

For Information

S.93-43

Simon Fraser University
Department of Psychology

Roger Blackman
SPCSAB Chair
CC 5245 291-3358

MEMORANDUM

To: Members of Senate

Date: May 21, 1993

Topic: SPCSB: 92/93 Annual Report to Senate

Attached is the 92/93 annual report of the Senate Committee on Scholarships, Awards and Bursaries. As chair of SPCSB, I am taking this opportunity to alert members of Senate to the extreme difficulties facing the budget that supports our scholarship, award and bursary programs.

Near the start of the 91/92 fiscal year, when most budgets were cut back, this budget was slashed by \$500,000, or about 12%. This reduction was evenly divided between the undergraduate component, managed by the Associate Vice-President Academic, and the graduate component, managed by the Dean of Graduate Studies.

There were three additional factors that have had a negative impact on this budget, particularly on its undergraduate component. First, some semesters ago the University required that 35% of the income earned from endowments be reinvested to maintain the real value of the principal. Previously, 100% of this interest had been available for scholarships and awards. This change meant an effective reduction in the 91/92 budget of approximately \$147,000. Although this reinvestment requirement was waived in 92/93, that has provided only short-term relief.

Second, in the last couple of years the university has diverted some of the funds earmarked for scholarships for international students to cover infrastructure costs in the Centre for International Students. Although that was not a technical violation, it appeared to SPCSB to be inconsistent with the spirit of the practice under which a portion of the differential tuition fee income was allocated for international student scholarships and awards.

Third, the undergraduate scholarships budget has been in deficit in each of the last three years. The accumulated debt is now at a level that must be addressed. In part these deficits resulted from a substantial increase in the undergraduate Entrance Scholarship Program between 1988 and 1991 (see attached table). While the number of awards has been halved, we are still paying for that "bulge" and doing so from a smaller budget. As detailed in the 92/93 annual report, expenditures on the Entrance and Open scholarship programs have each been cut back by about 17% from 91/92 levels, and we face further retrenchment this year.

I took a full statement of these budgetary concerns to President Saywell last fall, asking for some relief. In response, he approved a 1-year holiday from the endowment interest reinvestment requirement as noted above, he arranged for the Development Office to raise funds to replace, on a once-only basis, a modest portion of the \$1/2 million of lost 92/93 income, and he agreed to explore alternative sources of income. These were very significant steps. Together with a further raising of eligibility standards in the Open Scholarship Program and cutbacks in most of the other graduate and undergraduate scholarship, awards and bursary programs, it allowed these programs to survive the 92/93 fiscal year.

The graduate awards budget was also in deficit in 92/93 due to commitments made prior to the \$250,000 reduction in the 92/93 budget. \$125,000 was provided by the Vice-President Academic at fiscal year-end to cover part of the deficit.

SPCSAB is very concerned that some stability be returned to a budget that has had some large, unexpected perturbations over the last 2-3 years, changes that have often confused and frustrated the very groups whom we are trying to support. A critical contributor to that stability would be the continuation of the long-established practice of allocating to the scholarships, awards and bursaries budget a specified proportion of the additional funds raised through tuition fee increases. In the tentative 93/94 operating budget, that amount is \$238,000.

SPCSAB has learned that the administration's commitment to continuing this practice may be wavering. When questioned at the last Board of Governor's meeting, the President was apparently not prepared to assure the Board that the university would make the specified allocation of a portion of tuition fee revenue to the 93/94 financial aid and awards budget. This issue will be revisited at the next Board meeting. It is the strongly held view of SPCSAB that this budget has taken more than its share of cut-backs in the last year or two.

SPCSAB urges the administration to reaffirm its commitment to the scholarships, awards and bursary programs by assuring continuation of its long-standing practice of allocating a specified proportion of revenue from tuition fee increases to the financial aid and awards budget.

CC: Bob Brown, Acting President
Fred Moonen, Chair of the Board of Governors

\spcsab7\anrepmem



13-R-10. Entrance Scholarships
 Number and Type of Scholarships Accepted,
 1978 to 1992

	1978	1979	1980	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991	1992	TOTAL
Simon Fraser								1	1	1	1	1	1	1	1	4
GM Shrums	7	7	8	8	6	12	9	15	13	11	15	15	20	14	16	176
Steel		1	1	2	3	4	2	3	4	3	4	4	3			27
GMS 2s		4	5	16	10	11	11									57
Presidents		1	68	81	80	94	100	106	87	102	134	104	104	104		957
Deans						7	8	14	27	32	39	39	39	39		141
McTaggart					4	4	5	1	1	1	2					18
J.Diamond	3	1	2	3	3	2	2	1	2	2	3					24
Chancellors					21	55	85	99	26	3	42	43	65	65	65	455
RLA's						16	13	12	7	12	12					72
SFU Prizes											24	38	35			97
Abe Unrau Coop												22				22
Total	7	10	9	15	16	126	180	215	241	159	157	217	239	309	150	2050
Number of School	7	9	8	13	15	68	86	88	94	98	114	176	149	148	170	1243

REPORT TO SENATE

**SENATE POLICY COMMITTEE ON
SCHOLARSHIPS, AWARDS AND BURSARIES**

MAY 1993

**Dr. Roger Blackman
SPCSAB Chair**

TABLE OF CONTENTS

	Page
I. Introductory Comments	1
II. Undergraduate Program Policies	1 - 3
III. Operating Budget: Undergraduates Programs	3 - 4
IV. Undergraduate Awards Disbursement	5 - 6
V. Graduate Bursaries	6
VI. Bridge Loans: Undergraduate/Graduate	6
VII. Work Study Program: Undergraduate/Graduate	7
VIII. 1992/93 Graduate Awards - Administered by the Dean of Graduate Studies	8 - 10

I. INTRODUCTORY COMMENTS

This report covers the business activities of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the three semesters, 92-2, 92-3, and 93-1.

The Committee held meetings on:

June 29, 1992
November 9, 1992
November 26, 1992
January 28, 1993
February 4, 1993
May 10, 1993

In addition to routine business, the Committee attempted to deal with shortfalls in the 92/93 budget. Anticipating extreme pressure on the Financial Aid & Awards operating budget for undergraduate programs, shortly before the 92/93 fiscal year began SPCSAB initiated changes designed to "protect, as much as possible, the Bursary budget, and to allocate any necessary reductions approximately equally between the Entrance Scholarship and Open Scholarship Programs" (p.2, 91/92 Annual Report). Comparison of the 91/92 and 92/93 operating budgets figures on p. 3 & 4 of this report show that reductions were indeed necessitated, and that they were allocated in a manner consistent with the position established by SPCSAB. Continuing concerns regarding the FAA budget are addressed in the transmittal memorandum to Senate accompanying this report.

II. UNDERGRADUATE PROGRAM POLICIES

1. Entrance Scholarship Program: Unit Value of Awards

<u>Name of Award</u>	<u>92/93 Value</u>	<u>Approved for 93/94</u>
Simon Fraser	\$30,000	\$30,000
Gordon M. Shrum	\$20,000	\$20,000
William and Ada Steel	deleted	deleted
SFU Alumni Leadership		\$25,000
Dean's in Applied Science	\$10,000	\$10,000
Dean's in Science	\$10,000	\$10,000
Dean's in Arts	\$10,000	\$10,000
Dean's in Business Admin.	\$10,000	\$10,000
President's	\$10,000	\$10,000
Jack Diamond	\$10,000	\$10,000
Chancellor's	\$8,000	\$8,000
Abe Unrau Co-op Ed.	\$2,850	\$2,850
SFU Entrance Prize	\$1,000	\$1,000

Most of the above scholarships may include an additional \$1,000 for travel allowance (for designated School Districts in B.C.)

National Entrance Scholarships

<u>Name of Award</u>	<u>92/93 Value</u>	<u>Approved for 93/94</u>
Gordon M. Shrum President's (deleted)	\$22,000	\$22,000
Kenneth Strand	\$12,000	\$12,000
Jack Diamond	\$12,000	\$12,000

Note: Travel allowance is included in the face value.

College Transfer Entrance Scholarships

<u>Name of Award</u>	<u>92/93 Value</u>	<u>Approved for 93/94</u>
Hon. William G. Hamilton President's	\$15,000 *	\$15,000 *
Ken Caple	\$7,500 *	\$7,500 *

* plus \$1,000 travel allowance (for designated College Districts in B.C.)

2. Open Scholarship Program: Eligibility Requirements

In order to respond to budget limitations, the terms of reference for the Undergraduate Open Scholarship were changed as follows:

FROM (92/93)

Eligibility: To qualify a student must have, at SFU, a minimum CGPA of 3.60, a minimum semester GPA of 3.50 in the last semester of registration and have completed at least 24 credit hours of normally graded courses over the past 3 semesters of registration in such courses. Tuition will be paid in the same semester a student meets all eligibility requirements.

For students who fall short of the 24 credit-hour requirement because one semester's registration was in a single course of 5 credits or less, the last four semesters will be considered, and that semester of one course will be set aside in determining credit-hour and semester GPA eligibility. All eligibility requirements must be met.

TO (93/94)

Eligibility:

1. A minimum SFU cumulative GPA of at least 3.60. Students with a cumulative GPA of 3.75 and above are assured of eligibility in this regard. Uncertainty about the availability of funds means that it is impossible to make a prior determination of the cut-off cumulative GPA that will be used in any semester. Students with a cumulative GPA between 3.60 and 3.74 will be informed through F.A.C.T.S. (call 291-4137) of their eligibility status by the 6th or 7th week of classes each semester. The threshold cumulative GPA will be set as low as permitted by the availability of funds.
2. A minimum semester GPA of 3.50 in the last semester of registration.
3. Registration in one of the last three semesters.
4. Complete at least 24 credit-hours of normally graded courses over the last three semesters of registration in such courses. For students who fall short of the 24 credit-hour requirement because one semester's registration was in a single course of 5 credits or less, the last four semesters will be considered and that semester of one course will be set aside in determining credit-hour and semester GPA eligibility.

III. OPERATING BUDGET: UNDERGRADUATE PROGRAMS

	<u>90/91</u>	<u>91/92</u>	<u>92/93</u>
--	--------------	--------------	--------------

I. GRADUATE

1. Bursaries			
A. Open	\$19,000	\$21,000	\$18,000
B. Daycare	3,000	4,000	4,000
2. Emergency Loans (Non-recovery)	600	<u>800</u>	<u>800</u>
Graduate Sub-total:	<u>\$22,600</u>	<u>\$25,800</u>	<u>\$22,800</u>

II. UNDERGRADUATE

1. Open Scholarships	\$621,570	\$805,000	\$663,000
2. Entrance Scholarships			
A. B.C. Secondary	611,878	736,411	616,411

	<u>90/91</u>	<u>91/92</u>	<u>92/93</u>
B. National	14,000	21,000	18,000
C. College	36,000	42,000	38,000
D. International	0		
Sub-total: (II-1, II-2)	<u>\$1,283,448</u>	<u>\$1,604,411</u>	<u>\$1,335,411</u>
3. Bursaries			
A. Open	\$250,000	\$ 200,000	\$212,000
B. Daycare	13,000	15,000	18,000
4. Awards	108,000	112,000	110,000
5. Work Study	20,000	24,000	32,000
6. Emergency Loans (Non-recovery)	<u>3,000</u>	<u>5,000</u>	<u>6,000</u>
Sub-total: (II-3 - II-6)	<u>394,000</u>	<u>356,000</u>	<u>378,000</u>
TOTAL: (I & II)	<u>\$1700,048</u>	<u>\$1,986,211</u>	<u>\$1,736,211</u>

III. INTERNATIONAL

1. Graduate Bursaries			
A. Open	\$ 95,000	\$ 28,354	\$32,354
B. Daycare	4,000	4,000	4,000
2. Undergraduate Bursaries			
A. Open	\$109,122	\$ 90,000	\$102,000
B. Daycare	8,000	10,000	10,000
3. Undergrad. Scholarships	<u>52,000</u>	<u>70,000</u>	<u>50,000</u>
Intern'l Sub-total:	<u>\$268,122</u>	<u>\$ 202,354</u>	<u>\$198,354</u>
4. One time supplement for Bursaries for International Students			\$25,000 (Mar.'93)
GRAND TOTAL: (I & II & III)	<u>\$1,968,170</u>	<u>\$2,188,565</u>	<u>\$1,959,565</u>

IV. UNDERGRADUATE AWARDS DISBURSEMENT

1. UNIVERSITY SCHOLARSHIPS, AWARDS AND BURSARIES

		<u>91/92 TOTAL</u>	<u>92/93 TOTAL</u>
i.	<u>Scholarships</u>		
	Open	1,323	1,138 *
	Entrance Scholarships Continuing	691	626
	Entrance Scholarships New	260	150
	Sub-total	<u>951</u>	<u>776</u>
	Total:	2274	1914
ii.	<u>Awards</u>		
	Athletics	49	34
	Recreation	32	32
	University Arts & Service	<u>88</u>	<u>100</u>
		169	166
iii.	<u>Bursaries</u>		
	Open	405 *	242 *
	Daycare	64	84
	International	<u>113 *</u>	<u>196</u>
	Total	582	522
iv.	<u>Honour Roll</u>	331	363

Note: A student may receive up to three honour roll designations per year.

* Some of these expenditures were funded from Private funds.

2. PRIVATE SCHOLARSHIPS, AWARDS AND BURSARIES

	<u>91/92</u> <u>TOTAL</u>	<u>92/93</u> <u>TOTAL</u>
i. Scholarships	209 *	76
ii. Bursaries	564 *	391
iii. Awards, Medals, Prizes	<u>153</u>	<u>195</u>
Toral	926	662

* Some of these expenditures were transferred from Awards budget line items to Private accounts. In 92/93 costs were transferred from the operating awards budget to a number of private accounts to accommodate award budget reductions.

V. GRADUATE BURSARIES

	<u>91/92</u> <u>TOTAL</u>	<u>92/93</u> <u>TOTAL</u>
1. Open	75	41
2. International	83	82
3. Daycare	<u>17</u>	<u>10</u>
Total	175	133

VI. BRIDGE LOANS: UNDERGRADUATE/GRADUATE

Short term, interest-free loans are available to students who require interim emergency funding while awaiting funds from other sources.

Value: Normally \$300 - \$800 (average \$500)

During 1991/92, 1,332 loans were issued totalling \$664,807
During 1992/93, 1,384 loans were issued totalling \$723,676

Note: Non-recoverable debt in 92/93 was less than \$6,000.

VII. WORK STUDY PROGRAM: UNDERGRADUATE/GRADUATE

The SFU Work Study Program provides part time employment which is intended to be mutually beneficial to students and the University. Every effort is made to provide career-related job experience, which is primarily of a research nature. The Work Study program is intended normally to supplement Provincial and Federal student loan programs, as per policy requirements of the government funded program. However, Work Study funded through SFU requires only that students demonstrate financial need to qualify. All students must meet financial needs test, must be registered in, and maintain 9 credit hours or more in undergraduate studies, or for graduates be registered in a graduate program, and must be in satisfactory academic standing.

	<u>91/92 TOTAL</u>	<u>92/93 TOTAL</u>
Undergraduates employed	437	581
Graduates employed	22	41

VIII: 1992/93 GRADUATE AWARDS

Administered by the Dean of Graduate Studies

Disbursement by Award Category

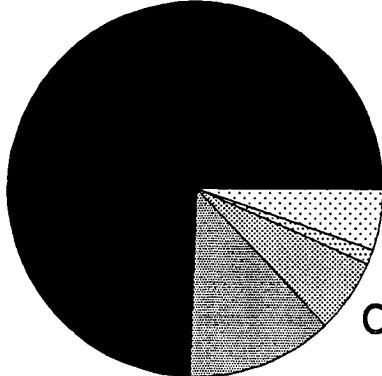
	1992/93	1991/92
Graduate Fellowship (GF)	\$1,433,750	\$1,577,950
President's Ph.D. Research Stipend	\$ 318,800	\$ 266,800
C.D. Nelson Memorial Graduate Scholarship	\$ 126,327	\$ 135,000
Special Graduate Entrance Scholarship (SGES)	\$ 14,000	\$ 27,000
Special Graduate Research Fellowship (SGRF)	\$ 164,000	\$ 111,000
 Total expenditures	 \$2,056,877	 \$2,117,750

Disbursements by Semester & Award Category

Name	92-2	92-3	93-1	Total
GF	53 @ \$3850 66 @ \$4450	93 @ \$4100 53 @ \$4700	39 @ \$4100 31 @ \$4700	
		\$497,750	\$630,400	\$305,600
				\$1,433,750
Stipend	22 @ \$4450	22 @ \$4700	25 @ \$4700	
		\$97,900	\$103,400	\$117,500
				\$ 318,800
Nelson	5 @ \$5000	10 @ \$5,333	9 @ \$5,333	
		\$25,000	\$53,330	\$47,997
				\$ 126,327
SGES	2 @ \$3000	1 @ \$4000 2 @ \$2000	none	
				\$6,000
		\$8,000		\$ 14,000
SGRF	none	40 @ \$4000	1 @ \$4000	
				\$160,000
				\$4,000
				\$ 164,000
TOTAL 1992/93	\$626,650 148 awards	\$955,130 221 awards	\$475,097 105 awards	\$2,056,877 474 awards
TOTAL 1991/92	\$586,300 141 awards	\$937,200 239 awards	\$594,250 142 awards	\$2,117,750 522 awards

S.F.U. Graduate Awards

Graduate Fellowship \$1,577,950 74.5%



Spl. Grad. Research \$111,000 5.2%

Spl. Grad. Entrance \$27,000 1.3%

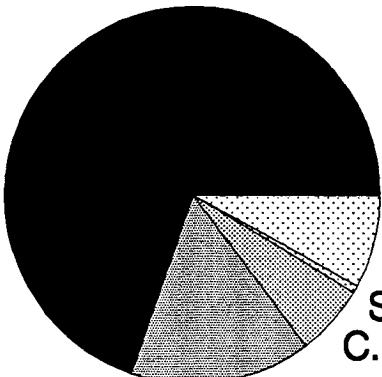
C.D. Nelson \$135,000 6.4%

PhD Stipend \$266,800 12.6%

1991/92

Total: \$ 2,117,750

Graduate Fellowship \$1,433,750 69.7%



Spl. Grad. Research \$164,000 8.0%

Spl. Grad. Entrance \$14,000 0.7%

C.D. Nelson \$126,327 6.1%

PhD Stipend \$318,800 15.5%

1992/93

Total: \$ 2,056,877

PRIVATE GRADUATE AWARDS 1992/93

Administered by the Dean of Graduate Studies

Semester 92-2			Semester 92-3			Semester 93-1		
No.	Value	Total	No.	Value	Total	No.	Value	Total
1	\$6,000	\$6,000	1	\$5,333	\$5,333	1	\$6,009	\$6,009
8	\$5,667	\$45,336	13	\$5,667	\$73,671	14	\$5,667	\$79,338
1	\$5,000	\$5,000	7	\$5,000	\$35,000	1	\$5,333	\$5,333
3	\$3,850	\$11,550	1	\$4,100	\$4,100	8	\$5,000	\$40,000
2	\$3,084	\$6,168	1	\$4,000	\$4,000	2	\$4,700	\$9,400
1	\$1,534	\$1,534	1	\$3,850	\$3,850	6	\$4,100	\$24,600
1	\$325	\$325	1	\$2,833	\$2,833	7	\$4,000	\$28,000
17		\$75,913	2	\$2,295	\$4,590	1	\$3,477	\$3,477
			1	\$2,000	\$2,000	1	\$3,231	\$3,231
			1	\$1,900	\$1,900	2	\$3,000	\$6,000
			1	\$1,700	\$1,700	3	\$2,000	\$6,000
			2	\$1,534	\$3,068	1	\$1,780	\$1,780
			3	\$1,500	\$4,500	2	\$1,534	\$3,068
			1	\$1,279	\$1,279	1	\$1,500	\$1,500
			4	\$1,000	\$4,000	1	\$1,475	\$1,475
			1	\$950	\$950	1	\$1,433	\$1,433
			1	\$889	\$889	2	\$1,250	\$2,500
			1	\$850	\$850	1	\$1,200	\$1,200
			2	\$800	\$1,600	1	\$1,087	\$1,087
			1	\$600	\$600	4	\$1,000	\$4,000
			2	\$500	\$1,000	1	\$709	\$709
			1	\$314	\$314	6	\$700	\$4,200
			2	\$300	\$600	1	\$642	\$642
			1	\$250	\$250	1	\$600	\$600
			52		\$158,877	2	\$550	\$1,100
						1	\$545	\$545
						3	\$500	\$1,500
						1	\$474	\$474
						1	\$200	\$200
						1	\$185	\$185
						78		\$239,586

FY Totals:	147	\$474,376
------------	-----	-----------

Note: Included above are 40 semesters of support funded through GREAT awards which are now processed through the Private Awards data system for administrative efficiency. These awards total \$206,015 in FY 92/93.