

**For Information**

**S. 95 - 59**

**REPORT TO SENATE**

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

**SEPTEMBER 1995**

**Dr. Katherine Heinrich  
SPCSAB Chair**

**Senate Policy Committee on Awards, Scholarships and Bursaries**  
**Report to Senate, September 1995**

This report covers all business activities of the Senate Committee on Scholarships, Awards and Bursaries (SPCSAB) for the three semesters 94-2, 94-3 and 95-1.

**Meetings**

The committee held meetings on

June 22, 1994  
August 4, 1994  
September 15, 1994  
November 17, 1994  
January 19, 1995  
March 30, 1995

**Awards**

Following substantial changes made to the Undergraduate Entrance Scholarship program in 1993/94, one of our primary tasks this year was to monitor the effects with respect both to awards offered and accepted and to the budget. One positive outcome was that we were able to reduce the CGPA necessary for students to be awarded an open scholarship. The award is only guaranteed to those who meet the eligibility criteria including a CGPA of at least 3.75. In the Summer awards were made to qualified students with CGPA at least 3.75, but in the Fall to those with CGPA at least 3.68, and in the Spring at least 3.65. This is consistent with our long-term goal to have the same CGPA for students continuing on Entrance scholarships (currently 3.6 after the second semester) and for the awarding of open scholarships.

A summary of the awarding of undergraduate entrance scholarships and open scholarships is given below:

**Undergraduate Entrance Scholarships - 94-2, 94-3, 95-1**

| <u>Award Name</u>              | <u>Total Value</u> | <u>Duration</u> | <u>Gender</u> |          |
|--------------------------------|--------------------|-----------------|---------------|----------|
|                                |                    |                 | <u>M</u>      | <u>F</u> |
| <u>94-2</u>                    |                    |                 |               |          |
| Caple College Transfer         | 3,000              | 2 semesters     | 1             | 1        |
| <u>94-3</u>                    |                    |                 |               |          |
| Alumni Leadership              | 25,000             | 8 semesters     |               | 1        |
| Shrum (BC)                     | 20,000             | 8 semesters     | 8             | 9        |
| Shrum (National)               | 20,000             | 8 semesters     |               | 3        |
| President's (Secondary School) | 10,000             | 8 semesters     | 2             | 3        |

### Undergraduate Entrance Scholarships - 94-2, 94-3, 95-1 (contd.)

| <u>Award Name</u>                  | <u>Total Value</u> | <u>Duration</u> | <u>Gender</u> |          |
|------------------------------------|--------------------|-----------------|---------------|----------|
|                                    |                    |                 | <u>M</u>      | <u>F</u> |
| National Strand (Secondary School) | 3,000              | 2 semesters     | 1             | 1        |
| Hamilton (College)                 | 10,000             | 4 semesters     |               | 1        |
| Caple (College)                    | 3,000              | 2 semesters     | 4             | 6        |
| Diamond (BC)                       | 3,000              | 2 semesters     | 3             | 2        |
| Diamond(National)                  | 3,000              | 2 semesters     | 2             |          |
| Regional Summit                    | 3,000              | 2 semesters     | 4             | 5        |
| Summit                             | 3,000              | 2 semesters     | 44            | 43       |
| Deans                              | 6,000              | 4 semesters     | 13            | 13       |
| <u>95-1</u>                        |                    |                 |               |          |
| Caple (College)                    | 3,000              | 2 semesters     | 2             | 1        |
| Regional Summit                    | 3,000              | 2 semesters     | 1             |          |

### Open Scholarships - 1994/95

|      |           |                         |                  |
|------|-----------|-------------------------|------------------|
| 94-2 | CGPA 3.75 | 150 awards (87 f/59 m)  | avg. award \$600 |
| 94-3 | CGPA 3.68 | 214 awards (135 f/79 m) | avg. award \$853 |
| 95-1 | CGPA 3.65 | 251 awards (163 f/88 m) | avg. award \$781 |

Average awards for females were: 94-2 \$604, 94-3 \$846, 95-1 \$806

Average awards for males were: 94-2 \$617, 94-3 \$865, 95-1 \$871

Total number of awards: 611

Total dollars awarded: \$479,494

### New Undergraduate Entrance Scholarship

Acting on a recommendation from the ad hoc Senate Committee on International Students, and following extensive consultations, SPCSAB approved the establishment of an entrance scholarship for international students:

#### "The Shrum International Undergraduate Scholarship

The Shrum International Undergraduate Scholarship recognizes excellence in academic achievement. Other considerations might include a commitment to school and community service, leadership, volunteer activity, music, the arts, or athletics. Applicants must be completing their qualifying year in the International Baccalaureate Program at one of the United World Colleges and be admitted to a first degree program at the University. The successful applicant will study at the University on a Student Visa and will be from a country under-represented among Simon Fraser University international undergraduate students. The Scholarship is

valued at \$5000 plus tuition per semester for each of eight semesters. Second and subsequent disbursements from the Scholarship are subject to the same criteria as the Gordon M. Shrum Scholarships."

Funding was provided from the undergraduate budget and a special allocation from the President to cover tuition. At this time funds available allow only the awarding of one such award per annum (total value \$40,000 plus tuition). The two students who have received awards to date are from The People's Republic of China and the former Yugoslavia.

Finally, we note that the Canada Scholarship program funded by the Federal government and providing 4-year scholarships to students entering science has been terminated. The program was novel in that it required that at least as many awards be made to female students as to male students.

### GRADUATE AWARD DISBURSEMENTS IN FY 1994/95

|          | AWARD NAME                         | NUMBER | VALUE   | TOTAL       |
|----------|------------------------------------|--------|---------|-------------|
| Sem 94-2 | Graduate Fellowship Master's       | 64     | \$4,100 | \$262,400   |
|          | Graduate Fellowship PhD            | 31     | \$4,700 | \$145,700   |
|          | President's Research Ph.D. Stipend | 31     | \$4,700 | \$145,700   |
|          | C.D. Nelson Entrance               | 8      | \$5,333 | \$42,664    |
|          | Special Entrance                   | 1      | \$3,000 | \$3,000     |
|          | SUBTOTAL                           |        |         | \$599,464   |
| Sem 94-3 | Graduate Fellowship Master's       | 65     | \$4,200 | \$273,000   |
|          | Graduate Fellowship PhD            | 47     | \$4,800 | \$225,600   |
|          | President's Research Ph.D. Stipend | 25     | \$4,800 | \$120,000   |
|          | C.D. Nelson Entrance               | 12     | \$5,333 | \$63,996    |
|          | Special Entrance                   | 9      | \$4,000 | \$36,000    |
|          |                                    | 1      | \$2,000 | \$2,000     |
|          |                                    | 1      | \$5,000 | \$5,000     |
|          | SUBTOTAL                           |        |         | \$725,596   |
| Sem 95-1 | Graduate Fellowship Master's       | 65     | \$4,200 | \$273,000   |
|          | Graduate Fellowship PhD            | 51     | \$4,800 | \$244,800   |
|          | President's Research Ph.D. Stipend | 23     | \$4,800 | \$110,400   |
|          | C.D. Nelson Entrance               | 13     | \$5,333 | \$69,329    |
|          | Special Entrance                   | 1      | \$3,500 | \$3,500     |
|          |                                    | 1      | \$2,500 | \$2,500     |
|          | SUBTOTAL                           |        |         | \$703,529   |
|          | GRAND TOTAL DISBURSEMENTS          |        |         | \$2,028,589 |
|          | 93/94 Bal. Fwd                     |        |         | \$189,978   |
|          | 94/95 ALLOCATION                   |        |         | \$2,184,443 |
|          | BALANCE (carried over to 95/96)    |        |         | \$345,832   |
|          | Disbursement Totals by Award       |        |         |             |
|          | Graduate Fellowship                |        |         | \$1,424,500 |
|          | President's Ph.D. Research Stipend |        |         | \$376,100   |
|          | C.D. Nelson Entrance               |        |         | \$175,989   |
|          | Special Entrance                   |        |         | \$52,000    |
|          |                                    |        |         | \$2,028,589 |

## Budget

Resulting from the restructuring of the Financial Aid and Awards Office, unassigned donated funds of approximately \$100,000 were identified and SPCSAB approved using them to establish an endowment the interest on which will provide two Summit Entrance Scholarships each year. Additional donations are both welcomed and encouraged. The committee met with Meg Clarke (Director, Development) to discuss funding for scholarships, awards and bursaries and to offer whatever help we could in any fund-raising activities.

In the last two university budgets there has been no cut to funding for scholarships, awards and bursaries and additional funds as determined by the formula have been allocated. The commitment of the President to providing funding for these programs is greatly appreciated.

Following a request from the Vice-President, Academic, for advice on the proportional allocation of this additional scholarship and bursary funding, SPCSAB made an analysis of past allocation history and reviewed funding at other universities; recommending (in May 1995) that funding be allocated to the two budgets based on FTE enrolment and that the funding for a graduate FTE be 6.5 times that for an undergraduate. This recommendation was accepted and came into effect in the 1995/96 budget year. The situation will be monitored.

## General

In order to provide a better record of our activities the Registrar's office is currently working to bring all SPCSAB policies together in one location. In conjunction with this the committee prepared a set of guidelines (Appendix A attached) to direct our decision making.

SPCSAB regularly approves the allocation of the undergraduate and graduate budgets and receives for information reports on the distribution of awards. We thank all those in the University who have worked with us over the year to develop and enhance our scholarship and awards program.

## Motions

The following motions were approved by the committee during the year:

### Undergraduate

Motion (June 1994):

That the revised criteria for limiting the number of Open Scholarship disbursements be approved:

Eligibility for the Open Scholarship is restricted to those students who are pursuing a first degree at Simon Fraser University. For purposes of this Scholarship only,

first degree shall include those students who are registered in the PDP (Professional Development Program) in the Faculty of Education\*. Eligibility will expire when the total of the accumulated credit hours (including those credit hours awarded at transfer and those completed at this University) exceeds by 10% the minimum number of credit hours required for completion of the degree program in which the student is registered.

\* A student will be eligible during the first semester of the PDP Program if all other eligibility requirements are met. Thereafter, since PDP courses are 'not normally graded courses', the student will cease to be eligible for further disbursements until such time as he/she completes the minimum 24 credit hours over the last three normally graded semesters.

Motion (September 1994):

That the Shrum International Undergraduate Student Scholarship be approved contingent on funding.

### Graduate

Motion (August 1994):

That while a student may be recommended for a Graduate Fellowship while carrying a DE grade, tenure of the award will be contingent on the clearing of all DE grades by the deadline for submission of grades.

Motions (March 1995):

That the upper limit on annual total scholarship income from sources that include SFU scholarships be increased from \$20K to \$22K.

That the award values of the graduate fellowships be increased by \$50.

That the departmental allocations of graduate fellowships for 1995/96 be approved.

### **Financial Assistance**

Although all scholarships and bursaries are administered under policy approved by SPCSAB, the allocation of bursaries, loans and many private awards are decided by the Student Academic Resource Office. A detailed report on that Office's activities has been prepared by the Director, C. French, and is attached. This report includes a description of loans taken out by SFU students. There is clearly a high level of financial need which we are unable to meet.

# Financial Assistance Programs Summary 1994 to April 1995

Submitted by:  
Charlotte French, Director  
Student Academic Resources  
October, 1995

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## FINANCIAL ASSISTANCE PROGRAM SUMMARY 1994/95

### INTRODUCTION

The following report is a year end summary of the need based and merit based award programs administered by Financial Assistance. The 1994/95 program year saw an overall increase in demand on programs. The most notable increase was in need based programs, namely, Government student loans and S.F.U. administered bursaries. Although bursary funding continues to increase, rising costs and decreasing employment opportunities force students to seek out all available avenues of support.

Government student loan awards to S.F.U. students increased by \$1,655,876 to 2,286 additional students in 1994/95. The S.F.U. bursary program, which is primarily awarded as a supplement to student loan funds, increased undergraduate privately funded and endowed bursary disbursements by \$117,748 to 161 additional students and SFU Open bursary disbursements by \$71,162 to 70 additional students.

Merit based scholarships and awards experienced a modest increase in total dollars disbursed, as did Athletic and Recreation awards.

A four year summary of all programs is included as Appendix A. Figures reported in the following report represent the academic year May to April, not the fiscal year.

## I. BURSARIES

Bursaries are awarded on the basis of financial need to students registered in a minimum of 9 semester hours. To be considered for bursary funding students must submit an application that includes a budget outlining their income and expenses for the semester. From these reported budgets, Financial Assistance assesses the students' unmet need. Students must have received maximum student loan funding (\$3995 per semester for a single student) or be ineligible for student loans before they will be considered for bursary awards. Bursaries are adjudicated after all scholarships and awards are disbursed to allow these funds to be included in the income calculation. Approximately 25% of students who receive bursaries also qualified for scholarships. However, scholarship awards are often not sufficient to meet student funding needs. Students who receive bursaries have exhausted all other sources of funding.

At the present time we are able to meet 20 to 30% of a student's assessed need through a combination of Private or Endowed Bursaries and SFU Funded Open Bursaries. Typically, for a domestic undergraduate student with no dependents a bursary award will cover approximately 60 to 70% of their assessed tuition fees (not including athletic and service fees). Bursaries rarely address living expenses or material and supply costs. For students with dependents or those living away from home the main cost of attending university is living expenses. Although bursary funding has increased, so has the unmet need of students.

In 1994/95 Financial Assistance received 1,819 applications for Undergraduate Open Bursaries and was able to make 687 bursary awards; 162 applications were received for Graduate Open Bursaries and 111 bursary awards were made. Due to limitations of the present recording system, data regarding reasons for denial is not available.

Most students apply for Private or Endowed Bursaries as well as the Open Bursary program. Private and Endowed Bursaries are adjudicated first to as many students as possible. Those students whose need is not met through Private or Endowed funds or who are not eligible for any of these bursaries are then considered for SFU Open Bursaries.

SFU Daycare Bursaries are also funded by SFU. These awards assist a small number of student parents meet the costs of childcare and are tenable only at the SFU Childcare Centre. These bursaries awards are made on the recommendation of the Director of the SFU Childcare Centre.

### 1. UNDERGRADUATE BURSARIES

| SFU Open (domestic) |         |         | SFU Open (international) |         | SFU Daycare   |         | Private and Endowed |          |
|---------------------|---------|---------|--------------------------|---------|---------------|---------|---------------------|----------|
| # of Students       | Ttl. \$ |         | # of Students            | Ttl. \$ | # of Students | Ttl. \$ | # of Students       | Ttl. \$  |
| 94/95               | 535     | 289,518 | 152                      | 117,014 | 65            | 12,695  | 477                 | 329,135  |
| 93/94               | 465     | 218,356 | 147                      | 85,574  | 65            | 14,603  | 316                 | 211,387  |
| Change              | +70     | +71,162 | +5                       | +31,440 | -             | - 1,908 | +161                | +117,748 |

## 2. GRADUATE BURSARIES

| SFU Open (domestic) |         |        | SFU Open (international) |         | SFU Daycare   |         | Private and Endowed |         |
|---------------------|---------|--------|--------------------------|---------|---------------|---------|---------------------|---------|
| # of Students       | Ttl. \$ |        | # of Students            | Ttl. \$ | # of Students | Ttl. \$ | # of Students       | Ttl. \$ |
| 94/95               | 58      | 41,225 | 53                       | 43,600  | 23            | 6,005   | 9                   | 4,650   |
| 93/94               | 52      | 31,800 | 57                       | 32,342  | 12            | 2,624   | 9                   | 7,600   |
| Change              | +6      | +9,425 | - 4                      | +11,258 | +11           | +3,381  | -                   | - 2,950 |

## II. EMERGENCY LOANS: UNDERGRADUATE/GRADUATE

Short term, interest-free loans are available to students who require interim emergency funding while awaiting funds from other sources. A student is allowed a maximum total Emergency Loan debt of \$1000, except in extraordinary circumstances. To receive an Emergency Loan a student must complete an application form, show documentation confirming means of repayment and be interviewed by a Financial Assistance Advisor. This process allows the Advisor to review the student's overall financial situation and consider other possible sources of funding.

Due to the rising delinquency on Emergency Loan repayments in the past, Financial Assistance has become more rigorous with the criteria for eligibility and the dollar values of these loans. The value of the outstanding loans considered unrecoverable has decreased from \$10,544 in 1993/94 to \$5,363 in 1994/95.

| Number of Loans |     | Total \$ Awarded |
|-----------------|-----|------------------|
| 94/95           | 674 | 317,329          |
| 93/94           | 887 | 422,278          |

## III. GOVERNMENT PROGRAMS

### 1. FEDERAL AND PROVINCIAL LOANS: Undergraduate/Graduate

Domestic students, graduate and undergraduate, may apply for funding assistance through the federal and provincial loan programs. Students apply for both programs through the provincial ministry responsible in the province in which they hold permanent residency. Financial need and a student loan award is determined by the information the student submits during the application process. Canada Student Loan is adjudicated first to a maximum allowable value and then provincial funding tops up to reach the students calculated need or the maximum loan allotment, whichever is less. Next to personal and family resources, Government Loans are considered to be the primary source of funding for Canadian students in financial need.

Canada Student Loan and BC Student Loan regulations have been undergoing revision for the past two years and will continue to do so for the next two. The most significant change in 1994/95 was the federal government increasing their portion of the combined federal/provincial award from 50% to 60%. However, this did not necessarily translate into higher funding for students as the assessment criteria remained unchanged. This change was actually detrimental for BC students in their first and second year of post-secondary education as these students usually receive the provincial portion of their award in the form of a non repayable grant rather than a loan.

In 1994/95 the maximum award that a single, undergraduate student with no dependents could receive for one semester was \$3995; \$2397 in CSL and \$1598 in BC funding. This amount was intended to cover shelter (dormitory residence was approximately \$1170 per semester), tuition (\$965 for 12 semester hours including activity fees, etc.), books and supplies (usually budgeted at \$300), food (varies; approximately \$700), transportation (\$216 for bus passes) and all other miscellaneous living costs (dental, medical, cleaning supplies, toiletries, etc.). Without miscellaneous expenses, the above list of costs totals \$3441.

Changes to the assessment process which are being implemented for the 1995/96 program year could mean increased loan award values for many students who are not presently receiving maximum awards. There are some students who will find themselves penalized under the new system however, as a higher portion of their income will be assessed for contribution toward costs. For example, an existing deduction of \$600 for scholarships and bursaries has been changed and now includes earnings from all sources, including part-time work. Semester maximum award limits remain unchanged.

One of the most significant changes for the 1995/96 program year will be the introduction of designated lenders by both Canada Student Loan and BC Student Loan. Students will now be required to negotiate their student loans with one of the contracted lenders who will assume a portion of the delinquency risk once the student is required to begin repayment. For the Canada Student Loan program the designated lenders are the Royal Bank of Canada, the Canadian Imperial Bank of Commerce, the Bank of Nova Scotia and Edelweiss Credit Union. For the BC Student Loan program the designated lenders are the Royal Bank of Canada and the Bank of Nova Scotia.

|       | Canada Student Loan |            | B.C. Student Loan/Grant |           | Out-of-Province Loan |           |
|-------|---------------------|------------|-------------------------|-----------|----------------------|-----------|
|       | # of Students       | Ttl. \$    | # of Students           | Ttl. \$   | # of Students        | Ttl. \$   |
| 94/95 | 5,806               | 15,740,297 | 4,727                   | 7,110,784 | 585                  | 1,244,123 |
| 93/94 | 4,692               | 12,558,671 | 3,789                   | 9,046,710 | 351                  | 833,947   |

## 2. WORK STUDY PROGRAM: Undergraduate/Graduate

The Work Study program is a B.C. government funded program for students in high financial need which supplements a student's B.C. and Canada Student Loan award with paid work experience. A small SFU funded Work Study program supplements bursary funding for international students.

In August, 1994 the Student Services Branch of the BC Ministry of Skills, Training and Labour reviewed and made changes to the policies governing the Work Study program. These changes clarified the eligibility criteria for the Program and removed most of the institutional discretion in determining student eligibility. Unfortunately, these changes were announced late in August which caused delays in adjudicating student eligibility for the Fall 1994

semester This is reflected in the decrease in expenditures in the Program for 1994/95. In the long term the policy changes will allow us to identify students earlier and make them available for work in the first or second week of classes rather than the four or fifth week, as had occurred previously.

To be eligible for the BC Work Study program a student must meet the general eligibility criteria for BC Student Loans, have received the maximum allowable Canada and BC Student Loan award and have a financial need, as assessed by the SSB, greater than the Loan funding they received. Students who do not meet these criteria may only be considered for the Program in exceptional circumstances as specified by the Student Services Branch.

**S.F.U. Funded Work Study (International only):**

|        | Number of Students | Total \$ Awarded |
|--------|--------------------|------------------|
| 94/95  | 6                  | 2,817            |
| 93/94  | 8                  | 6,222            |
| Change | - 2                | - 3,405          |

**Government Funded Work Study:**  
**Undergraduate**

|        | Number of Students | Total \$ Awarded |
|--------|--------------------|------------------|
| 94/95  | 499                | 346,337          |
| 93/94  | 527                | 369,454          |
| Change | - 28               | - 23,117         |

**Graduate**

|        | Number of Students | Total \$ Awarded |
|--------|--------------------|------------------|
| 94/95  | 8                  | 16,724           |
| 93/94  | 31                 | 25,680           |
| Change | - 23               | - 8,956          |

### 3. PART TIME STUDENT ASSISTANCE PROGRAM

The Part Time Student Assistance Program, offered by the B.C. government, operated on an experimental basis in 1991/92 and was in the first year of province wide operation in 1992/93. The requirements for eligibility are the same as for government loan funding except that students must be registered in less than 9 semester hours and demonstrate that they are unable to study full-time. Awards to students are adjudicated by the institution and are given in the form of grants rather than loans. These awards may only be used to cover direct educational costs.

This is the only Financial Assistance program available to part-time students at SFU. Our yearly grant budget is \$38,500. SFU was granted some additional funding during the Spring 1995 semester due to the heavy demand on the program. This was unusual action from the SSB and is not expected in 1995/96. In fact, this program has been expanded to include more institutions and more educational programs which has prompted the SSB to advise SFU that our funding for the 1995/96 program year may be decreased.

| Number of Awards |     | Total \$ Awarded |
|------------------|-----|------------------|
| 94/95            | 65  | 39,285           |
| 93/94            | 53  | 31,225           |
| Change           | +12 | + 8,060          |

### IV. MERIT BASED AWARDS

Private and Endowed Scholarships are available to continuing students who meet specified criteria and have a minimum cumulative grade point average of 3.50. To be considered for these Scholarships students must apply to Financial Assistance and be selected by the Senate Undergraduate Awards Adjudication Committee (SUAAC). Funding from Endowed and Private Scholarships increased substantially in 1993/94 (by approximately \$48,000) but remained essentially unchanged in 1994/95.

Academic and Service Awards are given to students, faculty or staff for outstanding performance in an academic area or outstanding service to the University community. Recipients of these Awards are determined by Department or individual nomination and confirmed or adjudicated by SUAAC. Funding for Private and Endowed and SFU funded Academic and Service Awards has remained substantially unchanged for the past four years (see four year supplement).

S.F.U. Service Awards continue to be the most difficult to award. Some Service Awards may not be disbursed in a given year due to a lack of nominations. In 1993/94 only one of the four major service awards was able to be adjudicated. In 1994/95 all but the Terry Fox Gold Medal were awarded. Timing of the adjudication of these awards is under review.

| Endowed/Private Schs. |     |         | Endowed/Private Awards |         | SFU Funded Awards |         |
|-----------------------|-----|---------|------------------------|---------|-------------------|---------|
| # of Students         |     | Ttl. \$ | # of Students          | Ttl. \$ | # of Students     | Ttl. \$ |
| 94/95                 | 165 | 117,290 | 52                     | 12,330  | 84                | 44,250  |
| 93/94                 | 163 | 114,275 | 41                     | 7,130   | 107               | 44,558  |
| Change                | +2  | +3,015  | +11                    | +5,200  | - 23              | - 308   |

#### V. ATHLETIC AND RECREATION AWARDS

Endowed, Private and SFU funded Athletic Awards are given on the basis of Athletic merit. Some of these awards include an academic achievement component. Recipients of Athletic Awards are selected by nomination of the Director of Athletics and Recreation and confirmed by the SUAAC. SFU has increased its support to Athletic Awards by \$10,000 over the past four years while Private and Endowed support has increased by \$48,000.

Athletic Tuition gifts are made to students from funds raised by the Athletics section of the Department of Athletics and Recreation. These gifts are not administered through Financial Assistance or SUAAC but as of January 1994 have been recorded on the Financial Assistance computer system for information purposes.

Recreation Awards are funded by SFU. Recipients are selected through nomination of the Director of Athletics and Recreation and confirmed by the SUAAC. Funding available for these awards has remained unchanged in the past four years; however, nominations decreased in 1994/95 by \$3,600.

| Endowed/Private Athletics |     |         | SFU Funded Athletics |         | Athletic Tuition |         | SFU Funded Rec. Awds. |         |
|---------------------------|-----|---------|----------------------|---------|------------------|---------|-----------------------|---------|
| # of Students             |     | Ttl. \$ | # of Students        | Ttl. \$ | # of Students    | Ttl. \$ | # of Students         | Ttl. \$ |
| 94/95                     | 171 | 79,645  | 56                   | 41,000  | 67               | 57,333  | 31                    | 15,600  |
| 93/94                     | 153 | 69,229  | 52                   | 35,700  | n/a*             | n/a     | 31                    | 18,600  |
| Change                    | +18 | +10,416 | +4                   | +5,300  | -                | -       | -                     | - 3,000 |

\* Data in this category is incomplete prior to 1994/95

# APPENDIX A

## I. BURSARIES

### 1. UNDERGRADUATE BURSARIES

| SFU Open (domestic) |         |         | SFU Open (international) |         | SFU Daycare   |         | Private and Endowed |         |
|---------------------|---------|---------|--------------------------|---------|---------------|---------|---------------------|---------|
| # of Students       | Ttl. \$ |         | # of Students            | Ttl. \$ | # of Students | Ttl. \$ | # of Students       | Ttl. \$ |
| 94/95               | 535     | 289,518 | 152                      | 117,014 | 65            | 12,695  | 477                 | 329,135 |
| 93/94               | 465     | 218,356 | 147                      | 85,574  | 65            | 14,603  | 316                 | 211,387 |
| 92/93               | 191     | 78,029  | 160                      | 110,863 | 60            | 10,888  | 231                 | 158,068 |
| 91/92               | 663     | 239,161 | 144                      | 70,599  | 63            | 10,901  | 264                 | 165,701 |

### 2. GRADUATE BURSARIES

| SFU Open (domestic) |         |        | SFU Open (international) |         | SFU Daycare   |         | Private and Endowed |         |
|---------------------|---------|--------|--------------------------|---------|---------------|---------|---------------------|---------|
| # of Students       | Ttl. \$ |        | # of Students            | Ttl. \$ | # of Students | Ttl. \$ | # of Students       | Ttl. \$ |
| 94/95               | 58      | 41,225 | 53                       | 43,600  | 23            | 6,005   | 9                   | 4,650   |
| 93/94               | 52      | 31,800 | 57                       | 32,342  | 12            | 2,624   | 9                   | 7,600   |
| 92/93               | 43      | 25,900 | 69                       | 53,867  | 5             | 645     | 8                   | 9,861   |
| 91/92               | 68      | 34,128 | 71                       | 52,523  | 16            | 5,366   | 10                  | 13,968  |

## II. EMERGENCY LOANS: UNDERGRADUATE/GRADUATE

| Number of Loans |       | Total \$ Awarded |
|-----------------|-------|------------------|
| 94/95           | 674   | 317,329          |
| 93/94           | 887   | 422,278          |
| 92/93           | 1,384 | 723,676          |
| 91/92           | 1,362 | 664,776          |

15.

III. GOVERNMENT PROGRAMS

1. FEDERAL AND PROVINCIAL LOANS: Undergraduate/Graduate

| Canada Student Loan |         |            | B.C. Student Loan/Grant |           | Out-of-Province Loan |           |
|---------------------|---------|------------|-------------------------|-----------|----------------------|-----------|
| # of Students       | Ttl. \$ |            | # of Students           | Ttl. \$   | # of Students        | Ttl. \$   |
| 94/95               | 5,806   | 15,740,297 | 4,727                   | 7,110,784 | 585                  | 1,244,123 |
| 93/94               | 4,692   | 12,558,671 | 3,789                   | 9,046,710 | 351                  | 833,947   |
| 92/93               | 5,251   | 12,365,440 | 3,726                   | 9,141,759 | 415                  | 816,282   |
| 91/92               | 5,263   | 12,044,733 | 3,585                   | 8,264,681 | 359                  | 743,618   |

2. WORK STUDY PROGRAM: Undergraduate/Graduate

SFU Funded Work Study:

| Number of Students |    | Total \$ Awarded |
|--------------------|----|------------------|
| 94/95*             | 6  | 2,817            |
| 93/94*             | 8  | 6,222            |
| 92/93              | 38 | 19,315           |
| 91/92              | 54 | 29,324           |

Government Funded Work Study:

**Undergraduate**

| Number of Students |     | Total \$ Awarded |
|--------------------|-----|------------------|
| 94/95              | 499 | 346,337          |
| 93/94              | 527 | 369,454          |
| 92/93              | 550 | 445,228          |
| 91/92              | 380 | 286,245          |

**Graduate**

| Number of Students |    | Total \$ Awarded |
|--------------------|----|------------------|
| 94/95              | 8  | 16,724           |
| 93/94              | 31 | 25,680           |
| 92/93              | 41 | 34,851           |
| 91/92              | 22 | 17,611           |

\*Program was restricted to limited use for international students.

**3. PART TIME STUDENT ASSISTANCE PROGRAM**

| Number of Awards |    | Total \$ Awarded |
|------------------|----|------------------|
| 94/95            | 65 | 39,285           |
| 93/94            | 53 | 31,225           |
| 92/93            | 45 | 26,860           |
| 91/92            | 28 | 17,625           |

**IV. ACADEMIC AND SERVICE AWARDS AND PRIVATE/ENDOWED SCHOLARSHIPS**

| Endowed/Private Schs. |         |         | Endowed/Private Awards |         | SFU Funded Awards |         |
|-----------------------|---------|---------|------------------------|---------|-------------------|---------|
| # of Students         | Ttl. \$ |         | # of Students          | Ttl. \$ | # of Students     | Ttl. \$ |
| 94/95                 | 165     | 117,290 | 52                     | 12,330  | 84                | 44,250  |
| 93/94                 | 163     | 114,275 | 41                     | 7,130   | 107               | 44,558  |
| 92/93                 | 84      | 66,690  | 59                     | 12,116  | 94                | 52,642  |
| 91/92                 | 89      | 69,520  | 34                     | 7,124   | 82                | 55,518  |

V. ATHLETIC AND RECREATION AWARDS

| Endowed/Private Athletics |     |         | SFU Funded Athletics |         | Athletic Tuition |         | SFU Funded Rec. Awds. |         |
|---------------------------|-----|---------|----------------------|---------|------------------|---------|-----------------------|---------|
| # of Students             |     | Ttl. \$ | # of Students        | Ttl. \$ | # of Students    | Ttl. \$ | # of Students         | Ttl. \$ |
| 94/95                     | 171 | 79,645  | 56                   | 41,000  | 67               | 57,333  | 31                    | 15,600  |
| 93/94                     | 153 | 69,229  | 52                   | 35,700  | n/a              | n/a     | 31                    | 18,600  |
| 92/93                     | 143 | 65,660  | 33                   | 23,450  | n/a              | n/a     | 32                    | 19,200  |
| 91/92                     | 11  | 51,442  | 51                   | 30,800  | n/a              | n/a     | 33                    | 19,200  |

## SPCSAB - PRINCIPLES

These principles are to guide SPCSAB in the design and establishment of scholarships, fellowships, awards and bursaries for the support of students (graduate and undergraduate) at Simon Fraser University. The principles are to be followed in accord with the responsibilities of SPCSAB as defined by Senate and the University Act.

The following definitions will hold:

*undergraduate scholarship* - Funds provided on a competitive basis to undergraduate students with high academic standing.

*graduate fellowship/scholarship* - One semester support provided on a competitive basis to graduate students of high academic standing.

*award* - This term will be used to cover scholarship, fellowships, prizes and special purpose awards.

*bursary* - Funds made available on the basis of need to students with good academic standing.

There are two programs: undergraduate and graduate.

### Establishing the awards

1. Within the undergraduate and graduate programs, the level of academic standing should be consistent across all awards in a given program.
2. A broad spectrum of awards should always be available (entrance, continuing, special).
3. In accord with the BC Human Rights Act eligibility requirements should not be biased against any group of students but may, in very special circumstances, allow for special provisions where a specific group has been traditionally underrepresented.
4. Visa students should have the same access to awards as students who are Canadian citizens and Permanent Residents, except in the case of undergraduate entrance scholarships where awards are designated according to admission category.
5. Entrance scholarships should be designed to reflect the distribution of students over the various entrance categories of admission.
6. There should be a balance between the various types of awards in each program that ensures the financial needs of as many students as possible are met, that academic success is encouraged and recognised and that recruitment needs are supported. The distribution over these categories should be reviewed regularly.
7. Each program should have a special awards category to allow the Chairs of SUAAC and SGAAC to take advantage of opportunities to recruit students.

8. In developing criteria for endowed awards SPCSAB should work closely with the development office. Although the desires of donors should be followed as closely as possible, the terms for such awards must meet SPCSAB policies. Terms must be as unambiguous as possible and easily adjudicated.
9. SPCSAB should work closely with the development office and assist with fund-raising activities as the opportunities arise.

#### **Support levels**

1. There should always be the possibility of long-term support.
2. The programs (graduate and undergraduate) should be flexible enough to allow the number of awards of each type to vary from year to year in light of a changing university budget and external policies affecting students needs.
3. Awards and bursaries funded by the university should be of sufficient monetary value to meaningfully affect a student's financial situation. At the graduate level this is interpreted to mean that scholarships and fellowships should fully support a single student at a reasonable level for the duration of the award.

#### **Procedures**

1. Application procedures should be straightforward and easily complied with. Criteria should be clear and advertised as broadly as possible. They should not change dramatically from one competition to another without adequate notice.
2. The Chairs of SUAAC and SGAAC should annually provide to SPCSAB a budget plan for the allocation of awards sponsored by the university's operating budget. Those budgets should not exceed the anticipated funds available and should maintain sufficient flexibility to prevent cost overruns.
3. The adjudication (as per Senate regulations) for awards will be done respectively by SUAAC and SGAAC who will bring to SPCSAB as necessary recommended changes in programs.
4. The Chairs of SGAAC and SUAAC should report annually to SPCSAB. Such a report could be verbal.
5. Program and budget reviews should be ongoing and proposed changes should be made based on data available. The following data should be collected annually: (a) acceptance rate on entrance scholarships; (b) success rate of entrance scholarship holders; (c) nature of entrance scholarship holders: gender, school, GPA on entering and after each of first two semesters, program entered; (d) nature of continuing scholarship and fellowship holders: CGPA, gender, program; (e) distribution and size of bursaries, and level of bursary funding requested; (f) perception of the nature of the undergraduate entrance scholarships within the school system in BC, and their recruiting effectiveness; (g) annual reports on the category of "special" awards.

*Approved by SPCSAB, March 30th, 1995*