

To: Senate

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

Re: Annual Report, Fiscal 1998 - 1999

Date: November 18, 1999

I am pleased to submit to you the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for fiscal 1998-1999.

Overview

The Senate Policy Committee on Scholarships, Awards and Bursaries is the committee charged by Senate with setting policy for the administration of student scholarships and other forms of financial aid at SFU. Two other committees, SUAAC (undergraduate awards) and SGAAC (graduate awards), adjudicate financial awards to students where adjudication is needed.

The number of applications for financial aid climbs each year; in fiscal 1998-1999, SFU received approximately 2600 applications for bursaries, each applicant requesting consideration for 10 or more awards, and a similar number of scholarship applications. Applications are reviewed and vetted by staff in Student Services. In the case of scholarships and other awards, final decisions are then made by the adjudication committees in meetings held each semester.

Although the University continues to benefit from a growing number of privately funded scholarships, awards and bursaries, the bulk of these awards are funded by the University as a percentage of fee and tuition revenues. When revenues increase as a result of increases in tuition, enrollments, or course loads, so does the budget for financial aid. The final allocation of these funds is indicated in the attached report. It is worth noting that a corollary of the four-year freeze on tuition has been

to "freeze" one of the means by which the financial aid budget is increased.

In recent years, there has been increased recognition about the growing debt load that students incur during their university years. It is currently estimated that fourth-year undergraduate students receiving BC Student Assistance have an average government loan debt of \$19,000. The new Canada Millennium scholarships have been integrated with the existing government student assistance packages and may help to decrease some students' total debt.

John M. Luke

SENATE POLICY COMMITTEE ON SCHOLARSHIPS, AWARDS AND BURSARIES

Report to Senate, November 1999

This report covers all business activities of the Senate Committee on Scholarships, Awards and Bursaries (SPCSAB) for the three semesters 98-2, 98-3 and 99-1. Attached to this summary are the 1998-1999 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

June 15, 1998
November 27, 1998
February 26, 1999

Committee Members:

John D'Auria (Chair)
Sheila Roberts
Neil Watson
Evelyn Palmer
Janet Mou
Margo Guertin
Valerie Dunsterville
Ron Heath (Chair, SUAAC)
Bruce Clayman (Chair, SGAAC)
Charlotte French (Resource member)
K.C. Bell (Secretary)

Business:

June 15, 1998

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

- President Jack Blaney confirmed that scholarships, awards and bursaries budgets would not be reduced during the next five years if there was increased revenue from financial assistance endowments.
- The final draft of the revised Endowment Management Policy was received for information.

The following motions were approved:

- That the total funds per annum that a graduate student may receive from scholarship, fellowship or award support be increased from \$22K to \$27K.
- That a graduate student should be allowed to hold a combination of Special Entrance Scholarships and /or Graduate Fellowship in a total amount not to exceed \$27K/annum.
- That, consideration be given to moving some awards to more accurately reflect enrolment patterns and that, unless otherwise specified, academic awards are intended for students registered in academic semesters and should not be available to students who are on a co-op work term with less than the stipulated minimum credit hour enrolment.

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Report to Senate, November 1999, 2

- That the scholarships, awards and bursaries budget for fiscal 1998 – 1999 be approved. Tuition fee income and enrollment numbers made an additional \$50,318 for undergraduate financial assistance.

November 27, 1998

The committee received for information:

- Data on the distribution of scholarships, awards and bursaries in the Faculty of Business Administration.
- Notice that Senate has approved SPCSAB's annual reporting date for September.

The committee approved the following motions:

- That the 1997 – 1998 Annual Report to Senate be formally approved as circulated.
- That the Dean of Arts' Medal for Teaching, Research and/or Teaching be approved.
- That a student with a debilitating disease be considered for the Open Scholarship on a reduced courseload basis once she has met the requirement for 24 normally-graded courses at SFU.
- That the Open Undergraduate Scholarship be "de-linked" from the Entrance Scholarships in all publications and other promotional materials.

February 26, 1999

The Committee approved the following motions:

- That the graduate fellowship and awards eligibility criteria be approved.
- That the International Council for Canadian Studies offer of matching funds of \$1,500 for a Canadian Merit Scholarship be accepted and matched.

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) Work Study Program
 - 7) Federal Canada Study Grants and Part-time Loans
 - 8) Government-Funded Student Loan and Grant Programs
- iv) Graduate Award Disbursements
- v) Budgets: Fiscal 1998 - 1999 compared to 1997 - 1998

MEMORANDUM

Simon Fraser University

TO: SPCSAB

FROM: Randall Martin, Acting Director
Student Recruitment

RE: 1998/99 Entrance Scholarships

DATE: 24 September, 1999

C:

Attached please find year-end reports for the 1998/99 Entrance Scholarship program, comprised of one report on expenditures and another on details of scholarship offer and acceptance rates.

Some interesting trends have emerged, in a comparison of these reports and statistics with those collected for the previous academic year:

- Our overall scholarship acceptance rate for BC secondary school students has increased approximately 10% over last year, and we currently have an acceptance rate of approximately 48%. This rate varies from program to program; e.g., the Shrum scholarship acceptance rate is 75% while the Summit scholarship acceptance rate is only 43%.
- This year six (\$40,000) international scholarships were offered to students from the United World College system around the globe. This represents an increase of three scholarships over last year. Additionally, International Summit scholarships valued at \$4,500 were added to our scholarship offerings this year. An additional three international students accepted admission offers, possibly as a result of these new Summit scholarships. This United World College group represents a demographic mix from six different countries: Bulgaria, China, Poland, Romania, Sierra Leone and Zimbabwe.
- The Phi Theta Kappa Scholarship, valued at \$4,000, was awarded for the first time this year. Three students from the United States commenced study this fall under Phi Theta Kappa, two from Oregon and one from Arizona.

Regards,



1999 Entrance Scholarship Awards Statistics

Scholarship	Total Offers	Offers Outstanding	Accepted	Deferred	Declined
Shrum International Entrance Scholarship	6		6		
International Summit Entrance Scholarship	8		2		6
Gordon Shrum National Scholarship	5		3		2
Kenneth Strand National Scholarship	6		6		
Jack Diamond National Scholarship	5		5		
National Specht in Applied Science	1				1
National Specht in Science	3		1		2
Hamilton College Transfer Scholarship	4		4		
College Deans Scholarship in Arts					
College Deans Scholarship in Applied Science					
College Deans Scholarship in Business					
College Deans Scholarship in Science					
Ken Caple College Transfer Scholarship	4		3		1
Simon Fraser Entrance Scholarship	2				2
SFU Alumni Leadership Scholarship	1		1		
Gordon M. Shrum Scholarship	25		17	1	7
Deans Scholarship in Applied Science	3		2		1
Deans Scholarship in Arts	13		8		5
Deans Scholarship in Business Administration	2		1		1
Deans Scholarship in Education	1		1		
Deans Scholarship in Science	5		4		1
Jack Diamond Leadership Scholarship	10		4		6
Summit Entrance Scholarship	319		137		182
Regional Summit Entrance Scholarship					
Tadeusz Specht Scholarship in Applied Science	9		8		1
Tadeusz Specht Scholarship in Science	66		26		40
Jack Diamond Scholarship	12		10		2
Phi Theta Kappa Scholarship	3		3		
Grand Total	513	0	252	1	260

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1998/99 Entrance Scholarship Expenditures

Program	GL Account Number	Semesters			98/99
		98-2	98-3	99-1	Expenditures
B.C.					
SF	11-191131-7114				
	*11-191131-7114		\$7,500	\$16,875	\$24,375
Alumni	*11-191131-7129		\$9,375	\$3,125	\$12,500
Shrum	11-191131-7112		\$2,500	\$5,000	
	*11-191131-7115	\$32,625	\$139,625	\$110,250	
		\$32,625	\$142,125	\$115,250	\$290,000
Steel	11-191131-7112				
President's	11-191131-7116	\$3,750	\$7,500	\$5,000	\$16,250
Dean's misc old	11-191131-7117		\$1,250		
Dean's misc new	*11-191131-7117	\$2,500			
Dean's APSC	*11-191131-7139	\$3,500	\$9,250	\$10,500	
Dean's Arts	*11-191131-7106	\$7,000	\$38,250	\$22,750	
Dean's Bus	*11-191131-7108		\$5,250		
Dean's Educ		\$1,750	\$3,500	\$1,750	
Dean's Sci	*11-191131-7137		\$13,250	\$8,750	
		\$14,750	\$70,750	\$43,750	\$129,250
Chancellor's	11-191131-7119				
B.C. Regional	*11-191131-7148		\$17,250	\$17,500	\$34,750
Summit	*11-191131-7149	\$5,250	\$158,750	\$117,250	\$281,250
Abe Unrau	11-191131-7119				
Jack Diamond	Leadership		\$11,500	\$7,500	\$19,000
	*11-191131-7118		\$20,500	\$6,750	\$27,250
Specht APSC	*23-419222-7112		\$8,000	\$3,500	\$11,500
Specht Sci	*23-419222-7137		\$28,000	\$27,250	\$55,250
National					
Shrum	11-191132-7115				
	*11-191132-7143		\$38,750	\$17,750	\$56,500
Jack Diamond	11-191132-7112				
	*11-191132-7146		\$19,250		
			\$19,250	\$2,300	\$21,550
Specht APSC	*23-419222-7112				
Specht SCI	*23-419222-7137		\$1,750		\$1,750
Strand	11-191132-7115				
	*11-191132-7144		\$16,500	\$10,500	\$27,000
President's	11-191132-7115				
College					
Hamilton	11-191133-7115				
	*11-191133-7121	\$2,500	\$8,000		
		\$2,500	\$8,000	\$7,500	\$18,000
Deans Sci	*11-191133-7137		\$2,250		\$2,250
Dean Arts	*11-191133-7106		\$5,750	\$3,500	\$9,250
Dean APSC	*11-191133-7139		\$5,750	\$3,500	\$9,250
Dean Business	*11-191133-7108				
President's	11-191133-7116				
Caple	11-191133-7116				
	*11-191133-7141		\$16,250	\$22,063	\$38,313
International					
President's	11-191134-7118			\$2,250	
Contingency	13-875627-7103				
Shrum	11-191134-7102	\$5,000	\$35,000	\$30,000	
Tuition	11-191134-7103	\$3,698	\$22,407	\$18,815	
		\$8,698	\$57,407	\$51,065	\$117,168
Total Expenditures		\$87,571	\$652,907	\$481,928	\$1,202,406

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

To: John D'Auria, Chair
SPCSAB

From: K.C. Bell, Secretary
SPCSAB

Re: Open Scholarship Statistics, fiscal 1998-1999

Date: September 21, 1999

For the fiscal year 1998-1999, Open Scholarships continued to be awarded at a CGPA level of 3.70. This is consistent with practice since the Fall of 1996.

A total of 898 Scholarships were awarded over the three semesters 98-2, 98-3 and 99-1. 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
98-2	226	\$169,323	\$749	3.7	\$77
98-3	337	\$315,854	\$937	3.7	\$77
99-1	335	\$313,852	\$937	3.7	\$77
98/99	898	\$799,029	\$890		

Due to the University's continued high admission requirements, the cost of the Open Scholarship continues to increase.

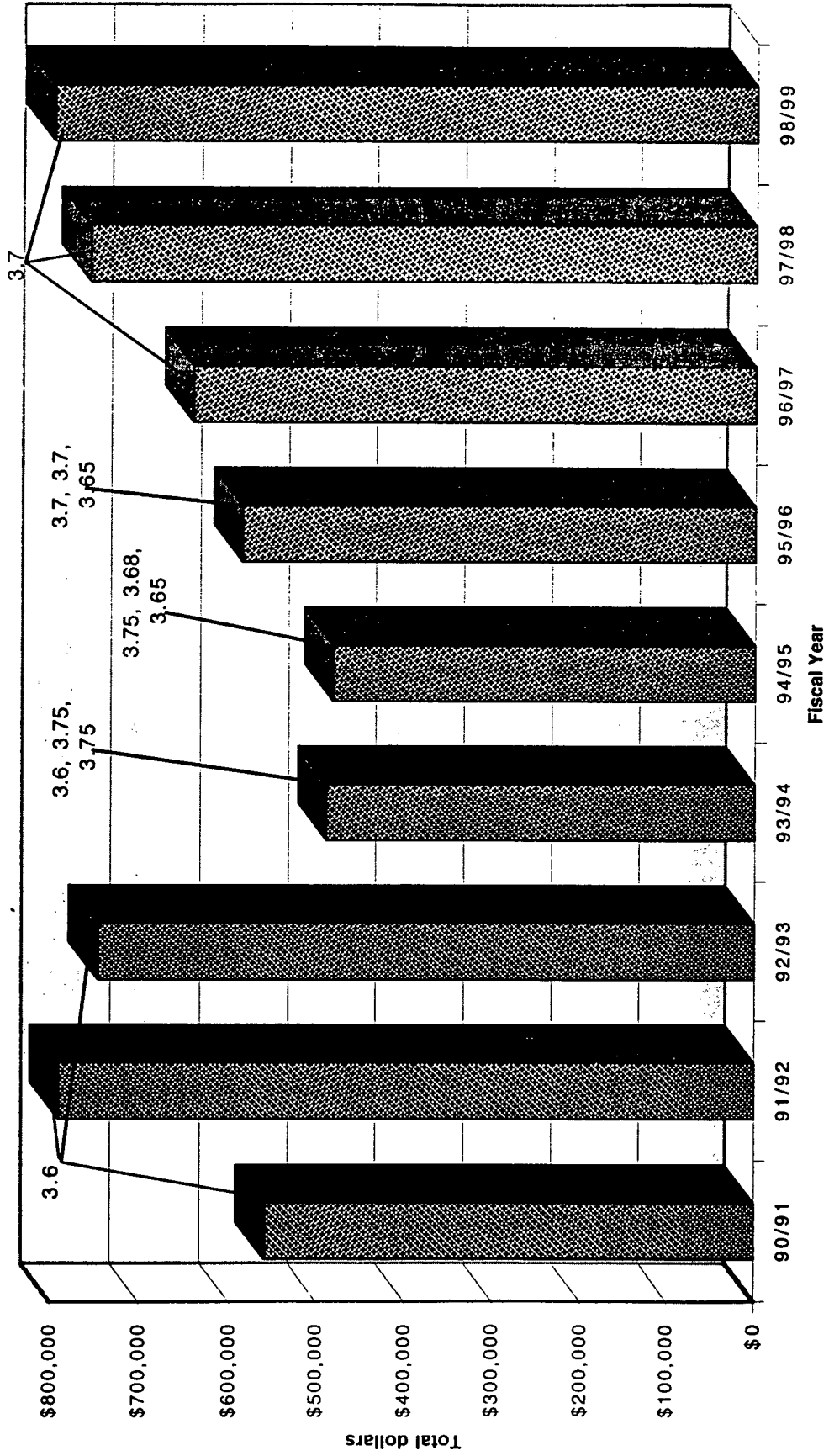
Fiscal 1998 – 1999 saw an additional 39 scholarships awarded and \$40,000 more disbursed than in fiscal 1997 – 1998; however, this represented a significant slowing of growth in both the number and amount of scholarships issued in fiscal 1996 – 1997.

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 required for eligibility,

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

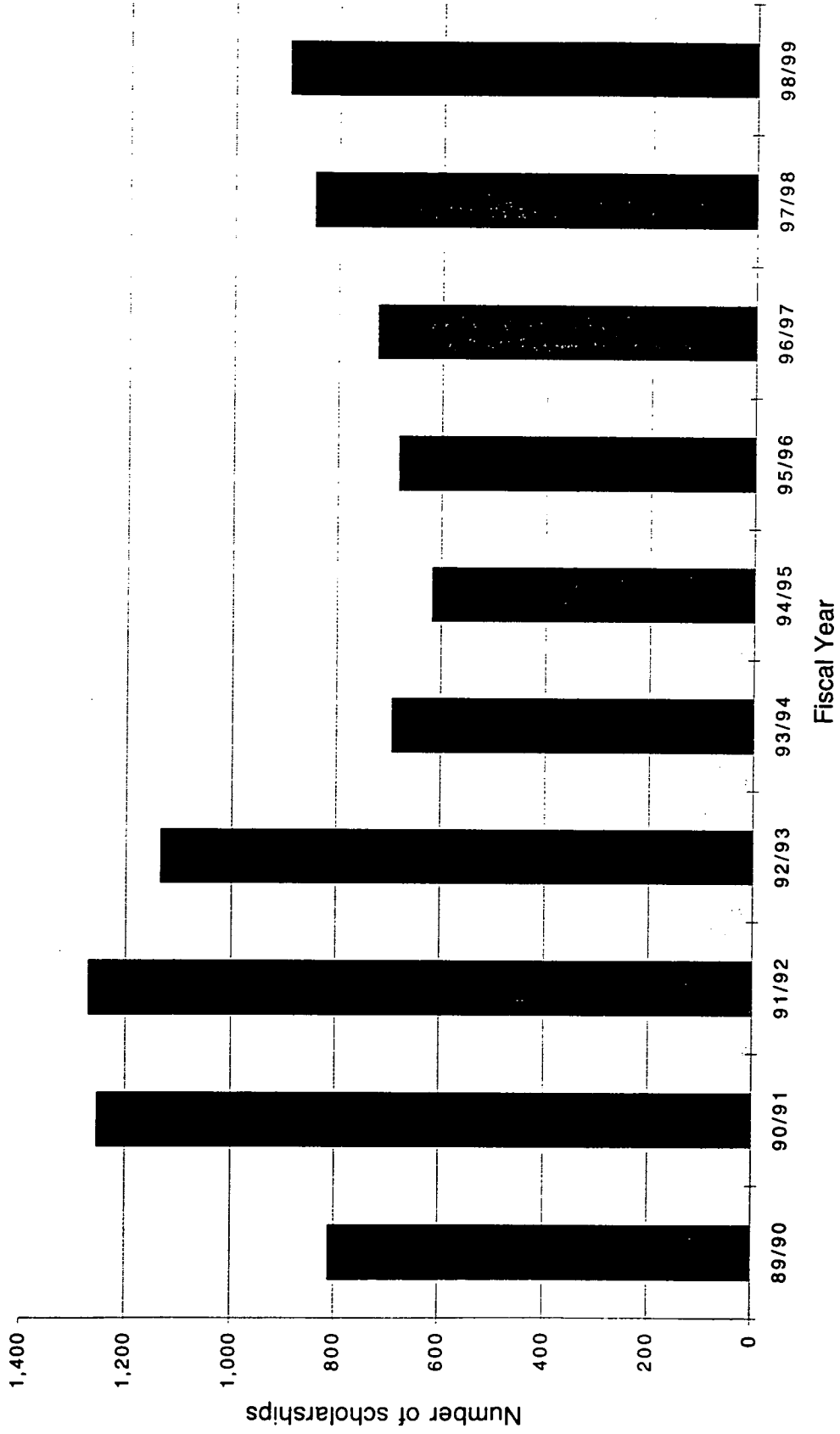
OS by fiscal year

Open Scholarship Disbursements by Year



OS, Number per year

Number of Open Scholarships by Fiscal Year





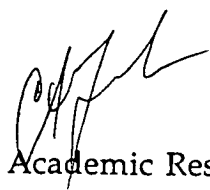
Simon Fraser University

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

From: Charlotte French 
Director, Student Academic Resources

Subject: 1998/99 Financial Assistance
Year End Reports

Date: September 23, 1999

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

- 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) Work-Study Program
- 7) Federal Canada Study Grants and Part-time Loans

Not included in the package is a report for the Government Funded Student Loan and Grant programs.

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 1998/99**

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 end of 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 searchable 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 1998/99 increased by a total of \$9,187 and 19 additional scholarship disbursements compared to 1997/98; a total dollar increase of approximately 7%. Five new donor funded scholarships were established in 1998/99.

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. The large increase in the number of awards given in this category but small increase in total dollars is due to some new awards which are of smaller values but given to a large number of students. For example, the Engineering Science Undergraduate Student Society has established an award to assist project teams with the cost of building their designs. The awards are not large in value but are awarded each semester to many teams.

There has been no increase to the University funded awards budget for over seven years. The change in the number of SFU funded awards disbursed primarily reflects decisions by the School for Contemporary Arts in 1997/98 to give more awards of a smaller value to their students from the allocated budget for their awards program.

MERIT BASED AWARDS

	Endowed/Annual Schs.		Endowed/Annual Awards		SFU Funded Awards	
	# of Students Awards	Ttl. \$	# of Students Awards	Ttl. \$	# of Students Awards	Ttl. \$
98/99	203	147,690	115	41,435	92	43,907
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

submitted by C. French, September 9, 1999



**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 were not tracked prior to 1997/98. In an attempt to better recognize the external organizations that support our students and the students who receive these awards, University Advancement and Financial Assistance developed new procedures to capture this information for those organizations who request that we disburse the funds. This is the second year of recording the scholarships, awards and bursaries that SFU students have received from these external organizations.

Scholarships and bursaries in this category include: Royal Canadian Legion Bursaries; 3M Bursaries; Terry Fox Humanitarian Awards; Canadian Merit Scholarship Foundation Awards; Canada Trust Scholarships and many others.

UNDERGRADUATE EXTERNAL

Year	External Scholarships		External Awards		External Bursaries	
	Ttl. # of Sch.	Ttl. \$	Ttl. # of Awd.	Ttl. \$	Ttl. # of Bur.	Ttl. \$
98/99	130	117,382	56	54,913	35	23,374
97/98	118	109,562	36	37,008	71	48,369

GRADUATE EXTERNAL

Year	External Scholarships		External Awards		External Bursaries	
	Ttl. # of Sch.	Ttl. \$	Ttl. # of Awd.	Ttl. \$	Ttl. # of Bur.	Ttl. \$
98/99	8	8,500	0	0	2	1,076
97/98	4	4,900	0	0	9	21,768



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

Bursary Program 1998-99

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 searchable web accessed database.

In the 1998/99 award year (May 1998 - April 1999) Financial Assistance received 2514 bursary applications with a total calculated financial need of \$1,565,785. This represents an increased financial need of \$269,047 (21% increase) from 1997/98. In 1998/99, \$36,449 more dollars were awarded through all bursary programs than in 1997/98 which represents a 3% increase. There has been no additional operating funds allocated for bursaries for over six years. The small increases that exist come from donor gifts. A total of fourteen new bursaries were established in 1998/99.

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 1998/99.

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.

*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. \$
98/99	818	414,171	158	122,258	5	1,107	514	393,825
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. \$
98/99	59	43,453	36	21,945	0	0	7	6,155
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 (International)

SFU Funded Work Study - Undergraduate/Graduate

Number of Students		Total \$ Awarded
98/99	5	6,700
97/98	7	9,750
96/97	4	4,000
95/96	12	9,716
94/95*	6	2,817

*Program is restricted to limited use for international students.

submitted by C. French, September 9, 1999



**Report to the
Senate Policy Committee on Scholarships, Awards, and Bursaries
Athletic and Recreation Awards 1998/99**

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 notable increase in the number of and total dollars disbursed through donor based Athletic awards since 1996/97. This increase is due in large part, to the transfer of funds from the Athletic Operating Endowment to the newly created 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 associations 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. This re-allocation of funds was approved again this year.

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.

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 is budgeted at \$19,200.

ATHLETIC AND RECREATION AWARDS

Endowed/Annual # of Student Awards		Athletics Ttl. \$	SFU Funded Athletics # of Student Awards		Athletic Tuition # of Student Awards		SFU Funded Rec. Awds. # of Student Awards	
98/99	265	180,930	52	36,600	141	89,189	31	18,600
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

Note: statistics are for the academic year starting May 1 and ending April 30.

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, 1998/99, SFU athletes received 142 disbursements totaling \$90,979.

BC ATHLETIC ASSISTANCE PROGRAM

Year	# of Award	Ttl. \$
98/99	142	90,979
97/98	138	90,112
96/97	212	136,156

submitted by C. French, September 9, 1999



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

Emergency Loan Program 1998/99

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. Maximum emergency loans values are usually \$500.

During the previous six years, the Emergency Loan program had shown a consistent decrease in disbursements every year, both in total dollars and numbers of loans. However, the number and total value of loans disbursed this year has increased by 99 loans, a 26% increase, and \$89,003, a 56% increase. The increase in emergency loan disbursements is due to a combination of the implementation of an electronic confirmation of enrollment process for BC government assistance and the centralization of government student loan processing by two of the approved lenders.

This year Simon Fraser University participated in a pilot project to confirm student enrollment electronically to the government allowing the student loan documents to be sent directly to a student's home rather than requiring students to pick them up at the educational institutions. Line-ups that used to be 45 minutes to one hour are now reduced to twenty-five minutes. Overall the project was a success. However, the length of time for a loan document to be mailed to a student from the time it was printed in Victoria was longer than expected.

At the same time two of the major lenders participating in the government student assistance program, the Royal Bank and the Bank of Nova Scotia, centralized their student loan processing to Regina and Toronto respectively. No advanced notice of plans to relocate was given to the governments or the educational institutions. This change from local processing has meant a delay of up to ten days and caused students to access more emergency loans to address their immediate expenses.

Making rent payments for a new semester is the most common reason for students funded by government assistance to access the Emergency Loan Program. Lenders are not allowed to disburse government assistance funds until the first day of classes, which usually falls after rents are due. 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 delays in loan disbursements this year meant more students needed more emergency loan money to pay for rent, food and books at the start of the Fall and the Spring semesters.

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 1998/99 three loans totaling \$1600 were sent to collections.

EMERGENCY LOANS (Undergraduate/Graduate)

	Number of Loans	Total \$ Awarded
98/99	433	246,828
97/98	345	157,825
96/97	352	160,716
95/96	527	265,472
94/95	674	317,329

submitted by C. French, September 9, 1999



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

Work-Study Program 1998-99

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 from the BC Government 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; the budget for 1998-99 was \$420,000; and the budget for 1999-2000 is \$408,500.

Simon Fraser University is among the very few 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 to allow 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.

For the Fall 1998 semester the Work-Study program was changed from a paper application process to a web-based process. Individuals interested in submitting projects for Work-Study students complete and submit a request form on the web. The request is logged into a database and the Work-Study Coordinator is notified by e-mail. The projects are reviewed and approved on-line. When approved, projects automatically appear on the posting search web site which is available only to approved Work-Study students.

Students receive their notice of eligibility by mail beginning two weeks prior to the start of a semester. Their Work-Study information package includes instructions for the web site and their eligibility form. The web project postings are available only to eligible Work-Study students and are made available for viewing two weeks prior to the start of a semester. In previous years students could only view project postings in the Student Employment Centre.

Feedback on the new process has been very positive. Supervisors do not have to wait for paper forms and can complete and submit their project description from anywhere. More project submissions are being received and are received earlier. Less time is required from the point of submission to posting of a project because a number of steps were able to be eliminated. Students may now view the postings from anywhere they have web access.

The BC Work-Study budget year is August 1 to July 31 of the following year. The numbers in the chart below are based on a reporting period of April 1 to March 31 of the following year. The numbers can be very inconsistent year over year in this report because they cross budget years. Included in the 1997/98 reported year were higher than normal summer expenditures for 97-2 and a one time addition to the budget for 98-1.

Students Aiding Students

A portion of the Work-Study funding from the government, approximately ten percent, is allocated for a program called Students Aiding Students. This program provides funding for full-time students who wish to assist students with permanent disabilities. The majority of students hired through this program take class notes on behalf of the student they are aiding. Others assist students to access materials and services in the library. In the 1998/99 year 104 students were hired through this program and earned a total of \$35,318. These numbers are incorporated in the Work-Study numbers reported below.

Government Funded Work Study - Undergraduate

Number of Awards		Total \$ Awarded	Total \$ Spent
98/99	344	301,300	246,503
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

Note: these numbers include Students Aiding Students

Government Funded Work Study - Graduate

Number of Awards		Total \$ Awarded	Total \$ Spent
98/99	4	2,910	2,507
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

submitted by Charlotte French, September 9, 1999



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

Canada Study Grants and Part-time Loans 1998-99

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 required payments so do not make use of the part-time loan program.

During the 1998-99 award year, Financial Assistance received 39 part-time loan applications. Thirty-six of the applicants demonstrated a sufficiently high financial need and were awarded \$26,103. However, only fifteen students actually accepted the loans and believed that they could comply with the repayment requirements.

The number of students accessing the Canada Study Grant for high need part-time students has continued to grow in 1998-99. The eligibility criteria for this grant are improved compared to the previous provincial program allowing more students to be eligible and more real need to be met. This year 138 students applied for part-time grants and 108 students with a total calculated need of \$162,731 were awarded \$112,407. This is an increase of 72% in total dollars awarded over last year and more than doubles the program size from just two years ago.

PART-TIME CANADA STUDENT LOAN

Year	Number of Awards	Total \$ Awarded
98/99	36	26,103
97/98	45	46,550

PART-TIME CANADA STUDY GRANT

Year	Number of Awards	Total \$ Awarded
98/99	108	112,407
97/98	70	65,365
96/97	52	48,989
95/96*	61	45,480
94/95*	65	39,285

*indicates years funded by BC Part-time Student Assistance Program

19.

Canada Study Grant for Female Doctoral Students

Three years ago the federal government introduced a grant program to support female doctoral students in specific programs. The goal 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. This program has not been very successful.

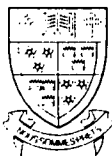
At SFU we have struggled to identify eligible students. Last year, 1997-98, one student received funding. This year, 1998-99, three students received \$8,876 in total funding.

Year	Number of Awards	Total \$ Awarded
98/99	3	8,876
97/98	1	1,769
96/97	0	0
95/96	3	6,367

Students with Permanent Disabilities

A Canada Study Grant is also available to assist students with permanent disabilities to purchase equipment required 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. The Ministry of Advanced Education, Training and Technology advises that the take-up rate has improved. For the period April 1, 1998 to March 31, 1999, 12 students at Simon Fraser received \$45,832 in support.

submitted by C. French, September 9, 1999



Office of the Registrar

Simon Fraser University

Financial Assistance

Burnaby, BC, Canada V5A 1S6

Telephone (604) 291-3892

Facsimile (604) 291-4969

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

Government Student Loans 1998/99

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 11% of our full-time graduate students and 28% of full-time undergraduate students received their primary funding through government student assistance in the Fall 1998 semester.

Government funding assistance varies from province to province with regard to the mix of student loan versus grant and the value of possible disbursements. Over the past ten years governments have decreased the amount of assistance that they are giving as grants and have changed to loan based awards. The outcome of this change has been dramatic increases in the total debt with which 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. Current figures are not available. Because of concerns around the increasing debt, new programs are being introduced to re-introduce grant programs and to assist former students who are trying to repay their loans.

During the 1998-99 program year three new measures were introduced to the Canada Student Loan program: Canada Study Grants for Students with Dependents; extended Interest Relief; and Debt Reduction. The Canada Study Grant (CSG) for Students with Dependents is issued as part of the federal and provincial student assistance package and does not require a separate application. A student is assessed as usual for their Canada and BC student loans and if their financial need is sufficiently high for a total weekly award of more than \$275 the student could be eligible for a CSG. CSGs are \$40 per week for students with 1 or 2 dependents 18 years of age or under and \$60 per week for 3 or more qualifying dependents.

Extended Interest Relief and Debt Reduction measures were introduced as a combined package. These programs are available to former students who are in repayment of their loans. Interest Relief allows a former student in financial hardship to defer loan payments for a period of time during which the Government will make the interest payments. The federal Interest Relief program has existed for some time with a life time maximum of 30 months. Last year the program was extended to 54 months for students in their first five years of repayment and 30 months for those in their sixth or subsequent year of repayment. The Debt Reduction program works in conjunction with Interest Relief as former students may apply for Debt Reduction when they have used up their maximum Interest Relief periods. Debt Reduction will pay down the Canada Student Loan of any former student whose federal student loan debt compared to family income is above a certain level. In 1998-99 only two students nation wide qualified for Debt Reduction.

In order to improve service to our students and to manage an increasingly complex and growing program, during the past two years Simon Fraser participated in two pilot projects with the Ministry of Advanced Education, Training and Technology (MAETT) to increase the level of automation with which the B.C. Student Assistance Program is delivered. In 1997-98 we implemented an electronic process, replacing the required manual process, to notify the Ministry of students who had withdrawn from studies or reduced their course load below the required full-time level. The project was very successful. In 1998-99 we implemented an electronic process, again replacing a manual process, to confirm full-time enrolment of students who have applied for B.C. Student Assistance and indicated they were attending Simon Fraser. This program has also been successful however a couple of issues do need to be addressed.

The current manual method of distribution requires that all government loan documents and grant cheques are distributed to the recipient students through their post-secondary institution. These documents must be handed to students personally and the institution staff must confirm that the student is enrolled in the required number of credits, complete additional sections of the form and check two pieces of identification. The documents can not be distributed until immediately prior to the start of a semester which creates line-ups almost two hours in length.

The new method of distribution allows the loan documents to be mailed to the student's home. The MAETT creates an electronic file of students who are eligible for government student assistance and have indicated on their application that they are attending Simon Fraser University. The file is matched against our registration records and all students on the list who meet the minimum registration requirements are confirmed. Within two to three days the approved loan documents are printed in Victoria and processed for mailing to the students' homes. The student must then take the loan document to their approved lender to negotiate and receive funds.

The project has been successful in reducing line-ups at the University. However, loan documents are valid for thirty days from the date that enrolment is confirmed and delays in mailing from Victoria and processing time at the lenders has created problems with loan documents expiring before they are processed and subsequent delays for students to receive their funds. The most notable problem this year has been the centralization of student loan processing by two of the approved lenders, the Royal Bank and the Bank of Nova Scotia. Loan documents that used to be processed in Vancouver or at the student's local branch are now processed in Regina and Toronto, respectively. Documents can take up to ten days to reach the processing centers, seven days is not uncommon, but students are not advised when they hand their documents in at their own branch that this will occur. We have found that approximately one half of the documents are expiring before the banks have processed them. This is invisible to the students as the banks contact Financial Assistance directly to reconfirm the student's enrolment status.

The 1999-2000 year may bring a number of significant changes to the government student loan and grant programs. Being implemented for the Fall of 1999 are credit checks for students twenty-two years of age or older and the Canada Millennium Scholarships. During 1999-2000, the governments will be re-negotiating the risk sharing agreements with the lending agencies and a number of banks have been threatening to withdraw from the government student loan programs. Also being negotiated in 1999-2000 are the remaining bilateral agreements between the provincial and federal governments with regard to government student assistance policies, procedures and funding. British Columbia currently has arguably the best designed and funded student assistance program in the country. Harmonization with the federal program could actually mean decreased funding to students in order to match federal requirements.

The tables below report the number of government assistance awards and the total dollars of assistance received by SFU students during the 1998-99 award year. The first table reports numbers for students who are considered residents of British Columbia and are receiving funding through the BC government. The second table reports students who are receiving funding through another Canadian province or territory and from the United States.

Due to new methods of collecting student loan data, the statistical reports from which the numbers below are determined have been rewritten and historical data has been reported again using the new data collection method.

BC Residence - Federal and Provincial Assistance

Undergraduate/Graduate

	Canada Student Loan		B.C. Student Loan/Grant		BC Grants	
	# of Awards	Ttl. \$	# of Awards	Ttl. \$	# of Awards	Ttl. \$
98/99	6,033	18,381,343	5,392	11,109,853	1,436	2,287,583
97/98	5,626	17,532,707	5,071	10,830,892	916	1,633,952
96/97	5,582	17,182,398	4,993	10,002,055	934	1,568,926
95/96	5,352	16,787,859	4,440	7,437,865	916	1,283,519
94/95	5,073	15,171,562	4,138	7,654,827	721	1,001,662

Out of Province and U.S. Students

	Canada Student Loan		Provincial Loan/Grant		U.S. Student Loan	
	# of Awards	Ttl. \$	# of Awards	Ttl. \$	# of Awards	Ttl. \$
98/99	400	1,615,807	369	964,324	27	125,506
97/98	420	1,798,761	436	1,258,390	27	113,447
96/97	467	1,914,615	509	1,238,154	24	97,385
95/96	513	1,991,188	535	1,389,969	20	112,779
94/95	470	1,774,932	516	1,296,743	8	37,302

submitted by Charlotte French, September 27, 1998

SIMON FRASER UNIVERSITY

SPCSAB 99-4
Appendix iv)

DEAN OF GRADUATE STUDIES

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: October 1, 1999

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 1998-99 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$1,783,000
President's Ph.D. Research Stipend	\$385,000
C.D. Nelson Entrance	\$204,000
Special Entrance	<u>\$45,444</u>
	\$2,417,444



Enclosure

24.

GRADUATE AWARDS IN FY 1998-99

	AWARD NAME	NUMBER	VALUE	TOTAL
Semester 98-2	GF Master's	58	\$4,400	\$255,200
	GF Ph.D.	61	\$5,000	\$305,000
	Stipend	35	\$5,000	\$175,000
	Nelson	12	\$5,667	\$68,004
	Entrance	0		\$0
	SUBTOTAL			<u>\$803,204</u>
Semester 98-3	GF Master's	89	\$4,400	\$391,600
	GF Ph.D.	58	\$5,000	\$290,000
	Stipend	19	\$5,000	\$95,000
	Nelson	12	\$5,667	\$68,004
	Entrance	12	varies	<u>\$45,444</u>
	SUBTOTAL			<u>\$890,048</u>
Semester 99-1	GF Master's	73	\$4,400	\$321,200
	GF Ph.D.	44	\$5,000	\$220,000
	Stipend	23	\$5,000	\$115,000
	Nelson	12	\$5,666	\$67,992
	Entrance	0		<u>\$0</u>
	SUBTOTAL			<u>\$724,192</u>
TOTAL EXPENDITURES				\$2,417,444
Base Budget 98-99				\$2,465,180
FY 97-98 Carryover				\$48,218
TOTAL AVAILABLE FOR AWARDS				\$2,513,398
BALANCE AVAILABLE at March 31, 1999				\$95,954

25.

Account	Purpose	1997-1998 Budgeted	1997-1998 Expenditures	1998-1999 Budget	1998-1999 Expenditures
1. GRADUATE					
	Bursaries				
11-91112-7131	a) Open	\$47,000	\$45,590	\$47,000	\$43,453
11-91112-7136	b) Daycare	\$3,500	\$181	\$3,500	\$0
11-91111-7141	Emergency Loans (non-recovery)	\$3,300	\$3,555	\$3,300	\$0
	Graduate Subtotal:	\$53,800	\$49,326	\$53,800	\$43,453
2. UNDERGRADUATE					
11-91123-7112	Open Scholarships	\$550,000	\$756,448	\$817,138	\$800,338
11-91123-6391	General Contingency				
11-91123-6397	Surplus Carryforward	\$242,087		\$182,456	
11-91123-6398	Open Contingency (96/97)	\$88,942		\$43,756	\$500
11-91123-8498	Designated Contingency (Dean's Spl)	\$15,740			
	Opens/Contingency Totals:	\$896,769	\$756,448	\$1,043,350	\$800,838
	Entrance Scholarships				
	a) BC Secondary				
11-91131-7114	i) SFU Entrance	\$25,000	\$7,500	\$25,000	\$24,375
11-91131-7129	ii) SFU Alumni	\$20,000	\$25,000	\$20,000	\$12,500
11-91131-7115	iii) Shrum (BC)	\$125,000	\$294,750	\$125,000	\$290,000
11-91131-7116	iv) President's	\$225,000	\$57,536	\$225,000	\$16,250
11-91131-7119	v) Chancellor's	\$45,000	\$5,000	\$45,000	
11-91131-7148	vi) Regional Summit Scholarships	\$30,000	\$19,500	\$30,000	\$34,750
11-91131-7149	vii) Summit Scholarships	\$250,000	\$370,250	\$250,000	\$281,250
11-91131-7117	ix) Dean's Entrance Scholarships	\$150,000	\$108,000	\$150,000	\$129,250
11-91131-7118	x) Jack Diamond (BC)		\$33,500		\$46,250
	b) National				
11-91132-7143	i) Shrum (National)	\$35,000	\$37,250	\$35,000	\$56,500
11-91132-7144	ii) Strand	\$10,000	\$63,000	\$10,000	\$27,000
11-91132-7146	iii) Jack Diamond	\$25,000	\$16,250	\$25,000	\$21,550
	c) College Transfer				
11-91133-7121	i) Hamilton	\$15,000	\$23,000	\$15,000	\$18,000
11-91133-7141	ii) Caple	\$45,000	\$25,000	\$45,000	\$38,313
	iii) College Deans		\$31,500		\$20,750
	d) International				
11-91134-7116	i) President's International	\$0		\$0	
11-91134-7102	ii) Shrum International	\$25,000	\$36,848	\$25,000	\$117,168

26.

Account	Purpose	1997-1998 Budgeted	1997-1998 Expenditures	1998-1999 Budget	1998-1999 Expenditures
11-91134-7103	Shrum international tuition component	\$20,000	\$21,483	\$20,000	
11-91131-7149	f) Travel Adjustments	\$50,000		\$50,000	
11-91131-7115	g) Commitments-Prior Winners	\$103,250		\$103,250	
	Entrance Subtotal:	\$1,198,250	\$1,175,367	\$1,198,250	\$1,133,906
	Bursaries				
11-91121-7131	a) Open	\$417,533	\$420,692	\$417,533	\$414,171
11-91121-7136	b) Daycare	\$16,000	\$3,142	\$16,000	\$1,107
	Bursaries Subtotal:	\$433,533	\$423,834	\$433,533	\$415,278
11-91122-7163	Awards	\$107,670	\$104,709	\$107,670	\$93,173
11-91124-5281	Work Study (SFU funded)	\$24,000	\$18,915	\$24,000	\$3,637
11-91111-7141	Bridge Loans (non-recovery)	\$12,150	\$0	\$12,150	\$3,657
	Undergraduate Subtotal:	\$2,672,372	\$2,479,273	\$2,818,953	\$2,450,489
	Subtotal: Grad and U'grad	\$2,726,172	\$2,528,599	\$2,872,753	\$2,493,942
3. INTERNATIONAL					
	Graduate Bursaries				
11-91141-7131	a) Open	\$42,300	\$24,806	\$42,300	\$21,945
11-91141-7136	b) Daycare	\$2,000	\$1,628	\$2,000	\$0
	Grad Bursaries Subtotal:	\$44,300	\$26,434	\$44,300	\$21,945
	Undergraduate Bursaries				
11-91142-7132	a) Open	\$100,600	\$116,833	\$100,600	\$122,258
11-91142-7136	b) Daycare	\$5,000	\$0	\$5,000	\$0
	c) Workstudy (SFU funded)	\$0		\$0	
	U'grad Bursaries Subtotal:	\$105,600	\$116,833	\$105,600	\$122,258
	International Subtotal:	\$149,900	\$143,267	\$149,900	\$144,203
	4. SPECIAL PURPOSE a) Scholarship Contingencies				
13-875627-8499	Total	\$0	\$12,856	\$13,050	\$8,127
	TOTAL:	\$2,876,072	\$2,684,722	\$3,035,703	\$2,646,272

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