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MEMORANDUM

ATTENTION Senate

DATE December 12th, 2017

FROM Stephen Spector, Acting Chair
Senate Policy Committee on
Scholarships, Awards and Bursaries

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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 2016/2017.

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 2016/2017 period are detailed in Table 1.

Attachments

Table 1

Appendix 1 - SPCSAB 17-04

Appendix 2 - SPCSAB 17-05

Table 1

January 2017	Graduate Dean Entrance Scholarship	SPCSAB approved changes to the Terms of Reference for the Graduate Dean Entrance Scholarship effective Summer 2017
May 2017	Major Entrance Scholarship	SPCSAB approved: - the suspension of the SFU automatic scholarship programs for high school students and the existing Major Entrance Scholarships - reallocation of the SFU automatic scholarship and Major Entrance Scholarships funding to the new Entrance Scholarship program effective Spring 2019.
May 2017	Entrance Scholarship	SPCSAB approved the terms of reference for the SFU Entrance Scholarship Program for both domestic and international undergraduate students effective Fall 2018.
May 2017	Major Entrance Scholarship	SPCSAB approved that current students who have been awarded the following Major Entrance Scholarships prior to the Fall of 2018: - Simon Fraser Entrance Scholarship - Simon Fraser Alumni Leadership Entrance Scholarship - Gordon M. Shrum Entrance Scholarship (includes Shad Valley Shrum and National Shrum) - SFU Africa Entrance Scholarship - SFU Aga Khan Academies Entrance Scholarship W. Ronald Heath Entrance Scholarship for United World College students may elect prior to the start of the Fall 2018 term to comply with the terms of reference of the new SFU Entrance Scholarship program. Once made, this choice is irrevocable.
May 2017	Major Entrance Scholarship	SPCSAB approved that the new Major Entrance Scholarship be reviewed no later than the end of the third year (Fall 2020) by the Senate Policy Committee on Scholarships, Awards and Bursaries.



Financial Aid and Awards - Student Services

Disbursement Summary of Funding Administered or Supported through Financial Aid and Awards
Comparative Report: Fiscal Year 2015/2016 vs. 2016/2017

Type of Financial Aid Support	FY 2015/2016		FY 2016/2017	
	# of Awards Disburse	Total Disbursements	# of Awards Disburse	Total Disbursements
INTERNALLY MANAGED FINANCIAL AID AND AWARDS				
Entrance Scholarships and Awards (University funded)	1,122	\$ 3,599,458	1,105	\$ 3,805,559
Entrance Scholarships and Awards (Annual/Endowed)	135	\$ 352,000	117	\$ 358,500
Subtotal	1,257	\$ 3,951,458	1,222	\$ 4,164,059
Open Scholarship (Undergraduate)	1,584	\$ 1,708,340	1,638	\$ 1,802,550
In-Course Awards (University funded)	424	\$ 394,307	406	\$ 373,020
In-Course Awards (Annual/Endowed)	341	\$ 424,442	336	\$ 466,260
In-Course Scholarships (Annual/Endowed)	470	\$ 471,220	374	\$ 524,550
Subtotal	2,819	\$ 2,998,309	2,754	\$ 3,166,380
Bursary (Open - Undergraduate - Domestic - University funded) ^a	1,576	\$ 1,988,705	1,595	\$ 1,784,356
Bursary (Open - Undergraduate - International - University funded)	1,106	\$ 1,519,604	1,283	\$ 1,608,176
Bursary (International Supplement - Undergraduate - University funded) ^b	879	\$ 864,062	850	\$ 767,582
Bursary (Open - Graduate - Domestic - University funded)	257	\$ 378,741	310	\$ 443,385
Bursary (Open - Graduate - International - University funded)	417	\$ 582,621	445	\$ 594,090
Bursary (Designated) ^c	132	\$ 289,633	148	\$ 371,852
Bursary (Credit Based Graduate Programs)	92	\$ 117,270	101	\$ 131,386
Bursary (Annual/Endowed - Undergraduate) ^d	4,037	\$ 1,332,716	3,831	\$ 1,152,987
Bursary (Annual/Endowed - Graduate)	72	\$ 97,159	58	\$ 89,013
Subtotal	8,568	\$ 7,170,511	8,621	\$ 6,942,827
Athletics Awards (University funding) ^e	392	\$ 620,541	425	\$ 629,531
Athletics Awards (Annual/Endowed) ^f	371	\$ 620,710	400	\$ 750,024
Subtotal	763	\$ 1,241,251	825	\$ 1,379,555
Work-Study Program (Undergraduate) ^g	354	\$ 544,426	353	\$ 540,149
Work-Study Program (Graduate) ^g	55	\$ 84,893	69	\$ 115,935
Subtotal	409	\$ 629,319	422	\$ 656,084
TOTAL INTERNALLY MANAGED FINANCIAL AID AND AWARDS	13,816	\$ 15,990,848	13,844	\$ 16,308,905
EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS				
StudentAid BC Loans and Grants ^h	26,965	\$ 45,536,804	25,315	\$ 43,920,401
Subtotal	26,965	\$ 45,536,804	25,315	\$ 43,920,401
Out of Province Loans and Grants	1,310	\$ 4,810,261	1,318	\$ 5,096,860
U.S. Loan Awards	276	\$ 1,027,554	355	\$ 1,338,476
Subtotal	1,586	\$ 5,837,815	1,673	\$ 6,435,336
Aboriginal Emergency Assistance	74	\$ 51,760	43	\$ 25,835
Subtotal	74	\$ 51,760	43	\$ 25,835
Non-SFU Administered External Scholarships, Awards, and Bursaries ⁱ	325	\$ 482,945	312	\$ 499,009
Subtotal	325	\$ 482,945	312	\$ 499,009
Athletics Awards (B.C. Athletic Assistance Program)	62	\$ 54,571	56	\$ 55,110
Subtotal	62	\$ 54,571	56	\$ 55,110
TOTAL EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS	29,012	\$ 51,963,895	27,399	\$ 50,935,691

Notes:

- (a) Bursary - Open - includes funding for World University Services of Canada (WUSC) student and other university funded bursaries
 (b) Bursary - International Student Supplement (new from 2015/16) - Recognizing that international tuition fees had increased significantly over a 3 year period, to help with these increased costs, undergraduate students admitted in the 2014/15 academic year or earlier were provided a special bursary, the International Student Bursary Supplement.
 (c) Bursary - Designated - includes Field School, Exchange, International Co-op, Aboriginal (Ugrad/Grad), Youth in Care, SFU Intl Emergency Assistance, and International Student Supplement (new from 2015/16)
 (d) Now includes # of awards disbursed for SFSS BuildSFU Bursary which was created in Spring 2014
 (e) The University funding for athletic awards includes athletic entrance awards, recreation awards, international student-athlete awards, and female student athlete awards.
 (f) Externally fund-raised Athletic Awards were combined with the Annual/Endowed Athletic Awards category from 2015/16 onwards
 (g) Work-Study hourly wage moved from \$10.25 to \$12.25.
 (h) 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.
 (i) Non-SFU administered external financial aid and awards normally just requires proof of enrollment from institution. Funds are then disbursed to the student's SFU account.



**Financial Summary of Graduate Scholarships/ Bursaries/ Awards (SBA) Budget
Fiscal Year 2016/2017**

BUDGET

Budget Allocation for FY2016/2017	7,767,236.00
Add: Scholarship funds carryforward Balance from FY2015/2016	762,979.86
Total SBA Budget for FY2015/2016	8,530,215.86

EXPENSES (by academic term)

Name of Award	Value of Award	Summer 2016		Fall 2016		Spring 2017		Total for FY2016/2017	
		Number of Award Payments	Expensed in Term (\$)	Number of Award Payments	Expensed in Term (\$)	Number of Award Payments	Expensed in Term (\$)	Total number of award payments	Total Expensed in FY16/17 (\$)
C.D. Nelson Scholarships ⁽¹⁾	up to \$18,000 annually	71	401,250.00	56	384,000.00	45	297,000.00	172	1,082,250.00
Graduate Dean Entrance Scholarships ⁽¹⁾	up to \$21,000 annually	4	26,000.00	28	111,250.00	30	128,500.00	62	265,750.00
Graduate Fellowships	\$3,250 or \$6,500	217	1,176,500.00	354	1,953,250.00	364	1,878,500.00	935	5,008,250.00
Graduate Fellowships (Supplemental)	\$3,250 or \$6,500	7	55,250.00	7	39,000.00	12	84,500.00	26	178,750.00
President's PhD Scholarship	\$6,500	16	104,000.00	14	91,000.00	7	45,500.00	37	240,500.00
Special Graduate Entrance Scholarships General	\$1,000-\$10,000	20	71,774.00	77	276,150.00	7	36,000.00	104	383,924.00
Provost Scholarships ⁽¹⁾	\$5,000 annually	104	187,681.00	113	198,561.00	96	157,755.00	313	543,997.00
Travel & Minor Research Awards	varies	200	132,144.00	123	75,314.00	154	95,496.00	477	302,954.00
Graduate International Research Travel Awards	\$1,000-\$6,500	15	50,020.00	2	9,500.00	2	11,000.00	19	70,520.00
Dean's Leadership Travel Award	\$1,000	2	2,000.00	0	0	0	0	2	2,000.00
Indigenous Graduate Student Travel Award	varies	0	0	0	0	1	700.00	1	700.00
Graduate Aboriginal Entrance Scholarships	\$15,000-\$18,000	5	28,000.00	5	30,000.00	5	30,000.00	15	88,000.00
Internal Graduate Award	\$1,750	3.00	5,250.00	0	0	0	0	3	5,250.00
Totals		664	2,206,619.00	779	3,138,025.00	718	2,764,951.00	2,148	8,172,845.00

Total Expenses in FY2016/2017 **8,172,845.00**

BALANCE

Additions to Scholarship Account (e.g., GGSF funding, VPR office for Supplemental GF)	134,030.00
Net Balance at Fiscal Year End (March 31, 2016)	491,400.86

NOTES

(1) These scholarships are paid over multiple terms and may include students receiving their first scholarship payment in previous fiscal years. The total expenses on this report reflects the number of payments made this fiscal year.



GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2014/2015 through 2016/2017

Name and Type of Award	FY2016/2017			FY2015/2016		FY2014/2015	
	Award Duration/Value (\$)	Number of Award Payments	Total Expenses (\$)	Number of Award Payments	Total Expenses (\$)	Number of Award Payments	Total Expenses (\$)
INTERNALLY-FUNDED GRADUATE AWARDS							
Graduate scholarships/fellowships/awards funded by Graduate SBA budget							
C.D. Nelson Scholarships	18,000/yr (1-2yrs)	172	1,082,250.00	200	1,132,250.00	176	931,333.00
Graduate Dean's Entrance Scholarships (non existing prior to FY2016/2017)	21,000 (2-4yrs)	62	265,750.00	0	0	0	0
Graduate Fellowships ⁽¹⁾	3,250-6,500	935	5,008,250.00	816	4,485,125.00	806	4,206,250.00
Graduate Fellowships Supplemental	3,250-6,500	26	178,750.00	36	221,750.00	17	103,125.00
President's PhD Scholarships	\$6,500	37	240,500.00	48	308,500.00	87	543,750.00
Special Graduate Entrance Scholarships	varies (avg 3,000)	104	383,924.00	80	352,350.00	85	341,017.00
Provost Scholarships	5,000/yr (1-3yrs)	313	543,997.00	305	540,331.00	267	463,241.00
Travel & Minor Research Awards ⁽²⁾	varies (avg 500)	477	302,954.00	461	318,708.00	431	290,553.00
Graduate International Research Travel Awards	1,000-6,500	19	70,520.00	18	77,427.00	24	121,590.00
Dean's Leadership Travel Award	1,000	2	2,000.00	1	1,000.00	0	0.00
Indigenous Graduate Student Travel Award (formerly Graduate Aboriginal Travel Stipend)	varies (avg \$700)	1	700.00	2	1,922.98	5	5,000.00
Graduate Aboriginal Entrance Scholarships	\$18,000/yr (2yrs)	15	88,000.00	16	90,000.00	13	73,000.00
Internal Graduate Award	\$21,000/yr (4 yrs)	3	5,250.00	0	0	0	0
Graduate scholarships/fellowships/awards funded by Graduate SBA budget		2,166	8,172,845.00	1,981	7,529,363.98	1,906	7,078,859.00
Graduate scholarships/fellowships funded by Faculties/Schools							
Faculty of Applied Sciences Graduate Fellowships	3,250	22	71,500.00	17	54,750.00	22	68,750.00
Faculty of Business Administration Graduate Scholarships	varies	28	96,760.00	25	74,000.00	28	108,900.00
Faculty of Communication, Art & Technology Graduate Fellowships	3,250	13	42,250.00	7	22,500.00	8	25,000.00
Faculty of Education Graduate Scholarships	3,250-6,500	12	42,250.00	8	29,250.00	7	25,000.00
Faculty of Health Sciences Graduate Scholarships	varies	74	203,770.00	72	189,850.00	51	166,500.00
School of Computing Science Graduate Fellowships/Scholarships	3,250-6,500	103	707,800.00	46	292,000.00	0	0.00
School of Interactive Arts and Technology Graduate Fellowships	6,500	0	0	0	0.00	1	6,250.00
Global Communication Scholarship	varies	13	41,536.00	12	45,999.00	7	57,498.00
Graduate Liberal Studies Scholarship	varies	5	27,000.00	7	19,500.00	5	20,300.00
SFU Research Partnership Scholarship	26,340	2	52,680.00	1	17,560.00	0	0.00
Ben-Gurion University / SFU Joint Scholarship	varies	0	0	1	2,000.00	0	0.00
Graduate scholarships/fellowships funded by Faculties/Schools		272	1,285,546.00	196	747,409.00	129	478,198.00
Other internally-funded awards							
Private Awards (supported by endowments & annual donations)	varies	407	1,527,845.00	330	1,261,450.00	297	1,116,625.00
CTEF Graduate Fellowships (supported by Community Trust Endowment Fund)	6,500	14	91,000.00	11	84,500.00	15	93,750.00
VPR USRA Science ⁽³⁾	4,500	57	256,500.00	58	261,000.00	80	340,570.47
VPR USRA Social Science and Humanities ⁽³⁾	2,250-4,500	45	147,375.00	42	141,750.00	54	169,171.91
Other internally-funded awards		523	2,022,720.00	441	1,748,700.00	446	1,720,117.38
TOTAL INTERNALLY-FUNDED GRADUATE AWARDS		2,961	11,481,111.00	2,618	10,025,472.98	2,481	9,277,174.38



GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2014/2015 through 2016/2017

Name and Type of Award	FY2016/2017			FY2015/2016		FY2014/2015	
	Award Duration/Value (\$)	Number of Award Payments	Total Expenses (\$)	Number of Award Payments	Total Expenses (\$)	Number of Award Payments	Total Expenses (\$)
EXTERNALLY-FUNDED GRADUATE AWARDS							
National scholarships funded by Federal funding agencies							
NSERC Graduate Scholarships	17,500-50,000 (1-4yrs)	220	1,930,504.00	197	1,702,016.00	187	1,567,667.00
NSERC Industrial Post-Grad Scholarships (excludes industrial portion)	15,000	16	80,000.00	27	131,250.00	32	158,750.00
SSHRC Graduate Scholarships	17,500-50,000 (1-4yrs)	347	2,843,352.00	330	2,772,117.00	332	2,757,935.69
CIHR Graduate Scholarships	17,500-50,000 (1-4yrs)	77	671,666.00	88	764,175.00	96	877,831.00
Canada Graduate Scholarships-M. Smith Foreign Study Supplements	5,300-6,000	7	37,280.00	5	28,749.00	1	5,950.00
NSERC Undergraduate Student Research Awards	4,500	79	355,500.00	72	324,000.00	71	313,143.75
National scholarships funded by Federal funding agencies		746	5,918,302.00	719	5,722,307.00	719	5,681,277.44
Major scholarships funded by Provincial funding agencies							
Pacific Institute Climate Solutions Graduate Fellowships	12,000-18,000 (1-4yrs)	12	81,500.00	31	137,500.00	24	109,000.00
Major scholarships funded by Provincial funding agencies	-	12	81,500.00	31	137,500.00	24	109,000.00
Other externally-funded awards and grants							
NSERC IPGS Industrial Sponsorships (contributed by industrial partners)	6,000	16	32,000.00	27	52,500.00	32	63,500.00
External Awards	varies	47	277,186.00	53	205,175.00	65	276,996.00
Northern Scientific Training Program Grants	varies	6	16,400.00	8	15,661.40	5	11,839.80
Centre for Digital Media Scholarships (MDM program)	varies	51	294,000.00	36	317,500.00	35	355,752.00
NSERC and SSHRC GGSF Expenses ⁽⁴⁾	varies	varies	45,500.00	varies	45,646.37	varies	43,824.42
CIHR Health Research Awards ⁽⁵⁾	varies	12	31,239.00	7	24,900.00	4	17,004.00
Other externally-funded awards		132	696,325.00	131	661,382.77	141	768,916.22
TOTAL EXTERNALLY-FUNDED GRADUATE AWARDS		890	6,696,127.00	881	6,521,189.77	884	6,559,193.66
TOTAL GRADUATE AWARD FUNDS EXPENSED BY FISCAL YEAR		3,851	18,177,238.00	3,499	16,546,662.75	3,365	15,836,368.04

NOTES

- (1) The total number of Graduate Fellowships reflects the number of award payments made to graduate students within the fiscal year. Starting Fall 2015, the value for one GF increased to \$6,500
- (2) In Fiscal years 2013 to 2016, there were two options to receive funds for the Travel & Minor Research Awards program. Departments could 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 would pay the funds directly to students via the Student Information System as a scholarship.
- (3) The figures for the VPR USRA in FY2014-15 includes a few awards that started in Spring 2015, but continued into the Summer 2015 term.
- (4) The NSERC & SSHRC GGSF expenses usually consists of reimbursement for various GF supplemental awards spending.