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MEMORANDUM

ATTENTION Senate

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

RE: Annual Report

DATE December 13, 2018

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I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2017/2018.

Overview

SPCSAB is the committee charged by Senate with setting policy for the administration of student awards, scholarships, bursaries and other forms of financial aid at SFU. This is primarily for university-administered funding. 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 and administers undergraduate scholarships and awards (entrance, athletic, in-course), government student loans (Canadian and US) and needs-based bursary and work-study programs (for both undergraduate and graduate students).

SPCSAB is not responsible for administering budgets for scholarships, awards, work-study or bursary programs. 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 2017-18 period are detailed in Table 1.

Attachments

Table 1

Appendix 1 – SPCSAB 18-09

Appendix 2 – SPCSAB 18-10

Table1: Actions of SPCSAB

January 2018	Terry Fox Gold Medal	SPCSAB approved changes to the Terms of Reference so that it limits the eligibility of recipients to SFU students only and replace the tuition funding with a one-time award in the amount of \$5,000 along with a medal and plaque effective Spring 2018.
January 2018	Gordon M. Shrum Gold Medal	SPCSAB approved the changes to the Terms of Reference by removing the \$500 monetary value and to add requirement for supporting documentation effective Spring 2018.
January 2018	University-funded Athletics Awards	SPCSAB approved the following changes to the University-funded Athletics Awards: (a) the following current university-funded SFU athletic awards no longer be awarded - o Recreation Promotion Awards (Athletics) - o Athletic General Awards - o SFU Athletic Scholarship - o Rick Hansen Athletic Award - o Athletic Entrance Award - o Jack Diamond Entrance Award - o Jack Diamond Athletic Award (b) funding be allocated to the new university general SFU Athletics Award effective Summer 2018. (c) that new SFU Athletic Awards terms of reference be approved effective Fall 2018.
January 2018	Provost International Fellowship	SPCSAB approved the changes to the Terms of Reference, effective Fall 2018, by removing clause 5 which reads: <i>"PIF recipients are not eligible to receive other scholarship support from internal SFU sources e.g., major entrance scholarships (C.D. Nelson Scholarships), Graduate Fellowships (GFs), Special Graduate Entrance Scholarships (SGES), etc.), with the exception of private awards which are derived from annual and endowed funds."</i>

Appendix 1 Undergraduate Studies – Fiscal Years 2017-2018

Appendix 2 Graduate Studies – Fiscal Years 2017/2018

Disbursement Summary of Funding Administered or Supported through Financial Aid and Awards
Comparative Report: Fiscal Year 2016/2017 vs. 2017/2018

Type of Financial Aid Support	FY 2016/2017		FY 2017/2018	
	# of Awards Disbursed	Total Disbursements	# of Awards Disbursed	Total Disbursements
INTERNALLY MANAGED FINANCIAL AID AND AWARDS				
Entrance Scholarships and Awards (Undergraduate - University funded)	1,105	\$ 3,805,559	1,108	\$ 3,761,254
Entrance Scholarships and Awards (Undergraduate - Annual/Endowed)	117	\$ 358,500	110	\$ 425,000
Subtotal	1,222	\$ 4,164,059	1,218	\$ 4,186,254
Open Scholarship (Undergraduate - University funded)	1,638	\$ 1,802,550	1,762	\$ 1,873,090
In-Course Awards (Undergraduate - University funded)	406	\$ 373,020	388	\$ 378,000
In-Course Awards (Undergraduate - Annual/Endowed)	336	\$ 466,260	335	\$ 500,924
In-Course Scholarships (Undergraduate - Annual/Endowed)	374	\$ 524,550	379	\$ 526,215
Subtotal	2,754	\$ 3,166,380	2,864	\$ 3,278,229
Open Bursary (Undergraduate - Domestic - University funded)*	1,595	\$ 1,784,356	1,363	\$ 1,570,497
Open Bursary (Undergraduate - International - University funded)	1,283	\$ 1,608,176	1,349	\$ 1,796,757
International Supplement Bursary (Undergraduate - University funded)*	850	\$ 767,582	567	\$ 480,425
Open Bursary (Graduate - Domestic - University funded)	310	\$ 443,385	258	\$ 486,940
Open Bursary (Graduate - International - University funded)	445	\$ 594,090	413	\$ 673,752
Designated Bursary (University funded)*	148	\$ 371,852	125	\$ 293,168
Bursary (Graduate - Credit-based Programs - University funded)	101	\$ 131,386	99	\$ 164,763
Bursary (Undergraduate - Annual/Endowed)*	3,831	\$ 1,152,987	4,017	\$ 1,363,073
Bursary (Graduate - Annual/Endowed)	58	\$ 89,013	64	\$ 123,289
Subtotal	8,621	\$ 6,942,827	8,255	\$ 6,952,664
Athletics Awards (Undergraduate - University funded)*	425	\$ 629,531	437	\$ 675,232
Athletics Awards (Undergraduate - Annual/Endowed)*	400	\$ 750,024	402	\$ 639,550
Subtotal	825	\$ 1,379,555	839	\$ 1,314,782
Work-Study Program (Undergraduate - University funded)*	353	\$ 540,149	344	\$ 534,077
Work-Study Program (Graduate - University funded)*	69	\$ 115,935	56	\$ 97,840
Subtotal	422	\$ 656,084	400	\$ 631,917
TOTAL INTERNALLY MANAGED FINANCIAL AID AND AWARDS	13,844	\$ 16,308,905	13,576	\$ 16,363,846
EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS				
StudentAid BC Loans and Grants ^h	25,315	\$ 43,920,401	25,621	\$ 47,905,294
Subtotal	25,315	\$ 43,920,401	25,621	\$ 47,905,294
Out of Province Loans and Grants	1,318	\$ 5,096,860	1,583	\$ 5,529,736
U.S. Loan Awards	355	\$ 1,338,476	353	\$ 1,490,146
Subtotal	1,673	\$ 6,435,336	1,936	\$ 7,019,882
Aboriginal Emergency Assistance	43	\$ 25,835	26	\$ 14,700
Subtotal	43	\$ 25,835	26	\$ 14,700
Non-SFU Administered External Scholarships, Awards, and Bursaries ⁱ	312	\$ 499,009	298	\$ 443,805
Subtotal	312	\$ 499,009	298	\$ 443,805
Athletics Awards (B.C. Athletic Assistance Program)	56	\$ 55,110	38	\$ 55,392
Subtotal	56	\$ 55,110	38	\$ 55,392
TOTAL EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS	27,399	\$ 50,935,691	27,919	\$ 55,439,073

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
 (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 for 2017-18 fiscal was \$12.25. It has been moved up to \$15.20 (starting Summer 2018 onwards).
 (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.



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Attention: Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB)
Date: November 1, 2018

Financial Summary of Graduate Scholarship, Bursaries and Awards (SBA) Budget

Scholarship and Awards Budget: the Office of Graduate and Postdoctoral Studies received \$7,922,580 for the FY2017/18 Graduate SBA Budget. We had a carry forward balance of \$491,401 from the FY2016/17.



GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Financial Summary of Graduate Scholarships/ Bursaries/ Awards (SBA) Budget
Fiscal Year 2017/2018

BUDGET

Budget Allocation for FY2017/2018	7,922,580.00
Add: Scholarship funds carryforward Balance from FY2016/2017	491,401.00

Total SBA Budget for FY2017/2018	8,413,981.00
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EXPENSES (by academic term)

Name of Award	Value of Award	Summer 2017		Fall 2017		Spring 2018		Total for FY2017/2018	
		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 FY17/18 (\$)
C.D. Nelson Scholarships ⁽¹⁾	up to \$18,000 annually	45	288,000.00	49	336,000.00	41	270,000.00	135	894,000.00
Graduate Dean Entrance Scholarships ⁽¹⁾	up to \$21,000 annually	28	114,875.00	53	325,834.00	55	336,208.00	136	776,917.00
Graduate Fellowships	\$3,250 or \$6,500	229	1,287,000.00	335	1,849,250.00	244	1,257,750.00	808	4,394,000.00
Graduate Fellowships (Supplemental)	\$3,250 or \$6,500	2	13,000.00	7	45,500.00	8	45,500.00	17	104,000.00
President's PhD Scholarship	\$6,500	18	117,000.00	11	71,500.00	8	52,000.00	37	240,500.00
Special Graduate Entrance Scholarships - General	\$1,000-\$10,000	10	57,786.00	102	357,650.00	10	51,000.00	122	466,436.00
Provost Scholarships	\$5,000 annually	93	136,669.00	95	139,067.00	86	122,002.00	274	397,738.00
Travel & Minor Research Awards	varies	185	149,030.00	65	41,838.00	165	143,197.00	415	334,065.00
Graduate International Research Travel Awards	\$1,000-\$6,500	10	48,930.00	1	6,500.00	4	8,600.00	15	64,030.00
Dean's Leadership Travel Award	\$1,000	0	0	0	0	0	0	0	-
Indigenous Graduate Student Travel Award	varies	3	3,300	0	0	6	5,130.00	9	8,430.00
Graduate Aboriginal Entrance Scholarships	\$15,000-\$18,000	5	30,000.00	5	30,000.00	5	30,000.00	15	90,000.00
Internal Graduate Award	\$1,750	0	0	0	0	0	0	0	-
Totals		628	2,245,590.00	723	3,203,139.00	632	2,321,387.00	1,983	7,770,116.00

Total Expenses in FY2017/2018	7,770,116.00
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BALANCE

Additions to Scholarship Account (e.g., GGSF funding, VPR office for Supplemental GF)	42,092.86
Net Balance at Fiscal Year End (March 31, 2018)	685,957.86

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

**Summary of Graduate Scholarships/Bursaries/Awards (SBA) Base Budget Allocations
Five-Year Overview: Fiscal Years 2014/2015 through 2018/2019**

FY2014/2015 Base Budget - approved by BoG	6,772,236
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No adjustments for FY2014/2015

<i>FY2014/2015 Graduate Students Unique headcount (based on IRP data)</i>	5,339
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FY2015/2016 Base Budget - approved by BoG	6,947,236
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Adjustments for FY2015/2016:

<i>Add: base budget increase</i>	175,000
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<i>FY2015/2016 Graduate Students Unique headcount (based on IRP data)</i>	5,368
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FY2016/2017 Base Budget - approved by BoG	7,767,236
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Adjustments for FY2016/2017:

<i>Add: base budget increase</i>	820,000
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<i>FY2016/2017 Graduate Students Unique headcount (based on IRP data)</i>	5,420
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FY2017/2018 Base Budget - approved by BoG	7,922,580
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Adjustments for FY2017/2018:

<i>Add: base budget increase</i>	155,344
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<i>FY2017/2018 Graduate Students Unique headcount (based on IRP data)</i>	4,444
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FY2018/2019 Base Budget - approved by BoG	8,922,580
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Adjustments for FY2018/2019:

<i>Add: base budget increase</i>	1,000,000
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GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2015/2016 through 2017/2018

Name and Type of Award	FY2017/2018			FY2016/2017		FY2015/2016	
	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)	135	894,000.00	172	1,082,250.00	200	1,132,250.00
Graduate Dean's Entrance Scholarships (non existing prior to FY2016/2017)	21,000 (2-4yrs)	136	776,917.00	62	265,750.00	0	0
Graduate Fellowships ⁽¹⁾	3,250-6,500	808	4,394,000.00	935	5,008,250.00	816	4,485,125.00
Graduate Fellowships Supplemental	3,250-6,500	17	104,000.00	26	178,750.00	36	221,750.00
President's PhD Scholarships	\$6,500	37	240,500.00	37	240,500.00	48	308,500.00
Special Graduate Entrance Scholarships	varies (avg 3,000)	122	466,436.00	104	383,924.00	80	352,350.00
Provost Scholarships	5,000/yr (1-3yrs)	274	397,738.00	313	543,997.00	305	540,331.00
Travel & Minor Research Awards ⁽²⁾	varies (avg 500)	415	334,065.00	477	302,954.00	461	318,708.00
Graduate International Research Travel Awards	1,000-6,500	15	64,030.00	19	70,520.00	18	77,427.00
Dean's Leadership Travel Award	1,000	0	0.00	2	2,000.00	1	1,000.00
Indigenous Graduate Student Travel Award (formerly Graduate Aboriginal Travel Stipend)	varies (avg \$700)	9	8,430.00	1	700.00	2	1,922.98
Graduate Aboriginal Entrance Scholarships	\$18,000/yr (2yrs)	15	90,000.00	15	88,000.00	16	90,000.00
Internal Graduate Award	\$21,000/yr (4 yrs)	0	0.00	3	5,250.00	0	0
Graduate scholarships/fellowships/awards funded by Graduate SBA budget		1,983	7,770,116.00	2,166	8,172,845.00	1,983	7,529,363.98
Graduate scholarships/fellowships funded by Faculties/Schools							
Faculty of Applied Sciences Graduate Fellowships	3,250	15	48,750.00	22	71,500.00	17	54,750.00
Faculty of Business Administration Graduate Scholarships	varies	27	106,000.00	28	96,760.00	25	74,000.00
Faculty of Communication, Art & Technology Graduate Fellowships	3,250	6	19,500.00	13	42,250.00	7	22,500.00
Faculty of Education Graduate Scholarships	3,250-6,500	9	32,500.00	12	42,250.00	8	29,250.00
Faculty of Health Sciences Graduate Scholarships	varies	69	142,818.00	74	203,770.00	72	189,850.00
School of Computing Science Graduate Fellowships/Scholarships	3,250-6,500	24	181,300.00	103	707,800.00	46	292,000.00
School of Interactive Arts and Technology Graduate Fellowships	6,500	0	0	0	0	0	0.00
Global Communication Scholarship	varies	23	57,501.00	13	41,536.00	12	45,999.00
Graduate Liberal Studies Scholarship	varies	4	23,000.00	5	27,000.00	7	19,500.00
SFU Research Partnership Scholarship	26,340	6	52,680.00	2	52,680.00	1	17,560.00
Ben-Gurion University / SFU Joint Scholarship	varies	0	0	0	0	1	2,000.00
Graduate scholarships/fellowships funded by Faculties/Schools		183	664,049.00	272	1,285,546.00	196	747,409.00
Other internally-funded awards							
Private Awards (supported by endowments & annual donations)	varies	420	1,667,735.00	407	1,527,845.00	330	1,261,450.00
CTEF Graduate Fellowships (supported by Community Trust Endowment Fund)	6,500	12	78,000.00	14	91,000.00	11	84,500.00
KEY Graduate Scholarship	6,500	16	104,000.00	0	0	0	0
KEY Big Data USRA	2,250-4,500	21	90,000.00	0	0	0	0
VPR USRA Science ⁽³⁾	4,500	55	244,125.00	57	256,500.00	58	261,000.00
VPR USRA Social Science and Humanities ⁽³⁾	2,250-4,500	45	135,000.00	45	147,375.00	42	141,750.00
Other USRA's ⁽⁶⁾	varies	4	16,000.00	0	0.00	0	0.00
Other internally-funded awards		569	2,334,860.00	523	2,022,720.00	441	1,748,700.00
TOTAL INTERNALLY-FUNDED GRADUATE AWARDS		2,735	10,769,025.00	2,961	11,481,111.00	2,620	10,025,472.98



GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2015/2016 through 2017/2018

Name and Type of Award	FY2017/2018			FY2016/2017		FY2015/2016	
	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)	213	1,892,508.00	220	1,930,504.00	197	1,702,016.00
NSERC Industrial Post-Grad Scholarships (excludes industrial portion) Discontinued	15,000	3	15,000.00	16	80,000.00	27	131,250.00
SSHRC Graduate Scholarships	17,500-50,000 (1-4yrs)	329	2,719,155.00	347	2,843,352.00	330	2,772,117.00
CIHR Graduate Scholarships	17,500-50,000 (1-4yrs)	57	488,333.00	77	671,666.00	88	764,175.00
Canada Graduate Scholarships-M. Smith Foreign Study Supplements	5,300-6,000	6	35,900.00	7	37,280.00	5	28,749.00
NSERC Undergraduate Student Research Awards	4,500	65	292,500.00	79	355,500.00	72	324,000.00
National scholarships funded by Federal funding agencies		673	5,443,396.00	746	5,918,302.00	719	5,722,307.00
Major scholarships funded by Provincial funding agencies							
Pacific Institute Climate Solutions Graduate Fellowships	12,000-18,000 (1-4yrs)	7	46,000.00	12	81,500.00	31	137,500.00
Major scholarships funded by Provincial funding agencies	-	7	46,000.00	12	81,500.00	31	137,500.00
Other externally-funded awards and grants							
NSERC IPGS Industrial Sponsorships (contributed by industrial partners) Discontinued.	6,000	3	6,000.00	16	32,000.00	27	52,500.00
External Awards	varies	53	225,868.00	47	277,186.00	53	205,175.00
Northern Scientific Training Program Grants	varies	7	11,735.49	6	16,400.00	8	15,661.40
Centre for Digital Media Scholarships (MDM program)	varies	54	281,500.00	51	294,000.00	36	317,500.00
NSERC and SSHRC GGSF Expenses ⁽⁴⁾	varies	varies	26,000.00	varies	45,500.00	varies	45,646.37
CIHR Health Research Awards ⁽⁵⁾	varies	10	13,046.00	12	31,239.00	7	24,900.00
Other externally-funded awards		127	564,149.49	132	696,325.00	131	661,382.77
TOTAL EXTERNALLY-FUNDED GRADUATE AWARDS		807	6,053,545.49	890	6,696,127.00	881	6,521,189.77
TOTAL GRADUATE AWARD FUNDS EXPENSED BY FISCAL YEAR							
		3,542	16,822,570.49	3,851	18,177,238.00	3,501	16,546,662.75



GRADUATE AND POSTDOCTORAL STUDIES
SIMON FRASER UNIVERSITY

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2015/2016 through 2017/2018

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.
- (5) The CIHR Health Research Awards includes the CIHR Health Professional Student Awards, the CIHR Health Research Community Awards and the CIHR travel awards.
- (6) Other USRA's consist of: BPK Fac Undergrad Res Award; BPK Len Brownlie USRA; Charles Allard USRA; Faculty of Science USRA