

## **Trent University Peterborough Undergraduate Levy Policy**

Approved by Committee – October 16, 2020

Approved by Student Referendum – Spring 2019

### **1. Background & Purpose**

#### **Background**

A Trent Central Student Association (TCSA) referenda question was put forward by students in the Spring of 2018 which contributed to the identification of a gap in University policy and provincial legislation dealing with Levy Fees. As a result, a committee was struck to propose and draft a solution to this gap that would introduce protections and procedures for the creation, collection, and distribution of levy fees by Spring 2019. The committee was comprised of representatives of groups that receive levy fees and students at large, and met bi-weekly to construct this policy. (See Appendix I: Terms of Reference for this Committee)

#### **Purpose**

This policy aims to:

- A. Clearly define Trent University's unique levy fee structure, and the relationships that it creates between both groups that receive levy fees, Trent students, the TCSA, groups that receive levy fees and the Trent University administration;
- B. Explain the role of groups that receive levy fees in the Trent University community;
- C. Outline the process for creation, amendment, and dissolution of a levy fee through the TCSA referenda process;
- D. Detail procedures regarding levy fees that are both refundable and non-refundable;
- E. Coordinate financial accountability to and complaints processes for Trent University students;
- F. Provide a course of action for groups that receive levy fees that are low-functioning and/or non compliant; and
- G. Introduce a Levy Council through which these procedures and practices can be maintained with the same membership, voting, and quorum as the Special Committee on Levies.

### **2. Definitions**

- Ancillary Fee:  
[https://www.trentu.ca/currentstudents/sites/trentu.ca.currentstudents/files/documents/Ancillary%20Fee%20Protocol%202017\\_including%20non-compulsory%20ancillary%20protocol.pdf](https://www.trentu.ca/currentstudents/sites/trentu.ca.currentstudents/files/documents/Ancillary%20Fee%20Protocol%202017_including%20non-compulsory%20ancillary%20protocol.pdf) • Accessibility for Ontarians with Disabilities Act (AODA): <https://www.aoda.ca> • Canadian Federation of Students (CFS): <https://www.cfs-fcee.ca>
- Colleges and Student Services Committee (CASSC):  
<https://www.trentu.ca/currentstudents/policies-decision-making/colleges-and-student-services-committee>
- Consumer Price Index (CPI): <https://www150.statcan.gc.ca/t1/tb11/en/tv.action?pid=1010010601>
- Levy Council: Terms of Reference to be created in 2019-2020 academic year • Levy Fees:  
<https://trentcentral.ca/clubs-levy.php>
- Levy Fee Recipients: <https://trentcentral.ca/clubs-levy.php>
- Referendum: <https://trentcentral.ca/governance.elections.faq.php>
- Student: Any person admitted to or enrolled at Trent University, full time or part time, pursuing non-credit, undergraduate, graduate or professional studies, whether or not the individual is currently registered in courses or is currently a candidate for a degree, diploma or certificate,

including between semesters. <https://www.trentu.ca/currentstudents/policies-decision-making/student-conduct/student-charter-rights-and-responsibilities>

- Trent Central Student Association (TCSA): <https://trentcentral.ca>
- Trent University: <https://www.trentu.ca>

### **3. Policy Goals**

As the result of the aforementioned, this policy will then:

- A. Provide clarity and guidance for groups receiving existing levy fees, those looking to create levy fees in the future, and future leadership of those groups;
- B. Maintain the autonomy of groups that receive levy fees;
- C. Promote transparency and accountability between all of the involved parties;
- D. Support the security and stability of groups that receive levy fees;
- E. Strive to fill gaps in existing university policy related to levy fees; and
- F. Foster solidarity among all of the involved parties.

### **4. Scope**

This policy:

- A. Introduces protections and procedures for the creation, collection and distribution of levy fees;
- B. Will support the ways in which students remain knowledgeable about how levy fees are administered and allocated. It will allow students to see the impact of their financial contributions on campus and in the community through more transparent financial processes;
- C. Will serve as a reference for all levy-fee paying students if questions or concerns arise with fee recipients;
- D. Empowers a Levy Council that meets on a regular basis to review or amend the policy. It also tasks this Council with overseeing and handling complaints and disputes;
- E. Delineates the roles of the Trent University Finance Department in administering levy fees, as well as reaffirms autonomy of all levy fee recipients from Trent University and the Trent Central Student Association; and
- F. Reaffirms the independence and autonomy of the operations of levy fee recipients.

### **5. Accessibility**

- A. Information about this levy policy will be both easily accessed and the language herein easily understood by students, levy groups and other stakeholders. This policy will be available in an AODA compliant format on the TCSA website.
- B. This policy will be shared with new levy fee recipients, shortly after a successful referendum by the Levy Council and be part of the TCSA's all candidates' meetings. It is the responsibility of all levy fee recipients to be familiar with the policy.
- C. Levy Council agendas and past minutes will be circulated no later than one week before meetings to ensure all participants have time to review.
- D. Meetings and refundable fee pickup options will be in physically accessible rooms and open to all students. Aids will be provided upon request to make meetings accessible.
- E. This policy recognizes a broad definition of physical accessibility including, but not limited to, barriers to mobility devices and proximity to public transit.
- F. A contact will be provided for additional accommodation needs.

## **6. Authority and Responsibility of Parties**

This section outlines the authority and responsibility of the parties outlined below:

- A. All Parties**
- B. Levy Fee Recipients**
- C. Levy Council**
- D. TCSA**
- E. Trent University**

- A. This section covers the authority and responsibility of **All Parties**:
  - i. It is the responsibility of all parties to create an equitable space for open respectful discussion.
- B. This section covers the authority and responsibility of the **Levy Fee Recipients**:
  - i. All levy fee recipients are responsible for understanding, knowing and following the Trent University Levy policy;
  - ii. All levy fee recipients are responsible for responding to student information requests, complaints and concerns. Refundable levies are responsible for responding to student requests for refunds;
  - iii. All levy fee recipients will direct all complaints regarding other levy fee recipients to the Levy Council.
  - iv. All groups that receive fees are considered equal.
- C. This section covers the authority and responsibility of the **Levy Council** pertaining to levy fees:
  - i. The Levy Council shall meet at a minimum four times per year;
  - ii. Every year the Levy Council will review the Trent University Levy Policy;
  - iii. The Levy Council will be responsible for updating the Trent University Levy Policy;
    - i. Changing of the Trent University Levy Policy will require a 2/3 super majority for a passing vote;
    - ii. Policy updates will include changes needed to make this document consistent with new University policy and Provincial legislation.
  - iv. The Levy Council is responsible for providing the Trent University Levy Policy to new levy fee recipients after successful referenda and an invitation to the next meeting will be extended to new levy fee recipients;
  - v. The Levy Council is committed to supporting transparency between all levy groups and students;
  - vi. The Levy Council is responsible for the handling of issues and complaints within a timely fashion
    - i. Complaints ought to receive a response from the Levy Council within 5 business days;
    - ii. The Levy Council will ensure that the complainant has contacted the levy fee recipient in question;
    - iii. Responsible for the development of a procedure to issue refunds on behalf of non-responsive levy groups.
  - vii. Levy fee recipients can approach the Levy Council for support and guidance.
- D. This section covers the authority and responsibility of the **TCSA**:
  - i. The TCSA does not exercise authority over the conduct, business, or finances of other levy fee recipients;
  - ii. The TCSA is responsible for running a referendum on levies as per the TCSA by-laws (XIV.I)
  - iii. The TCSA is responsible for participating in the levy council as an equal member;

- iv. The TCSA will direct all complaints regarding levy fee recipients to the Levy Council.
- E. This section covers the authority and responsibility of **Trent University**:
  - i. It is understood that the University will collect and disburse levy fees to levy fee recipients.

## **7. Financial Accountability and Reporting**

This section outlines the financial reporting requirements and the accountability for levy fee recipients to students.

All levy fee recipients are responsible for understanding, knowing and following the policy set forth.

- A. Each levy group is responsible to provide most recent year-end financial statements and up-to date contact information to the TCSA for the purpose of making available online to the students, through the TCSA website.
  - i. This includes the most following documents:
    - i. Profit and Loss Statement or a Surplus and Deficit Report
    - ii. Balance Sheet
    - iii. Financial Review or Audited Financial Statements when available
  - ii. Information to be provided:
    - i. Group email
    - ii. Main website (if possible)
    - iii. Primary contact information
- B. Incorporation provides financial and legal accountability to governing bodies as well as levy fee recipient group membership. Incorporation also provides protection for Trent University and the TCSA, and ensures the autonomy of levy fee recipients. Levy fee recipients will be encouraged to incorporate or seek partnership with another incorporated levy fee recipient.
- C. Voting privilege on the Levy Council can be revoked by the Council for non-compliance with the Accountability & Reporting requirements.
- D. The Levy Council has a responsibility to publish non-compliance with the Accountability & Reporting requirements of levy fee recipient groups.

## **8. Procedures**

Levy fees will be directly controlled by the Trent University student body.

- A. Creation of new levy fees and changes to existing levy fees:**
  - i. New levy fees are established through referendum initiated by students and conducted by the TCSA, as outlined by TCSA By-laws (XIV.I);
  - ii. Proposed changes to TCSA by-laws which would affect referendum rules and groups receiving levy fees will be brought to the Levy Council's attention when the proposals are brought to the TCSA Board, in the spirit of communication and consultation;
  - iii. Referendum questions will outline the amount of levy fee, the levy fee recipient, and refundable vs. non-refundable status of the fee;
  - iv. As per a successful 2011 referendum question, all levy fees are indexed to the Consumer Price Index (CPI) as published by Statistics Canada. The TCSA will calculate the CPI increase for each levy fee annually and forward those calculations to levy fee recipients and the Trent University Finance Department in time for the creation of the following year's

billing tables.

**B. Collection of levy fees:**

- i. The TCSA will inform the Trent University finance department in the spring of each year the levy fees to be collected in the next academic year as determined by Trent Students via the referendum process;
- ii. Levy fees are collected from students by University Finance office along with tuition and ancillary fees;
- iii. Currently, half of each fee is charged to each student enrolled in 1.5 or more credits in each of the fall and winter terms (with the exception of the TCSA's summer and per credit fee system).

**C. Distribution of levy fees:**

- i. The University will distribute fees to the recipient groups each fall and winter either directly to the group's University account or via cheque;
- ii. The University will produce a clear statement outlining the fee collected, number of students charged, and any Accounts Payable withheld from payment;
- iii. In the fall, individuals representing levy fee recipients must show ID proving their identity to collect their levy fee cheque;
- iv. In the winter, levy fee recipients must also submit a copy of their previous year's financial statements to the University Finance office in order to receive the remainder of their disbursement.

**D. Dissolution of levy fees:**

- i. A fee can only be dissolved through a successful referendum question per the referendum process outlined above;
- ii. As per TCSA by-laws, a dissolution question can skip the petition requirement and be placed on the ballot by the TCSA Board if a levy fee cheque has not been collected by the levy fee recipient for two consecutive years;
- iii. The dissolution question will include direction as to where any moneys held in trust by the University will be given.

**9. Complaint & Dispute Resolution**

The purpose of this section is to provide students with an opportunity to bring forward concerns and complaints about levy fee recipients to be resolved.

Complaints will be resolved using the simplest option possible given the circumstances, preferably in the order listed below.

**Consultation:** Complainant seeks help from the Levy Council. Options are reviewed together and the complainant decides how to proceed:

**Option 1:** Complainant chooses to resolve the matter with the respondent independently.

**Option 2:** The Levy Council facilitates discussion between the two parties.

**Option 3:** The complainant goes through the process of defunding the respondent.

**11. Appendixes**

A. Terms of Reference for Levy Policy Committee (attached)

B. Ontario Ministry of Training, Colleges and Universities Binding Policy Directive on Tuition and

Ancillary Fees: <http://www.tcu.gov.on.ca/pepg/documents/TuitionandAncillaryFees.pdf> C. Trent Central Student Association By-laws: <https://trentcentral.ca/policies.php> D. Trent University

Ancillary Fee Protocol:

[https://www.trentu.ca/currentstudents/sites/trentu.ca.currentstudents/files/documents/Ancillary%20Fee%20Protocol%202017\\_including%20non-compulsory%20ancillary%20protocol.pdf](https://www.trentu.ca/currentstudents/sites/trentu.ca.currentstudents/files/documents/Ancillary%20Fee%20Protocol%202017_including%20non-compulsory%20ancillary%20protocol.pdf) E. Trent

University's Charter of Student Rights and Responsibilities:

<https://www.trentu.ca/currentstudents/policies-decision-making/student-conduct/student-charter-rights-and-responsibilities>