

For Information

**SIMON FRASER UNIVERSITY
OFFICE OF THE REGISTRAR
MEMORANDUM**

S.98-90

To: Senate
From: K.C. Bell, Secretary, Senate Policy Committee
on Scholarships, Awards and Bursaries
Re: SPCSAB Annual Report for Fiscal 1997 - 1998
Date: October 15, 1998

Attached is the final text of the Annual Report for the Senate Policy Committee on Scholarships, Awards and Bursaries for Fiscal 1997 - 1998.

In the absence of a meeting to adopt the Report, copies of the draft were submitted to the Committee members and, in the absence of dissenting opinions or comments, the Report has been accepted as approved.



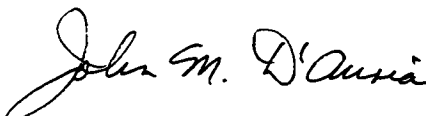
For Information

SPCSAB 98-7

REPORT TO SENATE

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

November, 1998


Dr. John D'Auria
Chair, SPCSAB

SENATE POLICY COMMITTEE ON SCHOLARSHIPS, AWARDS AND BURSARIES

Report to Senate, November 1998

This report covers all business activities of the Senate Committee on Scholarships, Awards and Bursaries (SPCSAB) for the three semesters 97-1, 97-3 and 98-1. Attached to this summary are the 1997-1998 year-end summary reports for all Bursary, Award and Undergraduate Scholarship programs for which the Committee is responsible. This includes government-funded student assistance programs.

Meetings:

The committee held meetings on

December 10, 1997
January 26, 1998
February 19, 1998

Committee Members:

John Pierce (Chair until August 31/97)
John D'Auria (Chair from September 15/97)
Kathy Heinrich (Past Chair)
Sheila Roberts
Neil Watson
Evelyn Palmer
Salman Manki
Mirjana Roksandic
Valerie Dunsterville
Ron Heath (Chair, SUAAC)
Bruce Clayman (Chair, SGAAC)
Charlotte French (Resource member, Secretary, until December 1997,)
K.C. Bell (Secretary from January 1998)

Business:

December 10, 1997

Members of the committee reported on the following business arising from the minutes of the previous meeting:

- The BC Government's matching funds program has been phased out except for endowed bursaries, for which it is scheduled to end in 1999.
- The BC Athlete Support Fund has been moved to the Ministry of Small Business, Tourism and Culture's Sports Services Branch and the funds are now distributed through the amateur sport foundation associated with the individual sport rather than through the Universities.
- The committee was urged to take an active role in promoting and raising funds for the Campus Community Bursary Endowment.

The 1996/97 Year-End Program Reports were received:

- Entrance Scholarships: For the 1998/99 Entrance Scholarship cycle information cards have been prepared and will be distributed in High Schools advising that all

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- BC 12 entering students with a 94% or higher admission average will be guaranteed a Summit Scholarship
- Open Scholarships: The increase in spending for Open Scholarships in the last three years is due to the change in the structure of Entrance Scholarships. Fewer Entrance Scholarships are renewable and students are moving into the Open Scholarship program.
- Government Loans: The Committee received a report on the work of the Roundtable on Post-Secondary Education which is lobbying the federal government for changes. The federal Ministry of Finance and Human Resources Development Canada is still working on terms of reference for the Canada Millennium Endowment Fund.
- Work Study Program: The committee will prepare and propose a motion reflecting their support for the program and for additional funding for the program.
- Part-time Student Assistance: There is a need to improve advertising of this program.
- Emergency Loans: There has been a decrease in use over the past few years and there are very few written off debts so the fund does not deplete.

January 26, 1998

The committee received for information:

- A chart showing the distribution of entrance scholarships by gender and scholarship
- A chart showing the number of students who were both registered and eligible to take up the second installment of their entrance scholarships in 98-1
- An ad hoc report showing the number of approved credentials for students registered in 98-1 to be used in calculating the funding for Deans' entrance scholarships

February 19, 1998

The committee received the 97/98 budget for information.

The following motions were approved:

- That for five years, as of April 1, 1998, the University will continue to adjust that portion of the scholarships, awards and bursaries budget allocated from the University's operating funds according to the existing formula based on tuition and enrolment. Further, during this period no change will be made to this adjustment as a result of increased income from the scholarships, awards and bursaries endowments.
- That the level of Graduate Fellowships be increased by \$150 from levels last set in 1995-96.

Budget

Acting on the unanimous recommendation of the Committee, President Jack Blaney agreed that "the University [would] continue to adjust that portion of the scholarships, awards and bursaries budget allocated from the University's operating funds according to the existing formula based on tuition and enrolment for five years, effective April 1, 1998. During this period, no change will be made to this adjustment as a result of increased income from the scholarships, awards and bursaries endowments."

A spreadsheet comparing scholarship, awards and bursary line items for fiscal 1996/97 to those for fiscal 1998/99 is attached as Appendix v).

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Appendices

Attached are year end reports for the various areas of the scholarships, awards and bursaries portfolio.

- i) Undergraduate Entrance Scholarships
- ii) Undergraduate Open Scholarships
- iii) Programs administered by Student Academic Resources, including
 - 1) In-Course Scholarships and Academic and Service Awards
 - 2) External Scholarships, Awards and Bursaries
 - 3) Bursary Programs
 - 4) Athletic and Recreation Awards
 - 5) Emergency Loan Program
 - 6) Government Student Loan Programs
 - 7) Work-Study Program
 - 8) Federal Special Opportunity Grants and Part-time Loans
- iv) Graduate Award Disbursements
- v) Budgets: Fiscal 1997 - 1998 compared to 1996 - 1997



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appendix i)

Memorandum

To: SPCSAB

From: Rick Smith, Director, Student Recruitment

Re: 1997/98 Entrance Scholarship Program

September 2, 1998

The attached report represents the 97/98 fiscal expenditures for the SFU Entrance Scholarship Program. The major entrance scholarship competition, which includes the Gordon M. Shrum, Dean's and National scholarships, attracted 506 applicants this year. A distribution report indicating the number of awards offered and accepted in each category is also included. Overall, of 471 scholarship offers 223 new scholars are expected to begin their studies at SFU in the 1998 Fall Semester.

We were very pleased this year to have the Scholar's Mentorship Program in full swing. Early in '97 this initiative was suggested by the Dean of Student Services who turned to a small group of exceptional scholarship students in an effort to provide mentorship to new entrance scholarship students. Now called the Mind Bank this group of scholars has been instrumental in developing strategies for the success of our new scholarship winners. In the upcoming year this initiative to promote academic success within the community of scholars will be expanded to include both new and continuing students. An in-depth research project is currently being developed which will endeavor to look more deeply at the attitudes and perceptions of all entrance scholarship students. This project hopes to identify the specific needs of SFU entrance scholarship students toward developing support programs to insure the future success of our scholarship students.

1997/98 Entrance Scholarship Expenditures

Program	GL Account Number	Semesters			97/98 Expenditures
		97-2	97-3	98-1	
B.C.					
OF	11-191131-7114				
	*11-191131-7114	\$3,750		\$3,750	
		\$3,750		\$3,750	\$7,500
Alumni	*11-191131-7129	\$3,125	\$9,375	\$12,500	\$25,000
Shrum	11-191131-7112	\$7,500	\$47,500	\$7,500	
	*11-191131-7115	\$37,500	\$79,375	\$115,375	
		\$45,000	\$126,875	\$122,875	\$294,750
Steel	11-191131-7112				
President's	11-191131-7116	\$14,318	\$27,800	\$15,720	\$57,838
Dean's misc old	11-191131-7117	\$6,250	\$5,000	\$2,500	
Dean's misc new	*11-191131-7117	\$6,000	\$3,000	\$2,250	
Dean's APSC	*11-191131-7139		\$3,500	\$1,750	
Dean's Arts	*11-191131-7108	\$1,750	\$27,000	\$22,750	
Dean's Bus	*11-191131-7108		\$3,500	\$3,500	
Dean's Educ			\$1,750	\$1,750	
Dean's Sci	*11-191131-7137	\$1,750	\$8,750	\$5,250	
		\$18,750	\$62,800	\$39,750	\$149,000
Chancellor's	11-191131-7118		\$4,000	\$1,000	\$5,000
B.C. Regional	*11-191131-7148		\$12,800	\$7,000	\$19,800
Summit	*11-191131-7149	\$1,750	\$203,800	\$165,000	\$370,550
Abe Unrau	11-191131-7119				
Jack Diamond	11-191131-7118			\$1,250	
	*11-191131-7118		\$23,500	\$8,750	
			\$23,800	\$10,000	\$33,500
Specht APSC	*23-419222-7112		\$1,750	\$1,750	\$3,500
Specht Sci	*23-419222-7137		\$8,000	\$5,250	\$13,250
National					
Shrum	11-191132-7115				
	*11-191132-7143		\$24,250	\$13,000	\$37,250
Jack Diamond	11-191132-7112				
	*11-191132-7148		\$12,750	\$3,500	
			\$12,750	\$3,500	\$16,250
Specht APSC	*23-419222-7112		\$8,000	\$2,250	\$10,250
Specht SCI	*23-419222-7137		\$11,800	\$4,000	\$15,800
Strand	11-191132-7115				
	*11-191132-7144		\$37,000	\$26,000	
			\$37,000	\$26,000	\$63,000
President's	11-191132-7115				
College					
Hamilton	11-191133-7115				
	*11-191133-7121	\$7,500	\$8,000	\$7,500	
		\$7,500	\$8,000	\$7,500	\$23,000
Deans Sci	*11-191133-7137		\$1,750	\$1,750	\$3,500
Dean Arts	*11-191133-7108	\$1,750	\$5,250	\$7,000	\$14,000
Dean APSC	*11-191133-7139	\$1,750	\$5,250	\$3,500	\$10,500
Dean Business	*11-191133-7108	\$1,750	\$1,750		\$3,500
President's	11-191133-7116				
Cople	11-191133-7116	\$1,750	\$3,500		
	*11-191133-7141	\$3,500	\$5,750	\$10,500	
		\$5,250	\$9,250	\$10,500	\$25,000
International					
President's	11-191134-7116				
Shrum	11-191134-7102	\$8,000	\$16,000	\$16,848	\$36,848
Tuition	11-191134-7103	\$3,488	\$9,000	\$9,000	\$21,488
Total Expenditures		\$110,158	\$619,384	\$491,702	\$1,221,244

1998 Entrance Scholarship Awards Statistics

Scholarship	Total Offers	Offers Outstanding	Accepted	Deferred	Declined
Shrum International Entrance Scholarship	3		3		
Gordon Shrum National Scholarship	4		4		
Kenneth Strand National Scholarship	13		6		7
Jack Diamond National Scholarship	9		7		2
National Specht in Applied Science					
National Specht in Science					
Hamilton College Transfer Scholarship	1		1		
College Deans Scholarship in Arts	3		2		1
College Deans Scholarship in Applied Science	1		1		
College Deans Scholarship in Business					
College Deans Scholarship in Science	1		1		
Ken Caple College Transfer Scholarship	10		9		1
Simon Fraser Entrance Scholarship	1		1		
SFU Alumni Leadership Scholarship	1				1
Gordon M. Shrum Scholarship	25		16		9
Deans Scholarship in Applied Science	7		5		2
Deans Scholarship in Arts	20		16		4
Deans Scholarship in Business Administration	4		2		2
Deans Scholarship in Education	2		1	1	
Deans Scholarship in Science	8		5		3
Jack Diamond Leadership Scholarship	8		4		4
Summit Entrance Scholarship	282		80	2	200
Regional Summit Entrance Scholarship	15		9		6
Tadeusz Specht Scholarship in Applied Science	11		4		7
Tadeusz Specht Scholarship in Science	31		17		14
Jack Diamond Scholarship	11		9		2
Grand Total	471	0	203	3	265

(No. of students accepted but did not attend = 24)

**SIMON FRASER UNIVERSITY
OFFICE OF THE REGISTRAR
MEMORANDUM**

appendix ii)

**To: John D'Auria, Chair
SPCSAB**

**From: K.C. Bell, Secretary
SPCSAB**

Re: Open Scholarship Statistics, fiscal 1997-1998

Date: September 16, 1998

For the fiscal year 1997-1998, Open Scholarships continued to be awarded at a CGPA level of 3.70. This was consistent with practice in fiscal 1996-1997.

A total of 845 Scholarships were awarded over the three semesters 97-2, 97-3 and 98-1. Detailed figures are set out in the chart below and cover the number of awards made in each semester, the total amount awarded by the Open Scholarship program each semester, the average size of the awards per semester, the CGPA requirement and the per credit cost of the Scholarship.

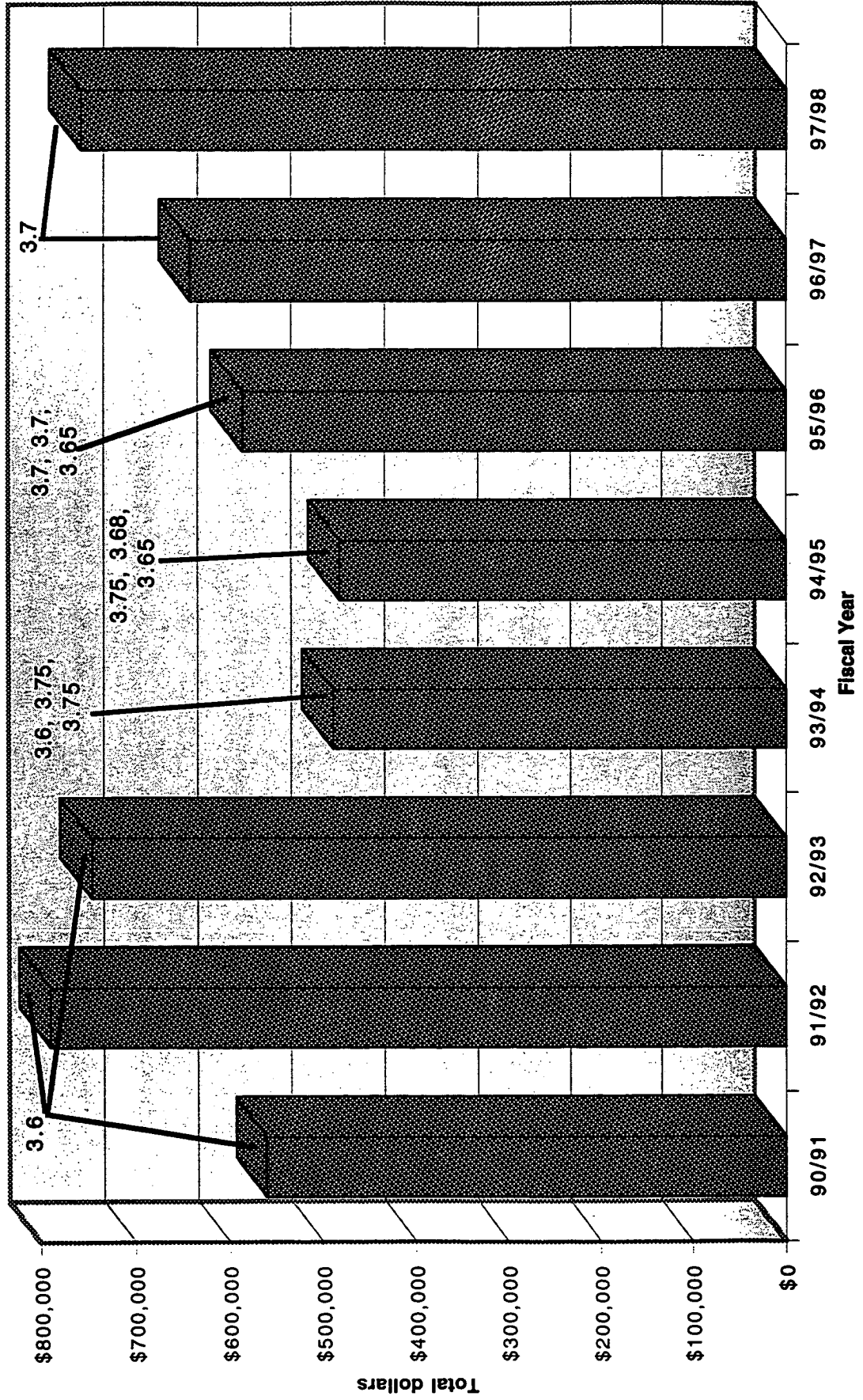
Sem	#	Awards	Total Awarded	Avg Award	CGPA	Per credit
972	215	\$166,474	\$774	3.7	\$77	
973	315	\$296,219	\$939	3.7	\$77	
981	315	\$293,755	\$933	3.7	\$77	
97/98	845	\$756,448				

Due to the University's continued high admission requirements, which continue to produce a highly successful student population, and to the revised Entrance Scholarship program, which moves most Entrance Scholarship winners on to the Open after two semesters, the cost of the Open Scholarship continues to increase by around \$100,000 each year.

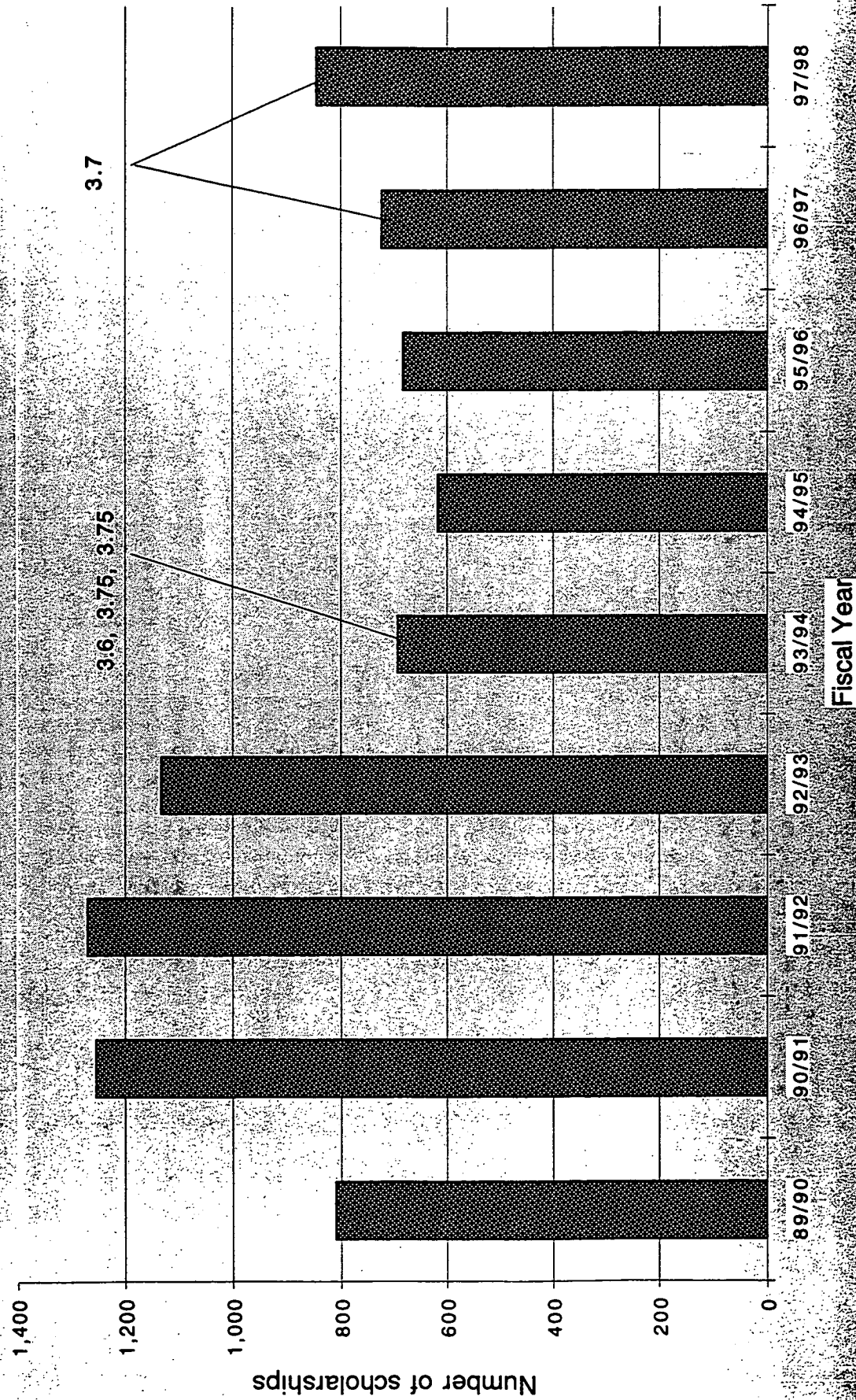
I have attached a chart showing the pattern of disbursements for the Open Scholarships since fiscal 1990-1991 for your information. This chart shows the total amount disbursed for the Opens each fiscal year, and indicates for each year the CGPA

Also included is a chart showing the number of Open Scholarships issued per fiscal year since fiscal 1989 - 1990.

Open Scholarship Disbursements by Year



Number of Open Scholarships by Fiscal Year





Simon Fraser University

Director of Student Academic Resources

tel 291-4275; fax 291-4722; email charlotte_french@sfu.ca

Memorandum

To: Ron Heath
Dean of Student Services/Registrar

Subject: 1997/98 Financial Assistance
Year End Reports

From: Charlotte French
Director, Student Academic Resources

Date: September 11, 1998

Attached please find the year end summary reports for programs administered by Financial Assistance. The following reports are included:

- 1) Scholarships for In-Course Undergraduates and Academic And Service Awards
- 2) External Scholarships, Awards and Bursaries
- 3) Bursary Programs
- 4) Athletic and Recreation Awards
- 5) Emergency Loan Program
- 6) Government Student Loan Programs
- 7) Work-Study Program
- 8) Federal Special Opportunity Grants and Part-time Loans

Also included in this package is an appendix of tables recording the disbursement figures for these programs from the 1992/93 award year to the 1997/98 award year.

Please note that all reports give data based on a May 1 to April 30 academic year. Therefore, the figures reported will not necessarily balance with statistics for the SFU fiscal year, April 1 to March 31, or with the government program years of August 1 to July 31.

c. J. D'Auria, Chair SPCSAB
KC Bell, Secretary SPCSAB



**Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
Scholarships for In-Course Undergraduate Students
and
Academic and Service Awards for the University Community 1997/98**

Scholarships for In-Course Undergraduate Students

Scholarships funded through endowments and annual gifts from donors are available to continuing undergraduate 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 by the second week of classes of the semester the scholarship is being offered. Endowed and Annual Scholarships are adjudicated directly by the Senate Undergraduate Awards Adjudication Committee (SUAAC). Information about these scholarships is published in the University Calendar and listed in a search-able web accessed database. A few of these scholarships are selected by nomination of the academic department and confirmed by the SUAAC.

Endowed and Annual Scholarships disbursed to students in 1997/98 increased by a total of \$7,378 and five additional scholarship disbursements over 1996/97.

Academic and Service Awards for the University Community

Academic and Service Awards are given to students, faculty or staff for outstanding performance in an academic area or outstanding service to the University or the community at large. These awards include the Terry Fox Gold Medal, the BC Sugar Achievement Award, the C.D. Nelson Award and many others. Academic and Service Awards reported in the table below are funded through donor based endowments and annual gifts or by University operating dollars. Donor funded awards have had a small increase in the last year.

There has been no increase to the University funded awards budget for over six years. The increase in the number of SFU funded awards disbursed primarily reflects a decision by the School for Contemporary Arts to award more awards of a smaller value to their students from the dollars allotted to their awards program.

MERIT BASED AWARDS

	Endowed/Annual		Schs.	Endowed/Annual Awards		SFU Funded Awards	
	# of Students	Ttl. \$		# of Students	Ttl. \$	# of Students	Ttl. \$
97/98	184	138,503		68	30,670	113	45,009
96/97	179	131,125		66	27,161	87	45,900
95/96	169	114,870		59	24,720	87	46,307
94/95	165	117,290		52	12,330	84	44,250



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Report to the Senate Policy Committee on Scholarships, Awards and Bursaries

External Scholarships, Awards and Bursaries

Each year Simon Fraser University students receive scholarships, awards and bursaries which are administered by organizations and corporations external to the University. These awards had not been tracked prior to 1997/98. In an attempt to better recognize the organizations that are supporting our students and the students who are receiving these awards, the Office of University Development and Financial Assistance developed new procedures to capture this information. The table below is the first recording of the scholarships, awards and bursaries that SFU students have received from organizations external to the University who request the University to distribute the funds.

UNDERGRADUATE EXTERNAL

External Scholarships		External Awards		External Bursaries	
Ttl # of \$Scholarships	Ttl. \$	Ttl # of Awds	Ttl. \$	Ttl # Bursaries	Ttl.
118	109,562	36	37,008	71	48,369

GRADUATE EXTERNAL

External Scholarships		External Awards		External Bursaries	
Ttl # of \$Scholarships	Ttl. \$	Ttl # of Awds	Ttl. \$	Ttl # Bursaries	Ttl.
4	4,900	0	0	9	21,768

submitted by C. French, September 9, 1998



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

Bursary Program 1997-98

Bursaries are awarded on the basis of financial need and satisfactory academic performance to full-time undergraduate and graduate students*. Bursaries are funded through endowments and annual gifts from donors as well as through University operating funds. To be considered for a bursary students must apply to Financial Assistance by the end of the second week of classes of each semester. Bursaries are adjudicated by Financial Assistance on behalf of the Senate Undergraduate Awards Adjudication Committee. Information about the bursary programs is published in the University Calendar and listed in a search-able web accessed database.

In the 1997/98 award year (May 1997 - April 1998) Financial Assistance received 2558 bursary applications with a total calculated financial need of \$1,296,738. This represents an increase of 480 applications (23% increase) and an increased financial need of \$228,399 (21% increase) from 1996/97. In 1997/98 \$18,564 more dollars were awarded through all bursary programs than in 1996/97, this represents a 2% increase.

Below and attached are three tables comparing changes in the Bursary program over time. The first two tables below compare disbursements for all Simon Fraser University bursary programs from 1993/94 to 1997/98.

The third table below records the bursary dollars awarded to international students as work-study funds. A small program was established to assist international students in financial need who have difficulty accepting grant funding. These students must meet the same financial need requirements as the other bursary recipients and work on projects organized through the Centre for International and Exchange Student Services. The increase in dollars earned by the students in this program reflects the financial need of the students involved and an increase in the hours required for the projects on which they are working.

*Undergraduate students are considered full-time if they are registered in 9 or more semester hours of normally graded courses. Graduate students must be registered in an approved full-time program.

BURSARIES

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. \$
97/98	777	420,692	116	116,833	12	3,142	436	355,159
96/97	623	411,120	112	115,015	12	1,935	417	347,342
95/96	608	381,443	176	145,325	30	6,540	429	316,235
94/95	535	289,518	152	117,014	65	12,695	477	329,135

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. \$
97/98	61	45,590	25	17,494	2	553	8	7,002
96/97	43	48,018	29	24,985	10	3,267	5	4,634
95/96	37	36,825	54	44,700	19	4,727	6	9,400
94/95	58	41,225	53	43,600	23	6,005	9	4,650

WORK STUDY PROGRAM

SFU Funded Work Study - Undergraduate/Graduate

Number of Students		Total \$ Awarded
97/98	7	9,750
96/97	4	4,000
95/96	12	9,716
94/95*	6	2,817

*Program was restricted to limited use for international students.

submitted by C. French, September 9, 1998



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

Athletic and Recreation Awards 1997/98

Athletic Awards

Athletic awards are available to students who are members of varsity teams at Simon Fraser University and are awarded primarily on the basis of Athletic merit, though some awards have an academic achievement component. Athletic awards are funded through endowed and annual donor donations as well as university operating funds. The table below shows a large increase in the number of and total dollars disbursed through donor based Athletic awards in 1997/98. This increase is due to the addition of some new awards, better use of existing awards and, primarily, the transfer of funds from the Athletic Operating Endowment to an Athletic Award Endowment. In 1996 a change was made in the procedures for administration of the provincial BC Athletic Assistance Program. The funds were taken away from the educational institutions and given to the amateur sports organizations to administer. This meant that some students who had previously received provincial assistance would no longer receive funding. In order to maintain expected levels of assistance for these students, the Department of Athletics moved funds from their operating endowment to an award endowment.

Athletic Tuition awards are made available to student athletes competing on varsity teams on the basis of athletic merit. Funds for these awards are raised by the individual teams to support their own athletes. The decrease in number of awards and total dollars disbursed through this program in 1997/98 is in part a reflection of the increased value of disbursement from the Athletic Awards Endowment. Financial Assistance began tracking these awards in January 1994.

University funding for Athletic awards has remained unchanged for over six years at \$39,000. The department of Athletics has disbursed all of its allowable funds this year.

B.C. Athletic Assistance Program

Starting in the 1996-97 award year external support from the BC Athletes Assistance Program was also disbursed through Financial Assistance. In 1996-97, Simon Fraser student athletes received 212 disbursements totaling \$136,156 from this program. In this past year, 1997-98, SFU athletes received 138 disbursements totaling \$90,112, a decrease of 74 disbursements and \$46,044.

Recreation Awards

Simon Fraser University supports a number of awards for students who actively support the University's Recreation Program. The awards are given in recognition of individual participation, leadership and volunteerism in various aspects of the Recreation Department. University funding for Recreation Awards has remained unchanged for over six years and was fully disbursed in 1997/98.

ATHLETIC AND RECREATION AWARDS

Endowed/Annual Athletics			SFU Funded Athletics		Athletic Tuition		SFU Funded Rec. Awds.	
# of Students	Ttl. \$		# of Students	Ttl. \$	# of Students	Ttl. \$	# of Students	Ttl. \$
97/98	303	188,851	55	39,000	103	77,696	32	19,200
96/97	205	109,802	50	38,800	134	90,038	32	19,200
95/96	153	90,895	50	39,000	63	60,209	35	21,000
94/95	171	79,645	56	41,000	67	57,333	31	15,600

*Years indicated reflect statistics for the academic year starting May 1 and ending April 30.



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

Emergency Loan Program 1997/98

Short term (60 day), interest-free loans are available to students who require interim emergency funding while awaiting funds from other sources. To receive an emergency loan a student must demonstrate a guaranteed source of repayment, for example an assessed student loan or confirmation of part-time employment. The maximum value of an Emergency Loan disbursement is \$500.

The Emergency Loan program has shown a significant decrease in disbursements, both in total dollars and numbers of loans, over the past six years (see six year data in Appendix table 2). However, there has been very little change in the number of loans and the total dollars disbursed in the last two years which may indicate that program use has stabilized. The primary reason for decreased use and no change between the 1996/97 and 1997/98 years is probably due to improvements in the delivery of government student assistance by the Student Services Branch (SSB) of the B.C. Ministry of Advance Education, Training and Technology. In the last few years the SSB have improved the efficiency of the loan adjudication process and stabilized their computer systems. This means that student loan applications have been processed in a more timely manner allowing most students to receive their funding in time for the start of classes and requiring less use of bridge funding programs at the educational institutions. Because most semesters start after the first day of a month and the banks are not allowed to disburse government assistance funds until the first day of classes, making rent payments on time for a new semester is the most common reason for students funded by government assistance to access the Emergency Loan Program. Students who hold part-time jobs are most likely to access the program in mid-semester to cover rent or food if scheduled work hours have not been as high as expected.

The adjudication criteria for this program were tightened significantly four years ago to deal with the increasing number and value of loans that were being sent to collection. With the criteria outlined above, the number and value of loans sent to collection have decreased to a nominal figure. In 1997/98 two loans totaling \$1100 were sent to collections.

Efforts have been made in the past year to make the University community more aware of the availability of this program. There is concern in Financial Assistance that more students need this service than are accessing it.

EMERGENCY LOANS

Undergraduate/Graduate

Number of Loans		Total \$ Awarded
97/98*	345	157,825
96/97	352	160,716
95/96	527	265,472
94/95	674	317,329

*Years indicated reflect statistics for the academic year starting May 1 and ending April 30.

submitted by C. French, September 9, 1998



Report to the Senate Policy Committee on Scholarships, Awards and Bursaries

Government Student Loans 1997/98

Domestic Canadian students, graduate and undergraduate, may apply through their home province to receive funding assistance from the federal, provincial and territorial governments. Government assistance is a primary source of funding for 30% of Canadian post-secondary students. The goal of the programs is to promote accessibility of post-secondary education among academically qualified students who do not have the personal or family resources to meet the costs of education.

At Simon Fraser University approximately 25% of our full-time graduate and undergraduate students receive their primary funding through government student assistance.

Government funding assistance varies from province to province with regard to the mix of student loan versus grant and the value of possible disbursements. Nation wide there has been a substantial decrease in the proportion of student assistance that is awarded as grant and a subsequent increase in the portion that is disbursed as a loan. The outcome of this change has been dramatic increases in the total debt with which these students are graduating from their post-secondary programs. The average debt of students in their fourth year of studies receiving BC Student Assistance in 1996-97 was \$19,000. The BC Ministry of Advanced Education, Training and Technology estimates that the average debt of the same group of students in 1999-2000 will be \$25,000. This figure represents students who are in the process of completing an undergraduate program.

Accumulation of high debt loads and the fear of accumulating high debt loads can and does affect a student's decision to remain in school and affects a student's ability to focus on their studies. Many students who receive the maximum allowed levels of assistance through government programs still have a financial need that is not met. Students are not allowed to earn through work, scholarships, bursaries or any other sources more than \$600 during a loan period without there being an equivalent impact to their student loan award.

The table below reports the number of students and the total dollars of government student assistance received by SFU students during the 1997/98 award year. The third column labeled "Out of Province Loans" reports students attending SFU who are receiving funding through provinces other than British Columbia or who are receiving loan and grant assistance through the United States.

Due to changes in both the data collection and the data reporting methods, this year's statistics are a more accurate reflection of individual student loan recipients and the dollars they received than has been reported in the past. Next year's report will include revised historical numbers using the new reporting procedure.

GOVERNMENT PROGRAMS

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. \$
97/98	6,415	19,508,371	5,959	12,599,910	468	1,258,390
96/97	7,278	19,391,653	6,088	11,460,931	817	1,320,377
95/96	6,841	19,169,338	5,673	8,918,319	721	1,375,693
94/95	5,806	15,740,297	4,727	7,110,784	585	1,244,123

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

Work-Study Program 1997-98

The Work-Study program is part of the BC Student Assistance Program. Work-Study is targeted to those graduate and undergraduate students who have received maximum funding through Canada Student Loan and BC Student Loan and Grant and who have an assessed financial need beyond the maximum. The purpose of the Work-Study program is to supplement the assistance these students are already receiving. Work-Study funding is the only supplemental funding which will not decrease a student's government loan disbursement. Only BC residents are eligible for the program.

Over the past three years Simon Fraser University's allotment of funds has been decreasing due to transition to a new funding formula and more eligible post-secondary institutions receiving a portion of the total. In the 1995-96 program year Simon Fraser University was allotted \$460,000; our budget for 1997-98 year was \$444,000; the budget for 1998-99 is \$420,000 and will continue to decrease over the coming years. Please note that although the program and budget year for Work-Study is from August 1 to July 31 of the next calendar year, this report is based more closely on the SFU fiscal year reporting statistics from May 1 to April 30 of the next calendar year. Consequently the budget figures noted above and the award figures noted below will not balance.

Also of note is that Simon Fraser University is the only post-secondary institution in British Columbia that does not supplement the government funding for the Work-Study program. Other institutions supplement the funds in one or a combination of the following two ways; by budgeting additional funds from institutional money to add to the number of awards given and allowing students from other provinces to participate or by adding funds to increase the hourly pay rate. The maximum fundable pay rate through the government is \$8.75 per hour.

A total of 1701 notices of eligibility were sent to students prior to the start of the three semesters. This number does not reflect total eligibility as some students' loan assessment from the government would not have been complete at the time candidates must be identified.

The table below shows a dramatic increase in the number of students hired through the Work-Study program and the total dollars awarded during the 1997-98 program year. This is partially due to budgeting factors in two different funding years. In the funding year 1996-97 funds for the fall and spring semesters were budgeted with too much caution which left more than a usual amount of money available to be awarded in the 1997 summer semester. During the 1997-98 funding year, a more generous budget plan was adopted for the fall and spring semesters. In addition, the BC government gave us a one time additional allocation of funds that had not been spent by another institution. The effect of these additional funds will also be reflected in next year's report as they will be disbursed in part during the summer 1998 semester.

For the 1998-99 academic year, the Work-Study program will be moving to a web based delivery method. All project submissions and job postings will be handled through the web site and e-mail. These changes should improve service, availability of the Program and streamline administration.

Students Aiding Students

A portion of the Work-Study funding from the government, up to fifteen percent, must be allocated for a program called Students Aiding Students. This program provides funding for full-time students who wish to assist special needs students on campus. The majority of students hired through this program take class notes on behalf of special needs students. Others assist students to access materials and services in the small library. In the 1997/98 year 140 students were hired through this program and earned a total of \$64,611.

Government Funded Work Study - Undergraduate

Number of Students		Total \$ Awarded	Total \$ Spent
97/98	612	668,121	542,932
96/97	481	420,211	353,804
95/96	561	501,661	438,850
94/95	499	429,672	361,879

Government Funded Work Study - Graduate

Number of Students		Total \$ Awarded	Total \$ Spent
97/98	12	15,740	11,350
96/97	4	3,537	3,436
5/96	12	14,296	13,001
94/95	16	21,205	19,911

submitted by Charlotte French, September 9, 1998



**Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
Federal Special Opportunity Grants and Part-time Loans 1997-98**

Part-time Studies

Prior to 1996-97, financial assistance for part time students in British Columbia was available from a grant program financed by the provincial government and administered by the educational institutions. A poorly used federal loan program was also available. In August 1996 the provincial program was replaced by a federal program that combined the existing loan program and a new grant program. The part-time loan program requires students to begin making interest payments while they are still in studies. Most students are unable to make the payments required so do not make use of the part-time loan program. During 1997-98 24 students received \$25,189 in part-time student loans.

The federal Special Opportunity Grant for high need part-time students has been very successful this year. The criteria for awarding this grant are improved over the previous provincial program allowing more students to be eligible and more real need to be met. This year 70 students with a total calculated need of \$72,394 were awarded \$65,365, an increase of 18 students and \$16,376 in awards.

PART-TIME SPECIAL OPPORTUNITY GRANT

Number of Awards		Total \$ Awarded
97/98*	70	65,365
96/97*	52	48,989
95/96	61	45,480
94/95	65	39,285

*indicates years funded by federal Special Opportunity Grants. Previous years funded by BC Part-time Student Assistance.

Female Doctoral Student Grant

Two years ago the federal government introduced a grant program to support female doctoral students in specific programs. The intent of the program is to encourage female students to continue studies to the Doctoral level in fields in which females are under represented based on national statistics.

There has been a limited take-up of this program nation wide. At Simon Fraser University one student received a grant for \$1,769 in the 1997/98 award year.

Students with Permanent Disabilities

A Special Opportunities Grant is also available to assist students with permanent disabilities to purchase required equipment to support their studies. In its first year, 1996/97, this program had a relatively low take-up rate in British Columbia due to existing provincial programs most notably the equipment bank. In 1997/98, the program procedures were improved and better integrated with existing programs. Unfortunately, recipient data is not available at this time. However, the Ministry advises that the take up rate has improved.

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. \$
97/98	777	420,692	116	116,833	12	3,142	436	355,159
96/97	623	411,120	112	115,015	12	1,935	417	347,342
95/96	608	381,443	176	145,325	30	6,540	429	316,235
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

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. \$
97/98	61	45,590	25	17,494	2	553	8	7,002
96/97	43	48,018	29	24,985	10	3,267	5	4,634
95/96	37	36,825	54	44,700	19	4,727	6	9,400
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

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II. EMERGENCY LOANS

Undergraduate/Graduate

Number of Loans		Total \$ Awarded
97/98	345	157,825
96/97	352	160,716
95/96	527	265,472
94/95	674	317,329
93/94	887	422,278
92/93	1,384	723,676

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. \$
97/98	4,930	15,299,306	5,251	10,897,367	488	1,418,772
96/97	7,278	19,391,653	6,088	11,460,931	817	1,320,377
95/96	6,841	19,169,338	5,673	8,918,319	721	1,375,693
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

2. WORK STUDY PROGRAM (International)

SFU Funded Work Study - Undergraduate/Graduate

	Number of Students	Total \$ Awarded
97/98	7	9,750
96/97	4	4,000
95/96	12	9,716
94/95*	6	2,817
93/94*	8	6,222
92/93	38	19,315

*Program was restricted to limited use for international students.

Government Funded Work Study - Undergraduate

	Number of Students	Total \$ Awarded	Total \$ Spent
97/98	612	668,121	542,932
96/97	481	420,211	353,804
95/96	561	506,661	438,850
94/95	499	429,672	361,879
93/94	527	369,454	
92/93	550	445,228	

Government Funded Work Study - Graduate

	Number of Students	Total \$ Awarded	Total \$ Spent
97/98	12	15,740	11,350
96/97	4	3,537	3,436
95/96	12	14,296	13,001
94/95	16	21,205	19,911
93/94	31	25,680	
92/93	41	34,851	

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3. PART-TIME STUDENT ASSISTANCE PROGRAM

Number of Awards		Total \$ Awarded
97/98	70	65,365
96/97	52	48,989
95/96	61	45,480
94/95	65	39,285
93/94	53	31,225
92/93	45	26,860

IV. MERIT BASED AWARDS

	Endowed/Private Schs.		Endowed/Private Awards		SFU Funded Awards	
	# of Students	Ttl. \$	# of Students	Ttl. \$	# of Students	Ttl. \$
97/98	184	138,503	68	30,670	113	45,009
96/97	179	131,125	66	27,161	87	45,900
95/96	169	114,870	59	24,720	87	46,307
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

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. \$
97/98	303	188,851	55	39,000	103	77,696	32	19,200
96/97	205	109,802	50	38,800	134	90,038	32	19,200
95/96	153	90,895	50	39,000	63	60,209	35	21,000
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

SIMON FRASER UNIVERSITY

DEAN OF GRADUATE STUDIES

appendix iv)

Memorandum

TO: K. C. Bell
Assistant to the Registrar

FROM: B.P. Clayman
Vice-President, Research and
Dean of Graduate Studies

SUBJECT: Annual Report: SPCSAB

DATE: July 30, 1998

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 1997-98 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$1,965,100
President's Ph.D. Research Stipend	\$339,500
C.D. Nelson Entrance	\$209,633
Special Entrance	<u>\$42,700</u>
	\$2,556,933



Enclosure

GRADUATE AWARDS BUDGET IN FY 1997-98

	AWARD NAME	NUMBER	VALUE	TOTAL
Sem 97-2 Actual	GF Master's	51	\$4,250	\$216,750
	GF Ph.D.	79	\$4,850	\$383,150
	Stipend	32	\$4,850	\$155,200
	Nelson	11		\$62,337
	Entrance	0		\$0
	SUBTOTAL			\$817,437
 SEM 97-3 Actual	GF Master's	114	\$4,250	\$484,500
	GF PhD	72	\$4,850	\$349,200
	Stipend	18	\$4,850	\$87,300
	Nelson	13	\$5,666	\$72,326
	Entrance	11		\$42,700
	SUBTOTAL			\$1,036,026
 Sem 98-1 Actual	GF Master's	68	\$4,250	\$289,000
	GF PhD	50	\$4,850	\$242,500
	Stipend	20	\$4,850	\$97,000
	Nelson	14	\$5,666	\$74,970
	Entrance			\$0
	SUBTOTAL			\$703,470
 TOTAL EXPENDITURES				\$2,556,933
 FY 96/97 Carryover				\$188,662
Incr to 97/98 Grad Schol				\$47,309
Base Budget (97/98 Figure)				\$2,424,041
 TOTAL AVAILABLE FOR AWARDS				\$2,612,703
 BALANCE AVAILABLE at March 31, 1998				\$55,770

Account	Purpose	1996-1997 Budgeted	1996-1997 Expenditures	1997-1998 Budgeted	1997-1998 Expenditures
1. GRADUATE					
	Bursaries				
11-91112-7131	a) Open	\$47,000	\$48,018	\$47,000	\$45,590
11-91112-7136	b) Daycare	\$3,500	\$2,711	\$3,500	\$181
11-91111-7141	Emergency Loans (non-recovery)	\$3,300		\$3,300	\$3,555
	Graduate Subtotal:	\$53,800	\$50,729	\$53,800	\$49,326
2. UNDERGRADUATE					
11-91123-7112	Open Scholarships	\$550,000	\$644,728	\$550,000	\$756,448
11-91123-6391	General Contingency	\$241,591			
11-91123-6397	Surplus Carryforward	\$88,942		\$242,087	
11-91123-6398	Open Contingency (96/97)	\$30,000		\$88,942	
11-91123-8498	Designated Contingency (Dean's Spl)			\$15,740	
	Opens/Contingency Totals:	\$880,533	\$644,728	\$896,769	\$756,448
	Entrance Scholarships				
11-91131-7114	a) BC Secondary	\$25,000	\$22,500	\$25,000	\$7,500
11-91131-7129	i) SFU Entrance	\$20,000	\$22,875	\$20,000	\$25,000
11-91131-7115	ii) SFU Alumni	\$125,000	\$261,500	\$125,000	\$294,750
11-91131-7116	iii) Shrum (BC)	\$225,000	\$140,000	\$225,000	\$57,536
11-91131-7119	iv) President's	\$45,000	\$25,000	\$45,000	\$5,000
11-91131-7148	v) Chancellor's	\$30,000	\$50,500	\$30,000	\$19,500
11-91131-7149	vi) Regional Summit Scholarships	\$250,000	\$339,250	\$250,000	\$370,250
11-91131-7117	vii) Summit Scholarships	\$150,000	\$105,250	\$150,000	\$108,000
11-91131-7118	ix) Dean's Entrance Scholarships				
	x) Jack Diamond (BC)		\$37,500		\$33,500

Account	Purpose	1996-1997		1997-1998	
		Budgeted	Expenditures	Budgeted	Expenditures
b) National					
11-91132-7143	i) Shrum (National)	\$35,000	\$32,500	\$35,000	\$37,250
11-91132-7144	ii) Strand	\$10,000	\$28,000	\$10,000	\$63,000
11-91132-7146	iii) Jack Diamond	\$25,000	\$10,000	\$25,000	\$16,250
	c) College Transfer				
11-91133-7121	i) Hamilton	\$15,000	\$18,000	\$15,000	\$23,000
11-91133-7141	ii) Caple	\$45,000	\$52,250	\$45,000	\$25,000
	iii) College Deans		\$25,500		\$31,500
	d) International				
11-91134-7116	i) President's International	\$0 x		\$0	
11-91134-7102	ii) Shrum International	\$25,000	\$25,000	\$25,000	\$36,848
11-91134-7103	Shrum international tuition component	\$20,000	\$12,705	\$20,000	\$21,483
11-91131-7149	f) Travel Adjustments	\$50,000		\$50,000	
11-91131-7115	g) Commitments-Prior Winners	\$103,250	\$5,700	\$103,250	
	Entrance Subtotal:	\$1,198,250	\$1,214,030	\$1,198,250	\$1,175,367
	Bursaries				
11-91121-7131	a) Open	\$412,491	\$411,120	\$417,533	\$420,692
11-91121-7136	b) Daycare	\$16,000	\$1,935	\$16,000	\$3,142
	Bursaries Subtotal:	\$428,491	\$413,055	\$433,533	\$423,834
	Awards				
11-91122-7163		\$107,000	\$110,700	\$107,670	\$104,709
11-91124-5281	Work Study (SFU funded)	\$24,000	\$4,805	\$24,000	\$18,915
11-91111-7141	Bridge Loans (non-recovery)	\$12,150	(\$500)	\$12,150	\$0
	Undergraduate Subtotal:	\$2,650,424	\$2,386,818	\$2,672,372	\$2,479,273

Account	Purpose	1996-1997 Budgeted	1996-1997 Expenditures	1997-1998 Budgeted	1997-1998 Expenditures
3. INTERNATIONAL					
	Subtotal: Grad and U'grad	\$2,704,224	\$2,437,547	\$2,726,172	\$2,528,599
	Graduate Bursaries				
11-91141-7131	a) Open	\$42,300	\$24,985	\$42,300	\$24,806
11-91141-7136	b) Daycare	\$2,000	\$556	\$2,000	\$1,628
	Grad Bursaries Subtotal:	\$44,300	\$25,541	\$44,300	\$26,434
	Undergraduate Bursaries				
11-91142-7132	a) Open	\$100,600	\$115,284	\$100,600	\$116,833
11-91142-7136	b) Daycare	\$5,000	\$0	\$5,000	\$0
	c) Workstudy (SFU funded)	\$0	\$0	\$0	\$0
	U'grad Bursaries Subtotal:	\$105,600	\$115,284	\$105,600	\$116,833
	International Subtotal:	\$149,900	\$115,284	\$149,900	\$143,267
4. SPECIAL PURPOSE a) Scholarship Contingencies					
13-875627-8499	Total	\$0	\$3,721	\$0	\$12,856
	TOTAL:	\$2,854,124	\$2,556,552	\$2,876,072	\$2,684,722

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