

SIMON FRASER UNIVERSITY

MEMORANDUM

To: Senate

From: Stephen T. Easton, Chair *Belincheff for Stephen Easton*
Senate Policy Committee on Scholarships, Awards and Bursaries

Re: Annual Report (SPCSAB Reference 05-14)

Date: 17 November 2005

I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2004-2005.

Last year's Annual Report (2003-2004) was delivered in the spring of 2005. The introduction of the new Student Information Management System (SIMS) for the University meant that it took longer to develop relevant information last year. That transition has now been effected. Beginning with 2004-2005 we expect to return to the normal fall delivery of the SPCSAB Annual Reports.

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. 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. Academic Resources, a division of Student Services, processes bursary applications.

During 2004-05 financial assistance at the University increased significantly. Applications for undergraduate student bursaries increased by 9 percent while the University funded bursary budget increased by 91 percent to \$4.84 million. Graduate bursaries brought the total bursary budget to \$5.3 million, an increase of 46 percent over 2003-04 and 150 percent over 2002-03. A special Access Committee, established by the Board of Governors in Spring 2004, reviewed issues relating to the increasing tuition fees and the effect this was having on students' ability to attend university. The Access committee provided advice to SPCSAB on how the adjustment to the Scholarships, Awards and Bursaries component of the University's budget should be allocated. In particular it was noted that the portion of assessed need that could be accommodated by the bursaries budget had been declining. Thus the additional allocation to the SAB budget allowed the University to provide funding at 85% of assessed need. The SPCSAB agreed to this adjustment to the bursaries base in 2004-2005 based on the dramatic increase to

tuition fees but reserved judgment on the disposition of future SAB budget increases. The Committee expressed a desire to continue to recognize good student scholarship as well as dealing with issues related to student need.

The BC Government Student Assistance Program together with the Canada Millennium Scholarship Foundation changed some of the ways in which their funding was awarded. The sum of student loans and grants increased by less than one-half of one percent to \$42.6 million while the number of student awards fell by eight percent to 15,600.

Undergraduate entrance scholarship funding fell slightly to \$2.55 million in 2004-05 as total awards decreased from 684 to 554 primarily due to the decrease in Summit Entrance Scholarships. Some 1,266 Open Undergraduate Scholarships were awarded totaling \$1.4 million. This represents a constant funding level relative to the previous year. The award cutoff for a cumulative GPA remained at 3.70, and the payment per credit hour remained at \$100.

Graduate funding during the period was increased from \$3.8 million to \$4.7 million of which 78 percent was awarded through Graduate Fellowships, 12 percent for President's Ph.D. Research stipends, 6.7 percent for the C.D. Nelson Entrance Scholarships, and the remainder for Special Graduate Entrance Scholarships.

However, the 2004-05 fiscal year ended with the Graduate Fellowship account being overspent by \$572,000. There were three reasons for this: there was an unexpected increase in the demand for President Research Stipends that had to be met; the actual share of the tuition increase expected to flow to graduate funding was not as great as forecast; and the long conversion to the Peoplesoft computer system meant that important financial reports and late-posted Spring award disbursements led to very inaccurate year end budget forecast. The latter problem in particular is not expected to recur and the Dean of Graduate Studies plans to make proposals to deal with unanticipated increases in President Research Stipend demands.

In addition, the method of awarding of Graduate Fellowships has been changed. Presently, all Graduate Fellowships are awarded on the basis of the headcount in each graduate program. Starting in the fall of 2006, half of all Graduate Fellowships will be awarded according to headcount, and half will be awarded on the basis of a weighting of graduate degrees awarded in the preceding three years. The purpose of these changes is to emphasize degree completions rather than numbers in programs, and to underline support for research-intensive programs.

Simon Fraser University continued to fund the Work-Study Program with 541 awards costing \$608,000. This is the second year in which the University has funded these awards since the Province discontinued them.

Other notes of interest:

- The Canadian Millennium Foundation awarded 12 students the National In-Course Millennium Scholarships in 2004-05.
- Students who participated in the SFU International Field School programs, Foreign Exchange programs and International Co-op received 137 bursaries totaling \$221,000

- The Aboriginal Bursary Program targeted at aboriginal students in financial need made 35 awards totaling over \$57,000.
- Total disbursements of Athletic awards increased by 15 percent to \$480,000 primarily arising from an increase in endowed and annual donations. Four new donor funded athletic awards were established in 2004-05. Recreational Leadership awards totaled nearly \$80,000, an increase of 75 percent primarily due to the establishment of the new Recreation Promotion Awards.

SIMON FRASER UNIVERSITY

DEAN OF GRADUATE STUDIES

Memorandum

TO: Chair
Senate Policy Committee on
Scholarships, Awards & Bursaries

FROM: Jonathan C. Driver
Dean

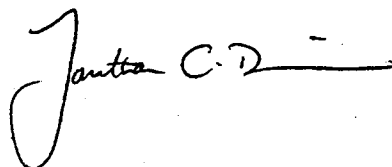
SUBJECT: Annual Report: SPCSAB

DATE: October 21, 2005

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 2004-05 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$3,666,000
President's Ph.D. Research Stipend	\$ 546,000
C.D. Nelson Entrance	\$ 306,334
Special Graduate Entrance Scholarship	<u>\$ 187,000</u>
	\$4,705,334



c: J. Hinchliffe

GRADUATE AWARDS IN FY 2004-05

BASE BUDGET 2004-05	\$3,940,097
SURPLUS CARRYOVER - FY 2003-04	<u>193,071</u>
TOTAL AVAILABLE FOR AWARDS	4,133,168

	<u>AWARD NAME</u>	<u>NUMBER</u>	<u>VALUE</u>	<u>TOTAL</u>	
Summer '04 Semester	GF Master's	148	6,000	\$ 888,000	
	GF Ph.D.	69	6,000	414,000	
	Stipend	25	6,000	150,000	
	Nelson	18	6,000	108,000	
	Entrance	0	varies		
					\$ 1,560,000
Fall '04 Semester	GF Master's	169	6,000	1,014,000	
	GF Ph.D.	91	6,000	546,000	
	Stipend	26	6,000	156,000	
	Nelson	16	6,000	96,000	
	Entrance	32	varies	<u>144,000</u>	
					1,956,000
Spring '05 Semester	GF Master's	78	6,000	468,000	
	GF Ph.D.	56	6,000	336,000	
	Stipend	40	6,000	240,000	
	Nelson *	17	6,000	102,334	
	Entrance	8	varies	<u>43,000</u>	
					<u>1,189,334</u>
TOTAL AWARD EXPENDITURES					<u>4,705,334</u>
SURPLUS CARRYOVER FOR FY 2005-06					<u>\$ (572,166)</u>

* This is the 'actual' amount reflected in the budget summary reported by Finance. However, DGS disbursement records indicate the total should be \$102,000. The \$334 discrepancy appears to be a data entry error in Finance.

SPCSAB Report on Entrance Scholarships

Report to the Senate Policy Committee on Scholarships, Awards and Bursaries 2004 – 05 (1047 – 1051) Entrance Scholarship Program

This report provides entrance scholarship data specific to intake and retention. 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.

Intake for the 1047 scholarship cycle:

The September entry is the largest intake of entrance scholarship students with the great majority entering SFU directly from high schools in BC. Entrance scholarship to students from other provinces in Canada include the Gordon M. Shrum National Entrance scholarship and the Kenneth Strand National Entrance Scholarship. Entrance scholarships for international students are the Shrum International Entrance Scholarship and the International Summit Entrance Scholarship. Chart one is a comparison of scholarships offered for 1047, vs the final count of new entrance scholarships disbursed.

Chart one: offers vs. final registrants for 2004, Fall

Source: SIMS, Sept - Nov 1, 2005

Award Title	OFFERED	DISBURSED
COLUMBIA COLLEGE ENTRANCE SCHOLARSHIP	1	1
DEANS SCHOLARSHIP APPLIED SCIENCE	6	4
DEANS SCHOLARSHIP FACULTY OF ARTS	15	8
DEANS SCHOLARSHIP BUSINESS ADMINISTRATION	6	3
DEANS SCHOLARSHIP SCIENCE	11	2
DEANS SCHOLARSHIP EDUCATION	1	1
GENERAL ENTRANCE SCHOLARSHIP		2
INTERNATIONAL SUMMIT SCHOLARSHIP	83	14
NATIONAL TADEUSZ SPECHT IN SCIENCE	3	1
PHI THETA KAPPA INTERNATIONAL SUMMIT	1	1
TADEUSZ SPECHT MEMORIAL SCIENCE	70	8
TECHONE SUMMIT SCHOLARSHIP	14	8
THE SIMON FRASER SCHOLARSHIP	2	2
THE JACK DIAMOND ENTRANCE SCHOLARSHIP	15	14
THE SUMMIT ENTRANCE SCHOLARSHIP	1378	410
THE GORDON M. SHRUM ENTRANCE SCHOLARSHIP	48	28
THE GORDON M. SHRUM NATIONAL ENTRANCE SCHOLARSHIP	5	1
THE H. Y. LOUIE ENTRANCE AWARD	5	5
THE JACK DIAMOND NATIONAL ENTRANCE SCHOLARSHIP	1	1
THE KEN CAPLE COLLEGE TRANSFER ENTRANCE SCHOLARSHIP	10	5
THE KENNETH STRAND NATIONAL ENTRANCE SCHOLARSHIP	48	19
THE LLOYD CARR-HARRIS SCHOLARSHIP	1	1
THE LOHN FOUNDATION ENTRANCE AWARD	2	3
THE SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP	14	7
THE SIMON FRASER ALUMNI LEADERSHIP ENTRANCE SCHOL.	2	2
THE WILLIAM M. HAMILTON COLLEGE TRANSFER SCHOLARSHIP	3	3
	3	1
Grand Total	1747	555

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SPCSAB Report on Entrance Scholarships

Chart two provides entrance scholarship registration numbers over the past four fall intakes. New awards include: the Lloyd-Carr-Harris Entrance scholarship, awarded to a directly admitted student to the Faculty of Business with the highest entering grade, and the H.Y. Louie Entrance Award and the Lohn Foundation Entrance Award. Both of these entrance awards are need-based awards jointly administered by Student Recruitment and Financial Assistance.

Summit Entrance scholarship: Previous to 1037, the Summit Entrance Scholarship was offered to students with an entering average of $\geq 93\%$. From 1037 onwards, the Summit has been offered to all applicants presenting a $\geq 90\%$ average at the time of admission. Possible contributing factors for the drop in Summit registrants for 1047 include: more BC12 students leaving the province to accept offers of scholarship outside BC (the high number in 1037 may be attributed in part to more BC students staying in the province with the double cohort in Ontario making admission to Ontario Universities very competitive.) and an environment of increased competition for well qualified students provincially, nationally and internationally. In 1037, offers of scholarship were not rescinded when students fell below $\geq 90\%$ on final grades. In 1047, 24 students who fell below $\geq 86\%$ on final grades had their offer of scholarship withdrawn. For additional detail, please see appendix A, comparing acceptance yields broken out by academic group, program, and award name.

Chart two: Entrance scholarship comparison on first installment

SCHOLARSHIP	2001, Fall	2002, Fall	2003, Fall	2004, Fall
DEANS APPLIED SCIENCE	3	3	5	4
DEANS BUSINESS ADMINISTRATION	2	1	4	3
DEANS FACULTY OF ARTS	7	3	6	8
DEANS FACULTY OF SCIENCE	1	4	4	2
DEANS EDUCATION				1
GENERAL ENTRANCE SCHOLARSHIP	1	3		2
HAMILTON COLLEGE TRANSFER SCHOL.	2	3	3	3
INTERNATIONAL SUMMIT SCHOLARSHIP	11	13	5	14
JACK DIAMOND NATIONAL SCHOLARSHIP	2	4	2	1
KENNETH STRAND NATIONAL SCHOLARSHIP	12	11	23	19
NATIONAL SHRUM ENTRANCE SCHOLARSHIP	6	4	5	1
PHI THETA KAPPA INT'L SCHOLARSHIP		2		1
SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP	6	7	8	7
TADEUSZ SPECHT APPLIED SCIENCE	2	1	5	
TADEUSZ SPECHT IN SCIENCE	22	39	7	8
TECHONE SUMMIT SCHOLARSHIP		10	8	8
THE ALUMNI LEADERSHIP SCHOLARSHIP		1	2	2
THE GORDON M. SHRUM SCHOLARSHIP	15	17	34	28
THE H.Y. LOUIE ENTRANCE AWARD			Introduced 1047	5
THE JACK DIAMOND ENTRANCE SCHOL.	14	12	14	14
THE KEN CAPLE COLLEGE SCHOLARSHIP	7	15	8	5
THE LLOYD CARR-HARRIS SCHOLARSHIP (BUSINESS)			Introduced 1047	1
THE LOHN FOUNDATION ENTRANCE AWARD			Introduced 1047	3
THE SIMON FRASER SCHOLARSHIP	1		1	2
THE SUMMIT ENTRANCE SCHOLARSHIP	137	114	540	412
Grand Total	251	267	684	554

SPCSAB Report on Entrance Scholarships

Success rates (scholarship retention): The over all success rate – based on the number of scholarship holders who achieve ≥ 3.0 on their first semester and “retain” their scholarship – was up slightly for the 1047 entry cohort. This number is significantly influenced by the Summit retention rate: 66% vs. 61% for the previous year.

Chart three: Success rates (≥ 3.0) on 2nd disbursement (1047 entry, and 1051 disbursement) vs 1037 - 1041

Count of Status	Status	disbursed	scholarship retention		scholarship retention
Award Title	1047 possible disbursement less deferrals	1051 DIS based on ≥ 3.0	1047 entry cohort success rate	Vs.	1037 entry cohort success rate
DEANS APPLIED SCIENCE	4	3	75.00%		60.00%
DEANS FACULTY OF ARTS	8	8	100.00%		80.00%
DEANS BUSINESS ADMINISTRATION	3	1	33.33%		100.00%
DEANS SCHOLARSHIP FACULTY OF SCIENCE	2	2	100.00%		100.00%
DEANS EDUCATION	1	1	100.00%		NA
GENERAL ENTRANCE SCHOLARSHIP	2	2	100.00%		100.00%
INTERNATIONAL SUMMIT SCHOLARSHIP	14	6	42.86%		60.00%
NATIONAL TADEUSZ SPECHT IN SCIENCE	1	0	0.00%		NA
PHI THETA KAPPA INTERNATIONAL SUMMIT	1	0	0.00%		NA
TADEUSZ SPECHT MEMORIAL IN SCIENCE	8	6	75.00%		71.43%
TECHONE SUMMIT SCHOLARSHIP	6	5	83.33%		75.00%
THE SIMON FRASER ENTRANCE	2	2	100.00%		100.00%
THE B.C. JACK DIAMOND ENTRANCE	14	1	7.14%		30.00%
THE SUMMIT ENTRANCE SCHOLARSHIP	398	263	66.08%		60.90%
THE GORDON M. SHRUM (B.C.)	28	28	100.00%		97.14%
THE GORDON M. SHRUM NATIONAL ENTRANCE	1	1	100.00%		100.00%
THE H. Y. LOUIE ENTRANCE AWARD	4	3	75.00%		66.67%
THE JACK DIAMOND NATIONAL ENTRANCE	1	0	0.00%		50.00%
THE KEN CAPLE COLLEGE TRANSFER	5	5	100.00%		100.00%
THE KENNETH STRAND NATIONAL	18	8	44.44%		54.55%
THE LLOYD CARR-HARRIS SCHOLARSHIP	1	1	100.00%		N/A
THE LOHN FOUNDATION ENTRANCE AWARD	3	1	33.33%		100.00%
THE SHRUM INTERNATIONAL SCHOLARSHIP	7	7	100.00%		100.00%
THE SIMON FRASER ALUMNI LEADERSHIP	2	2	100.00%		100.00%
THE WILLIAM M. HAMILTON COLLEGE	2	2	100.00%		100.00%
THE TADEUSZ SPECHT IN APPLIED SCIENCE	1	1	100.00%		80.00%
Grand Total	537	359	66.85%		64.95%

Important, by comparison, is the retention rate for the major award winners on their third installment onwards with an over 90% success rate. The renewal requirement for 1047 was ≥ 3.6 for the major scholarships. (See chart four)

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SPCSAB Report on Entrance Scholarships

KEY: ACC=accept (accepted offer of scholarship but did not enroll), DCL=declined offer of scholarship, DEF=deferred, DEN=denied, DIS=disbursed, DRP=dropped (did not meet previous semester conditions), OFF=offered (did not respond to offer), TRM=terminated (loses scholarship)

Renewal numbers: "0" (1st installment based on entering grade), "1" (2nd installment based on first semester performance of ≥ 3.0), "2" through "7" (based on CGPA of 3.6 for major awards)

Chart four: 1047 major award renewal data

Award Title	Renewal Number	DEF	DEN	DIS	DRP	TRM	Total	success rate
DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE	2			3			3	100.00%
DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE Total				3			3	100.00%
DEANS SCHOLARSHIP FACULTY OF ARTS	2	1		2			3	100.00%
DEANS SCHOLARSHIP FACULTY OF ARTS Total		1		2			3	100.00%
DEANS SCHOLARSHIP FACULTY OF BUSINESS	2			2			2	100.00%
DEANS SCHOLARSHIP FACULTY OF BUSINESS Total				2			2	100.00%
DEANS SCHOLARSHIP FACULTY OF SCIENCE	2			3			3	100.00%
DEANS SCHOLARSHIP FACULTY OF SCIENCE Total				3			3	100.00%
TECHBC FULL ENTRANCE SCHOLARSHIP	6		1				1	0.00%
TECHBC FULL ENTRANCE SCHOLARSHIP Total			1				1	0.00%
THE B.C SECONDARY SIMON FRASER ENTRANCE SCHOLARSHIP	2			1			1	100.00%
	3	1					1	100.00%
THE B.C SECONDARY SIMON FRASER ENTRANCE SCHOL. Total		1		1			2	100.00%
THE GORDON M. SHRUM B.C ENTRANCE SCHOLARSHIP	2	4	1	24		1	30	93.33%
	3			1			1	100.00%
	4	2	1	9	1		13	84.62%
	5	1		6			7	100.00%
	6	4		3			7	100.00%
	7			3		1	4	75.00%
THE GORDON M. SHRUM B.C Total		11	2	46	1	2	62	91.94%
THE GORDON M. SHRUM NATIONAL ENTRANCE SCHOLARSHIP	2			4			4	100.00%
	3			1			1	100.00%
	4		1	1			2	50.00%
	5	1					1	100.00%
	6	1		1			2	100.00%
	7			2			2	100.00%
THE GORDON M. SHRUM NATIONAL ENTRANCE SCHOL. Total		2	1	9			12	91.67%
THE SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP	2		1	7			8	87.50%
	3	1					1	100.00%
	4	1		4		1	6	83.33%
	5	3					3	100.00%
	6	1		3			4	100.00%
THE SHRUM INTERNATIONAL ENTRANCE SCHOLARSHIP Total		6	1	14		1	22	90.91%
THE SIMON FRASER ALUMNI LEADERSHIP	2			1			1	100.00%
	4		1				1	0.00%
THE SIMON FRASER ALUMNI LEADERSHIP Total			1	1			2	50.00%
THE WILLIAM M. HAMILTON COLLEGE TRANSFER ENTRANCE	2			2			2	100.00%
THE WILLIAM M. HAMILTON COLLEGE TRANSFER ENTR. Total				2			2	100.00%
Grand Total		21	6	83	1	3	114	91.23%

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SPCSAB Report on Entrance Scholarships

Chart six: Comparison - total expenditures on all entrance scholarship disbursements over 3 semesters (Summer, Fall and Spring):

1999-2000	2000-2001	2001-2002	2002-2003	2003-2004	2004-2005
\$1,268, 986	\$1, 323, 654	\$1,352,290	\$1,520, 810	\$2,812,397	\$ 2,550,630

SPCSAB Report on Entrance Scholarships

KEY: ACC=accept (accepted offer of scholarship but did not enroll), DCL=declined offer of scholarship, DEF=deferred, DEN=denied, DIS=disbursed, DRP=dropped (did not meet previous semester conditions), OFF=offered (did not respond to offer), TRM=terminated (loses scholarship)

Renewal numbers: "0" (1st installment based on entering grade), "1" (2nd installment based on first semester performance of ≥ 3.0), "2" through "7" (based on CGPA of 3.6 for major awards)

Appendix A. 1047 Entrance Scholarship report by academic group, program and award status. Data from SIMS, 10.18.2004

Acad Group (Latest)	Acad Program (Latest)	Award Title	ACC	DCL	DEF	DIS	OFF	Total	Yield	
APSC	BACH	INTERNATIONAL SUMMIT SCHOLARSHIP		2		1	1	4	25.00%	
		TECHONE SUMMIT SCHOLARSHIP				7	5	12	58.33%	
		THE SUMMIT ENTRANCE		1		5	13	19	26.32%	
		THE KENNETH STRAND NATIONAL ENTRANCE					1	1	0.00%	
	BACH Total			3		13	20	36	36.11%	
	BGSAP	INTERNATIONAL SUMMIT SCHOLARSHIP		1				1	0.00%	
		THE SUMMIT ENTRANCE				1	3	4	25.00%	
	BGSAP Total			1		1	3	5	20.00%	
	CMNS	COLUMBIA COLLEGE ENTRANCE SCHOLARSHIP					1		1	100.00%
		DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE					1		1	100.00%
		INTERNATIONAL SUMMIT SCHOLARSHIP			1	1			2	100.00%
		THE SUMMIT ENTRANCE	1	1		17	6	25	68.00%	
		THE SHRUM INTERNATIONAL ENTRANCE		1				1	0.00%	
	CMNS Total		1	2	1	20	6	30	70.00%	
	CMPT	DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE					2		2	100.00%
		THE SIMON FRASER ENTRANCE SCHOLARSHIP					1		1	100.00%
		THE SUMMIT ENTRANCE	5				27	20	52	51.92%
		THE GORDON M. SHRUM ENTRANCE	1	1			1		3	33.33%
		THE SHRUM INTERNATIONAL ENTRANCE					1		1	100.00%
	CMPT Total		6	1		32	20	59	54.24%	
	ENSC	DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE			1				1	0.00%
		INTERNATIONAL SUMMIT SCHOLARSHIP					1	7	8	12.50%
		THE SUMMIT ENTRANCE	28	9			32	111	180	17.78%
		THE GORDON M. SHRUM ENTRANCE		4			3	1	8	37.50%
		THE GORDON M. SHRUM NATIONAL		1					1	0.00%
		THE H. Y. LOUIE ENTRANCE AWARD					1		1	100.00%
THE KENNETH STRAND NATIONAL ENTRANCE		1					2	3	0.00%	
THE LOHN FOUNDATION ENTRANCE AWARD						1		1	100.00%	
THE SHRUM INTERNATIONAL ENTRANCE			1					1	0.00%	
ENSC Total		29	16		38	121	204	18.63%		
KIN	DEANS SCHOLARSHIP FACULTY OF APPLIED SCIENCE			1		1		2	50.00%	
	INTERNATIONAL SUMMIT SCHOLARSHIP			1			1	2	0.00%	
	TADEUSZ SPECHT MEMORIAL SCIENCE		1				2	3	0.00%	
	THE B.C. SECONDARY SCHOOL JACK DIAMOND	1	1					2	0.00%	
	THE SUMMIT ENTRANCE	5				14	12	31	45.16%	
	THE GORDON M. SHRUM ENTRANCE		1			1		2	50.00%	
	THE GORDON M. SHRUM NATIONAL		1					1	0.00%	
	THE KENNETH STRAND NATIONAL ENTRANCE		1			2	2	5	40.00%	
	(blank)		2			1		3	33.33%	
	KIN Total		6	9		19	17	51	37.25%	
APSC Total			42	32	1	123	187	385	32.21%	
ARTS	BA	DEANS SCHOLARSHIP FACULTY OF ARTS		7	1	7		15	53.33%	
		DEANS SCHOLARSHIP EDUCATION				1		1	100.00%	
		INTERNATIONAL SUMMIT SCHOLARSHIP	1	8	1	2	10	22	13.64%	
		PHI THETA KAPPA INTERNATIONAL SUMMIT				1		1	100.00%	
		TECHONE SUMMIT SCHOLARSHIP					1	1	0.00%	
		THE B.C. SECONDARY SCHOOL JACK DIAMOND	1			8		9	88.89%	
		THE SUMMIT ENTRANCE	10	10	6	92	113	231	42.42%	
		THE GORDON M. SHRUM ENTRANCE		1	1	3		5	80.00%	

SPCSAB Report on Entrance Scholarships

Acad Group (Latest)	Acad Program (Latest)	Award Title	ACC	DCL	DEF	DIS	OFF	Total	Yi
		THE GORDON M. SHRUM NATIONAL				1		1	100.00%
		THE H. Y. LOUIE ENTRANCE AWARD				1		1	100.00%
		THE KEN CAPLE COLLEGE TRANSFER			1	5	4	10	60.00%
		THE KENNETH STRAND NATIONAL ENTRANCE		2		7	9	18	38.89%
		THE SHRUM INTERNATIONAL ENTRANCE		3	1	4		8	62.50%
		THE SIMON FRASER ALUMNI LEADERSHIP				1		1	100.00%
		THE WILLIAM M. HAMILTON COLLEGE TRANSFER				2		2	100.00%
	BA Total		12	31	11	135	137	326	44.79%
	BFA	THE B.C. SECONDARY SCHOOL JACK DIAMOND				1		1	100.00%
		THE SUMMIT ENTRANCE	2	1	1	10	6	20	55.00%
		THE GORDON M. SHRUM ENTRANCE				1		1	100.00%
		THE JACK DIAMOND NATIONAL ENTRANCE				1		1	100.00%
		THE KENNETH STRAND NATIONAL ENTRANCE				1		1	100.00%
		THE LOHN FOUNDATION ENTRANCE AWARD				1		1	100.00%
	BFA Total		2	1	1	15	6	25	64.00%
	BGSAR	DEANS SCHOLARSHIP FACULTY OF ARTS				1		1	100.00%
		THE SUMMIT ENTRANCE	1	2		6	4	13	46.15%
	BGSAR Total		1	2		7	4	14	50.00%
	ARTS Total		15	34	12	157	147	365	46.30%
BUS	BUS	DEANS BUSINESS ADMINISTRATION		3		3		6	50.00%
		INTERNATIONAL SUMMIT SCHOLARSHIP		4	2	6	14	26	30.77%
		THE B.C. SECONDARY SCHOOL JACK DIAMOND				1		1	100.00%
		THE SUMMIT ENTRANCE	53	16		104	116	289	35.99%
		THE GORDON M. SHRUM ENTRANCE	1	1		2		4	50.00%
		THE H. Y. LOUIE ENTRANCE AWARD				1		1	100.00%
		THE KEN CAPLE COLLEGE TRANSFER			1			1	100.00%
		THE KENNETH STRAND NATIONAL ENTRANCE		1		2	2	5	40.00%
		THE LLOYD CARR-HARRIS SCHOLARSHIP				1		1	100.00%
		THE SHRUM INTERNATIONAL ENTRANCE				2		2	100.00%
	BUS Total		54	25	3	122	132	336	37.20%
	BUS Total		54	25	3	122	132	336	37.20%
SCI	BSC	DEANS SCHOLARSHIP FACULTY OF SCIENCE		7		2	2	11	18.18%
		GENERAL ENTRANCE SCHOLARSHIP				2		2	100.00%
		INTERNATIONAL SUMMIT SCHOLARSHIP		6	1	2	13	22	13.64%
		NATIONAL TADEUSZ SPECHT MEMORIAL SCIENCE				1	2	3	33.33%
		TADEUSZ SPECHT MEMORIAL SCIENCE	1	9		8	49	67	11.94%
		TECHONE SUMMIT SCHOLARSHIP				1		1	100.00%
		THE SIMON FRASER ENTRANCE SCHOLARSHIP				1		1	100.00%
		THE B.C. SECONDARY SCHOOL JACK DIAMOND				3		3	100.00%
		THE SUMMIT ENTRANCE	55	43	8	96	296	498	20.88%
		THE GORDON M. SHRUM ENTRANCE		9		17		26	65.38%
		THE GORDON M. SHRUM NATIONAL		2				2	0.00%
		THE H. Y. LOUIE ENTRANCE AWARD				2		2	100.00%
		THE KENNETH STRAND NATIONAL ENTRANCE		1		6	9	16	37.50%
		THE LOHN FOUNDATION ENTRANCE AWARD				1		1	100.00%
		THE SHRUM INTERNATIONAL ENTRANCE		1				1	0.00%
		THE SIMON FRASER ALUMNI LEADERSHIP				1		1	100.00%
		THE WILLIAM M. HAMILTON COLLEGE TRANSFER				1		1	100.00%
	BSC Total		56	78	9	144	371	658	23.25%
	SCI Total		56	78	9	144	371	658	23.25%
		THE KEN CAPLE COLLEGE TRANSFER			1			1	100.00%
	Total				1			1	100.00%
	Grand Total		167	169	26	546	837	1745	32.78%



Simon Fraser University

Associate Vice President Students and International

tel 604-291-3941; fax 604-291-4341; email: peg_johnsen@sfu.ca

Memorandum

To: Jo Hinchliffe
Secretary Senate Policy Committee on
Scholarships, Awards & Bursaries

From: Peg Johnsen

Re: Open Undergraduate Scholarship 2004/05
Fiscal Summary

Date: October 31, 2005

The Open Undergraduate Scholarship program for the 2004/05 fiscal year continued be to awarded at the CumGPA level of 3.700 (same CGPA minimum since 1996). In Fall 2004, the basic tuition fee increased by 15% from \$123.70 per credit hour to \$142.30 in addition to a 15% increase to premium fee credit hour fees.

The actual number of students receiving the Open Scholarship decreased, but overall the average dollar value given to students increased. For 2004/05, there were a total of 1,266 Open Scholarship recipients, resulting in a 9.9% decrease in the number of Open Scholarship recipients over the previous fiscal year, but there was an increase of 11.6% in the average dollar value of the Open Undergraduate Scholarship disbursed over the previous fiscal.

The annual budget for the Open Undergraduate Scholarship program for the 2004/05 fiscal year remained the same as 2003/04. Total disbursements over the three terms for 2004/05 amounted to \$1,399,100.

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

If you have any questions regarding the Open Undergraduate Scholarship, please do not hesitate to contact me.

Open Undergraduate Scholarship Data

	A	B	C	D	E	F	G	H
1	Fiscal Year	Sem	# Awards	Total Awarded	Avg Award	CGPA	Per credit	
2								
3	1989/90	89-3	399	\$240,616	\$603	3.6	\$ 52	
4		90-1	410	\$231,662	\$565	3.6	\$ 52	
5	Total:	89/90	809	\$472,278	\$584			
6								
7	1990/91	90-2	322	\$143,645	\$446	3.6	\$ 52	
8		90-3	467	\$290,444	\$622	3.6	\$ 55	
9		91-1	464	\$269,115	\$580	3.6	\$ 55	
10	Total:	90/91	1,253	\$703,204	\$561			
11								
12	1991/92	91-2	342	\$169,956	\$497	3.6	\$ 55	
13		91-3	465	\$318,246	\$684	3.6	\$ 62	
14		92-1	462	\$301,163	\$652	3.6	\$ 62	
15	Total:	91/92	1,269	\$789,365	\$622			
16								
17	1992/93	92-2	337	\$183,148	\$543	3.6	\$ 62	
18		92-3	422	\$298,984	\$708	3.6	\$ 62	
19		93-1	374	\$263,748	\$705	3.6	\$ 62	
20	Total:	92/93	1,133	\$745,880	\$658			
21								
22	1993/94	93-2	294	\$174,902	\$595	3.6	\$ 62	
23		93-3	195	\$161,636	\$829	3.75	\$ 68	
24		94-1	202	\$151,776	\$751	3.75	\$ 68	
25	Total:	93/94	691	\$488,314	\$707			
26								
27	1994/95	94-2	150	\$89,964	\$600	3.75	\$ 68	
28		94-3	214	\$182,500	\$853	3.68	\$ 73	
29		95-1	252	\$208,707	\$828	3.65	\$ 73	
30	Total:	94/95	616	\$481,171	\$781			
31								
32	1995/96	95-2	172	\$118,260	\$688	3.7	\$ 73	
33		95-3	233	\$220,605	\$947	3.7	\$ 77	
34		96-1	276	\$246,708	\$894	3.65	\$ 77	
35	Total:	95/96	681	\$585,573	\$860			
36								
37	1996/97	96-2	184	\$135,058	\$734	3.7	\$ 77	
38		96-3	280	\$267,545	\$956	3.7	\$ 77	
39		97-1	260	\$239,199	\$920	3.7	\$ 77	
40	Total:	96/97	724	\$641,802	\$886			
41								
42	19+A6997/98	97-2	216	\$167,167	\$774	3.7	\$ 77	
43		97-3	323	\$302,918	\$939	3.7	\$ 77	
44		98-1	318	\$295,911	\$933	3.7	\$ 77	

Open Undergraduate Scholarship Data

	A	B	C	D	E	F	G	H
45	Total:	97/98	857	\$765,996	\$894			
46								
47	1998/99	98-2	226	\$169,323	\$749	3.7	\$ 77	
48		98-3	337	\$315,854	\$937	3.7	\$ 77	
49		99-1	335	\$313,852	\$937	3.7	\$ 77	
50	Total:	98/99	898	\$799,029	\$890			
51								
52	1999/00	99-2	241	\$176,176	\$731	3.7	\$ 77	
53		99-3	334	\$313,159	\$938	3.7	\$ 77	
54		2000-1	358	\$329,714	\$921	3.7	\$ 77	
55	Total:	99/00	933	\$819,049	\$878			
56								
57	2000/01	00-2	235	\$173,789	\$740	3.7	\$ 77	
58		00-3	355	\$333,256	\$939	3.7	\$ 77	
59		01-1	345	\$318,087	\$882	3.7	\$ 77	
60	Total:	2000/2001	935	\$825,132	\$882			
61								
62	1	2001-2	295	\$218,372	\$740	3.7	\$ 73	
63		2001-3	444	\$389,702	\$878	3.7	\$ 73	
64		2002-1	439	\$381,352	\$873	3.7	\$ 73	
65	Total:	2001-2002	1,178	\$989,426	\$841			
66								
67	2002/2003	2002-2	306	\$220,752	\$721	3.7	\$ 73	
68		2002-3	496	\$515,970	\$1,040	3.7	\$ 85	
69		2003-1	459	\$468,200	\$1,020	3.7	\$ 85	
70	Total:	2002/2003	1,261	\$1,204,922	\$956			
71								
72	2003/2004	2003-2	335	\$272,680	\$814	3.7	\$ 85	
73		2003-3	552	\$587,435	\$1,064	3.7	\$ 100	
74		2004-1	504	\$525,600	\$1,043	3.7	\$ 100	
75	Total:	2003/2004	1,391	\$1,385,715	\$974			
76								
77	2004/2005	2004-2	357	\$308,800	\$865	3.7	\$ 100	
78		2004-3	478	\$580,800	\$1,215	3.7	\$ 100	
79		2005-1	431	\$509,500	\$1,182	3.7	\$ 100	
80	Total:	2004/2005	1,266	\$1,399,100	\$1,087			
81								
82								



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

Bursary Program 2004-2005

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. 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 2004-05 reporting year (May 2004 – April 2005), Financial Assistance received 5,817 applications with a total calculated financial need of \$7,038,336. This represents an increase in student financial need of \$569,596 or 9% over the previous year. The University funded bursary budget increased from \$2,567,835 to \$4,902,725, an increase of \$2,334,890 or 91%. Individual student bursaries were awarded at 85% of assessed need in 2004-05.

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 2004-05 year, 10 new donor funded bursaries were established, 8 annual donation and 2 endowment.

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 two students a year identified and immigrated to Canada by WUSC. 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.

SFU Open Bursaries for International undergraduate students includes funding for two groups of students, those entering the university prior to September 2003 and those entering on or after September 2003. Bursaries for International students entering on or after September 2003 are funded through their own tuition revenue. In 2004-05 the budget for these students was \$446,750 and 305 bursaries totaling \$440,695 were awarded.

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 15 bursaries totaling \$38,790 were disbursed. 14 bursaries were awarded to domestic students (\$36,000) and one was awarded to an international student (\$2,790)

Beginning in the 2004-05 academic year, cost recovery graduate programs were required to fund bursaries for their students from their tuition revenue. These programs are reported separately. In 2004-05, program funded bursaries totaling \$48,795 were disbursed to students in these programs, 10 bursaries totaling \$9,600 to international students and 44 totaling \$39,195 to domestic students. In 2004-05m students in theses programs have also received bursaries funded by donors. These bursaries were reported under Annual and Endowed Bursaries.

In 2003-04, the University established several bursary programs to assist in the promotion of the University's goal to encourage internationalization. Students who participate in SFU International Field School programs, SFU Foreign Exchange programs and International Co-op placements may be considered for these bursaries. This year 137 bursaries, totaling \$221,030 were awarded. 8 of theses bursaries were awarded to international students (\$12,235).

The University has also established the Aboriginal Bursary Program to assist aboriginal students in high financial need. In 2004-05, 35 bursaries totaling \$57,230 were awarded to aboriginal students.

*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

Summary Totals

	Total number Applications	Total Calculated Need	Total Undergraduate Bursaries Awd \$	Total Graduate Bursaries Awd \$	Grand Total Bursaries Awd \$
04/05	5,817	7,038,336	4,843,988	451,813	5,295,801
03/04	4,697	6,468,740	3,222,505	415,713	3,638,218
02/03	4,012	3,237,696	1,964,929	141,942	2,106,871
01/02	3,429	2,476,765	1,070,295	91,530	1,161,825
00/01	2,870	2,013,725	1,008,105	79,146	1,087,251
99/00	2,615	1,751,834	972,375	68,012	1,040,387
98/99	2,514	1,565,785	931,361	71,553	1,002,914
97/98	2,558	1,296,738	895,826	70,639	966,465
96/97	2,078	1,068,339	875,412	80,904	956,316

Undergraduate Bursaries - General

	SFU Open (domestic)		SFU Open (international)		SFU Daycare		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
04/05	2,856	2,558,837	938	1,428,385	13	5,931	690	572,575
03/04	2,320	1,502,092	735	1,014,020	18	5,451	600	522,662
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 - General

	SFU Open (domestic)		SFU Open (international)		SFU Daycare		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
04/05	253	261,285	112	118,280	13	5,923	20	17,530
03/04	184	197,880	63	60,854	13	7,019	30	26,055
02/03	42	25,310	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

Program Funded Bursaries for Cost-Recovery Graduate Programs (by program)

University funded bursaries for cost-recovery graduate programs (by program)

	EMBA			GAWM			MOT			GDBA		
	Appl	Awd	Total \$	Appl	Awd	Total \$	Appl	Awd	Total \$	Appl	Awd	Total \$
04/05	12	7	\$ 9,250	13	0	\$0	17	0	\$0	18	7	\$6,950
03/04	15	9	\$16,400	3	2	\$2,605	30	15	\$22,305	18	5	\$7,655
02/03	13	3	\$ 7,635	2	1	\$2,205	12	5	\$10,360	17	9	\$16,685

	MBA (Day)			MED/EdD (Off-Campus)			MPP		
	Appl	Awd	Total \$	Appl	Awd	Total \$	Appl	Awd	Total \$
04/05	47	19	\$17,315	1	0	\$0	35	21	\$15,280
03/04	74	38	\$46,570	6	3	\$3,805	27	21	\$24,265
02/03	28	21	\$34,470	5	3	\$4,635	N/A	N/A	N/A

Note:

- 1) In 2004/2005, GAWM and MOT students have received bursaries funded by donors. These bursaries were reported under annual & endowed bursaries
- 2) The MBA (Day) program tuition had increased significantly in 2002/2003 and 2003/ 2004, the impact resulted in higher demand of bursary funding during the period.
- 3)EMBA-Executive MBA, GAWM-Global Asset and Wealth Management MBA, MOT-Management of Technology MBA, GDBA-Graduate Diploma in Business Administration, MPP-Master of Public Policy

University Funded Designated Bursaries

	Field School			Exchange			International Co-op			Aboriginal		
	Appl	Awd	Total \$	Appl	Awd	Total \$	Appl	Awd	Total \$	Appl	Awd	Total \$
04/05	59	47	\$94,980	90	67	\$99,210	53	23	\$26,840	57	30	\$57,230
03/04	10	9	\$18,120	70	62	\$124,955	9	6	\$10,015	30	22	\$28,095

Submitted by T. Rahilly, November 2005



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

Athletic and Recreation Awards 2004-2005

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 total disbursement in all three categories of Athletic Awards has increased from \$416,560 in 2003-2004 to \$480,061 in 2004-2005.

Four new donor funded athletic awards, 1 annual donation and 3 endowment, were established in 2004-2005.

Recreation Awards

Simon Fraser University supports a number of awards for students who actively support the University's Recreation Program. The Recreational Leadership awards are given in recognition of individual participation, leadership and volunteerism in various aspects of Recreation Services. Thirty three awards totaling \$19,800 were awarded in 2003-2004. In January 2004, a new award, the Recreation Promotion Award, was created to further support and promote the University's recreation programs. 45 awards totaling \$61,238 were given in 2004-2005.

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 \$
04/05	374	312,883	49	36,100	42	51,240	76	79,838
03/04	349	276,098	58	40,900	47	54,137	54	45,425
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 funding level for Simon Fraser University remained the same from 2001/02 to 2002/03. However, due to Canadian Interuniversity Sport rules, some of the allocated funds could not be disbursed in 2002/03 so a portion of the funding was disbursed in the summer semester 2003 and is counted in the 2003-2004 year

BC ATHLETIC ASSISTANCE PROGRAM*

	# of Award	Total \$ Awarded
04/05	58	60,403
03/04	65	65,679
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 T. Rahilly, November 2005



Student Services

Simon Fraser University

Financial Assistance

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Report to the**Senate Policy Committee on Scholarships, Awards and Bursaries****British Columbia Government Student Assistance 2004-2005**

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.

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 2004/05 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. Although the numbers reflect that Simon Fraser students received \$68,201 less in government student assistance through BC in 2004/05 compared to 2003/04, this decrease can be attributed to improvements made to the report specifications in the student information system. According to the government's statistics Simon Fraser remained the second largest user of the assistance programs for the fourth year in a row. In 2004/05 BCSAP increased the living allowances for all students and increased the living allowances for parents. The expected contribution from students has decreased.

In 2004/05 the BC Grant and Canada Millennium Scholarship Foundation Bursary was eliminated from the BCSAP program. This change affected undergraduate students and is reflected in the BC/Federal Grant column in the table below. Students who would have previously been eligible for these grants received BC loans instead. However, to offset the increase in loan values, the BC Government, in partnership with the Canada Millennium Scholarship Foundation, introduced the BC Loan Reduction Program. Under the program eligible students who successfully complete each year's studies will have their BC Student Loan reduced. The amount of reduction will vary according to the BC Loan awarded. The grant programs that remained in effect were the Canada Study Grant for Students with Dependents, Canada Study Grant for High-Need Students with Permanent Disabilities, and Canada Study Grant for Female Doctoral Students.

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 \$
04/05	7,635	25,348,913	6816	15,569,562	1135	1,713,581	15586	42,632,056
03/04	8,119	24,912,956	5,588	11,080,185	3,300	6,438,162	17,007	42,431,303
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 \$
04/05	319	1,093,410	327	855,978	80	77,394	726	2,026,782
03/04	392	1,311,373	370	906,428	77	77,935	839	2,295,736
02/03	325	1,047,601	316	767,646	72	62,399	713	1,877,646
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



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

Work-Study Program 2004-2005

The Work-Study program was part of the provincial government's BC Student Assistance Program (BCSAP) until August 2002 when the provincial 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. Commencing Fall semester 2002 the program is funded by the University.

For the Fall semester 2002, Simon Fraser University implemented a University funded Work-Study program with a budget of \$360,000. In 2003-2004, the budget was increased to \$610,000. Like the SFU bursary program, the Work-Study 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 are no longer identified by system reporting alone so an application and adjudication process has been implemented. The application deadline is six weeks prior to the start of each semester and integrated with bursary adjudication process.

WORK-STUDY– Undergraduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
04/05	541	734,400	607,721
03/04	573	760,200	633,425
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:

- 1) These numbers include expenditures for the Students Aiding Students program until August 2000.
- 2) Total \$ Awarded reflects the number of students approved for funding; Total \$ Spent reflects the number of students actually hired and their earnings.

Of the \$607,721 awarded to SFU undergraduate students, \$36,386 (including benefits) was awarded to International undergraduate students who entered SFU in Fall 2003 and after.

WORK-STUDY – Graduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
04/05	38	41,200	34,227
03/04	40	51,000	45,528
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 T. Rahilly, November 2005



**Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
External Scholarships, Awards and Bursaries 2004-2005**

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 2004-05 year, Simon Fraser undergraduates received 334 external scholarships, awards and bursaries totaling \$545,248, an increase of 19% over 2003-04, 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 2004-2005, Simon Fraser had: 1 National winner in 4th year and 2 Provincial winners. 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 Awards

Also included in the numbers below are recipients of the Canada Millennium Scholarship Foundation merit awards. These scholarships are granted on the basis of academic performance, community service, leadership and entrepreneurship. In 2004-05, there were 7 National Award winners attending Simon Fraser University – 2 new recipients and 5 renewals, 12 Provincial/Territorial Award winners – 3 new recipients and 9 renewals, and 14 local award winners.

The World Petroleum Congress and Canadian Millennium Foundation offered a new award in 2003-2004 to recognize students enrolling in studies related to the petroleum industry who demonstrated academic merit and financial need. In 2004-2005 five SFU students received these awards of \$3,000 each, totaling \$15,000.

Another new scholarship was also established by the Canadian Millennium Foundation in 2003-2004. The National In-Course Millennium Scholarship recognizes upper level post secondary students who demonstrate academic merit and leadership. 12 students were awarded the National In-Course Scholarship in 2004-05. 8 third level students received \$4,000 each, 5 second level students, 3 new recipients and 2 renewals, received \$4,000 each, and 3 first level students, 1 new recipient and 2 renewals, received \$5,000 each, totaling \$62,500.

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. Awards programs in this category include the Rhodes Scholarship, the Queen Elizabeth II BC Centennial Scholarship, and many others. In 2004-2005 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 1 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 \$
04/05	261	487,823	11	17,700	62	39,725
03/04	247	437,854	0	0	31	20,900
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 \$
04/05	1	625	0	0	1	2,000
03/04	9	13,650	0	0	1	500
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 T. Rahilly, November 2005



**Report to the
Senate Policy Committee on Scholarships, Awards and Bursaries
Emergency Loan Program 2004-2005**

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.

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 four years there has been less disruption to the disbursement of government assistance to students and a notably positive impact on our Emergency Loan program. Administration of debt collection was the responsibility of Financial Services who provided Financial Assistance with an annual list of bad debts. However, with the transition to SIMS Student Financials bad debt lists were not available in 2003-2004 and 2004-2005.

EMERGENCY LOANS (Undergraduate/Graduate)

	Number of Loans	Total \$ Awarded	# Loans to Collection	Total \$ to Collection
04/05	197	123,707	N/A	N/A
03/04	239	137,712	4*	1,798
02/03	244	142,092	N/A	N/A
01/02	256	152,354	7	4,590
00/01	359	217,139	7	4,650
99/00	433	246,828	10	6,248
98/99	345	157,825	7	4,500
97/98	352	160,716	Not Recorded	Not Recorded
96/97	527	265,472	11	3,763
95/96	674	317,329	7	5,363
94/95	251	157,741	N/A	N/A

* These loans are from Summer semester 2003, prior to the implementation of SIMS.

Submitted by T. Rahilly, November 2005



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 2004-2005

Endowed/Annual 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 all of 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 totaling \$23,566 provided by the Ministry of Advanced Education to Surrey campus students.

11 new donor funded scholarships, 5 annual donation and 6 endowment, were established in 2004-05.

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.

Although no additional budget has been allocated to existing SFU funded awards, the Aboriginal Student Leadership Award was created in 2004. Four of these awards valued at \$2,000 each were awarded in 2004-2005.

In addition, 1 Canadian Merit Scholarship Foundation National Scholar received a total of \$3,557 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).

8 new awards, 6 annual donation and 2 endowment, were established in 2004-05.

MERIT BASED AWARDS

	In-Course Endowed/Annual Scholarships		Endowed/Annual Awards.		SFU Funded Awards	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
04/05	286	243,659	207	73,841	135	68,906
03/04	263	213,560	187	77,908	121	67,310
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 T. Rahilly, November 2005

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

Out of Province and United States Government Student Assistance 2004-2005

Out of Province and United States Student Loans

The tables below report students who are receiving funding through other Canadian provinces or territories and from the United States. Not all provinces advise the institutions of assistance granted to students, particularly grant awards.

The funding received by U.S. students increased by 2.7% from 2003-2004 to 2004-2005. U.S. students appear to be requesting maximum values on all government loan programs available to them. The number of awards has also increased substantially during 2004-2005 and includes subsidized and unsubsidized government loans, private loans, and parental loans. US students receive separate disbursements in each semester of their loan period and an increasing number of students are accessing private loans to supplement their government loans.

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 \$US
04/05	195	775,505	286	434,569	67	184,080	51	195,983
03/04	169	704,420	169	370,665	91	217,666	21	187,451
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 \$US
04/05	76	376,873	103	249,858	3	5,980	73	230,440
03/04	56	252,998	76	203,922	10	26,851	68	227,686
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: T. Rahilly, November 2005



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

Government Part-time Student Assistance and Canada Study Grants 2004-2005

Government Part-time Student Assistance

To be eligible for the federal government Part-time Canada Student Loans (PT-CSL) and Canada Study Grant – for High-Need Part-Time Students (CSG-HNPT), students must be registered in less than nine credit hours and have a demonstrated financial need. In 2004-2005, 98 applications were received for Part-time Loan and Grant. Of those students, 62 qualified for grant only, loan only, or grant and loan with a total assessed need of \$88,392.

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 2004-2005, 48 students were eligible for Part-Time Student Loans with a total award value of \$53,843. Only 28 of the students requested the funding to be issued and, in the end, only 24 students, with a total loan value of \$38,389 cashed their loans. However, there is a significant increase in the number and value of loans released from the previous year. This can partially be attributed to an increase in undergraduate part-time student enrollment of 10 percent in 2004-2005, and may also be due to rising tuition costs resulting in more students accessing the part-time loan program and being eligible for greater loan values.

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, medical, being a single parent, being parent from a low income family, caring for an elderly dependent, taking prerequisites to enter a full-time program and requiring less than nine credit hours to fulfill graduation requirements. The CSG-HNPT program has a maximum award value of \$1,200 per program year and is well used by Simon Fraser students. In 2004-2005, 41 students received grant awards totaling \$44,446. Seven of these students also received part-time loans and are included in the loan statistics.

PART-TIME CANADA STUDENT LOAN

	Number of Awards	Total \$ Awarded	# Loans to Released	Total \$ Loans Released
04/05	28	43,946	24	38,389
03/04	22	24,240	19	21,244
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	Not recorded	Not recorded
97/98	45	45,550	Not Recorded	Not Recorded

CANADA STUDY GRANT – FOR HIGH-NEED PART-TIME STUDENTS

	Number of Awards	Total \$ Awarded
04/05	41	44,446
03/04	42	43,513
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 not required. For those students who meet the criteria for a CSG-FD, the grants are automatically calculated and the award replaces federal loan funding. In other words, students do not receive additional funding but have a portion of their debt (loan) converted to grant.

	Number of Awards	Total \$ Awarded
04/05	1	3,000
03/04	7	18,327
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 T. Rahilly, November 2005