

For Information**SIMON FRASER UNIVERSITY
MEMORANDUM**

To: Senate

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

Re: Annual Report (SPCSAB reference 03-10)

Date: October 9, 2003

I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2002-2003.

Overview

SPCSAB is the committee charged by Senate with setting policy for the administration of awards, student scholarships, bursaries, and other forms of financial aid at SFU (and associated campuses). It should be noted that this is primarily for internal awards. Three other Senate committees, namely SUAAC (Senate Undergraduate Awards Adjudication Committee), SGAAC (Senate Graduate Awards Adjudication Committee) and SCUH (Senate Committee on University Honors) adjudicate financial awards to students where adjudication is needed. Bursary applications are processed by the office of the Registrar.

Fiscal year 2003-03 included a significant deviation from recent years as there was a significant increase in tuition fees, which in turn had a significant effect on awards (bursaries) at SFU. The increase in funding was awarded essentially equally to scholarships and bursaries. However, this was a matter of concern not only to SPCSAB but also the SFU Board of Governors. Summarizing a short report (attached) to the BOG, the number of applications increased by 20% over the previous year, while the calculated financial need increased 31%. Increases in this calculated need have been observed over the past 5 years. However with the increase in available financial resources (SAB budget increased by \$4.16 M), bursary awards increased to an annual average of 61% of student financial need as compared to 46% in the previous year. It should be noted also that the BC Student Assistance Program award limits remain lower than the estimated cost of

attending the university, a situation that continues to put pressure on our funded financial assistance program.

Although the total budget available for entrance scholarships increased, the number awarded decreased slightly from past years. This is due to a number of factors, including more applicants from the Ontario double-cohort (who applied to SFU but then went elsewhere), and a change in year-to-year record keeping. However it should be noted that the retention rates were significantly higher. The number of open scholarships did show a slight increase and more importantly, the amount awarded per credit hour was increased (16%) and the cut-off GPA was maintained at 3.7.

Of special interest during this fiscal year was the establishment of a special bursary program for specific programs, funded from the tuition revenue for full-fee graduate programs, such as Executive MBA program. In another area SFU implemented a University funded Work-Study program (previously funded by the BC government) to supplement funding for SFU students with demonstrated financial need. The number of requests from faculty and Departments for Work Study projects is greater than the program can financially support.

In normal business of the committee:

- To remain competitive with other Canadian universities for excellent graduate students, the committee approved raising the cap on total annual graduate funding to \$42,000.
- To address an identified priority of SFU to attract more First Nations students to the university, the committee approved funding of \$100,000 for awards for First Nations initiatives
- To assist in the integration of former TechBC students to the SFU population and to meet our commitments to the provincial government regarding support for these students, the committee assessed and set progressively higher GPA cut-offs over 3 years for TechBC students for Open Scholarships.
- To continue attracting well-qualified undergraduate students to SFU, the Summit Scholarship admission grade average was maintained at 93%.

John M. D'Amico

**Report to the Senate Policy Committee on Scholarships, Awards and Bursaries****2002-03 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.

Review of the 02-3, 03-1 scholarship cycle:**Final award numbers for Fall, 2002:**

Program title	Final scholarships awarded (includes deferrals)
DEAN'S SCHOLARSHIPS	11
GENERAL ENTRANCE SCHOLARSHIP	3
HAMILTON COLLEGE TRANSFER SCHOLARSHIP	3
INTERNATIONAL SUMMIT SCHOLARSHIP	17
JACK DIAMOND NATIONAL SCHOLARSHIP	4
KENNETH STRAND NATIONAL SCHOLARSHIP	11
NATIONAL SHRUM ENTRANCE SCHOLARSHIP	4
PHI THETA KAPPA INT'L SCHOLARSHIP	2
SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP	8
TADEUSZ SPECHT APPLIED SCIENCE	1
TADEUSZ SPECHT IN SCIENCE	39
TECHONE SUMMIT SCHOLARSHIP	11
THE ALUMNI LEADERSHIP SCHOLARSHIP	1
THE GORDON M. SHRUM SCHOLARSHIP	17
THE JACK DIAMOND ENTRANCE SCHOLARSHIP	12
THE KEN CAPLE COLLEGE SCHOLARSHIP	16
THE SIMON FRASER ENTRANCE SCHOLARSHIP	0
THE SIMON FRASER SCHOLARSHIP	0
THE SUMMIT ENTRANCE SCHOLARSHIP	114
Grand Total	274

The 2002-3 cycle saw a greater number of the donor based Tadeusz Specht Memorial Scholarship¹ awarded, continued growth in the number of registrants for the International Summit Scholarship and a slight increase in the number of Gordon M Shrum awards. The number of Ken Caple College scholarship winners who accepted (and then registered) was also up in 02-3. September of 2002 was the first year for the TechOne Scholarship offered to students entering the Tech One program at SFU Surrey; 11 students with admission averages of $\geq 90\%$ registered in classes. Other awards were

¹ The Tadeusz Specht Memorial Scholarship in Science and Applied Sciences are specific to the health related sciences.



offered at minimum of 93% on interim grades. In 2002-3, 13% of students who accepted our offer of scholarship never registered in classes at SFU.²

Retention

One measure of success for the entrance scholarship program is our retention statistics. The minor, or foundation level awards, have two possible disbursements – the first based on admission gpa, and the second based on first semester course work at SFU. General requirements for the second disbursement are registration in 12 credit hours and a minimum CGPA of 3.0. The success rate refers to the percentage of student who achieve the required ≥ 3 and receive their second disbursement.

Success rates (≥ 3.0) on 2nd disbursement (02-3 entry, 03-1 disbursement)

Program Title	Possible disbursement total less deferrals	disbursements	success rate
DEANS APPLIED SCIENCE	3	3	100%
DEANS BUSINESS ADMINISTRATION	1		0%
DEANS FACULTY OF ARTS	3	2	67%
DEANS FACULTY OF SCIENCE	3	2	67%
HAMILTON COLLEGE TRANSFER	2	2	100%
INTERNATIONAL SUMMIT SCHOLARSHIP	13	9	69%
JACK DIAMOND NATIONAL SCHOLARSHIP	2	1	50%
KENNETH STRAND NATIONAL SCHOLARSHIP	10	8	80%
NATIONAL SHRUM ENTRANCE SCHOLARSHIP	4	2	50%
PHI THETA KAPPA INT'L SCHOLARSHIP	2	1	50%
SHRUM INTERNATIONAL ENTRANCE	7	7	100%
TADEUSZ SPECHT APPLIED SCIENCE	1	1	100%
TADEUSZ SPECHT IN SCIENCE	38	24	63%
TECHONE SUMMIT SCHOLARSHIP	11	9	82%
THE ALUMNI LEADERSHIP SCHOLARSHIP	1	1	100%
THE GORDON M. SHRUM SCHOLARSHIP	17	17	100%
THE JACK DIAMOND ENTRANCE	12	2	16 %
THE KEN CAPLE COLLEGE SCHOLARSHIP	15	13	87%
THE SUMMIT ENTRANCE SCHOLARSHIP	114	94	82%
Grand Total	259	198	76%

² While 317 students indicated their intent to register at the University, 43 did not complete the registration process for 02-3.



Major award winners – those with a possibility of four or more disbursements - must maintain a CGPA of ≥ 3.60 to remain eligible. The following chart provides the detail of major award winner retention rates for the 03-1 semester.

Major award retention rates 03-1 (≥ 3.60):

Program Title	Possible disbursement total less deferrals	disbursements	success rate
DEANS APPLIED SCIENCE	3	3	100%
DEANS BUSINESS ADMINISTRATION	0		N/a
DEANS FACULTY OF ARTS	6	4	67%
HAMILTON COLLEGE TRANSFER	2	2	100%
NATIONAL SHRUM	9	5	55%
SHRUM INTERNATIONAL	14	12	86%
THE ALUMNI LEADERSHIP	2	2	100%
THE GORDON M. SHRUM	40	32	80%
THE SIMON FRASER SCHOLARSHIP	2	2	100%
Grand Total	78	62	79%

It is significant to note that following the acceptance of the Report of the Task Force on Undergraduate Student Recruitment by senate, substantial funding increases to the entrance scholarship budget allowed the scholarship cut-off for the 03-3 cycle to be set at 90% on interim grades for our foundation award, the Summit Entrance Scholarship. Equally significant is the increase in the numbers of the prestigious Gordon M. Shrum Entrance Scholarship.

Total expenditures on all entrance scholarship 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	02-2, 02-3, 03-1
\$1, 202, 406	\$1,268, 986	\$1, 323, 654	\$1,352,290	\$1,520, 810

entrance scholarship review: first disbursement

	1999-3 disbursements	2000-3 disbursements	2001-3 disbursements	2002-3 disbursements
DEANS APPLIED SCIENCE	2	1	3	3
DEANS BUSINESS ADMINISTRATION	1	1	2	1
DEANS FACULTY OF ARTS	8	5	7	3
DEANS FACULTY OF SCIENCE	4	1	1	4
GENERAL ENTRANCE SCHOLARSHIP	1	1	1	3
HAMILTON COLLEGE TRANSFER SCHOL.	3	1	2	3
INTERNATIONAL SUMMIT SCHOLARSHIP	2	1	11	13
JACK DIAMOND LEADERSHIP AWARD	4	1		
JACK DIAMOND NATIONAL SCHOLARSHIP	5	4	2	4
KENNETH STRAND NATIONAL SCHOLARSHIP	6	3	12	11
NATIONAL SHRUM ENTRANCE SCHOLARSHIP	3	4	6	4
PHI THETA KAPPA INT'L SCHOLARSHIP	3	6		2
SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP	6	9	6	7
TADEUSZ SPECHT APPLIED SCIENCE	8	26	2	1
TADEUSZ SPECHT IN SCIENCE	18		22	39
TECHONE SUMMIT SCHOLARSHIP	1	1		10
THE ALUMNI LEADERSHIP SCHOLARSHIP	17	16	15	1
THE GORDON M. SHRUM SCHOLARSHIP	11	12	14	17
THE JACK DIAMOND ENTRANCE SCHOL.	3	8	7	12
THE KEN CAPLE COLLEGE SCHOLARSHIP		1	1	15
THE SIMON FRASER SCHOLARSHIP	115	137		
THE SUMMIT ENTRANCE SCHOLARSHIP			137	114
Grand Total	221	238	251	267

Data is historical, extracted from SIMON, September 29 2003



Simon Fraser University
Dean of Student Services 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 2002/03 Fiscal Summary
Date: September 16, 2003

The Open Undergraduate Scholarship program for the 2002/03 fiscal year continued to be awarded at a CGPA level of 3.70, which was consistent with practice since 1996-2.

There were 1,261 Open Scholarship recipients, resulting in an increase of 7% over last fiscal year.

In the Fall 2002, the basic tuition fee increased from \$73.15 per credit hour to \$95.10 per credit hour and "premium fee" credit hour fees were introduced. In accordance with the SPCSAB decision to maintain the CGPA at 3.70 for the Open Scholarship, the amount of payment per credit hour was increased from \$73 to \$85 per credit hour beginning Fall 2002.

The annual budget for the Open Undergraduate Scholarship program for the 2002/03 fiscal year increased by \$278,568 (30%) over the previous years' budget to allow for the increase in credit hour fee disbursements. Total disbursements over the three-semester period amounted to \$1,204,922.

For the first time, in 2002/03, the Open Scholarship program included 12 students from SFU Surrey.

Over the 2002/03 fiscal year, there continues to be an increase in the number of Open Undergraduate Scholarship recipients which 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	
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	

Open Undergraduate Scholarship Data

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:	2000/2001	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			
2002/2003	2002-2	306	\$220,752	\$721	3.7	\$	73
	2002-3	496	\$515,970	\$1,040	3.7	\$	85
	2003-1	459	\$468,200	\$1,020	3.7	\$	85
Total:	2002/2003	1,261	\$1,204,922	\$956			

Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
Government Student Assistance 2002/03

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 approximately 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 24% of all undergraduate students received their primary funding through government student assistance in the Fall 2002 semester. Without this funding they would not be able to attend the University.

British Columbia Student Assistance Program (BCSAP)

The tables below report the number of government assistance awards and the total dollars of assistance received by Simon Fraser students from 1994/95 to the 2002/03 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 \$4.5 million more dollars in government student assistance through BC in 2002/03 compared to 2001/02, a 12% increase. According to the government's statistics Simon Fraser remained the second largest user of the assistance programs for the second year in a row. In 2002/03 BCSAP increased the maximum value of assistance available to single students with no dependents. This meant that certain students were able to receive more funding if their need was equal to or greater than the maximum allowable award. This change let more students be eligible for more funding this year.

The Canada Millennium Scholarship Foundation Bursary Awards were introduced by the federal government in 1999/00. 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 clearly reflected in the tables.

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, most Millennium Foundation Bursary Awards are allocated 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 and to maximize their government funding. This disqualifies them from Millennium Foundation Bursary Awards. To reduce the problem at semesterized institutions the BC government revamped the BC Grant program. Originally the first year grant program was kept and second year grant funds were

reinvested to extend eligibility to third and fourth year students. However, the Foundation is now creating corporate sponsored awards that build on the initial bursary awards. Simon Fraser University continues to work with the Foundation to mitigate the impact on SFU students of the BC government's method of administration on eligibility for corporate sponsored awards.

For 2002/03 the BC government decided to eliminate the grant program for first year students. This means that funding students would have received as grant the previous year will be awarded in the form of loan for 2002/03 and onward. The BC Loan figures in the tables below show the impact of this change in policy with a 16% increase in BC Loan dollars in one year.

For 2003/04 the BC government has increased allowable expenses in most categories. At the same time they have increased the expected contribution from students. The impact of these changes 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 \$
02/03	7,629	23,413,881	5,709	10,622,832	3,323	6,357,657	16,661	40,394,370
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 \$
02/03	273	723,542	356	876,191	68	52,644	697	1,652,377
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 United States Student Loans

The second set of tables below report students who are receiving funding through other Canadian provinces or territories and from the United States. Although there was an apparent decrease in the number of awards and total value of assistance being received by students from other provinces and territories in previous years, this year the number of awards and the total value has increased. Not all provinces advise the institutions of assistance granted to students, particularly grant awards

The funding received by U.S. students increased by 14% in 2002/03. U.S. students appear to be requesting maximum values on all government loan programs available to them.

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 \$
02/03	221	917,707	231	456,882	98	265,602	34	128,811
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 \$
02/03	57	276,274	76	202,438	10	21,129	24	102,904
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, August 2003.

**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 2002-03**

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. 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.

The table below shows the changes over time in the total number and value of scholarships for in-course students. In 2002-03, the increase in scholarships is primarily due to 32 scholarships totalling \$23,566 provided by the Ministry of Advanced Education to Surrey campus students. 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 this year.

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.

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 \$12,450 in tuition awards. 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 External Awards report for more information).

The increase in number for the Endowed/Annual Awards is due to the increase in participation in the Engineering Science Projects. In 2001-02, there were 47 recipients of the ENSC project award, totaling \$2,080. In 2002-03, there were 90 recipients of the ENSC Project Awards totaling \$4,200.

Four new awards, 2 annual donations and 3 endowments were established this year.

MERIT BASED AWARDS

	Endowed/Annual Scholarships		Endowed/Annual Awards.		SFU Funded Awards	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
02/03	289	228,091	212	62,717	109	58,178
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, August 2003

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

Athletic and Recreation Awards 2002-03

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. There are three categories of Athletic Awards: those funded through endowed and annual donor donations, those funded by University operating funds and those funded by money raised by the individual teams to support their own athletes (Athletic Tuition Awards).

The increase over the last two years 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 originally replaced awards given from Athletic Tuition Awards accounts and will likely grow in future years. The total disbursement in all three categories of Athletic Awards has increased from \$363,001 in 2001/02 to \$377,493 in 2002/03.

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 \$
02/03	352	265,243	55	38,600	62	54,450	32	19,200
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 in 2001/02 was largely due to larger funding allocations for Trinity Western University who brought more teams into the Canada West conference. The funding level for Simon Fraser University remained the same from 2001/02 to 2002/03. However, due to CIS rules, some of the allocated funds could not be disbursed in 2002/03 so a portion of the funding will be disbursed in the summer semester (2003-2) and a portion will be carried forward to the next academic year.

BC ATHLETIC ASSISTANCE PROGRAM*

	# of Award	Total \$ Awarded
02/03	65	53,710
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, August 2003

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

Bursary Program 2002-03

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. In 2002-03 students applied 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 2002-03 reporting year (May 2002 – April 2003), Financial Assistance received 4,012 applications with a total calculated financial need of \$3,237,696. This represents an increase in student financial need of \$760,931 or 31% over last year. The University funded bursary budget increased from \$633,335 to \$1,567,835, an increase of \$934,500 or 148%. Individual student bursary awards increased to an annual average of 61% of assessed need in 2002-03 from 46% of assessed need in 2001-02.

The tables below 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 2002-03 year, four new donor funded bursaries were established, three endowed and one annual.

Included in the SFU Open Undergraduate (domestic) data reported below is funding to a World University Services of Canada (WUSC) refugee student for three semesters. 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.

The SFU Open Graduate Bursary figures reported below includes the TSSU Child Care Bursary. This is the fifth year of this bursary program that is included in the TSSU labour contract with the University. This year eight bursaries totaling \$15,135 were disbursed. Five bursaries were awarded to domestic students (\$8,745) and three were awarded to international students (\$6,390)

Beginning in the 2002-03 academic year, full fee graduate programs are required to fund bursaries for their students from their tuition revenue. Included in the SFU Open Graduate (domestic and international) data reported are bursaries provided by several self-funded graduate programs: Specialist MBA, Master of Technology, Graduate Diploma in Business Administration, Global Assets and Wealth Management, Executive MBA and the Master of Education and Education Doctorate off campus programs. In 2002-03, bursaries totaling \$75,990 were disbursed to students in these programs. Ten of these bursaries totaling \$18,245 were awarded to international students and thirty two bursaries totaling \$57,745 were awarded to domestic students.

For the 2003-04 academic year the bursary award assessment and adjudication process will be co-ordinated with the Work-Study awards. The applications will be shared and both will have an application deadline of six weeks prior to the start of each semester. Students will receive one coordinated offer of financial assistance for both programs. The change should allow students to make better plans for the semester as they will know their funding package before the semester begins. Planning is now underway to coordinate bursary assessments for incoming secondary students with the entrance scholarship adjudication.

*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
02/03	4012	3,237,696
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 \$
02/03	1,461	1,047,642	330	400,950	10	2,628	595	513,709
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 \$
02/03	125	101,300	28	23,160	4	1,137	17	16,345
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

Bursaries for Cost-Recovery Graduate Programs (by program)

	EMBA		GAWM		MOT		GDBA		MBA (Day)		MED/EdD (off campus)	
	# Awd	Total\$	# Awd	Total\$	# Awd	Total\$	# Awd	Total\$	# Awd	Total\$	# Awd	Total\$
02/03	3	\$7,635	1	\$2,205	5	\$10,360	9	\$16,685	21	\$34,470	3	\$4,635

submitted by C. French, August 2003

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

Emergency Loan Program 2002-03

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 three years there has been less disruption to the disbursement of government assistance to students and a notably positive impact on our Emergency Loan program. 2002-03 had the lowest demand on Emergency Loans in eight years. Administration of debt collection is the responsibility of Financial Services who provides Financial Assistance with an annual list. No listing was provided in 2001-02 and only \$1,798 was sent to collections in 2002-03.

EMERGENCY LOANS (Undergraduate/Graduate)

	Number of Loans	Total \$ Awarded	# Loans to Collection	Total \$ to Collection
02/03	239	137,712	4	1,798
01/02	244	142,092	N/A	N/A
00/01	256	152,354	7	4,590
99/00	359	217,139	7	4,650
98/99	433	246,828	10	6,248
97/98	345	157,825	7	4,500
96/97	352	160,716	Not Recorded	Not Recorded
95/96	527	265,472	11	3,763
94/95	674	317,329	7	5,363

submitted by C. French, August 2003

**Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
Work-Study Program 2002-03**

The Work-Study program was part of the provincial government's BC Student Assistance Program (BCSAP) until August 2002 when the program was cancelled. Provincial Work-Study was targeted to graduate and undergraduate students who were B.C. residents and had an assessed financial need above the maximum funding allowance through BCSAP. 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.

For the September semester 2002, Simon Fraser University implemented a University funded Work-Study program. The University program is intended to be supplemental funding for Simon Fraser students with demonstrated financial need. The program is not restricted to BC residents nor to those receiving BCSAP. This means that participants can no longer be identified by system reporting alone so an application and adjudication process had to be implemented. The application deadline is six weeks prior to the start of each semester. Funding from Work-Study is now subject to assessment against a BCSAP award.

The BC Government 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. The 2002/03 reporting year includes one semester, 2002-2, funded through the BC government program and two semesters of SFU funded Work-Study.

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 which is available only to approved Work-Study students. Students are notified of their eligibility to participate in the program beginning two weeks prior to each semester. The number of requests for Work-Study students continues to be greater than our ability to fund students.

Beginning for the September 2003 semester, the Work-Study and Bursary program eligibility assessment will be a combined process. There will be a shared application and students will receive one co-ordinated offer of financial assistance for both programs.

WORK-STUDY- Undergraduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
02/03*	427	510,800	431,640
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.

WORK-STUDY - Graduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
02/03*	11	13,900	11,717
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

*The summer semester of 2002/03 completed the B.C. Government funded Work-Study program. For the Fall and Spring semesters of 2002/03 the Simon Fraser University funded Work-Study program was implemented.

submitted by Charlotte French, August 2003

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

Government Part-time Student Assistance and Canada Study Grants 2002-03

Government Part-time Student Assistance

To be eligible for the federal governments Part-time 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 2002-03, 78 students applied for Part-time Loan and Grant. Of those students, 60 qualified for grant only, loan only, or grant and loan with a total assessed need of \$76,584.

Students receiving a Part-time Loan must start making payments on the interest immediately, while still in studies. Many students who are in search of additional financial support cannot afford to make the payments. As a result, the loan program is not well used by Simon Fraser students. In 2002-03, 40 students were eligible for Part-Time Student Loans with a total award value of \$31,134. Only 18 of the students requested the funding to be issued and, in the end, only 16 students, with a total loan value of \$16,286, cashed their loans.

In order to be eligible for grant funding, students must not only demonstrate financial need but also meet specific criteria for not studying full-time. The list of acceptable conditions for maintaining part-time studies includes: permanent disability, being a 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 \$1,200 a year and is well used by Simon Fraser students. In 2002-03, 47 students received grant awards totalling \$45,450.

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 that year to allow students to be considered for Part-time Grant without applying for a Part-time Loan. 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
02/03	18	18,239	16	16,286
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
02/03	47	45,450
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

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

The federal government offers 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 calculated and the award replaces BC and federal loan funding. In other words, students no longer receive additional funding but have a portion of their debt (loan) converted to grant.

	# of Awards	Total \$ Awarded
02/03	3	8,749
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

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

Submitted by Charlotte French August 2003

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

External Scholarships, Awards and Bursaries 2002-03

Each year Simon Fraser University students receive scholarships, awards and bursaries that are administered and adjudicated by organizations and corporations external to the University. 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 2002-03 year, Simon Fraser undergraduates received 301 external scholarships, awards and bursaries totaling \$423,890, an increase of 19% over 2001-02, 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 including an annual grant of \$5,000 from the Foundation and an annual tuition waiver to a maximum of \$5,000 from the University. In 2002-03, Simon Fraser had: 3 Provincial awards of \$500 each and 4 National winners – 2 in 4th year, 1 in 3rd year and 1 in 2nd year. 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 four years ago when the Federal government created the Canada Millennium Scholarship Foundation and are granted on the basis of academic performance, community service, leadership and entrepreneurship. In 2002-03, there were 6 National Award winners attending Simon Fraser University – 2 new recipients, 4 renewals; 7 Provincial/Territorial Award winners – 2 new recipients, 5 renewals and 14 local Award winners.

Financial Assistance also actively promotes the availability of and assists students with the application process for numerous other 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. Awards programs in this category include the Rhodes Scholarship, the Queen Elizabeth II BC Centennial Scholarship, NRC Women in Engineering and Science Scholarship, and many others. This year Simon Fraser University students received 4 substantial scholarships from the Association of Universities and Colleges of Canada: 2 Fairfax Scholarships valued at \$5,000 renewable for two years and 2 Fessenden-Trott Scholarships valued at \$9,000 renewable for two years.

UNDERGRADUATE EXTERNAL

	External Scholarships		External Awards		External Bursaries	
	Total # of Scholarships	Total \$	Total # of Awards	Total \$	Total # of Bursaries	Total \$
02/03	236	381,781	5	6,715	60	35,394
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 \$
02/03	3	3,600	0	0	3	3,000
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 August 2003

DEAN OF GRADUATE STUDIES

Memorandum

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

FROM: Jonathan C. Driver
Dean

SUBJECT: Graduate Scholarships
2002-03 f.y. Annual Report

DATE: September 19, 2003

For fiscal year 2002-2003, I am pleased to report on the following graduate scholarship matters.

Graduate Fellowships:

GF Award Values: To reflect increased cost of living and tuition, the values of Graduate Fellowships were increased by \$400 to the Master's stipend and \$200 to the doctoral, from levels last established in 1998/99. Specifically, GF values were increased to \$4,800 (Master's level) and \$5,200 (Ph.D. level) effective September 1, 2002 (as all of our award programs run on an academic year; not a fiscal year).

GF Allocation: Historically, the GF allocation to each department is based on their full-time enrollment in the previous Fall semester. The resultant minimum GF allocations (based on 01-3 enrollments) are shown on the enclosed table. There were a total of **432** GFs available for the **694** applications received.

GF Budget: We projected that \$1,918,956 would be available for Graduate Fellowships for the 2002-03 f.y. The actual amount disbursed was \$2,001,200.

GF Eligibility Criteria: To be eligible to hold a GF, a student must normally have a CGPA of at least 3.50 and be registered as a full-time student.

President's Research Stipend

Since the GF award values were increased, the value of the President's Research Stipend was also increased to \$5,200 (from \$5,000) to maintain its parity with the GF doctoral level award. All doctoral students are eligible for this award once in their careers, provided that they have completed all degree requirements except the thesis.

The number of PRS stipends is strictly dependent on demand. In 2002-2003, there were 70 applicants. A total of \$359,200 was disbursed.

Entrance Scholarships:

The following entrance scholarships were disbursed in the 2002-03 f.y.:

C. D. Nelson Memorial Graduate Scholarships:

The number of **C. D. Nelson Entrance Scholarships** increased from 15 in the previous academic year to 20 in 2002-03. Departments nominate a maximum of 3 applicants to their graduate program for graduate entrance scholarships. The value of the C. D. Nelson Scholarships remained unchanged in 2002-03 at \$17,000 per year. Although this is generally a three-semester award, some recipients were only permitted to hold partial awards because the total funds per annum that a graduate student may receive from scholarship/fellowship/award support was \$35,000 in 2002-03. Consequently there were actually 11-25 recipients during 2002-03 depending on the semester. (Please refer to the "Graduate Awards in FY 2002-2003" Table appended to this report.) A total of \$328,650 was disbursed in this award category.

The following entrance scholarships were awarded from private and endowed sources during 2002-03. Departments recommend recipients from their pool of eligible applicants to the Dean of Graduate Studies as Chair of the Senate Graduate Awards Adjudication Committee for final adjudication.

Arthur and Ancie Fouks Graduate Entrance Award in Public Service	\$ 4,700
Arthur Andersen & Co. Graduate Entrance Scholarship	\$ 6,500
Dorothy Middler Thomas Graduate Entrance Scholarship in English	\$ 600
DuPont Graduate Entrance Scholarship in Chemistry	\$ 2,600
Faculty of Science Graduate Entrance Scholarship	\$ 1,800
Grace Woodworth MacInnis Graduate Scholarship	\$ 295
Graduate Entrance Scholarship in Business Administration	\$ 1,900
Graduate Entrance Scholarship in Political Science	\$ 1,700
Robert Hancock Dunham Memorial Scholarship in English	\$ 3,345
Scott Paper Limited Bicultural Graduate Entrance Fellowship	\$20,000
Simons Foundation Doctoral Entrance Fellowship	\$17,000
Thelma Finlayson Graduate Entrance Scholarship	\$ 4,000
William & Ada Isabelle Steel Memorial Graduate Scholarship	\$17,000
William F. & Ruth Baldwin Graduate Scholarship in History	\$14,350

Special Graduate Entrance Scholarships:

The SGES is a one-semester "top-up" award to retain or recruit the best students entering a graduate program at SFU. These awards are valued between \$3,000 and \$7,000, depending on the level of 'competition'. We offered all B-listed NSERC Scholarship holders a \$6,000 SGES – those offers were replaced with a C. D. Nelson Entrance Scholarship valued at \$17,000 as other recipients declined them.

Entering students are nominated for an SGES via the Graduate Program Chair to my office at any time -- students cannot apply directly. Nominations for an SGES must meet all of the following four main criteria:

- an applicant with outstanding academic qualifications
- a formal offer of admission to a graduate program at SFU, that has not yet been accepted;
- commitment by the department or prospective supervisor at SFU to attracting the applicant, as evidenced by an offer of substantial financial support
- one or more documented competing offers of support from other universities. This is not required for students who hold a major award such as an NSERC, SSHRC, MSFHR, CIHR scholarship or fellowship.

There were 43 nominations received. Of those, 33 students accepted the awards thereby entering graduate programs at SFU, 8 declined our offer, and 2 were upgraded to C. D. Nelson Entrance Scholarships valued at \$17,000/year. A total of \$113,185 was awarded.

Endowed Awards:

As well as the entrance scholarships outlined above, our office disbursed another 150 awards from endowment and private donation sources valued from \$300 to \$20,000. In 2002-03, a total of \$428,521.90 was disbursed in this category. There were approximately 1,200 applicants for these awards.

Annual Awards and Scholarships from External Sources:

There were 40 different 'annual' awards (from internal and external sources) available in 2002-03, valued from \$500 to \$19,300, including the following scholarships and fellowships from federal and provincial granting agencies:

1. National Science and Engineering Research Council

	<u>No. of Awards</u>	<u>Value</u>
PGS As	55	@ \$17,100/year
PGS Bs	21	@ \$19,300/year
IPGS	7	@ \$19,300/year
USRAs	68	@ \$4,500 (one-semester awards tenable in summer, fall or spring)

2. Social Sciences and Humanities Research Council

Doctoral Fellowships	38	@ \$17,000/year
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3. B.C. Health Research Fellowships

Studentships	3	@ \$17,000/year
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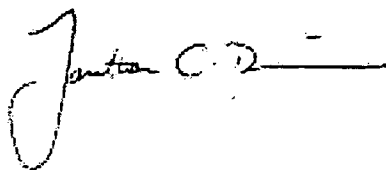
4. Michael Smith Foundation for Health Research

Trainee Awards (Master's and Doctoral)	9	@ \$20,000/year
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5. Science Council of B.C.

GREAT Awards	14	@ \$20,000/year
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Lastly, we administered approximately 15 other external, donor-designated merit-based awards of varying amounts.



c: S. Dench

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

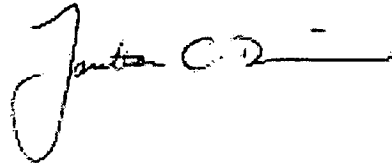
SUBJECT: Annual Report: SPCSAB

DATE: September 19, 2003

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 2002-2003 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$2,001,200
President's Ph.D. Research Stipend	\$ 359,200
C.D. Nelson Entrance	\$ 328,650
Special Graduate Entrance Scholarship	<u>\$ 113,185</u>
	\$2,802,235



c: Sarah Dench
Enclosures

GRADUATE AWARDS IN FY 2002-2003

BASE BUDGET

\$ 3,020,603

SURPLUS CARRYOVER - FY 01-02

65,373

TOTAL AVAILABLE FOR AWARDS

3,085,976

	AWARD NAME	NUMBER	VALUE	TOTAL	
Semester 02-2	GF Master's	86	\$ 4,400	\$ 378,400	
	GF Ph.D.	58	5,000	290,000	
	Stipend	24	5,000	120,000	
	Nelson	11	5,666	62,326	
	Entrance	0	varies	-	
					\$ 850,726
Semester 02-3	GF Master's	98	4,800	470,400	
	GF Ph.D.	52	5,200	270,400	
	Stipend	19	5,200	98,800	
	Nelson	25	5,666	141,650	
	Entrance	27	varies	108,000	
					1,089,250
Semester 03-1	GF Master's	67	4,800	321,600	
	GF Ph.D.	52	5,200	270,400	
	Stipend	27	5,200	140,400	
	Nelson	22	5,667	124,674	
	Entrance	1	varies	5,185	
					<u>862,259</u>

TOTAL AWARD EXPENDITURES

2,802,235

Balance of funds transferred from
Faculty of Applied Science for FAS-GFs

283,741

14,900

SURPLUS CARRYOVER FOR FY 2003-2004

\$ 298,641

18/09/2003

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REVISED Graduate Fellowship Allocations

2002-03

Department	2001-3 FT Enroll.	Prop. Dept. Alloc.	Initial Dept. Alloc.	Revised Dept. Alloc.	Already A-listed	Balance Remaining
Communication	62	15.68	14	16	11	5
Computing Science	109	27.57	25	28	23	5
Engineering Science	89	22.51	20	23	4	19
Kinesiology	35	8.85	8	9	8	1
Resource & Environ. Mgt.	98	24.79	22	25	20	5
SFU at Surrey	30	7.59	0	8	0	8
Archaeology	43	10.88	10	11	10	1
Contemporary Arts	9	2.28	3	3	2	1
Criminology	63	15.94	14	16	14	2
Economics	85	21.50	19	22	5	17
English	41	10.37	9	10	9	1
French	6	1.52	3	3	2	1
Geography	51	12.90	12	13	9	4
Gerontology	21	5.31	5	5	4	1
History	52	13.15	12	13	5	8
Latin American Studies	10	2.53	3	3	2	1
Liberal Studies	18	4.55	4	5	4	1
Linguistics	17	4.30	4	4	4	0
Philosophy	8	2.02	3	3	2	1
Political Science	36	9.11	8	9	4	5
Psychology	83	21.00	19	21	18	3
Publishing	29	7.34	7	7	0	7
Sociology & Anthropology	40	10.12	9	10	2	8
Women's Studies	15	3.79	3	4	3	1
Business Administration	152	38.45	35	38	0	38
Education	69	17.45	16	17	16	1
Biological Sciences	143	36.17	33	36	33	3
Chemistry	71	17.96	16	18	16	2
Earth Sciences	25	6.32	6	6	0	6
Mathematics	36	9.11	8	9	6	3
Molecular Biology & Biochemistry	51	12.90	12	13	12	1
Statistics	20	5.06	5	5	2	3
Physics	49	12.39	11	12	6	6
Special Arrangements	26	6.58	6	7	6	1
Totals:	1,692	428.00	384	432	262	170

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Additional part of S.03-106

This report to the Board of Governors was also intended to be sent to Senate as part of Dr. D'Auria's report dated October 9, 2003. Apologies for the late distribution. A. Watt



Office of the Dean of Student Services
Simon Fraser University
Senate Policy Committee on Scholarships,
Awards & Bursaries

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MEMORANDUM

TO: The Board of Governors

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

SUBJECT: Tuition Fees and Accessibility

DATE: October 15, 2003

In your memo of June 17, 2002 the following motion from the Finance and Administration Committee of the Board of Governors was communicated to the Senate Policy Committee on Scholarships, Awards and Bursaries:

That the Finance and Administration Committee request that the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) report to the Committee within one year within one year with special attention to demand for, and distribution of, that portion of the tuition fee increase allocated to the Scholarships, Awards and Bursaries fund; and that the Senate Committee on Enrolment Management and Planning (SCEMP) report to the committee within one year on the effects of the tuition increase on application and enrollment levels, with special attention to issues of diversity and, where possible, income levels.

Attached is the response of the Senate Policy Committee on Scholarships, Awards and Bursaries, and I'd like to express my appreciation to Dean Ron Heath and Ms. Charlotte French for compiling the information. If you require additional information, please let the committee know. Please note that the recently formed ad-hoc Working Group on Access Issues will also receive a copy of this reply for their deliberations.

John M. D'Auria



Office of the Dean of Student Services

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Report of the Senate Policy Committee on Scholarships, Awards and Bursaries to the Finance and Administration Committee of the Board of Governors

August 2003

A review of demand on the bursary and financial assistance programs was done to determine if there has been an impact on the programs following the tuition increase implemented in September 2003. The report will focus on bursaries as other institution based aid programs, such as Work Study, use the assessed need calculations from the bursary program to determine awards and recipients usually overlap across programs. A brief review of the impact of changes to the B.C. Government Assistance Program is also included.

Bursary Program

In 2002-03 Financial Assistance received 4,012 applications for bursaries compared to 3,429 in 2001-02, an increase of 683 applications or 20%. Of the 2002-03 applicants, 2,610 were identified as having a financial need totaling \$3,237,696 compared to 2174 recipients with \$2,476,765 of financial need in 2001-02. This is an increase from 2001-02 of 436 awards (or 20%) and \$760,931 in financial need (or 31%).

The attached line graph shows the trend of increasing total applications, total financial need and total awards for the past five years. The total number of applications and total calculated financial need have increased consistently over the five years shown despite the fact that tuition decreased in 2001-02. Total value of awards is dependent on the funds available from donor based bursaries and operating funds allocated to bursaries. The operating dollars budgeted for bursaries increased very little over the previous four years consistent with the allocation formula. The total operating dollars budgeted in 2002-03 for bursaries increased by just under \$1 million. Individual student bursary awards increased in 2002-03 to an annual average of 61% of assessed financial need from an annual average of 46% in 2001-02.

Chart 2, the bar graph, compares tuition and fees for a 12 credit hour semester to average financial need and the average bursary award for the last four years. This chart clearly shows that financial need has increased consistently over the time period even though tuition decreased in 2001-02 and increased in 2002-03. The value of bursary awards is determined by the financial need of the applicants and the total funding available for distribution. Therefore, the average bursary award is a function of financial need and available dollars. The average value of bursaries dropped in 2001-02 with the increase in financial need and limited increase to the bursary budget (as seen in chart 1) and increased in 2002-03 due to the substantial budget increase despite increased financial need.

The relationship between increase in tuition and attendance at University is unclear. A recent review of this issue in Canada published by the Canada Millennium Scholarship Foundation (Junor. S. & Usher, A, The Price of Knowledge 2002) showed that University attendance in jurisdictions whose tuition fees increased by over 100% in the 1990s showed a corresponding increase in University participation,

although the connection was weaker than in the 1980s. B.C., where tuition fees remained relatively unchanged due to tuition freezes in the same time period, had very little change in the participation rates.

Tuition is but one of the components of the costs incurred by students. The current estimated student budget for 2003-04 put reasonable costs of attendance (education and living) for a single student with no dependents attending Simon Fraser for two 15 credit hour semesters at \$15,442. Tuition and fees accounts for \$4,150, or 27% of that figure. The impact of changes to costs of living (housing, food, transportation, etc.) can have a more significant impact to an individual student than tuition alone. For an individual student a change in any one financial factor may make or break a decision to attend or may change the number of credit hours they are able to carry. Those factors are their expenses, including both living and education costs, and their resources, including assets, income, savings, and financial assistance.

Government Student Assistance

An important funding factor for many of our students is government student assistance. In any academic year, approximately 24% of Simon Fraser undergraduate students receive their primary funding through government assistance programs. Since bursaries are considered supplementary funding to meet unexpected costs or extra costs that a student cannot fund through other sources, the level of funding available through Canada Student Loans and Grants and B.C. Student Loans and Grants can be critical to a student's ability to attend. The B.C. Student Assistance Program (BCSAP) has not changed the maximum funding available to students with dependents in five years (maximum \$14,790 for two semesters) while the maximum for students without dependents increased last year for the first time in seven years from \$8,840 to \$9,350 for two semesters. B.C. government assistance programs do not recognize all costs associated with attendance at University. Costs such as computers and software are not recognized, motor vehicles may not be valued more than \$5,000, and costs of books and supplies are capped at \$1000 each semester which may not be sufficient for specialized programs such as Film and Visual Arts. In addition, some medical and other exceptional expenses may not be automatically recognized and B.C. has now restricted a student's ability to appeal these expense limits. The inability of the B.C. Student Assistance Program to meet the full financial needs of students puts more pressure on the institution funded financial assistance programs.

Other policy changes by governments also impact the proportion of assistance a student will receive as grant versus loan. For example, British Columbia has had a grant program to help encourage post-secondary participation for over ten years. The B.C. Grant program was limited to students in their first and second years of their first degree. In 2000 the federal government introduced the Canada Millennium Scholarship Foundation and a new needs based grant program. When this occurred the B.C. government adjusted their grant program to coordinate with the federal program. Between the two programs, students in their first degree would continue to receive Canada Student Loan funds at the same rate but would then be eligible for grant funds to the maximum award value for all four years. This reduced the rate of debt accumulation by reducing the number of students who received B.C. Student Loans. However, in 2002-03 the B.C. government decided to eliminate the first year grant. This means that students who started post-secondary studies in 2002-03 and must rely on government assistance for support will automatically have a higher debt level on graduation than their classmates who started the previous year.

The tables below show the increase in government assistance received by Simon Fraser University undergraduate students over the last five years. The numbers clearly reflect the impact of the increase in maximum annual funding to single students and the shift of first year students from grant to B.C. Student Loan.

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 \$
02/03	7,629	23,413,881	5,709	10,622,832	3,323	6,357,657	16,661	40,394,370
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

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

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 \$
02/03	221	917,707	231	456,882	98	265,602	34	128,811
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

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

Conclusion

Calculated financial need of students applying for bursaries at Simon Fraser University has increased each of the last five years independent of whether tuition has increased or decreased. Bursary awards are determined not only by student financial need but also by the funding available for awards. In 2002-03 bursary awards increased to an annual average of 61% of student financial need from 46% in 2001-02. Students who receive their primary funding for attendance at Simon Fraser University through the B.C. Student Assistance Program have had a decrease in grant eligibility at the same time that maximum award levels for some student categories have increased. The BCSAP award limits remain lower than the estimated cost of attendance - a situation that continues to put pressure on the institution funded financial assistance programs.

Undergraduate Scholarships

Over the past two years, significant increases and funding have been made to undergraduate scholarship programs.

Entrance Scholarships

In order to encourage outstanding new students to attend the University, the number of Shrum Entrance Scholarships was doubled from 20 to 40 and the value of the major entrance scholarships (SFU, SFU Alumni and Shrum) was increased by \$500 per semester/\$4000 over four years. Summit Scholarships (\$3500 over two semesters) were guaranteed for any student admitted with an average of at least 90%. Previously the minimum requirement had been 93% based on available funding. This has had a significant affect on enrolment as the percentage of students with greater than 90% increased from 12% of BC 12 students in 2002-3 to 22% in 2003-3. Those with greater than 95% increased from 1% to 4% in the same period. In most areas, SFU is now quite competitive in offering entrance scholarships for well-qualified students.

In 2003-04, we have added some special scholarship and awards programs to encourage First Nations/Aboriginal students to pursue post-secondary studies at the University. The total budget for the major entrance scholarships is in the area of \$2,312,000.

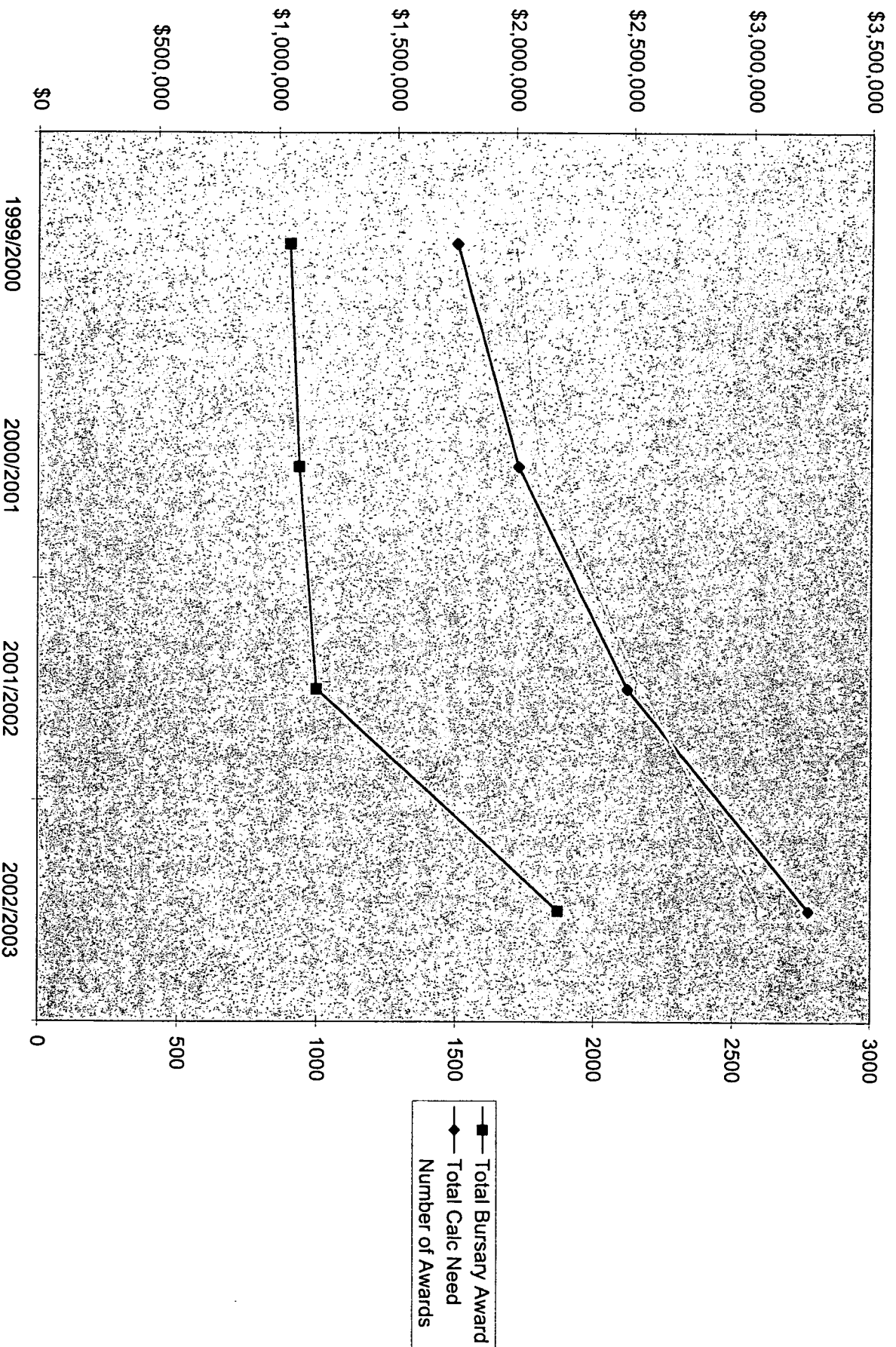
Open Scholarships

The qualification for the Open Scholarships has been stable at a CGPA of 3.70 for several years. The scholarship is valued at \$100 per credit hour based on the course credit hour load in the subsequent semester. In total, some \$1,675,000 is allocated to the Open Scholarship program.

Graduate Scholarships

In fiscal year 2002-03, the Dean of Graduate Studies Office received an additional \$667,055 as its portion of the tuition fee increase allocated to the Scholarships, Awards and Bursaries fund. To reflect increased cost of living and tuition, we increased the number and values of the C.D. Nelson Entrance Scholarships, Graduate Fellowships and the President's Research Stipends for the 2002-03 academic year. Since all DGS fellowships and scholarships are committed over the academic year from September 1, 2002 – August 31, 2003 (as opposed to the fiscal year), we carried forward a balance of \$298,641 for those awards tenable in the summer 2003-2 semester.

Chart1



Tuition (12 credits) vs. Average Financial Need and Average Bursary Award

