, there are only one or two seats allocated to undergraduate and graduate student bodies, on committees consisting of 30 to 45 members. Furthermore, often these student representatives are appointed by the university administration, rather than elected by the student body. This system results in decisions that that could have significant impact on students' education and learning experiences, but are made without meaningful student input.

Figure 6: Student Representation on University Governing Bodies

Institution	Governing Body	Number of Undergraduate Students on Governing Bodies	Percentage of seats	Number of Graduate Students on Governing Bodies	Percentage of seats
University of Western Ontario ³⁷	Board of Governors	2 of 27	7.4 per cent	1 of 27	3.7 per cent
McMaster University ³⁸	Board of Governors	1 of 37	2.7 per cent	1 of 37	2.7 per cent
Brock University ³⁹	Board of Trustees	2 of 32	6.3 per cent	1 of 32	3.1 per cent
Wilfred Laurier University ⁴⁰	Board of Governors	2 of 32	6.3 per cent	1 of 32	3.1 per cent
University of Windsor ⁴¹	Board of Governors	3 of 30	10 per cent	1 of 30	3.3 per cent
University of Waterloo ⁴²	Board of Governors	3 of 39	7.7 per cent	2 of 39	5.1 per cent
Queen's University ⁴³	Board of Trustees	1 of 44	2.3 per cent	1 of 44	2.3 per cent

Recommendation Sixteen: The provincial government must guaranteeing student involvement on university governing bodies, so that elected student representatives hold at least 25 per cent of voting seats on the governing bodies of each institution.

As the provincial government seeks to shift the governance of post-secondary institutions from a system of self-regulation and reporting towards more accountability and government coordination, student involvement and input must be included as part of the governance structure. Changes to the structure of governing bodies must be mandated by the provincial government, and so universities cannot institute these changes on their own authority. Consequently, OUSA recommends that the provincial government require greater student representation across the province's post-secondary institutions. OUSA's recommendation is that students constitute at least 25 per cent of seats, in order to recognize the significant role they play and stake they hold in their universities.

ALLOCATION OF FUNDING

Besides some staff time required to institute these changes, there would be few real costs incurred through this measure.

There are no costs estimated for this initiative.

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PRIORITY THREE: A PAN-CANADIAN COMMITMENT TO POST-SECONDARY EDUCATION

The final priority area recommended by Ontario students is to lobby and engage the federal government as partners in funding and supporting post-secondary education. While the governance of post-secondary education is a provincial responsibility, federal funding and financial aid is an important and necessary part of the system. Following OUSA's philosophy around 'Responsible Cost-Sharing' in post-secondary education, the federal government is a significant beneficiary of the economic and social development generated by Ontario's universities, and thus it also has a role to play in financing and supporting this system.

In recent years, a major cause of the under-funding of post-secondary education has been the decline of federal contributions. In 1993, the federal government began to cut post-secondary transfer payments, and in 1996, post-secondary funding began to be lumped in the Canada Health and Social Transfer, where there was no requirement that funds be dedicated to education. As a consequence, these funds tended to be allocated towards healthcare and K-12 education.⁴⁴ When adjusted for inflation and population growth, federal transfers to the provinces to fund post-secondary education in 2004 were 40 per cent lower than 1992/93.⁴⁵ In recent years, federal funding of higher education has strayed away from general operating funding, and has instead been directed toward research (e.g. Canada Research Chairs) and through arms-length foundations (e.g. the Canadian Foundation for Innovation and the Millennium Scholarship Foundation).

At a Council of the Federation meeting in August 2005, premiers requested the then-Prime Minister to convene a first ministers meeting on higher education, as well as increased funding through the Canada Social Transfer for post-secondary education. Premier McGuinty and Premier Charest also committed to hosting a summit with governments and stakeholders to formulate a strategy for post-secondary education and skills training in advance of a first ministers meeting. This summit is scheduled to take place on February 23-24, 2005 in Ottawa, however few other details about the event have been released.⁴⁶ The provincial government must take advantage of this upcoming opportunity to work with its counterparts and stakeholders to develop a strong strategy to envision and re-establish the federal role in funding post-secondary education.

Beyond simply developing a national strategy around post-secondary education, OUSA recommends that more concrete commitments be pursued around federal funding of higher education. In its September 2005 pre-budget submission to the federal government, the Canadian Alliance of Student Associations advocates for the creation of a dedicated Canadian Education Transfer from the provincial government to the provinces. The new education transfer would have the following characteristics:

1. All money in the dedicated education transfer must be applied to post-secondary education;
2. An initial funding level of \$4 billion in annual cash transfers would increase annually according to annual inflation and demographic growth. Of this sum, approximately \$1 billion would go to Ontario's post-secondary institutions, based on its population;
3. The education transfer agreement with the provinces would include a stipulation that they would not decrease their own post-secondary education spending when additional federal funding is provided.⁴⁷

OUSA strongly supports this proposal for a dedicated post-secondary transfer from the federal government, and believes that such a program must be immediately implemented. It is our recommendation that the provincial government join with students, faculty and institutions to aggressively lobby for greater federal investment in our post-secondary system.

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Recommendation Seventeen: The provincial government should join students, faculty and institutions to aggressively lobby the federal government for a dedicated post-secondary transfer.

In the recent federal election campaign, the Conservative party promised to work cooperatively with the provinces to address the fiscal imbalance on issues such as post-secondary education. While the main component of its platform on post-secondary education revolved around tax credits for textbooks and apprenticeships, in their response to a questionnaire from the Canadian Alliance of Student Associations, the Conservatives committed to the creation of an independent Canadian Education and Training Transfer, which would be funded at a base level and annually adjusted according to inflation and demographic growth.⁴⁸

The shift in government and the Conservatives' promise to create a dedicated transfer for post-secondary education provide a new opportunity for the provincial government to work with students and other stakeholders to bring its federal counterparts back into the business of supporting its universities. It is through these investments that both the provincial and federal governments can best ensure that the province's economy and people remain strong for decades to come.

SUMMARY OF RECOMMENDATIONS

Recommendation One: The provincial government must institute a system of responsible cost-sharing in Ontario, where students must not pay for more than 30 per cent of the total operating cost of the university system.

Recommendation Two: All tuition in Ontario must be regulated by the provincial government.

Recommendation Three: The provincial government must institute a robust, flexible and effective financial aid system consisting of both loans and grants.

Recommendation Four: The provincial government must increase university operating grants by 13 per cent per year in 2008-2009 to redress the current imbalance in student and public contribution.

Recommendation Five: The provincial government should continue to remove unfair ineligibilities and qualifications from the financial aid system, such as the exclusion of part-time students.

Recommendation Six: The provincial government should invest in an effective online presence which allows students to access all the information they need on the financial aid system, provides powerful tools to help students plan their finances, and allows for online applications.

Recommendation Seven: The provincial government should implement early intervention programs to encourage future participation in all levels of higher education.

Recommendation Eight: The provincial government should implement an up-front, merit-based scholarship program.

Recommendation Nine: The provincial government should eliminate the tuition tax credit, and use the money to fund other student financial aid programs.

Recommendation Ten: Multi-year plans must be developed between the province and institutions to ensure quality in the delivery of education from institutions, while keeping government accountable for funding levels.

Recommendation Eleven: Multi-year plans must examine issues of accessibility, quality, funding, accountability, and tuition regulation.

Recommendation Twelve: Tuition fees must be predictable and regulated by the government, so that students can plan and save for their education.

Recommendation Thirteen: Representative student organizations at the campus level must play an active role in the preparation of multi-year plans.

Recommendation Fourteen: The Higher Education Quality Council of Ontario must be created in order to provide current and independent data on the province's post-secondary institutions and the system at large.

Recommendation Fifteen: The provincial government must expand the mandate of the Higher Education Quality Council of Ontario to include system accessibility.

Recommendation Sixteen: The provincial government must guaranteeing student involvement on university governing bodies, so that elected student representatives hold at least 25 per cent of voting seats on the governing bodies of each institution.

Recommendation Seventeen: The provincial government should join students, faculty and institutions to aggressively lobby the federal government for a dedicated post-secondary transfer.

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