

2019 ENVIRONMENTAL
SCAN

College Resources



COLLEGES | COLLÈGES
ONTARIO | ONTARIO

College Resources

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1 HIGHLIGHTS

Revenues and expenses

- In 2017-18, college system revenues totaled almost \$4.7 billion. Grant revenue from all sources accounted for much less than half of college system revenue.
- College system expenses amounted to about \$4.3 billion in 2017-18. Like other organizations in both the public and private sectors, salaries and benefits together are by far the largest expense item for colleges.

Trends in college funding

- In 2017-18, real operating grants per full-time equivalent (FTE) student were almost 12 per cent higher than in 2002-03 – but almost 15 per cent lower than during the peak in 2007-08.
- Per student revenue from operating grants and tuition fees for Ontario colleges continues to be the lowest among the provinces. Funding per student for Ontario colleges continues to be significantly lower than for secondary schools and universities.
- Space per student is much lower for Ontario colleges (84 square feet per student) in comparison to universities and secondary schools and is in fact lower than it was three years earlier.
- While the apprenticeship per diem in current dollars is higher than it was in 2003-04, it is actually eight per cent lower than it was 15 years ago, once inflation is taken into account. The in-school student fee has not increased since it was introduced in 2002-03.

Human resources

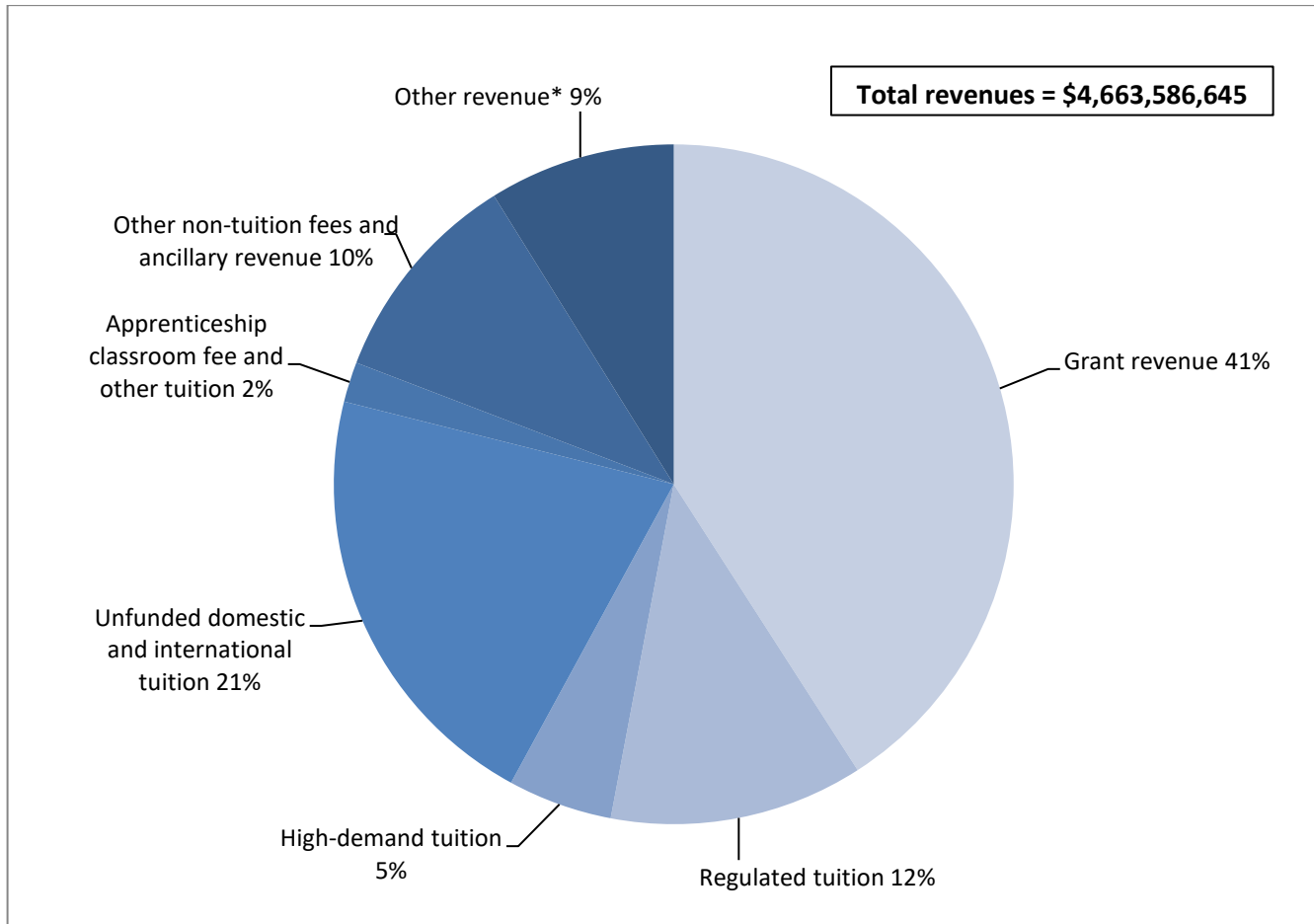
- Colleges employ more than 49,000 people. From 2002-03 to 2017-18, the number of full-time staff employed at colleges increased by 34 per cent, while full-time equivalent enrolment rose by 23 per cent.

Student financial aid

- In 2017-18, 149,000 college students were OSAP recipients. This represents 79 per cent of the total full-time post-secondary enrolment.

2 COLLEGE SYSTEM REVENUES AND EXPENSES

2.1 College system revenues, 2017-18



* Includes contractual and other fees for services.

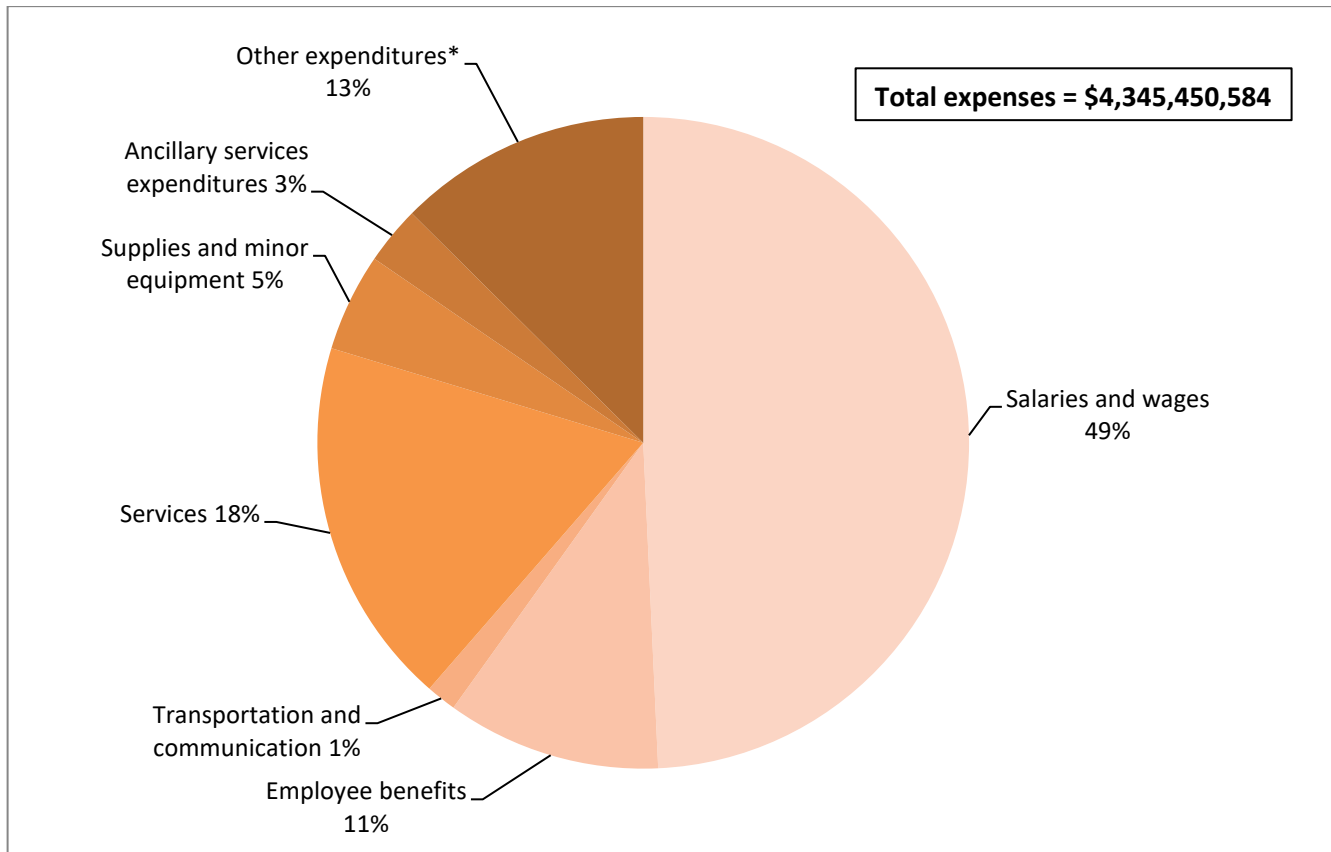
Source: Ontario Ministry of Training, Colleges and Universities, CFIS.

Prepared by Colleges Ontario.



- In 2017-18, grant revenue from all sources accounted for much less than half of college system revenue.
- Tuition fees were a significant source of revenue for colleges. In 2017-18, regulated and high-demand tuition fees accounted for 17 per cent of system revenue.

2.2 College system expenses, 2017-18



* Includes amortization expense.

Source: Ontario Ministry of Training, Colleges and Universities, CFIS.

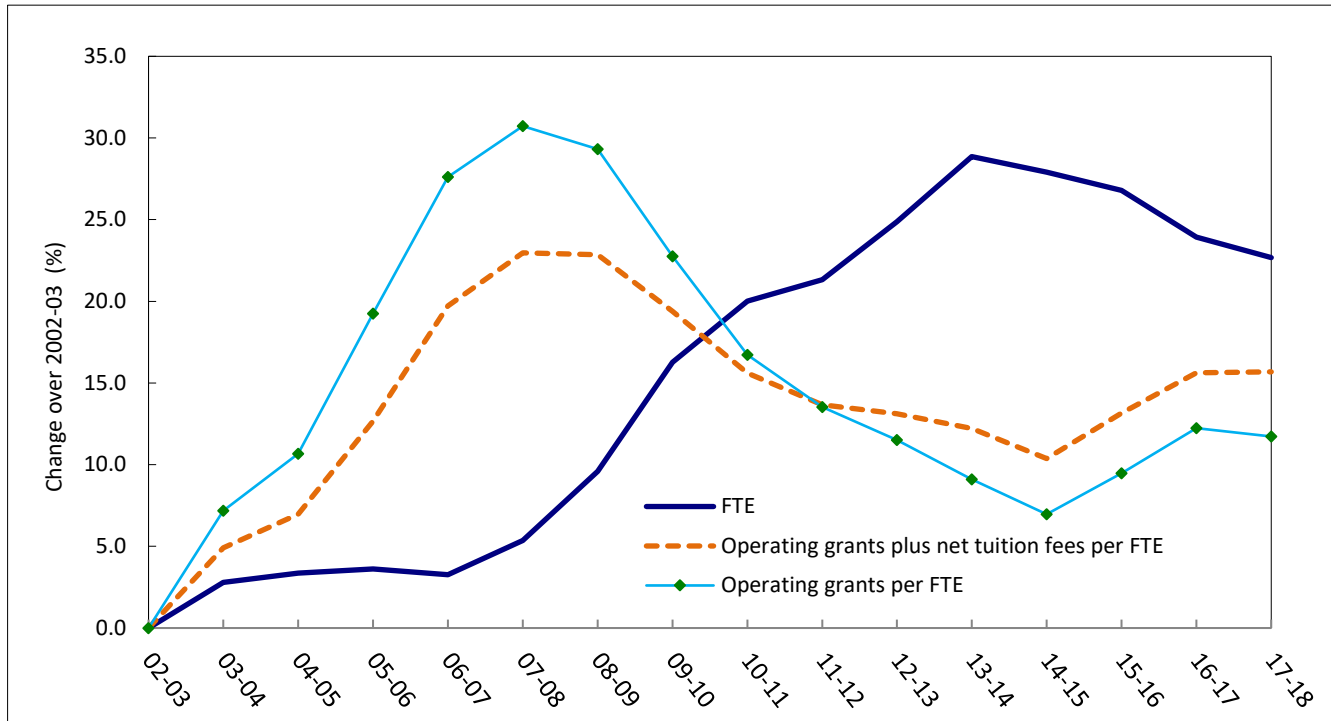
Prepared by Colleges Ontario.



- College system expenses include items such as amortization expenses, contract services, scholarships and student assistance from the tuition set-aside.
- Like other organizations in both the public and private sectors, compensation costs – salaries and benefits together – are the largest expense item for colleges.

3 TRENDS IN COLLEGE FUNDING

3.1 Enrolment and revenue changes, 2002-03 to 2017-18 (Indexed to 2002-03)



Note: Revenue figures are in constant 2002 dollars. Figures exclude tuition set-aside, collaborative and second-entry nursing, nursing pilot and clinical education funding for collaborative nursing. Also excluded is the portion of funding for other organizations that is not for the college sector. Regulated tuition fees.

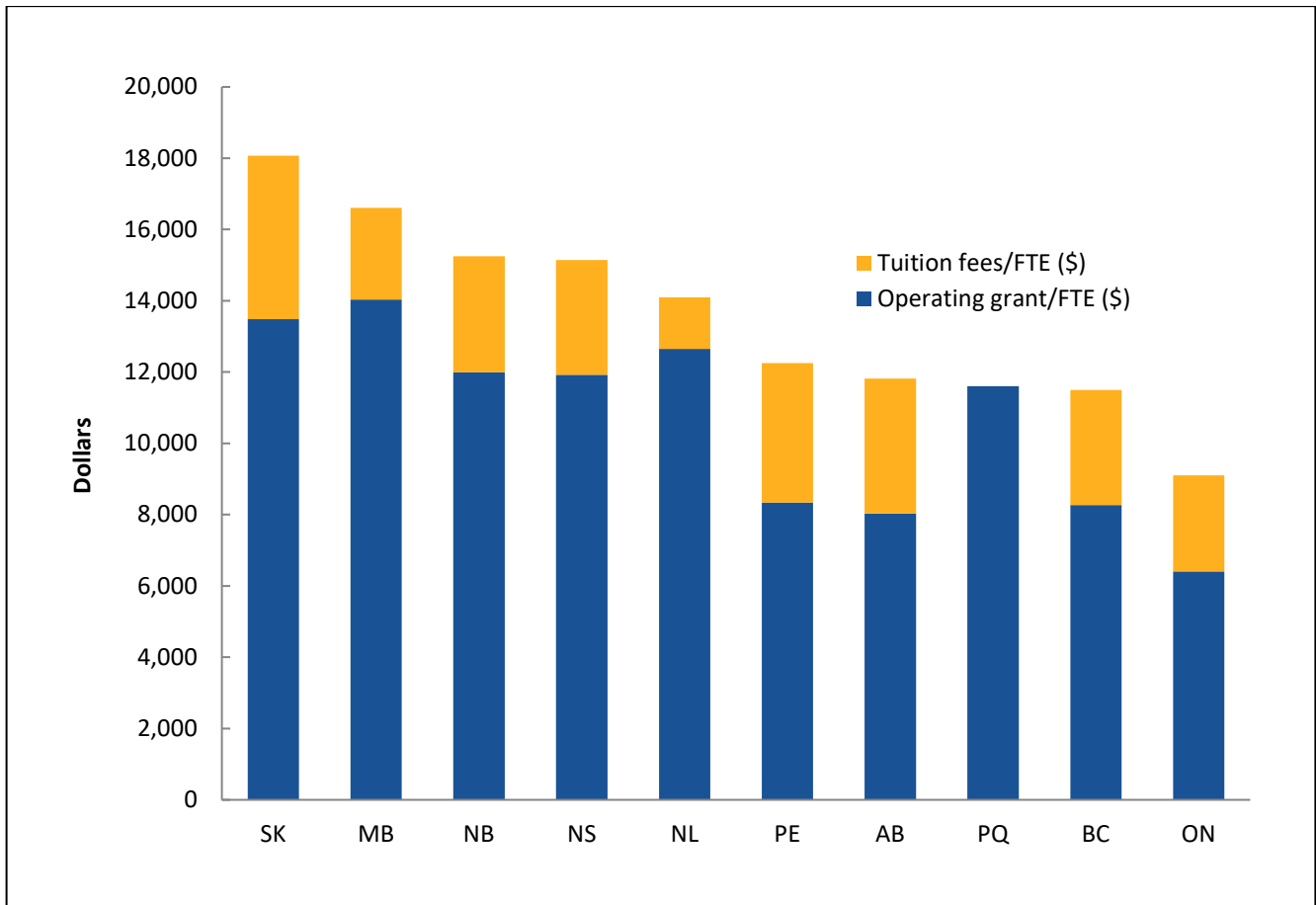
Sources: Ontario Ministry of Training, Colleges and Universities, Ontario Ministry of Finance, Statistics Canada and Colleges Ontario.

Prepared by Colleges Ontario.



- In 2017-18, real operating grants per student are almost 12 per cent higher than in 2002-03 – but almost 15 per cent lower than they were at their peak in 2007-08.
- When tuition fees and operating grants are considered together, real per student revenue in 2017-18 was estimated to be almost 16 per cent higher than in 2002-03. When compared with the 2007-08 peak, it was six per cent lower.

3.2 Estimated grant and tuition fee revenue per college student, all provinces, 2017-18



Note: Ontario figures exclude the tuition set-aside and collaborative and second-entry nursing and clinical education funding for collaborative nursing. Also excluded is the portion of funding for other organizations that is not for the college sector. Regulated tuition fees. Operating grants and enrolments are for provincially funded activity and exclude apprenticeship. Enrolment and funding data for Quebec are for full-time students.

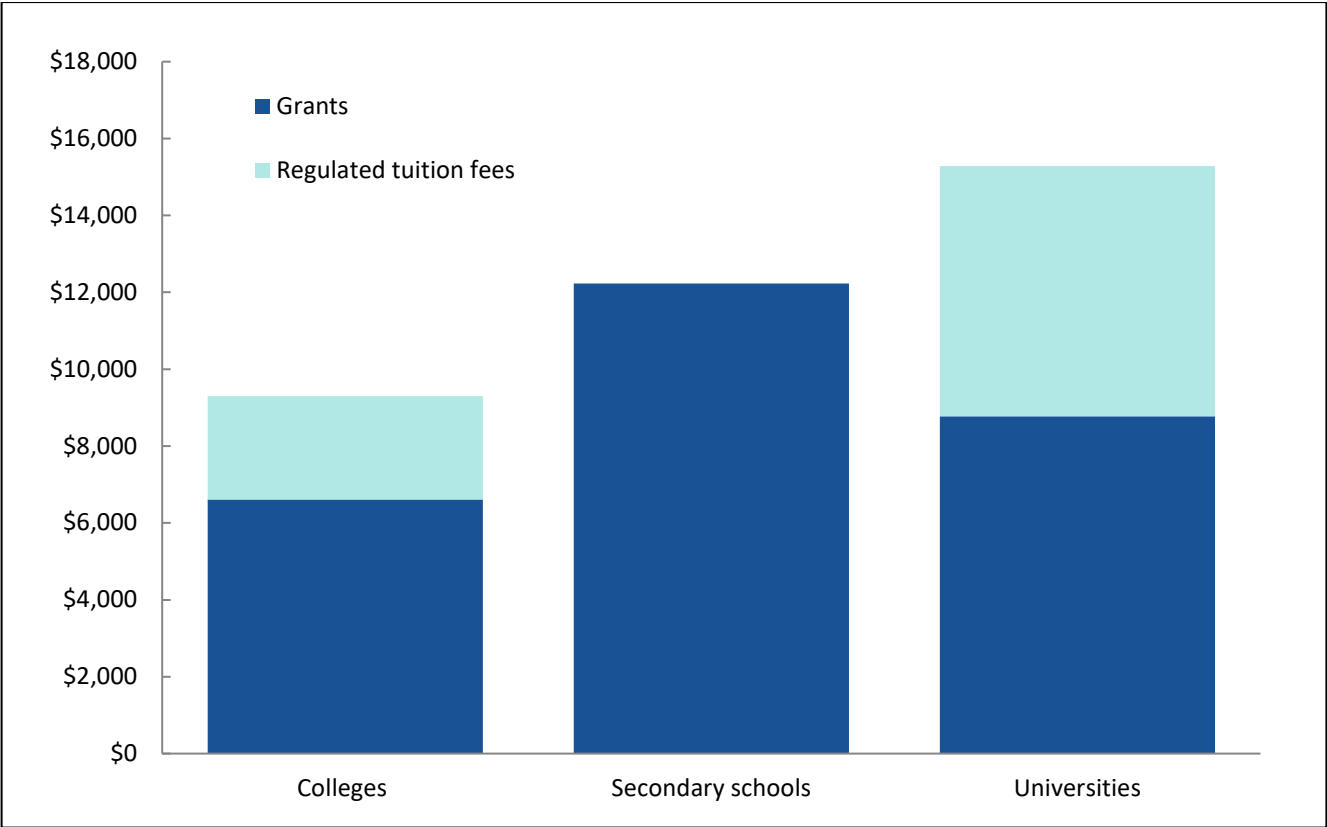
Sources: Ontario Ministry of Training, Colleges and Universities, relevant provincial ministries and Colleges Ontario.

Prepared by Colleges Ontario.



- When college operating grants and tuition fees are considered together, per student revenue in Ontario (\$9,100) in 2017-18 was significantly lower than in any other province.
- Per student revenue in Saskatchewan was the highest among the provinces and almost double that in Ontario.

3.3 Operating funding and regulated tuition fees per student Ontario education sectors, 2017-18

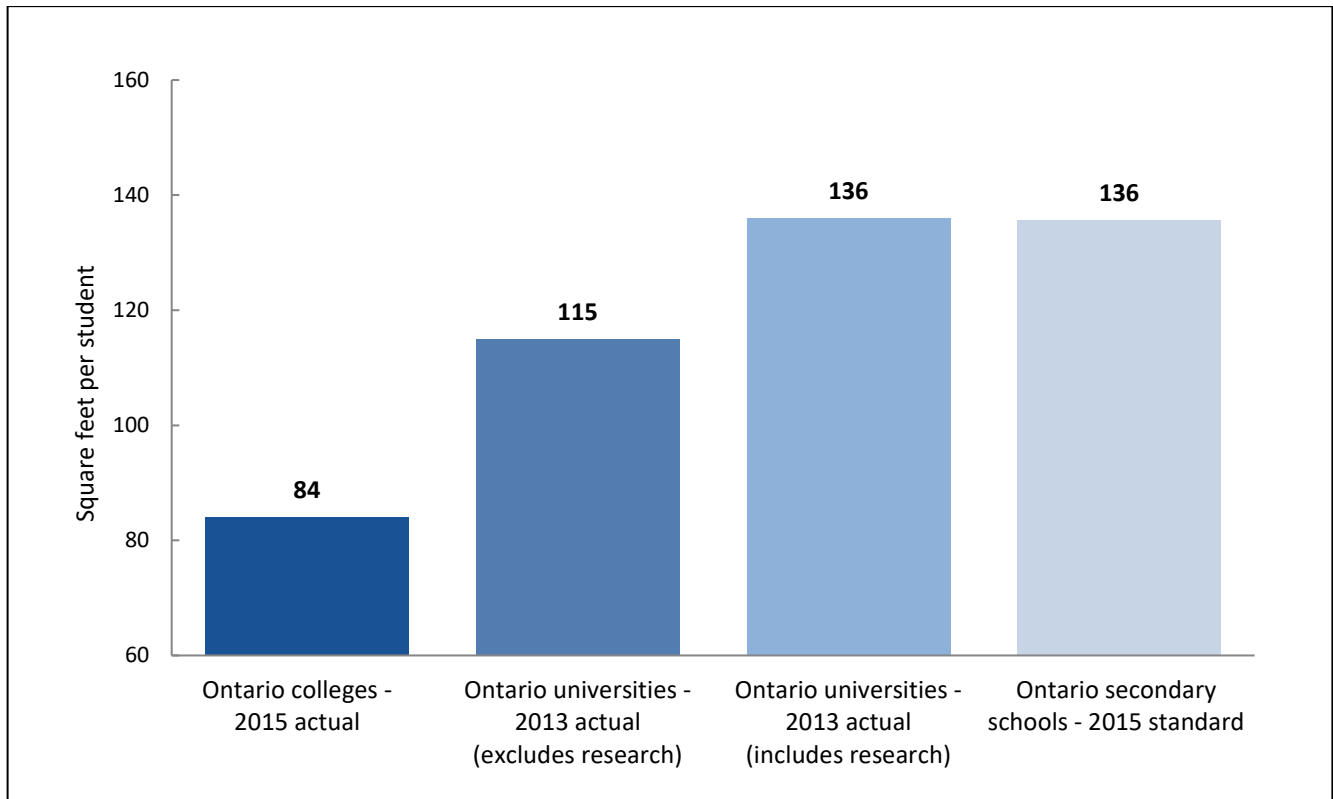


Note: Figures for colleges exclude tuition set-aside, collaborative and second-entry nursing and clinical education funding for collaborative nursing. For consistency with the university figures, funding for other organizations is included in the figures for colleges.
 Sources: Ontario Ministry of Training, Colleges and Universities, Ontario Public School Boards Association and Colleges Ontario.
 Prepared by Colleges Ontario.



- On a per student basis, funding for Ontario colleges continues to lag that received by publicly funded secondary schools and universities.

3.4 Square feet per student, Ontario education sectors



Note: Enrolment for colleges represents full college activity (unweighted FTEs).
Source: Colleges Ontario and Inventory of Physical Facilities of Ontario Universities.
Prepared by Colleges Ontario.



- Space per student in the college sector has declined since 2012, when there was 90 SF/FTE. The decline is attributable to a much slower increase in space in comparison to enrolment growth. Between 2012 and 2015, the total space inventory used by colleges increased by less than one per cent, whereas enrolment rose by more than seven per cent.

3.5 Summary of apprenticeship per diem history, 2003-04 to 2018-19

	Per diem fee	Student fee	Total apprenticeship budget per student	Ontario CPI (constant 2002 dollars)	Per diem in constant 2002 dollars	Total per student apprenticeship budget in constant 2002 dollars
2003-04	\$52.23	\$10	\$62.23	102.7	\$50.86	\$60.59
2004-05	\$53.47	\$10	\$63.47	104.6	\$51.12	\$60.68
2005-06	\$54.74	\$10	\$64.74	106.9	\$51.21	\$60.56
2006-07	\$56.03	\$10	\$66.03	108.8	\$51.50	\$60.69
2007-08	\$56.03	\$10	\$66.03	110.8	\$50.57	\$59.59
2008-09	\$57.35	\$10	\$67.35	113.3	\$50.62	\$59.44
2009-10	\$57.35	\$10	\$67.35	113.7	\$50.44	\$59.23
2010-11	\$57.35	\$10	\$67.35	116.5	\$49.23	\$57.81
2011-12	\$57.35	\$10	\$67.35	120.1	\$47.75	\$56.08
2012-13	\$57.35	\$10	\$67.35	121.8	\$47.09	\$55.30
2013-14	\$57.35	\$10	\$67.35	123.0	\$46.63	\$54.76
2014-15	\$57.35	\$10	\$67.35	125.9	\$45.55	\$53.49
2015-16	\$61.36	\$10	\$71.36	127.4	\$48.16	\$56.01
2016-17	\$63.09	\$10	\$73.09	129.7	\$48.64	\$56.35
2017-18	\$63.09	\$10	\$73.09	131.9	\$47.83	\$55.41
2018-19	\$63.09	\$10	\$73.09	135.0	\$46.73	\$54.14
Per cent change 2003-04 to 2018-19	20.8%		17.5%	31.5%	-8.1%	-10.6%

Note: Per diem and classroom fees are based on the standard six-hour training day.

Sources: Ontario Ministry of Training, Colleges and Universities, Ontario Ministry of Finance and Statistics Canada.

Prepared by Colleges Ontario.



- In current dollars, the apprenticeship per diem is almost 21 per cent higher than it was in 2003-04. However, the per diem is eight per cent lower than it was 15 years ago, once inflation is taken into account. The in-school student fee has not increased since its introduction in 2002-03.

4 HUMAN RESOURCES TRENDS

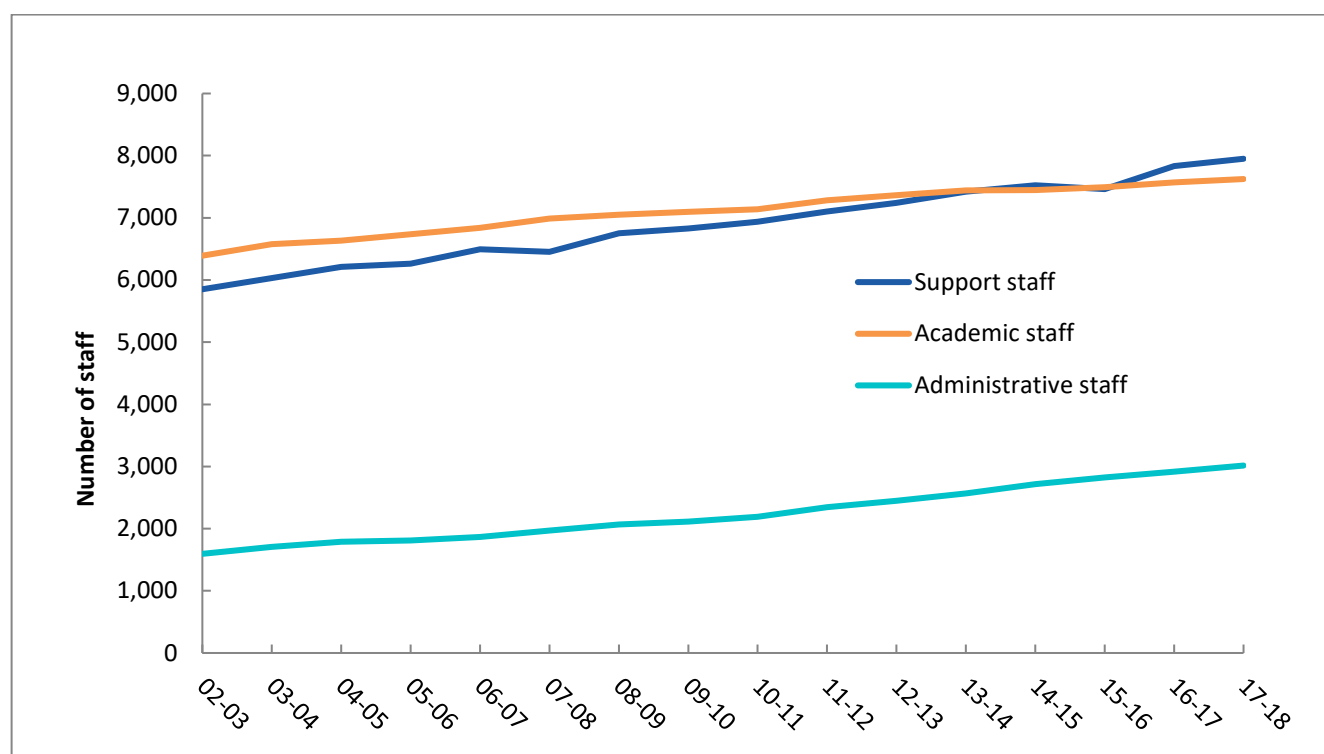
4.1 College staffing levels (head count), 2017-18

	Full time	Part time	Total
Academic staff	7,624	16,237	23,861
Support staff	7,950	14,360	22,310
Administrative staff	3,015	N/A	3,015
Total	18,589	30,597	49,186

Source: College Employer Council.
Prepared by Colleges Ontario.



4.2 Number of full-time college staff by category, 2002-03 to 2017-18



Source: College Employer Council.
Prepared by Colleges Ontario.



- Colleges employ more than 49,000 people. The total number of full-time staff at colleges increased by 34 per cent between 2002-03 and 2017-18, while full-time equivalent enrolment increased by 23 per cent.

5 STUDENT FINANCIAL AID

5.1 Levels of student assistance and number of recipients, college sector

	Canada-Ontario Integrated Student Loans (\$)	Total Canada and Ontario grants excluding OSOG ^{1,2} (\$)	College OSAP recipients ³ (#)	Total full-time post-secondary enrolment** (#)	% of total
2007-08	486,729,589	65,951,458	66,994	155,124	43%
2008-09	515,398,451	72,819,012	71,737	161,422	44%
2009-10	545,333,004	152,203,148	81,328	172,070	47%
2010-11	623,246,349	164,232,978	88,712	178,139	50%
2011-12*	689,338,751	195,598,764	111,529	179,740	62%
2012-13	782,584,506	224,477,517	124,551	185,445	67%
2013-14	857,042,853	240,984,355	130,962	192,466	68%
2014-15	832,532,779	243,396,255	128,991	190,758	68%
2015-16	860,539,492	243,991,816	131,304	190,945	69%
2016-17	834,681,397	307,159,230	132,622	186,804	71%
2017-18***	625,487,601	873,237,103	149,153	189,659	79%

Notes:

* From 2011-12 to 2016-17, the number of OSAP recipients includes students who received the 30% off Ontario Tuition grant.

** Full-time post-secondary head count (excludes other, sponsored and international students).

*** Starting in 2017-18, the Ontario Ministry of Training, Colleges and Universities has changed its reporting methodology from the number of full-time OSAP award entitlements to the number of students issued full-time OSAP awards.

¹ The Ontario Student Opportunity Grant (OSOG) reduces repayable debt on Canada-Ontario Integrated Student Loans to \$7,000 per two-term academic year until 2009-10, and to \$7,300 from 2010-11 to 2014-15. From 2014-15 to 2016-17, the OSOG threshold was adjusted annually for inflation. OSOG was discontinued in 2017-18 with the introduction of the Ontario Student Grant (OSG).

² The composition of Canada and Ontario grants has evolved over the past decade.

Source: Ontario Ministry of Training, Colleges and Universities.



5.2 Canada-Ontario Integrated Student Loan default rates

Type of institution	Default rate for 2017 (%)
Public colleges	9.1
Universities	3.0
Private career colleges	14.5
Other private and public institutions	2.3
Ontario total	6.7

Source: Ontario Ministry of Training, Colleges and Universities.
Prepared by Colleges Ontario.



- The default status of loans was assessed as of July 2017, or about two years after the 2014-15 academic year. The 2017 OSAP loan repayment measures reflect the repayment status of students who were issued Canada-Ontario Integrated Student Loans in the 2014-15 academic year, and completed or left their studies by 2015-16.
- Default rates among college students age 24 and under (9.6 per cent) are higher than those for students age 25 and over (8.1 per cent). Default rates for female college students (8.1 per cent) are lower than those for male college students (10.5 per cent).

6 APPENDICES

6.1 Appendix 1. Operating grants and regulated tuition fee revenue per FTE, 2002-03 to 2017-18

Academic year	Total operating grants ¹ (\$millions)	FTE	Total operating grants per FTE	Ontario CPI (constant 2002 dollars) ²	Total operating grants per FTE - constant dollars	Regulated tuition fee revenue per FTE	Tuition fee revenue per FTE - constant dollars	Tuition set-aside per FTE ³	Net tuition fee revenue per FTE	Net tuition fee revenue per FTE - constant dollars	Total operating grants plus net tuition fees per FTE	Total operating grants, plus net tuition fees per FTE - constant dollars
2002-03	\$768	176,482	\$4,349	100.0	\$4,349	\$1,786	\$1,786	\$170	\$1,616	\$1,616	\$5,965	\$5,965
2003-04	\$869	181,414	\$4,788	102.7	\$4,662	\$1,820	\$1,772	\$180	\$1,640	\$1,597	\$6,428	\$6,259
2004-05	\$918	182,413	\$5,034	104.6	\$4,813	\$1,820	\$1,740	\$180	\$1,640	\$1,568	\$6,674	\$6,381
2005-06	\$1,014	182,873	\$5,545	106.9	\$5,187	\$1,820	\$1,703	\$180	\$1,640	\$1,534	\$7,185	\$6,721
2006-07	\$1,101	182,255	\$6,039	108.8	\$5,551	\$1,911	\$1,756	\$180	\$1,731	\$1,591	\$7,770	\$7,142
2007-08	\$1,171	185,939	\$6,300	110.8	\$5,686	\$2,008	\$1,812	\$180	\$1,828	\$1,650	\$8,128	\$7,336
2008-09	\$1,233	193,420	\$6,373	113.3	\$5,625	\$2,110	\$1,862	\$180	\$1,930	\$1,703	\$8,303	\$7,328
2009-10	\$1,246	205,203	\$6,070	113.7	\$5,339	\$2,208	\$1,942	\$180	\$2,028	\$1,784	\$8,098	\$7,122
2010-11	\$1,253	211,817	\$5,914	116.5	\$5,077	\$2,311	\$1,984	\$190	\$2,121	\$1,820	\$8,035	\$6,897
2011-12	\$1,270	214,135	\$5,930	120.1	\$4,938	\$2,414	\$2,010	\$201	\$2,213	\$1,843	\$8,144	\$6,781
2012-13	\$1,302	220,369	\$5,907	121.8	\$4,850	\$2,524	\$2,072	\$212	\$2,312	\$1,899	\$8,219	\$6,748
2013-14	\$1,327	227,416	\$5,836	123.0	\$4,745	\$2,618	\$2,128	\$221	\$2,397	\$1,949	\$8,233	\$6,694
2014-15	\$1,322	225,731	\$5,857	125.9	\$4,652	\$2,658	\$2,111	\$225	\$2,433	\$1,932	\$8,290	\$6,584
2015-16	\$1,358	223,782	\$6,067	127.4	\$4,762	\$2,770	\$2,174	\$236	\$2,534	\$1,989	\$8,600	\$6,751
2016-17	\$1,385	218,721	\$6,332	129.7	\$4,882	\$2,859	\$2,204	\$245	\$2,614	\$2,015	\$8,945	\$6,897
2017-18	\$1,388	216,488	\$6,410	131.9	\$4,860	\$2,946	\$2,234	\$254	\$2,692	\$2,041	\$9,102	\$6,901
Per cent change 2002-03 to 2017-18	80.8	22.7	47.4	31.9	11.7	64.9	25.1	49.4	66.6	26.3	52.6	15.7

Notes:

¹ Figures exclude collaborative and second-entry nursing, nursing pilot and clinical education funding for collaborative nursing. Also excluded is the portion of funding for other organizations that is not for the college sector.

² Sources for CPI include Statistics Canada and the Ontario Ministry of Finance. Other sources include the Ontario Ministry of Training, Colleges, and Universities and Colleges Ontario.

³ Tuition set-aside figures are estimates.

6.2 Appendix 2. Number of college student assistance recipients, by student type

Student group	2012-13*	2013-14*	2014-15*	2015-16*	2016-17*	2017-18**
Dependant at home	37,944	40,914	41,587	41,511	41,164	43,739
Dependant away	32,250	32,605	31,378	30,683	28,508	27,098
Independent home	11,324	12,757	12,934	15,175	17,262	23,350
Independent away	25,561	26,579	25,387	26,074	26,938	31,975
Married	8,827	9,184	9,000	9,403	10,289	14,049
Sole support	8,645	8,923	8,705	8,458	8,461	8,942
Total	124,551	130,962	128,991	131,304	132,622	149,153

Notes:

* From 2011-12 to 2016-17, numbers include students who received the 30% Off Ontario Tuition grant.

** Change in reporting methodology starting in 2017-18. For 2006-07 to 2016-17: number of full-time OSAP award entitlements; For 2017-18: number of students issued full-time OSAP awards.

Source: Ontario Ministry of Training, Colleges and Universities.



6.3 Appendix 3. Average student assistance issued to college students, by student type

Student group	2012-13*	2013-14*	2014-15*	2015-16*	2016-17*	2017-18**
Dependant at home	4,222	4,495	4,522	4,684	4,828	5,771
Dependant away	6,538	7,112	7,328	7,465	7,790	9,351
Independent home	5,782	6,089	6,096	6,295	6,253	7,117
Independent away	10,644	10,874	10,899	10,465	10,568	11,604
Married	14,637	14,936	14,363	15,569	15,501	17,252
Sole support	19,576	19,986	19,890	19,691	19,963	23,855
Total	8,086	8,384	8,341	8,414	8,610	10,048

Notes:

* From 2011-12 to 2016-17, numbers include students who received the 30% off Ontario Tuition grant.

** Change in reporting methodology starting in 2017-18. For 2006-07 to 2016-17: Average based on number of full-time OSAP award entitlements. For 2017-18: Average based on number of students issued full-time OSAP awards.

Source: Ontario Ministry of Training, Colleges and Universities.



6.4 Appendix 4. Distribution of student assistance recipients by post-secondary sector* and student group 2017-18**

	Married/sole support		Independent		Dependant	
	#	% of student group	#	% of student group	#	% of student Group
Colleges of Applied Art and Technology	22,991	51.0%	55,325	39.7%	70,837	31.3%
Universities	10,998	24.4%	76,319	54.8%	153,128	67.7%
Private career colleges	10,599	23.5%	5,886	4.2%	1,669	0.7%
Other Ontario post-secondary institutions	490	1.1%	1,663	1.2%	692	0.3%

Notes:

* Distribution of recipients attending Ontario institutions.

**Change in reporting methodology starting in 2017-18: Table 4 shows number of students issued full-time OSAP awards.

Source: Ontario Ministry of Training, Colleges and Universities.

