

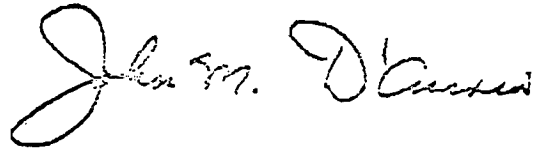
SIMON FRASER UNIVERSITY
MEMORANDUM

To: Senate

From: John D'Auria, Chair
Senate Policy Committee on Scholarships,
Awards and Bursaries

Re: Annual Report for Fiscal Year, 2001

Date: October 17, 2002



I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year (4/1-3/31) 2001-2002.

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, bursaries, and other forms of financial aid at SFU. It should be noted that this is primarily for internal awards. Two other Senate committees, SUAAC (undergraduate awards) and SGAAC (graduate awards) adjudicate financial awards to students where adjudication is needed.

Traditionally the number of applications for financial aid climbs each year; in fiscal 2001-2002, SFU received approximately 3429 (3142 UG/269 G) applications for bursaries (18 % increase), each applicant requesting consideration for 10 or more awards, and approximately 1019 applications were received for endowed and annual undergraduate scholarships. Similar increases were noted for scholarships. Applications are reviewed and vetted by staff in Student Services. In the case of scholarships and other awards, the adjudication committees (SUAAC, SGAAC), then make final decisions in meetings held each semester.

Although the University continues to benefit from a growing number of privately funded scholarships, awards and bursaries, the majority of its awards are funded by the University as a percentage of fees and tuition revenues. Given that tuition fees did increase significantly in fiscal year 2002 and since this was anticipated, there were actions taken to prepare for the effect of this increase on scholarships, awards and bursaries. As background, Senate is reminded that the following motion was approved by President Blaney in 1998, and reconfirmed by President Stevenson by memo on January, 2002, namely: "That for five years as of April 1, 1998, the university continue to adjust the portion of the scholarships, awards and bursaries allocated from the university's

operating funds according to the existing formula (~25% of the increase amount) based on tuition and enrolment. Further, that during this period no change be made to this adjustment as a result of increased scholarships, awards and bursaries endowments".

In anticipation of the possible increase to the tuition fees, SPCSAB passed two motions, namely: "To recommend in principle a '50-50' split between scholarships and bursaries of revenues generated from an increase to undergraduate tuition", and "To recommend to the Dean of Graduate Studies that he examine the issue of funding for graduate student bursaries, and to request that he bring forward a similar proposal related to the split of revenues from graduate tuition". These recommendations were based to some extent on the decreased funds made available to individuals over the last years, as mentioned in previous Annual Reports, and to more equitably fund bursaries for graduate students (now all students, undergraduate and graduate, are eligible for support from a common bursary fund). These recommendations guided the implementation of increases realized in fiscal year 2001, as will be reported in the Annual Report of SPCSAB next year.

In the regular business of the committee, a number of motions were passed. I would like to draw your attention to some items of note:

- Graduate awards for master's and doctoral students were raised by 9% (\$400) and 4% (\$200), respectively.
- Entrance Scholarships will be a common program for students attending a Canadian secondary school (note of explanation: same for provincial and national applicants)
- All students attending Canadian secondary schools will be eligible for both Dean's and Summit scholarships.

Enclosed you will find more details on various aspects of the disbursements of funds for Scholarships, Awards and Bursaries, but highlights include the following:

- With increased SAB funding supporting Student Recruitment efforts, an overall acceptance rate of 45% was achieved, an increase of 10% over last year.
- With the new self-reporting grade initiative, 339 offers of entrance scholarships were made to top BC students prior to receiving grade data and an increased acceptance rate of 51%.
- An increase in donor-funded scholarships, awards and bursaries of 19 was realized.
- Awardable amounts in athletic awards were capped as a result of joining the CIS.
- With the cancellation of the Work-Study program by the BC government, it was decided to fund this program in the 2002/03 fiscal year using operating funds of SAB.
- Approximately 23% of all UG students receive primary funding through government assistance before the implementation of tuition fees.
- Due to the regulations of the Millennium Bursary Program and the SFU semester system, student's eligibility is starting to be negatively effected.
- Funding for all graduate awards increased from \$2,236,855 in FY00 to \$2,619,353.

**Report to the Senate Policy Committee on Scholarships, Awards and Bursaries****2001-02 Entrance Scholarship Program**

Entrance scholarships are available to new applicants to Simon Fraser who, at the time of admission to the University, demonstrate academic excellence or a combination of extraordinary personal achievement and academic excellence.

Additional SAB funding in early 2002 supported the ongoing efforts of Student Recruitment to be more competitive in recruiting highly qualified students through our entrance scholarship program. Over all, 667 entrance scholarships were offered for 2002-3 with an acceptance rate of 45%. When compared to the acceptance rate of 41% on 2001-3 awards, we have seen a yield increase of almost 10%. The increased funding specifically supported our Gordon M. Shrum Scholarships; increased offers yielded 18 accepts for this prestigious award, 3 more students than in 2001.

Accumulated interest in the donor based Tadeusz Specht Memorial Scholarships in Science and the Applied Sciences enabled us to increase our scholarship offers in this award category. We improved our scholarship numbers in the Specht awards (specific to the health related sciences) from 22 accepts in 2001 to 52 accepts in 2002. The acceptance rate for the Specht awards in 2001 was 22%; our acceptance rate for 2002-3 was 31%, an increase in accepted offers of 41%.

Also significant was an increase in the Ken Caple College Transfer scholarship numbers. The Caple rewards those applicants from the BC College system with extraordinarily high grades - typically above a 4.0 CGPA on transferable academic work. We have awarded an average of 6 Caples per year over the past four years; 13 students accepted our offers this year and registered in classes in September. The numbers of our national and British Columbia foundation awards - the Kenneth Strand National Entrance scholarship and the Summit Entrance Scholarship - remained consistent with our award numbers in 2001.

New to the Registrar's portfolio of entrance scholarships for 2002-3 is the Tech One Entrance Scholarship specific to SFU Surrey applicants. Our inaugural year with these awards allowed 11 foundation awards of \$3500 each.

Lastly, significant improvements to business practices in admissions processing turnaround in 2002 supported our recruitment of highly qualified students. The self reported grade initiative enabled 339 offers of entrance scholarships *prior* to receiving grade data from the Ministry of Education in mid-May. Rolling offers of admission and scholarship began in February to top BC12 applicants. We achieved an acceptance rate of 51% on scholarship offers for this outstanding group of students who had a minimum average of 93% on interim, verified grades from BC12.

Total expenditures on all disbursements over 3 semesters:

98-2, 98-3, 99-1	99-2, 99-3, 00-1	00-2, 00-3, 01-1	01-2, 01-3, 02-1
\$1, 202, 406	\$1,268, 986	\$1, 323, 654	\$1,352,290

Entrance Scholarship review:
5 year comparison

Program Name	1998 No. of new recipients	1999 No. of new recipients	2000 No. of new recipients	2001 No. of new recipients	2002 No. of new recipients
Shrum International Entrance Scholarship	1	6	6	6	6
International Summit Scholarship	2	2	1	11	13
Gordon M. Shrum National Entrance Scholarship	4	2	4	6	4
Kenneth Strand National Entrance Scholarship	6	6	3	12	11
Jack Diamond National Scholarship	6	9	4	2	4
Honourable William M. Hamilton College Transfer Scholarship	2	4	1	2	2
Ken Caple College Transfer Scholarship	7	4	7	7	13
Gordon M. Shrum Scholarship	16	16	15	15	18
Simon Fraser Alumni Leadership Scholarship	0	1	1	1	1
Dean's Scholarships in the five Faculties	25	15	9	14	14
Summit Scholarship	81	126	135	137	138
Tadeusz Specht Memorial Scholarships in Science & Applied Science	22	27	35	22	52
Jack Diamond Entrance Scholarship	10	18	12	14	12
Jack Diamond Leadership Award	3	4	1	0	
Regional Summit Scholarship	9	0	0	0	
Phi Theta Kappa International Summit Scholarship	0	3	0	0	2
Stanley Morisse Scholarship	0		1	1	
Tech One Summit Scholarship					11
Totals	194	243	235	250	301



Simon Fraser University

Dean of Student Services & Registrar Office

Memorandum

To: Sarah Dench,
Secretary Senate Policy Committee on Scholarships, Awards & Bursaries
From: Peg Johnsen,
Assistant to the Dean, Finance & Operations
Re: Open Undergraduate Scholarship 2001/02 Fiscal Summary
Date: October 17, 2002

For fiscal 2001 – 2002 the number of Open Undergraduate Scholarship program recipients increased by approximately 25% resulting in a 20% disbursement increase over the previous fiscal year.

The Open Undergraduate Scholarship continued to be awarded at a CGPA level of 3.70, which was consistent with practice since 1996-2.

The number of scholarship recipients increased by 241 (25%) over last fiscal year.

The annual budget for the Open Undergraduate Scholarship program for the 2001/02 fiscal again was increased by \$164,294 (20%) over the previous years' budget to allow for the increase in the number of Open Undergraduate Scholarship eligible recipients. Total disbursements over the three-semester period amounted to \$989,426.

The Open Scholarship provided payment of \$73 per credit hour while the actual cost per credit hour was \$73.15. The average scholarship amount dropped by \$40 per award over last year due to the reduction in the cost of the credit hour fee.

A possible explanation for the increase in the number of recipients could be the result of the modest increase in enrollments; higher admission standards which are drawing students with stronger academic foundations; the number of students lengthening the amount of time to complete their degree; and an increase in the awareness of scholarship criteria standards. Nevertheless, the increase in the number of Open Undergraduate Scholarship recipients is a very positive reflection upon the quality of our students.

Attached is a spreadsheet with an updated summary of the Open Undergraduate Scholarship data.

If you have any questions regarding this matter, I would be most willing to meet with the SPCSAB to discuss the reports further.

Open Undergraduate Scholarship Data

Fiscal Year	Sem	# Awards	Total Awarded	Avg Award	CGPA	Per credit
89/90	89-3	399	\$240,616	\$603	3.6	\$ 52
	90-1	410	\$231,662	\$565	3.6	\$ 52
Total: 89/90		809	\$472,278	\$584		
90/91	90-2	322	\$143,645	\$446	3.6	\$ 52
	90-3	467	\$290,444	\$622	3.6	\$ 55
	91-1	464	\$269,115	\$580	3.6	\$ 55
Total: 90/91		1,253	\$703,204	\$561		
91/92	91-2	342	\$169,956	\$497	3.6	\$ 55
	91-3	465	\$318,246	\$684	3.6	\$ 62
	92-1	462	\$301,163	\$652	3.6	\$ 62
Total: 91/92		1,269	\$789,365	\$622		
92/93	92-2	337	\$183,148	\$543	3.6	\$ 62
	92-3	422	\$298,984	\$708	3.6	\$ 62
	93-1	374	\$263,748	\$705	3.6	\$ 62
Total: 92/93		1,133	\$745,880	\$658		
93/94	93-2	294	\$174,902	\$595	3.6	\$ 62
	93-3	195	\$161,636	\$829	3.75	\$ 68
	94-1	202	\$151,776	\$751	3.75	\$ 68
Total: 93/94		691	\$488,314	\$707		
94/95	94-2	150	\$89,964	\$600	3.75	\$ 68
	94-3	214	\$182,500	\$853	3.68	\$ 73
	95-1	252	\$208,707	\$828	3.65	\$ 73
Total: 94/95		616	\$481,171	\$781		
95/96	95-2	172	\$118,260	\$688	3.7	\$ 73
	95-3	233	\$220,605	\$947	3.7	\$ 77
	96-1	276	\$246,708	\$894	3.65	\$ 77
Total: 95/96		681	\$585,573	\$860		
96/97	96-2	184	\$135,058	\$734	3.7	\$ 77
	96-3	280	\$267,545	\$956	3.7	\$ 77
	97-1	260	\$239,199	\$920	3.7	\$ 77

6.

Open Undergraduate Scholarship Data

Total:	96/97	724	\$641,802	\$886		
97/98	97-2	216	\$167,167	\$774	3.7	\$ 77
	97-3	323	\$302,918	\$939	3.7	\$ 77
	98-1	318	\$295,911	\$933	3.7	\$ 77
Total:	97/98	857	\$765,996	\$894		
98/99	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
Total:	98/99	898	\$799,029	\$890		
99/00	99-2	241	\$176,176	\$731	3.7	\$ 77
	99-3	334	\$313,159	\$938	3.7	\$ 77
	2000-1	358	\$329,714	\$921	3.7	\$ 77
Total:	99/00	933	\$819,049	\$878		
00/01	00-2	235	\$173,789	\$740	3.7	\$ 77
	00-3	355	\$333,256	\$939	3.7	\$ 77
	01-1	345	\$318,087	\$882	3.7	\$ 77
Total:	00/01	935	\$825,132	\$882		
2001-2002	2001-2	295	\$218,372	\$740	3.7	\$ 73
	2001-3	444	\$389,702	\$878	3.7	\$ 73
	2002-1	439	\$381,352	\$873	3.7	\$ 73
Total:	2001-2002	1,178	\$989,426	\$841		



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: 2001-02 Financial Assistance
Year End Reports

From: Charlotte French
Director, Student Academic Resources

Date: October 7, 2002

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) Part-time Student Assistance and Canada Study Grants
- 8) Government Student Assistance Programs (including Canadian federal and provincial full-time funding and U.S. student loans)

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. Sarah Dench, Secretary SPCSAB



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

**Scholarship for In-Course Undergraduate Students
And
Academic and Service Awards for the University Community 2001-02**

Scholarships for In-Course Undergraduate Students

Scholarships funded through endowments and annual gifts from donors are available to continuing, full-time undergraduate students who meet specified criteria and have a minimum cumulative grade point average of 3.50. To be considered, students must submit applications to Financial Assistance by the end of the second week of classes of the semester the scholarship is offered. Most endowed and annual scholarships are adjudicated directly by the Senate Undergraduate Awards Adjudication Committee (SUAAC). A few of these scholarships are selected by nomination of the academic department and confirmed by the SUAAC. Information about these scholarships is published in the University Calendar and listed on the web site in a search capable format.

In 1999-2000, a one time donation from the Kaiser Foundation of \$32,000 to scholarships for undergraduate engineering students created a jump in the scholarship dollars awarded. The Kaiser Foundation now donates to the Engineering Science Project Award endowment, which is included in the Endowed/Annual Awards column of the table below.

Eight new donor funded scholarships, 4 annual donations and 4 endowments, were established in 2001-02.

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, Contemporary Arts Awards, History Book prizes 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.

Four new awards, 3 annual donations and 1 endowment were established this year.

There has been no budgeted increase to the University funded awards for many years. The apparent increases result from additional awards being included in the SFU Funded Awards category. Four Canadian Merit Scholarship Foundation National Scholars received a total of \$8,856 in tuition awards and two, instead of one, Terry Fox Award recipients each received \$1,000, plus three semesters of tuition. Canadian Merit Scholars receive funding of tuition costs for two, fifteen credit hour semesters a year for four years from the University and the remainder of their funding from the Foundation (see the External Awards report for more information).

MERIT BASED AWARDS

	Endowed/Annual Scholarships		Endowed/Annual Awards.		SFU Funded Awards	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	248	195,950	160	57,981	109	57,779
00/01	227	171,825	144	51,934	101	50,287
99/00	232	194,705	119	44,430	102	49,757
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, July 2002



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

External Scholarships, Awards and Bursaries 2001-02

Each year Simon Fraser University students receive scholarships, awards and bursaries that are administered and adjudicated by organizations and corporations external to the University. Tracking of these awards began in 1997-98. Scholarships, awards and bursaries in this category include: Canadian Merit Scholarship Foundation Awards, Canadian Millennium Scholarship Foundation merit awards, Terry Fox Humanitarian Awards, Canada Trust Scholarships, awards administered by the Association of Universities and Colleges of Canada, and many others.

In the 2001-2002 year, Simon Fraser undergraduates received 302 external scholarships, awards and bursaries totaling \$355,205, an increase of 29% over 2000-2001, see the table below. The awards have been categorized by the definitions used for our internal programs: scholarships are based primarily on academic performance; bursaries are based primarily on financial need; and awards are based on community service, excellence in a specific endeavor or a combination of criteria.

Canadian Merit Scholarship Foundation

Included in the numbers reported below are recipients of the Canadian Merit Scholarship Foundation awards. These scholarships are awarded to graduating high school students on the basis of academic excellence, community service and leadership. Simon Fraser University is one of a consortium of Canadian universities that work with the Foundation to select and support recipients. National winners receive a four year award consisting of \$5,000 from the Foundation and a tuition waiver of a maximum of \$5,000 from the University annually. In 2001-02, Simon Fraser had: 4 National Scholarship winners - 2 in third year, 1 in second year and 1 in first year; 2 Finalist winners (\$2,500 each one time); and 1 Regional winner (\$1000 one time). The table below includes the funds from the Foundation but Simon Fraser's disbursements for tuition are reported with the Scholarships for In-Course Undergraduate Students.

Canada Millennium Scholarship Foundation

Also included in the numbers below are recipients of the Canada Millennium Scholarship Foundation merit awards. These scholarships were established three years ago when the Federal government created the Canada Millennium Scholarship Foundation. In 2001-02 there were 20 Canada Millennium Merit Award recipients attending Simon Fraser: 3 National Award winners - 2 new recipients, 1 renewal (\$4,800 each, renewable for 4 years); 6 Provincial/Territorial Award winners - 3 new recipients, 3 renewals (\$4,000 each, renewable for 4 years); and 11 Local Award winners (\$4,000 each, one time). This is an increase from the 1999-2000 year when 2 National Award recipients and 1 Regional Award recipient were in attendance.

Financial Assistance also actively promotes the availability of and assists students with the application process for numerous external awards that are not reported in the table below. These awards support students' educational goals during and after studies at Simon Fraser University but are not disbursed through the University. Such awards programs include the Rhodes Scholarship, the Queen Elizabeth II BC Centennial Scholarship, NRC Women in Engineering and Science Scholarship, and among others.

UNDERGRADUATE EXTERNAL

	External Scholarships		External Awards		External Bursaries	
	Total # of Scholarships	Total \$	Total # of Awards	Total \$	Total # of Bursaries	Total \$
01/02	216	294,590	14	15,840	72	44,775
00/01	204	226,270	7	10,500	56	38,061
99/00	181	176,827	10	16,283	61	39,034
98/99	130	117,382	56	54,913	35	23,374
97/98	118	109,562	36	37,008	71	48,369

GRADUATE EXTERNAL

	External Scholarships		External Awards		External Bursaries	
	Total # of Scholarships	Total \$	Total # of Awards	Total \$	Total # of Bursaries	Total \$
01/02	6	7,200	0	0	1	2,000
00/01	5	6,300	0	0	3	1,400
99/00	8	6,550	0	0	2	980
98/99	8	8,500	0	0	2	1,076
97/98	4	4,900	0	0	9	21,768

Note: all statistics are for the academic year May 1 to April 30.

Submitted by Charlotte French, July 2002



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

Bursary Program 2001-02

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 apply to Financial Assistance by the end of the second week of classes 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 2001-02 reporting year (May 2001 – April 2002), Financial Assistance received 3429 applications with a total calculated financial need of \$2,476,765. This represents an increase in financial need for students of \$463,040 or 23% over last year. In comparison, like last year, there was only a 6.8% overall increase in the funding available to students through bursaries. (see table 1)

The following tables compare changes in the Bursary program over time. The SFU Open Bursaries and the SFU Daycare Bursaries are funded by University operating funds and are disbursed from one umbrella allocation. The Annual and Endowed Bursaries are funded through annual or long-term gifts from donor individuals or organizations. In 2001-02, six new donor funded bursaries were established, four endowed and two annual. Two of the new endowed bursaries are designated for graduate students.

Included in the SFU Open Graduate Bursary figures reported below is the TSSU Child Care Bursary. This is the fourth year of this bursary program that is included in the TSSU labour contract with the University. This year two bursaries totaling \$2,675 were disbursed. One bursary was awarded to a domestic student (\$1,625) and one was awarded to an international student (\$1,050).

Included in the SFU Open Undergraduate (domestic) data reported below is funding to a World University Services of Canada (WUSC) refugee student for one semester. Simon Fraser University has an agreement with the Simon Fraser Student Society to assist in the support of one student a year identified and immigrated to Canada by WUSC. Support is one year (twelve months) in duration while the student establishes landed immigrant status and becomes eligible for other funding. The University pays for tuition up to 12 credit hours each semester, the athletic and recreation fee, the student services fee, residence fees (dorms only), and a \$500 start-up bursary. From funds collected with the Student Society fee, the Simon Fraser Student Society pays the student society fee, reimbursement for textbooks, a \$500 monthly living allowance, and a bus pass. Two WUSC students will be supported during 2002-03.

*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

Applications Received and Calculated Financial Need

	Total # Applications	Total Calculated Need
01/02	3429	2,476,765
00/01	2870	2,013,725
99/00	2615	1,751,834
98/99	2514	1,565,785
97/98	2558	1,296,738
96/97	2078	1,068,339

Undergraduate Bursaries

	SFU Open (domestic)		SFU Open (international)		SFU Daycare		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	1,166	457,100	186	111,243	10	2,670	656	499,282
00/01	1,023	470,892	136	93,100	5	2,116	517	441,997
99/00	891	415,511	163	127,540	10	4,263	538	425,061
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		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	87	47,765	31	14,775	3	570	35	28,420
00/01	90	54,870	27	13,405	1	406	10	10,465
99/00	79	46,110	27	16,665	2	1,087	6	4,150
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



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

Athletic and Recreation Awards 2001-02

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 donations as well as university operating funds. Awards included in the table under the title 'Athletic Tuition Awards' are funded with money raised by the individual teams to support their own athletes.

The table below shows a very small decrease in the total number and value of Endowed/Annual Awards, SFU funded awards and Athletic Tuition awards disbursed to students this year. This is a change in the trend of previous years of continuous increases. In September of 2000 two of the varsity teams, Men's and Women's Basketball, moved from competing in the National Association of Intercollegiate Athletics (NAIA) to the Canadian Interuniversity Sport (CIS). The change of league meant a new set of regulations governing financial assistance for student athletes. Most notably there is an annual cap on total awards a student-athlete may receive in Endowed/Annual awards and SFU Funded awards equal in value to assessed tuition and fees (maximum approximately \$2672) from a maximum of tuition, fees and allowable living expenses (\$8800 annually). This change reduced the number and value of awards that could be given to members of the two basketball teams. In 2002-03 six teams will compete in the CIS.

The increase in the total dollars disbursed through donor based Endowed/Annual Athletic awards is due in large part to eight operating endowments being made active and including an award component. These funds replaced awards given from Athletic Tuition Awards accounts and will likely grow in future years. In addition one new endowed athletic award was established.

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 Recreation Services. University funding for Recreation Awards has remained unchanged for over eight years and is budgeted at \$19,200.

ATHLETIC AND RECREATION AWARDS*

	Endowed/Annual Athletics		SFU Funded Athletics		Athletic Tuition Awards		SFU Funded Recreation Awards	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	385	291,679	54	38,500	25	14,822	30	18,000
00/01	297	222,859	55	39,000	112	88,100	29	17,400
99/00	289	223,750	57	40,500	130	86,768	31	18,600
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

B.C. Athletic Assistance Program

The B.C. Athletic Assistance Program (BCAAP) is a provincial government program to support top athletes in pursuing their education while maintaining their sport training. The amount of funding available to student-athletes through this program has decreased notably over the years. The decrease this year is largely due to larger funding allocations for Trinity Western University who brought more teams into the Canada West conference. In 1996-97, Simon Fraser student athletes received 212 disbursements totaling \$136,156 from this program. In this past year, 2001-02, SFU athletes received 63 disbursements totaling \$61,250, a 55% decrease in funds over five years.

The value of awards a student-athlete on a CIS team may receive from the B.C. Athletic Assistance Program are restricted by the BCAAP regulations (maximum \$3500 annually) but not by the athletic organization. For CIS teams, these awards may be given in addition to the Endowed/Annual and SFU funded awards.

BC ATHLETIC ASSISTANCE PROGRAM*

	# of Award	Total \$ Awarded
01/02	63	61,250
00/01	90	66,916
99/00	85	62,926
98/99	142	90,979
97/98	138	90,112
96/97	212	136,156

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

submitted by C. French, July 2002



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

Emergency Loan Program 2001/02

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 government student loan awaiting documents or confirmation of part-time employment. Emergency loan values are usually no more than \$500 but individual award values depend on the specific circumstances of the student. Some students may receive more than one Emergency Loan during a semester. Students must meet with a Financial Assistance Advisor as part of the assessment process.

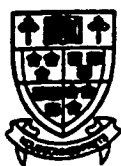
Making the first rent payment for a new semester is the most common reason for students funded by government assistance to access the Emergency Loan Program. Government assistance funds are not disbursed until the first day of classes which usually falls after rents are due. Students who hold part-time jobs are most likely to access the Program in mid-semester to cover rent or food if scheduled work hours have been lower than expected.

In previous years difficulties arising from implementation of new methods of enrollment confirmation and centralization of government loan processing by the loan administration organizations delayed disbursement of funds to students and increased the demand on the Emergency Loan program. Over the past two years there has been less disruption to the disbursement of government assistance to students and a notably positive impact on our Emergency Loan program. 2001-02 had the lowest demand on Emergency Loans in eight years.

EMERGENCY LOANS (Undergraduate/Graduate)

	Number of Loans	Total \$ Awarded	# Loans to Collection	Total \$ to Collection
01/02	244	142,092	N/A	N/A
00/01	256	152,354	7	4590
99/00	359	217,139	7	4650
98/99	433	246,828	10	6248
97/98	345	157,825	7	4500
96/97	352	160,716	Not Recorded	Not Recorded
95/96	527	265,472	11	3763
94/95	674	317,329	7	5363

submitted by C. French, July 2002



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

Work-Study Program 2001-02

Work-Study

The Work-Study program was part of the provincial governments BC Student Assistance Program. Work-Study was targeted to those graduate and undergraduate students who were B.C. residents and had an assessed financial need above the maximum funding allowance through Canada Student Loan, Canada Millennium grant, BC Student Loan and BC Grant. The purpose of the Work-Study program was to supplement the assistance these students were already receiving. Work-Study funding was the only supplemental funding that did not affect a student's government loan and grant disbursement. Only BC residents were eligible for the Program.

The B.C. government cancelled the Work-Study program as of August 2002. Beginning in September 2002, Simon Fraser will be funding a Work-Study program through operating funds.

Over the past five years Simon Fraser University's Work-Study allotment from the BC Government decreased due to an increase in the number of participating post-secondary institutions. In the 1995-96 program year Simon Fraser University was allotted \$460,000 but in 2001-02 only \$344,995.

The table below shows the number of Work-Study positions that were awarded to students, the total dollars that were allocated to those awards and the actual total dollars the students earned. Students are often unable to complete all of the work hours they have been awarded due to course demands, other time conflicts or early completion of the project and awards are budgeted accordingly. The maximum fundable pay rate through the Government was \$8.75 per hour.

At Simon Fraser, individuals interested in submitting projects for Work-Study students are invited to complete and submit a request form to Financial Assistance through the web by the deadline, usually one month prior to the start of each semester. When approved, projects automatically appear on the posting search website that is available only to approved Work-Study students. Students were notified of their eligibility to participate in the program beginning two weeks prior to each semester. Despite the decrease in funding, the number of requests for Work-Study students has not changed and is now higher than funding allows.

The BC Work-Study budget year was September to August of the following year. The numbers in the chart below are based on a reporting period of May to April. Because of the difference between reporting periods, the numbers can be very inconsistent year over year in this report. Included in the 1997/98 reported year are higher than normal summer expenditures for 97-2 and a one time addition to the budget for 98-1.

Students Aiding Students

Until August 2000, a portion of the Work-Study funding from the government, approximately ten percent, was allocated for a program called Students Aiding Students. This program provided funding for full-time students who wished to assist students with permanent disabilities. The majority of students hired through this program took class notes on behalf of the student they were aiding. Others assisted students accessing materials and services in the Library. The Government agreed to change the Students Aiding Students program for the 2000-01 academic year to be administered directly by the Centre for Students with Disabilities and adjust regulations accordingly. The table below includes Students Aiding Students participants until August 2000

GOVERNMENT FUNDED WORK-STUDY- Undergraduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
01/02	363	417,900	329,208
00/01	346	385,120	310,655
99/00	498	481,140	343,689
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 expenditures for the Students Aiding Students program until August 2000.

GOVERNMENT FUNDED WORK-STUDY - Graduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
01/02	5	7,000	5,362
00/01	7	8,300	7,503
99/00	19	19,830	18,130
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, July 2002



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

Government Part-time Student Assistance and Canada Study Grants 2001-02

Government Part-time Student Assistance

To be eligible for the federal government's Part-time Canada Student Loans (PT-CSL) and Grants (PT-CSG), students must be registered in less than nine credit hours and have a demonstrated financial need. In order to be eligible for grant funding, students must also meet specific criteria for not studying full-time. The list of acceptable conditions for maintaining part-time studies includes: permanent disability; single parent; caring for an elderly dependent; and requiring less than nine credit hours to fulfill graduation requirements. The Part-time Grant program has a maximum award value of \$1200 a year and is well used by Simon Fraser students.

Students receiving a Part-time Loan must start making payments on the interest immediately, while still in studies. Most students who are in search of additional support cannot afford to make the payments. As a result, the loan program is not well used by Simon Fraser students. Most applicants do not cash the loans even when they are awarded. In 2001-02, 57 of the 70 students who applied for Part-time Loan and Grant qualified for Grant and Loan or Loan only and had a total assessed need of \$56,903. Of the 57 eligible students 54 received Grant totaling \$50,739 and 30 students qualified for the Part-time Canada Student Loan. Only 7 students requested PT-CSL documents to be issued (for a total value of \$6,526) and of those only 5 students (total loan value of \$3,669) picked up their documents for negotiation.

The table below shows an apparent decline in the Part-time loan awards in 2000-01. However, government procedures for processing Part-time Loans changed to allow students to be considered for Part-time Grant without applying for a Part-time Loan. Subsequently students who are not interested in the Loan option are no longer assessed and awarded funding under the Loan program.

PART-TIME CANADA STUDENT LOAN

	# of Awards	Total \$ Awarded	# of Loans Released	Total \$ Loans Released
01/02	7	6,526	5	3,669
00/01	13	10,700	8	6,778
99/00	45	24,480	2	2,679
98/99	36	26,103	No Record	No Record
97/98	45	46,550	No Record	No Record

PART-TIME CANADA STUDY GRANT

	# of Awards	Total \$ Awarded
01/02	54	\$50,739
00/01	54	51,014
99/00	83	73,072
98/99	108	112,407
97/98	70	65,365
96/97	52	48,989

Canada Study Grant for Female Doctoral Students (CSG-FD)

Six 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 with financial need to continue studies to the doctoral level in fields that have an under representation of females based on national statistics.

Commencing 2001-02 these grants were assessed as part of the B.C Student Assistance Program application and a separate application is no longer required. For those students who meet the criteria for a CSG-FD, the grants are automatically assessed and the assessed award replaces BC and federal loan funding.

	# of Awards	Total \$ Awarded
01/02	5	\$14,569
00/01	7	17,781
99/00	6	13,966
98/99	3	8,876
97/98	1	1,769
96/97	0	0
95/96	3	6,387

Note: Statistics are reported for the academic year May 1 to April 30.

Submitted by Charlotte French July 2002



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

Government Student Assistance 2001-02

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 these 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 23% of all undergraduate students received their primary funding through government student assistance in the Fall 2001 semester. Without this funding they would not be able to attend the University.

The tables below report the number of government assistance awards and the total dollars of assistance received by SFU students during the 2001-02 award year. The first two tables report numbers for students who are considered residents of British Columbia and are receiving funding through the BC government. Simon Fraser students received \$2.5 million more dollars in government student assistance through BC in 2001-02 compared to 2000-01. According to the government's statistics Simon Fraser has moved from being the third largest user of the assistance programs to the second.

The second set of tables report students who are receiving funding through other Canadian provinces or territories and from the United States. Although there is an apparent decrease in the number of awards and total value of assistance being received by students from other provinces and territories, not all provinces advise the institutions of assistance granted to students, particularly grant awards. The decrease could reflect a different mix of provincial representation among students or may reflect increased financial barriers to moving away from home and the choice to stay in the home province or territory.

The number of and funding for U.S. students increased notably in 2000-01 and remained high in 2001-02. Our U.S. students appear to be taking advantage of their U.S. government assistance and requesting maximum values on all government loan programs available to them.

In response to ten years of reduced grant funding and increased loan funding to students, the Canada Millennium Scholarship Foundation awards were introduced by the federal government in 1999-2000. There are two components to the Millennium Scholarship Program, Bursary Awards and Merit Awards. In accordance with the legislation that created the Foundation, 95% of the funds available are directed to grants for students with financial need and 5% are directed to scholarships for students on the basis of leadership, community service, innovation and academic achievement. Simon Fraser students who have received Merit Awards are included in the External Awards report. Students who have received Bursary Awards are included in the tables below under the heading of BC/Federal Grant and Provincial/Federal Grant. The impact of the increase in grant funding from Millennium Bursaries for undergraduate students beginning 1999-00 is clear in the tables below.

The Millennium Foundation Bursary Awards are administered by the provincial authorities who also administer Canada and Provincial student assistance programs. The Millennium Bursary awards are available to students in the second, third and

fourth year of their first undergraduate degree. In British Columbia, all Bursary Awards are disbursed in the second half of an academic year to qualified students who applied for two semesters of government student assistance the previous August. SFU students prefer to apply for student loans one semester at a time in order to consider participation in Co-operative Education semesters, exchange programs, and other special semesters. This disqualifies them from Millennium Foundation Bursary awards. Simon Fraser University pointed out from the beginning that this requirement disadvantaged our students. The BC government also anticipated this problem among semesterized institutions and attempted to mitigate the situation by revamping the BC Grant program. BC originally chose to maintain their first year grant program and reinvest displaced second year grant funds by extending eligibility to third and fourth year students in order to fill some of the holes that the Canada Millennium Bursary Awards created. However, the problem is now impacting student eligibility in new corporate sponsored awards administered by the Foundation as only students who were considered eligible for Millennium grants are considered for the additional awards.

For 2002-03 the B.C. government has discontinued their grants for first year students and replaced it with loan funding. The impact of this change will be seen in next year's report.

BC Residence – Federal and Provincial Assistance

Undergraduate

	Canada Student Loan		British Columbia Loan		BC/Federal Grant		Totals	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	7,206	20,745,360	5,581	8,982,386	3,432	6,277,543	16,219	36,005,289
00/01	6,700	19,422,436	5,139	8,435,234	3,238	5,913,349	15,077	33,771,019
99/00	6,220	18,016,408	4,774	8,437,478	2,707	4,725,887	13,701	31,179,773
98/99	5,742	17,543,548	5,121	10,456,783	1,304	2,244,399	12,167	30,244,730
97/98	5,344	16,728,873	4,833	10,187,803	881	1,633,952	11,058	28,550,628
96/97	5,296	16,458,488	4,765	9,532,871	892	1,566,540	10,953	27,557,899
95/96	5,148	16,135,660	4,202	7,051,162	879	1,282,322	10,229	24,469,144
94/95	4,885	14,473,670	3,898	7,243,664	697	998,482	9,480	22,715,816

Graduate

	Canada Student Loan		British Columbia Loan		BC/Federal Grant		Totals	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	268	877,137	266	639,037	53	47,788	587	1,563,902
00/01	250	731,401	256	567,458	35	32,810	541	1,331,669
99/00	263	835,532	271	633,071	54	53,252	588	1,521,855
98/99	261	832,306	265	649,411	41	43,184	567	1,524,901
97/98*	240	790,574	254	634,665	N/A	N/A	494	1,425,239
96/97*	235	723,913	226	472,144	N/A	N/A	462	1,198,443
95/96*	204	652,199	196	386,703	N/A	N/A	401	1,040,099
94/95*	224	697,892	199	411,163	N/A	N/A	425	1,112,235

Out of Province and US Students

Undergraduate

	Federal Student Loan		Provincial Loan		Provincial/Federal Grant		US Student Loans	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	249	900,177	209	403,709	72	182,303	18	108,983
00/01	251	894,323	212	422,693	84	230,272	20	108,145
99/00	333	1,149,868	249	589,344	60	165,636	9	59,392
98/99	380	1,323,501	270	697,485	38	81,113	8	35,465
97/98	378	1,424,821	317	868,898	42	74,076	9	33,458
96/97	429	1,609,830	514	977,181	20	26,104	12	37,389
95/96	436	1,629,038	547	1,017,365	13	26,980	14	69,636
94/95	394	1,415,716	535	1,000,396	17	24,231	5	16,120

Graduate

	Federal Student Loan		Provincial Loan		Provincial/Federal Grant		US Student Loans	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
01/02	49	206,584	60	165,695	1	834	10	94,915
00/01	60	215,651	62	142,727	4	2,194	14	125,933
99/00	64	264,926	73	193,164	4	9,435	13	75,190
98/99	80	293,106	83	181,735	4	7,217	21	96,653
97/98*	86	373,940	106	309,576	3	5,840	20	79,989
96/97*	78	304,785	119	229,914	5	4,955	16	59,996
95/96*	88	362,150	157	340,064	5	5,560	10	43,143
94/95*	96	359,216	144	271,116	1	1,000	5	21,182

Submitted by C. French, July 2002

SIMON FRASER UNIVERSITY

DEAN OF GRADUATE STUDIES

Memorandum

TO: Dr. John D'Auria, Chair
Senate Policy Committee on
Scholarships, Awards & Bursaries

FROM: Jonathan C. Driver
Dean

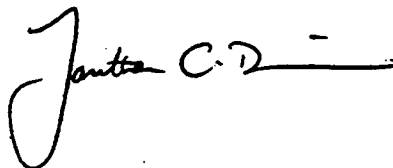
SUBJECT: Annual Report: SPCSAB

DATE: October 1, 2002

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 2001-2002 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$1,932,200
President's Ph.D. Research Stipend	\$335,000
C.D. Nelson Entrance	\$243,653
Special Graduate Entrance Scholarship	<u>\$108,500</u>
	\$2,619,353



c: Sarah Dench
Enclosure