



SIMON FRASER UNIVERSITY
ENGAGING THE WORLD

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MEMORANDUM

ATTENTION Senate

DATE January 2015

FROM Stephen T. Easton, Chair 
Senate Policy Committee on
Scholarships, Awards and Bursaries

RE: Annual Report

I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2013-2014.

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. 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. Financial Aid and Awards is a unit within Student Services, which processes bursary applications.

SPCSAB is not responsible for setting the amount of money available for scholarships, awards or bursaries. We include for information, reports from both undergraduate (Appendix 1) and graduate studies (Appendix 2) indicating how funds were distributed.

Policy decisions by SPCSAB in the 2013-14 period are detailed in Table 1.

Table1: Actions of SPCSAB

October 2013	Open Scholarship	SPCSAB changed the criteria FROM: "For students who fall short of the 24 units requirement because one term's enrolment was in a single course of five units or fewer, the last four terms will be considered and that term of one course will be set aside in determining unit and term GPA eligibility. However, the number of units completed in this term will be taken into consideration when arriving at the 24 unit minimum requirement over the last four terms of enrolment." TO: "For students who fall short of the 30 units requirement because one term's enrolment was in a single course of five units or fewer, the last four terms will be considered and that term of one course will be set aside in determining unit and term GPA eligibility."	
October 2013	Emergency Assistance for International Students	Terms of reference	For undergraduate and graduate students similar to domestic emergency fund.
February 2014	C.D. Nelson	Increasing the tenure of the C.D. Nelson from a maximum of 3 years to a maximum of 4 years. maximum scholarship support a student can receive while holding a C.D. Nelson or Provost Prize of Distinction to \$35,000.	
February 2014	Provost Prize of Distinction	Increasing the tenure of the Provost Prize of Distinction from a maximum of 3 years to a maximum of 4 years. maximum scholarship support a student can receive while holding a C.D. Nelson or Provost Prize of Distinction to \$35,000.	
May 2014	Ben-Gurion University/Simon Fraser University Cotutelle (International Joint PhD) Scholarship	Terms of reference	
May 2014	Ben-Gurion University/Simon Fraser University Cotutelle (International Joint PhD) Travel Award	Terms of reference	

May 2014	SPCSAB	Terms of Reference	To September 2014 Senate for approval.
July 2014	Mario Pinto Graduate Scholarship	Terms of reference	
July 2014	Youth in Care Tuition Assistance Program	Creation and terms of reference	

Appendix 1 Graduate Studies – Fiscal Years 2013-2014

Appendix 2 Undergraduate Studies – Fiscal Years 2013-2014

Appendix 1



DEAN OF GRADUATE STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies Three-Year Overview: Fiscal Years 2011/2012 through 2013/2014

Name and Type of Award	FY2013/2014			FY2012/2013			FY2011/2012		
	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)
INTERNALLY-FUNDED GRADUATE AWARDS									
Graduate scholarships/fellowships/awards funded by Graduate SBA budget									
C.D. Nelson Scholarships ⁽¹⁾	15,000-18,000	62	753,000.00	15000-18000	58	601,832.00	15000-18000	48	393,583.00
Graduate Fellowships ⁽²⁾	3,125-6,250	848	4,393,750.00	3,125-6,250	770	4,249,125.00	3,125 or 6,250	814	4,576,242.04
President's PhD Scholarships ⁽³⁾	6,250	121	756,250.00	6,250	123	768,750.00	6,250	151	943,750.00
Special Graduate Entrance Scholarships	1,000-10,000	97	381,455.00	1000-10000	91	329,465.00	334-10000	89	358,668.00
Provost Scholarship	5,000 annually	104	348,781.00	5000 annually	90	304,356.00	5000 annually	76	249,086.00
Travel & Minor Research Awards ⁽⁴⁾	varies (avg 500)	421	357,876.00	varies (avg 500)	350	190,785.78	varies (avg 500)	420	189,354.33
Graduate International Research Travel Awards	2,650-6,250	19	91,266.00	2650-6250	41	202,217.00	2650-6250	19	99,275.00
Graduate Student Research Award	2,000-7,500	128	722,125.00						
Dean's Leadership Award	1,000	4	4,000.00						
Other Graduate Awards ⁽⁵⁾	varies	varies	5,000.00	varies	2	5,333.00	-	-	-
Graduate scholarships/fellowships/awards funded by Graduate SBA budget		1,804	7,813,503.00		1,525	6,651,863.78		1,617	6,809,958.37
Graduate scholarships/fellowships funded by Faculties/Schools									
Faculty of Applied Sciences Graduate Fellowships	3,125	18	56,250.00	3,125	1	3,125.00	3,125	20	62,500.00
Faculty of Business Administration Graduate Scholarships	2,000-13,300	30	117,800.00	2,500-4,000	28	114,000.00	2500-7500	24	110,000.00
Faculty of Communication, Art & Technology Graduate Fellowships	3,125-6250	15	48,438.00	3,125-6250	7	21,875.00	3,125	9	28,125.00
Faculty of Education Graduate Scholarships	3,125	9	28,125.00	3,125-6250	6	25,000.00	3000-6250	7	24,750.00
Faculty of Health Sciences Graduate Scholarships	305-6,250	60	196,640.00	3,125	5	15,625.00	3,125	10	52,250.00
School of Computing Science Graduate Fellowships/Scholarships	3,000	9	27,000.00	3,000	8	24,000.00	-	-	-
School of Interactive Arts and Technology Graduate Fellowships	6,250	1	6,250.00	3,125	1	3,125.00	-	-	-
Global Communication Scholarship	5,750-11,500	6	38,332.00						
Graduate scholarships/fellowships funded by Faculties/Schools		148	518,835.00		56	206,750.00		70	277,625.00
Other internally-funded awards									
Additional Graduate Fellowships (from UPF funds)	3,125-6,250	40	250,000.00	3,125-6,250	81	450,000.00	3,125 or 6,250	116	650,000.00
Graduate Aboriginal Entrance Scholarships ⁽⁶⁾	15,000-18,000	5	55,000.00	15000-18000	2	22,000.00			
Private Awards (supported by endowments & annual donations)	210-27,000	290	1,056,956.00	210-27,000	290	1,050,348.00	210-15000	231	759,781.00
CTEF Graduate Fellowships (supported by Community Trust Endowment Fund)	6,250	15	93,750.00	6,250	17	106,250.00	6,250	12	81,250.00
VPR-Climate Justice Project Graduate Fellowships (funded by VP Research)	3,125	2	6,250.00	3,125-6,250	2	9,375.00	6,250	1	6,250.00
VPR- USRA Science ⁽⁸⁾	4,500	57	249,468.75	4,500	57	256,500.00	4,500	56	250,276.75
VPR-USRA Social Science and Humanities ⁽⁷⁾	2,250-4,500	41	105,159.15	2250-4500	49	136,884.50	2250-4500	29	90,084.38
Other internally-funded awards		450	1,816,583.90		498	2,031,357.50		445	1,837,642
TOTAL INTERNALLY-FUNDED GRADUATE AWARDS		2,402	10,148,921.90		2,079	8,889,971.28		2,132	8,925,225.50

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2011/2012 through 2013/2014

Name and Type of Award	FY2013/2014			FY2012/2013			FY2011/2012		
	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)	Value per Award (\$)	Number of Award Recipients	Total Expenses (\$)
EXTERNALLY-FUNDED GRADUATE AWARDS									
National scholarships funded by Federal funding agencies									
NSERC Graduate Scholarships	17,300-50,000	102	1,963,481.00	17,300-50,000	116	2,170,869.47	17,300-50,000	135	2,235,852.29
NSERC Industrial Post-Grad Scholarships (excludes industrial portion)	15,000	15	185,000.00	15,000	18	170,000.00	15,000	9	120,000.00
SSHRC Graduate Scholarships	17,500-50,000	170	3,111,822.00	17,500-50,000	201	3,511,783.95	17,500-50,000	216	3,319,679.82
CIHR Graduate Scholarships	17,500-50,000	31	644,330.00	17,500-50,000	36	660,626.72	17,500-50,000	32	586,606.58
Canada Graduate Scholarships-M. Smith Foreign Study Supplements	5,250-6,000	10	60,000.00	5,250-6,000	8	46,650.00	Up to 6,000	11	64,960.00
NSERC Undergraduate Student Research Awards	4,500	75	331,760.34	4,500	62	275,681.25	4,500	70	311,387.36
National scholarships funded by Federal funding agencies		403	6,296,393.34		441	6,835,611.39		473	6,638,486.05
Major scholarships funded by Provincial funding agencies									
MSFHR Graduate Trainee Awards	-	-	-	7,000-20,000	3	16,417.00	7,000-20,000	9	79,251.00
Pacific Century Graduate Scholarships	-	-	-	-	-	-	5000	2	10,000.00
Pacific Leaders Graduate Student Fellowships	-	-	-	20,000	1	13,334.00	20,000	1	20,000.00
Pacific Institute Climate Solutions Graduate Fellowships	12,000-18,000	9	105,000.00	12,000-18,000	11	135,000.00	12,000-18,000	7	82,334.00
Major scholarships funded by Provincial funding agencies	-	9	105,000.00	-	15	164,751.00	-	19	191,585.00
Other externally-funded awards and grants									
NSERC IPGS Industrial Sponsorships (contributed by industrial partners)	6,000	15	86,626.76	6,000	18	67,058.06	6,000-7,500	9	44,730.85
Donor-Designated Awards	varies	58	438,963.00	varies	48	327,536.00	250-22500	56	288,357.00
Northern Scientific Training Program Grants	varies	5	9,679.27	varies	4	11,580.90	varies	8	20,290.45
Centre for Digital Media Scholarships (MDM program)	2,000-8,100	33	208,412.00	1,250-15,224	31	191,204.00	5,000	4	20,000.00
NSERC & SSHRC GGSF Awards & Spending (8)	varies	-	-	varies	1	337.50	varies	140	72,336.69
CIHR Health Professional Student Awards	4,251	3	12,753.00	4,251	4	17,004.00	4,251	3	12,753.00
Other externally-funded awards		114	756,434.03		106	614,720.46		220	458,467.99
TOTAL EXTERNALLY-FUNDED GRADUATE AWARDS		526	7,157,827.37		562	7,615,082.85		712	7,288,539.04
TOTAL GRADUATE AWARD FUNDS EXPENSED BY FISCAL YEAR		2,928	17,306,749.27		2,641	16,505,054.13		2,844	16,213,764.54



DEAN OF GRADUATE STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2011/2012 through 2013/2014

NOTES

(1) C.D. Nelson Scholarships are paid over three terms, normally starting in the Fall term. The figures reported may include recipients receiving their first award payment in previous years. The total number of award recipients reflects the number of students that were paid at least one installment of their C.D. Nelson Scholarship within the current fiscal year.

(2) The total number of Graduate Fellowships reflects the number of award payments made to graduate students within the fiscal year.

(3) Formerly called the President's Research Stipend. This award was changed to the President's PhD Scholarship in Fall 2012.

(4) In Fiscal years 2012-2013 and 2013-2014, there were two options to receive funds for the Travel & Minor Research Awards program. Departments can choose to pay the funds directly to the students and be reimbursed by Graduate Studies at the end of the academic year, or Graduate Studies can pay the funds directly to students via the Student Information System as an award. Thus, the total number of students receiving this award is only an estimate.

(5) Other Graduate Awards include matching funds for the Minerva Foundation Award and the new Graduate Aboriginal travel stipends.

(6) The first offers for the Graduate Aboriginal Entrance Scholarships went out in Fall 2013. Formerly, this was paid from the SBA account (91211). In January 2014, the funds were transferred to its own account (91222). These awards are funded by the VP Academic office.

(7) The Vice President's Undergraduate Research Student Awards (VPR-USRA) for Science and Humanities were offered starting in FY 2010-2011. These awards are funded by the VP Research office.

(8) The NSERC & SSHRC GGSF expenses for FY2011-2012 primarily consists of additional travel and minor research awards as a one-time exception.



OFFICE OF GRADUATE STUDIES AND POSTDOCTORAL FELLOWS
SIMON FRASER UNIVERSITY

**Summary of Graduate Scholarships/Bursaries/Awards (SBA) Base Budget Allocations
Five-Year Overview: Fiscal Years 2010/2011 through 2014/2015**

FY2010/2011 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2010/2011:</i>	
<i>Add: Year of Science funding</i>	240,000
<i>FY2010/2011 Graduate Students Unique headcount (based on IRP data)</i>	5,507
FY2011/2012 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2011/2012:</i>	
<i>Add: University Priority Funding</i>	650,000
<i>FY2011/2012 Graduate Students Unique headcount (based on IRP data)</i>	5,513
FY2012/2013 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2012/2013:</i>	
<i>Add: University Priority Funding</i>	450,000
<i>FY2012/2013 Graduate Students Unique headcount (based on IRP data)</i>	5,363
FY2013/2014 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2013/2014:</i>	
<i>Add: University Priority Funding</i>	250,000
FY2014/2015 Base Budget - approved by BoG	6,772,236



OFFICE OF GRADUATE STUDIES AND POSTDOCTORAL FELLOWS
SIMON FRASER UNIVERSITY

**Financial Summary of Graduate Scholarships/ Bursaries/ Awards (SBA) Budget
Fiscal Year 2013/2014**

BUDGET

Budget Allocation for FY2013/2014	6,772,236.00
Add: UPF funding for FY2013/2014	250,000.00
Add: Scholarship funds carryforward Balance from FY2012/2013	2,047,533.57
Less: Aboriginal Scholarship funds carried forward from FY2012-2013	(11,000.00)

Total SBA Budget for FY2013/2014

9,058,769.57

EXPENSES (by academic term)

Name of Award	Value of Award	Summer 2013		Fall 2013		Spring 2014		Total for FY2013/2014	
		Number of Award Payments	Expensed in Term (\$)	Number of Award Payments	Expensed in Term (\$)	Number of Award Payments	Expensed in Term (\$)	Number of Award Recipients	Total Expensed in FY13/14 (\$)
C.D. Nelson Scholarships (1)	\$15,000-\$18,000	42	222,333.00	50	265,334.00	49	265,333.00	62	753,000.00
Graduate Fellowships	\$3,125 or \$6,250 (per term)	236	1,200,000.00	424	2,253,125.00	188	940,625.00	848	4,393,750.00
Graduate Fellowships (from UPF funds)	\$3,125 or \$6,250 (per term)	37	231,250.00	-	-	3	18,750.00	40	250,000.00
President's PhD Research Stipends	\$6,250 (per term)	50	312,500.00	25	156,250.00	46	287,500.00	121	756,250.00
Special Graduate Entrance Scholarships - General	\$1,000-\$10,000	11	35,585.00	69	282,495.00	17	63,375.00	97	381,455.00
Provost Scholarship (2)	\$5,000 annually	65	108,459.00	77	124,302.00	70	116,020.00	104	348,781.00
Travel & Minor Research Awards (3)	varies (average \$500)	146	191,601.00	110	62,442.00	165	103,833.00	421	357,876.00
Graduate International Research Travel Awards	\$2,650-\$6,250	10	47,503.00	6	31,513.00	3	12,250.00	19	91,266.00
Graduate Student Research Awards	\$2,000-\$7,500	128	722,125.00	-	-	-	-	128	722,125.00
Dean's Leadership Awards	\$1,000	2	2,000.00	-	-	2	2,000.00	4	4,000.00
Other Graduate Awards	varies	-	-	-	-	varies	5,000.00	varies	5,000.00
Totals		727	3,073,356.00	761	3,175,461.00	543	1,814,686.00	1,844	8,063,503.00

Total Expenses in FY2013/2014

8,063,503.00

BALANCE

Net Balance at Fiscal Year End (March 31, 2014)

995,266.57



OFFICE OF GRADUATE STUDIES AND POSTDOCTORAL FELLOWS
SIMON FRASER UNIVERSITY

**Financial Summary of Graduate Scholarships/ Bursaries/ Awards (SBA) Budget
Fiscal Year 2013/2014**

NOTES

(1) C.D. Nelson Scholarships are paid over three terms, normally starting in the Fall term. The figures reported also include students receiving their first CD Nelson scholarship in previous fiscal years. The total number of award payments per term reflects the number of students that were paid at least one installment of their C.D. Nelson Scholarship in that term. Thus, in FY2013/2014, a total of 62 students were paid their scholarship installments over several terms.

(2) The Provost Scholarship is a top-up award for national scholarship recipients including those students who received one of the tri-council awards. This award may be paid over several terms and in multiple years. The total number of award recipients per term reflects the number of students that were paid at least one installment of their Provost Scholarship in that term. Thus, in FY2013/2014, a total of 104 students were paid their scholarship in installments over several terms.

(3) In Fiscal year 2013-2014, there were two options to receive funds for the Travel & Minor Research Awards program. Departments can either be responsible for paying the funds directly to the students and be reimbursed by Graduate Studies at the end of the academic year, or Graduate Studies can pay the funds directly to students via the Student Information System as an award. Thus, the total number of students receiving this award and the breakdown per term is only an estimate.

(4) Aboriginal Graduate Scholarships are paid over several terms and are funded by the VPA office. In FY2013-2014, these funds were paid from a different account in order to keep better track of the funds.

Appendix 2

Type of Financial Aid Support	FY 2013/2014		FY 2012/2013	
	# of Awards Disbursed	Total Disbursements	# of Awards Disbursed	Total Disbursements
INTERNALLY MANAGED FINANCIAL AID AND AWARDS				
Entrance Scholarships (University funded)	1,185	\$ 3,564,065	1,898	\$ 4,600,254
Entrance Scholarships (Annual/Endowed)	175	\$ 396,750	110	\$ 253,975
Subtotal	1,360	\$ 3,960,815	2,008	\$ 4,854,229
Open Scholarship (Undergraduate)	1,723	\$ 1,649,210	2,093	\$ 1,588,960
In-Course Awards (University funded)	317	\$ 289,122	293	\$ 305,686
In-Course Awards (Annual/Endowed)	228	\$ 263,269	186	\$ 218,645
In-Course Scholarships (Annual/Endowed)	382	\$ 361,689	374	\$ 330,785
Subtotal	2,650	\$ 2,563,290	2,946	\$ 2,444,076
Bursary (Open - Undergraduate - Domestic - University funded)	1,880	\$ 2,134,237	1,848	\$ 1,937,591
Bursary (Open - Undergraduate - International - University funded)	975	\$ 728,706	1,068	\$ 606,217
Bursary (Open - Graduate - Domestic - University funded)	272	\$ 351,645	286	\$ 336,442
Bursary (Open - Graduate - International - University funded)	484	\$ 502,499	453	\$ 446,735
Bursary (Designated) ^a	136	\$ 275,204	155	\$ 331,892
Bursary (Credit Based Graduate Programs)	70	\$ 74,686	52	\$ 65,568
Bursary (Annual/Endowed - Undergraduate) ^b	2,058	\$ 831,190	902	\$ 826,265
Bursary (Annual/Endowed - Graduate)	56	\$ 57,416	72	\$ 68,321
Subtotal	5,931	\$ 4,955,583	4,836	\$ 4,619,031
Athletics Awards (University base budget funding) ^c	321	\$ 349,928	437	\$ 166,100
Athletic Awards (Additional institutional funding) ^c		\$ 148,117		\$ 113,000
Athletic Awards (Externally Fund-Raised) ^d				\$ 361,605
Athletics Awards (Annual/Endowed) ^d	427	\$ 780,047	384	\$ 484,767
Subtotal	748	\$ 1,278,092	821	\$ 1,125,472
Work-Study Program (Undergraduate)	477	\$ 626,258	394	\$ 526,485
Work-Study Program (Graduate)	42	\$ 54,912	38	\$ 47,813
Subtotal	519	\$ 681,170	432	\$ 574,298
TOTAL INTERNALLY MANAGED FINANCIAL AID AND AWARDS	11,208	\$ 13,438,950	11,043	\$ 13,617,106
EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS				
StudentAid BC Loans and Grants ^e	31,218	\$ 52,307,865	28,828	\$ 49,358,128
Subtotal	31,218	\$ 52,307,865	28,828	\$ 49,358,128
Out of Province Loans and Grants	1,162	\$ 3,899,979	1,225	\$ 4,040,189
U.S. Loan Awards	361	\$ 1,422,660	357	\$ 1,323,290
Subtotal	1,523	\$ 5,322,639	1,582	\$ 5,363,479
Non-SFU Administered Scholarships ^f	220	\$ 346,658	218	\$ 357,921
Non-SFU Administered Awards ^f	42	\$ 37,663	37	\$ 57,110
Non-SFU Administered Bursaries ^f	78	\$ 56,589	64	\$ 64,007
Subtotal	340	\$ 440,910	319	\$ 479,038
Athletics Awards (B.C. Athletic Assistance Program)	52	\$ 58,449	60	\$ 59,637
TOTAL EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS	33,133	\$ 58,129,863	30,789	\$ 55,260,282

Notes:

(a) Bursary - Designated - includes Field School, Exchange, International Co-op, and Aboriginal (Ugrad/Grad)

(b) Now includes # of awards disbursed for SFSS BuildSFU Bursary which was initiated in Spring 2014

(c) The total # awards disbursed (321 and 437) is associated to both the base budget and additional Athletic Award funding

(d) Externally fund-raised Athletic Awards were combined with the Annual/Endowed Athletic Awards category for 2013/14 onwards. In 2012/13 the total # awards disbursed (384) was associated with both the Externally-Fund Raised and Annual/Endowed funding.

(e) StudentAid BC funding for full-time and part-time students including any federal and provincial loan funding along with possible grant funding. Number awarded includes same student receiving more than one loan in the year.

(f) Non-SFU administered financial aid and awards normally just requires proof of enrollment from institution. Funds are then disbursed to the student's SFU account.