

For Information

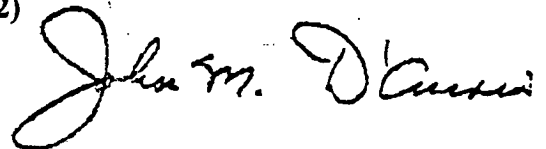
SIMON FRASER UNIVERSITY
MEMORANDUM

To: Senate

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

Re: Annual Report (SPCSAB reference 01-12)

Date: October 16, 2001



I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2000-2001.

Overview

The Senate Policy Committee on Scholarships, Awards and Bursaries is the committee charged by Senate with setting policy for the administration of student scholarships, bursaries, and other forms of financial aid at SFU. It should be noted that this is primarily for internal awards. Two other Senate committees, SUAAC (undergraduate awards) and SGAAC (graduate awards) adjudicate financial awards to students where adjudication is needed.

The number of applications for financial aid climbs each year; in fiscal 2000-2001, SFU received approximately 2900 applications for bursaries, each applicant requesting consideration for 10 or more awards, and approximately 900 applications were received for endowed and annual undergraduate scholarships. Applications are reviewed and vetted by staff in Student Services. In the case of scholarships and other awards, the adjudication committees then make final decisions in meetings held each semester.

Although the University continues to benefit from a growing number of privately funded scholarships, awards and bursaries, the majority of its awards are funded by the University as a percentage of fees and tuition revenues. When revenues increase as a result of increases in tuition, enrollments, or course loads, so does the budget for financial aid. It should be noted that with the continuing tuition freeze, the funds available for scholarships and, in particular, bursaries, have not increased significantly, despite increases in enrollments.

Nevertheless, there is a small increasing trend in the awarding of entrance scholarship over the last few years and of special interest, is the increase in acceptances of international Entrance scholarships.

One effect of the freeze has been the inability to increase the amounts available for bursaries. In fact the bursary awards have been fixed for seven years. For example, the average, individual bursary award for undergraduates has decreased to \$460 from \$560 since 1994. Given that such awards go to those who most need financial support, this is a situation that should be revisited soon for additional support.

As pointed out in previous reports, there has been increased recognition about the growing debt load that students incur during their university years. It is currently estimated that undergraduate students receiving BC Student Assistance graduate with a median government loan debt of \$20,000. Related to this, in 2000, Simon Fraser University has moved from being the third largest user of assistance programs to second.

The committee would also like to point out that proposed changes by the Government in the delivery of student loans and grants will further penalize students, i.e., changing from lump sum payments at the beginning of a semester to incremental disbursements. Universities have lobbied against incremental disbursements, but to no avail.

In the area of graduate scholarships there has been an effort to attract outstanding graduate students by an increase in the amount of top-up funds available to fellowship winners. All recipients of NSERC or SSHRC graduate awards may be nominated by their departments for Special Graduate Entrance Scholarships without the need to show that they have competing offers from other universities.

In the regular business of the committee, a number of motions were passed. I would like to draw your attention to some items of note:

- the internal procedures of the committee were changed to introduce the position of Vice-Chair;
- a cap was placed on the total annual funds that a graduate student can earn from all sources from \$27,000 to \$35,000 within a limit of 130 extra work hours;
- budget carry forward was used to maintain a minimum 3.70 gpa for award of Open Scholarships;
- approved terms of reference changes in certain athletic awards reflecting entry of SFU into CIAU;



**Report to the Senate Policy Committee on Scholarships, Awards and Bursaries
 2000-01 Entrance Scholarship Program**

Entrance scholarships are available to new applicants to Simon Fraser who, at the time of admission to the University, demonstrate academic excellence or a combination of extraordinary personal achievement and academic excellence.

In an effort to remain competitive with other universities in British Columbia and across Canada, Student Recruitment extended more offers of scholarship this Fall – 9% more than in 2000 – for a total of 619 offers. This strategy, combined with increased recruiting activity and resulting success on both the national and international fronts, has seen a 6% increase in our overall yield of highly qualified students. Our registration rate on offers – the final measure of the number of students who accept our awards – was 40% this Fall.

Acceptance rates of the Kenneth Strand National Entrance Scholarship have seen an increase of 9 award winners over last year – up from 3 registrants to 12. We are also pleased to report 11 new International Summit Entrance Scholarship students from our United World College target market – targeted publications and recruiting efforts have helped to bring more of these excellent international students to Simon Fraser.

Acceptance rates after registration have remained consistent for most provincial awards. The Senate Undergraduate Adjudication Committee authorized 22 offers of the Gordon M. Shrum award – consistent with 2000 - with a final yield of 15 registrants, also consistent with last year's yield. The BC Summit Entrance Scholarship has, over the past four years, seen a steady increase in our number of registrants. The Shrum award winners all had admission averages of 95% or higher, and our 137 Summit registrants all had interim grades of 93% or higher. Recruitment also managed to make offers of Summit Scholarship to those students who, on final grades, managed to improve significantly their admission average from below 93% on interim grades to 94% and above on finals.

Retention rates for the majority of our entrance scholarships have also remained consistent with, typically, high rates of retention for these top students. Retention in this context means students have been academically qualified to receive their second scholarship disbursement. The Gordon Shrum Awards have seen a three-year average retention rate of 98%. The Summit scholarship (awarded solely on grades) has seen an average retention rate of 77% over three years.

Lastly, it must be noted that Admission's self-reported grade initiative allowed SFU to make early and comprehensive offers of admission, scholarship and residence to highly qualified applicants as early as February 22 this year. Offering Entrance Scholarships on self-reported grades (verified by the secondary schools) was a pilot project for Student Recruitment in 2001 which we plan to pursue again in 2002 as part of a three-year study.

Total expenditures on all disbursements over 3 semesters:	98-2 , 98-3, 99-1	99-2, 99-3, 00-1	00-2, 00-3, 01-1
	\$1, 202, 406	\$1,268, 986	\$1, 323, 654

Entrance Scholarship review:
4 year comparison

Program Name	1998 No. of new recipients	1999 No. of new recipients	2000 No. of new recipients	2001 No. of new recipients
Shrum International Entrance Scholarship	1	6	6	6
International Summit Scholarship	2	2	1	11
Gordon M. Shrum National Entrance Scholarship	4	2	4	6
Kenneth Strand National Entrance Scholarship	6	6	3	12
Jack Diamond National Scholarship	6	9	4	2
Honourable William M. Hamilton College Transfer Scholarship	2	4	1	2
Ken Caple College Transfer Scholarship	7	4	7	7
Gordon M. Shrum Scholarship	16	16	15	15
Simon Fraser Alumni Leadership Scholarship	0	1	1	1
Dean's Scholarships in the five Faculties	25	15	9	14
Summit Scholarship	81	126	135	137
Tadeusz Specht Memorial Scholarships in Science & Applied Science	22	27	35	22
Jack Diamond Entrance Scholarship	10	18	12	14
Jack Diamond Leadership Award	3	4	1	0
Regional Summit Scholarship	9	0	0	0
Phi Theta Kappa International Summit Scholarship	0	3	0	0
Stanley Morisse Scholarship	0	0	1	1
Totals	194	243	235	250

F.

**SIMON FRASER UNIVERSITY
DEAN OF STUDENT SERVICES**

MEMORANDUM

To: Senate Policy Committee on Scholarships, Awards & Bursaries
From: Peg Johnsen, Acting Assistant to the Dean of Student Services
Re: Open Undergraduate Scholarship for Fiscal 2000 - 2001
Date: October 9, 2001

In follow up to the attached March 12, 2001 memo, the final totals for the Open Undergraduate Scholarship awarded for fiscal 2000 - 2001 are:

	Semester	# of Opens	Total	Avg Schol.	CGPA	Cost/Credit
00/01	00-2	235	\$173,789	\$740	3.7	\$77
	00-3	355	\$333,256	\$939	3.7	\$77
	01-1	345	\$318,087	\$922	3.7	\$77
TOTAL		935	\$825,132	822		

Please note, that although the Open Undergraduate Scholarship is assessed automatically each semester, manual disbursements of the scholarships are required to be done due to one of the following reasons:

- changes to late deferred grades that increase the students various grade points;
- students who took graded courses during Co-op work terms, dropping them below the required 24 credits/3 semesters;
- student returned from foreign exchanges.

The Open Undergraduate Scholarship continued to be awarded at a CGPA level of 3.70, which was consistent with practice since 1996-2.

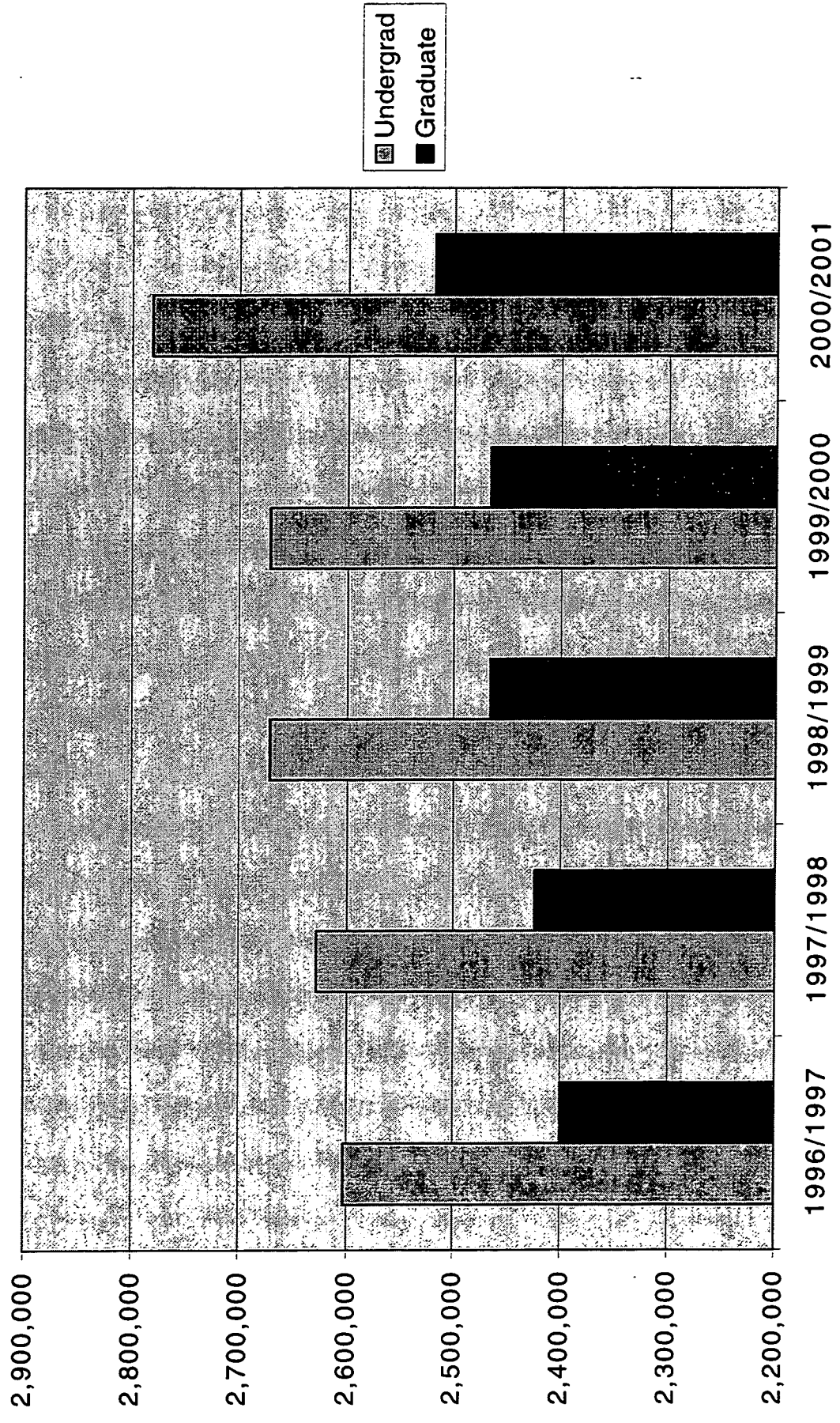
Total disbursements over the three-semester period amounted to \$825,132: as the budgeted amount for the scholarship was \$817,138. We were within .97% of our target.

The number of scholarships disbursed in the year increased by 2, while the average scholarship increased by \$4. Overall, the cost to the University of this scholarship increased again over the previous fiscal year by .74% (or \$6,083).

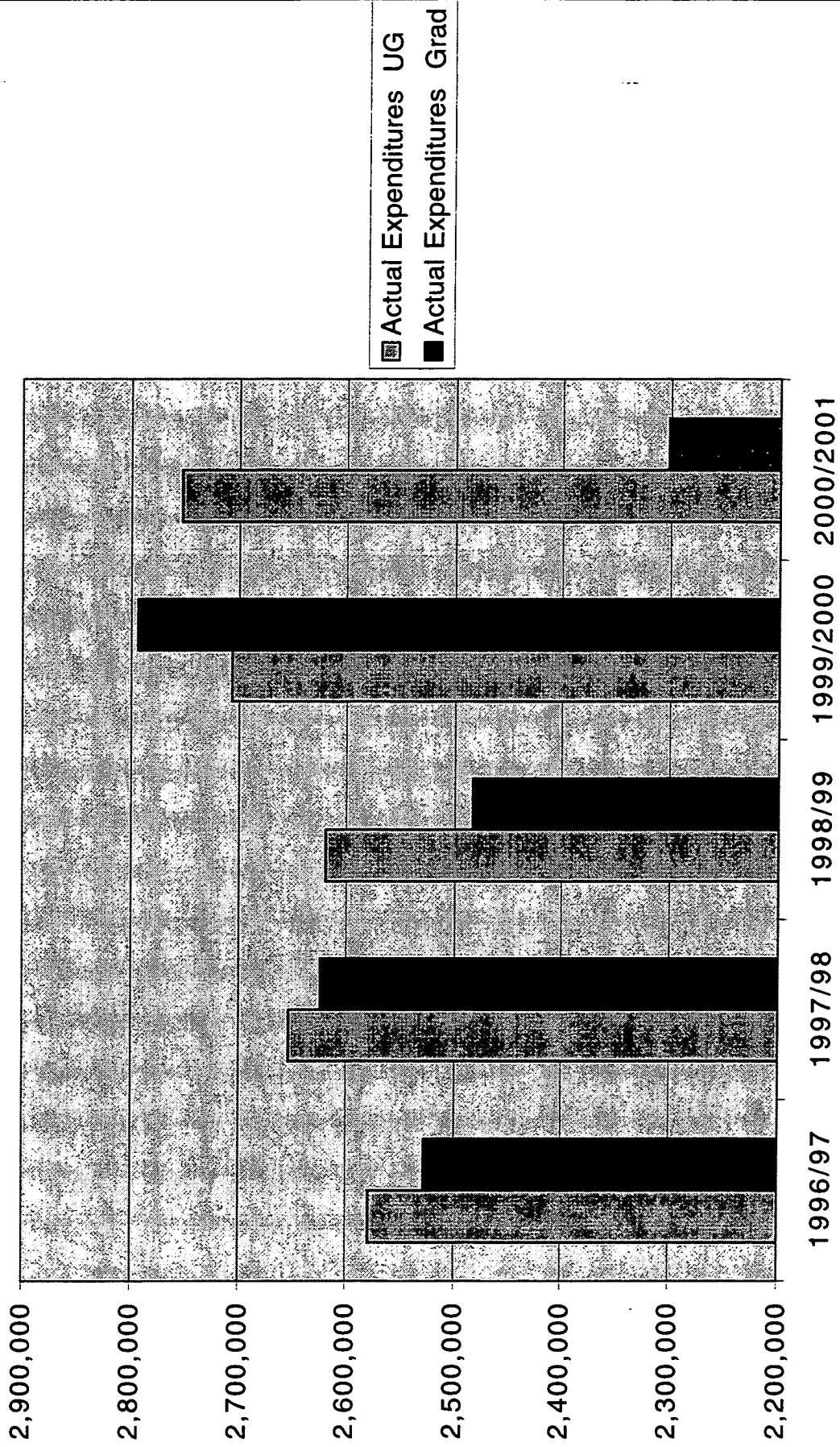
Open Scholarship Totals

Fiscal Year	Sem	# Awards	Total Awarded	Avg Award	CGPA	Per credit
95/96	952	172	\$118,260	\$688	3.7	\$73
	953	233	\$220,605	\$947	3.7	\$77
	961	276	\$246,708	\$894	3.65	\$77
	Total: 95/96	681	\$585,573	\$860		
96/97	962	184	\$135,058	\$734	3.7	\$77
	963	280	\$267,545	\$956	3.7	\$77
	971	260	\$239,199	\$920	3.7	\$77
	Total: 96/97	724	\$641,802	\$886		
97/98	972	216	\$167,167	\$774	3.7	\$77
	973	323	\$302,918	\$939	3.7	\$77
	981	318	\$295,911	\$933	3.7	\$77
	Total: 97/98	857	\$765,996	\$894		
98/99	982	226	\$169,323	\$749	3.7	\$77
	983	337	\$315,854	\$937	3.7	\$77
	991	335	\$313,852	\$937	3.7	\$77
	Total: 98/99	898	\$799,029	\$890		
99/00	992	241	\$176,176	\$731	3.7	\$77
	993	334	\$313,159	\$938	3.7	\$77
	2000-1	358	\$329,714	\$921	3.7	\$77
	Total: 99/00	933	\$819,049	\$878		
00/01	00-2	235	\$173,789	\$740	3.7	\$77
	00-3	355	\$333,256	\$939	3.7	\$77
	01-1	345	\$318,087	\$882	3.7	\$77
	Total: 00/01	935	\$825,132	\$882		
2001-2002	2001-2	295	\$218,372	\$740	3.7	\$73.15
	2001-3	455	\$375,000	\$824	3.7	\$73.15
	2002-1					
	Total: 01/02	750	\$593,372	\$791		

Annual Financial Assistance Funding Available



Financial Assistance Actual Expenditures



8.

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

Athletic and Recreation Awards 2000-01

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. Athletic awards are funded through endowed and annual donor donations as well as university operating funds. Awards included in the table under the title 'Athletic Tuition Awards' are funded by money raised by the individual teams to support their own athletes.

The table below shows a very small decrease in the total number and value of Endowed/Annual Awards, SFU funded awards and Athletic Tuition awards disbursed to students this year. This is a change in the trend of previous years of continuous increases. In September of 2000 two of the varsity teams, Men's and Women's Basketball, moved from competing in the National Association of Intercollegiate Athletics (NAIA) to the Canadian Intercollegiate Athletics Union (CIAU). With the change came a new set of regulations governing financial assistance for student athletes, most notably an annual cap on total awards a student-athlete may receive in Endowed/Annual awards and SFU Funded awards equal in value to assessed tuition and fees (maximum approximately \$2672) from a maximum of tuition, fees and allowable living expenses (\$8800 annually). This change reduced the number and value of awards that could be given to members of the two Basketball teams. The value of awards a student-athlete on a CIAU team may receive from the B.C. Athletic Assistance Program (BCAAP) are restricted by the BCAAP regulations (maximum \$3500 annually) but not by the athletic organization. These awards may be given in addition to the Endowed/Annual and SFU funded awards.

The notable increase in the total dollars disbursed through donor based Endowed/Annual Athletic awards between 1996-97 and 1999-2000 is due in part to the transfer of funds from the Athletic Operating Endowment to the newly created Athletic Award Endowment. In 1996 a change was made in the procedures for administration of the provincial BC Athletic Assistance Program. The bulk of funds were taken away from the educational institutions and given to the amateur sports associations to administer. This meant that some students who had previously received provincial assistance would no longer receive funding. In order to maintain expected levels of assistance for these students, Recreation Services and Athletics moved funds from their operating endowment to an award endowment. This re-allocation of funds has been approved on a continuing basis.

In addition four new donor funded athletic awards were available to student athletes this year. Two of these awards are endowed or multi-year donations and the other two are one time gifts.

Recreation Awards

Simon Fraser University supports a number of awards for students who actively support the University's Recreation Program. The awards are given in recognition of individual participation, leadership and volunteerism in various aspects of Recreation Services. University funding for Recreation Awards has remained unchanged for over eight years and is budgeted at \$19,200.

- 2 -

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 \$
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. Beginning in the 1996-97 award year, external support from the BC Athletes Assistance Program was also disbursed through Financial Assistance in order to meet regulations of the Government and sporting organizations. The amount of funding available to student-athletes through this program has decreased notably over the years. In 1996-97, Simon Fraser student athletes received 212 disbursements totaling \$136,156 from this program. In this past year, 2000-01, SFU athletes received 90 disbursements totaling \$66,916, a 51% decrease in funds over three years.

BC ATHLETIC ASSISTANCE PROGRAM*

	# of Award	Total \$ Awarded
00/01	90	66,916
99/00	85	62,926
98/99	142	90,979
97/98	138	90,112
96/97	212	136,156

*Note: all statistics are for the academic year starting May 1 and ending April 30.

submitted by C. French, July 2001

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

Bursary Program 2000-01

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. To be considered for a bursary, students apply to Financial Assistance by the end of the second week of classes each semester. Bursaries are adjudicated by Financial Assistance on behalf of the Senate Undergraduate Awards Adjudication Committee. Information about the bursary programs is published in the University Calendar and listed in a searchable, web accessed database.

In the 2000-01 reporting year (May 2000 - April 2001), Financial Assistance received 2870 bursary applications with a total calculated financial need of \$2,013,725. Last year, 1999-2000, the change in calculated financial need was 12% over 1998-99. This year, 2000-01, there has been an additional increased financial need for students of \$261,891 or 15% over last year. In comparison, like last year, there has been only a 4% overall increase in the funding available to students through bursaries. SFU is falling far behind the needs of our students.

The following three tables compare changes in the Bursary program over time. The first two tables compare disbursements for all Simon Fraser University bursary programs from 1993-94 to 2000-01. The SFU Open Bursaries and the SFU Daycare Bursaries are all funded by University operating funds and are disbursed from one umbrella allocation of funds. The Annual and Endowed Bursaries are funded through annual or long-term gifts of donor individuals or organizations. In the 2000-01 year, seven new donor funded bursaries were established. Of particular note are two bursaries for graduate students that added \$3300 to graduate bursary funding. Growth in the undergraduate Annual and Endowed bursary programs is primarily due to increases in existing endowments such as the Campus Community Bursary fund, the Alumni Bursary fund, and the general SFU Bursary Endowment.

Included in the SFU Open Graduate Bursary figures reported below is the TSSU Child Care Bursary. This is the second year of this bursary program that is included in the TSSU labour contract with the University. This year five bursaries totaling \$4,375 were disbursed. Two bursaries were awarded to domestic students (\$1,560) and three were awarded to international students (\$2,815).

Included in the SFU Open Undergraduate (domestic) data reported below is funding to a World University Services of Canada (WUSC) refugee student for two semesters at a value of \$4894. Simon Fraser University has an agreement with the Simon Fraser Student Society to assist in the support of one student a year identified and immigrated to Canada by WUSC. Support is one year (twelve months) in duration while the student establishes landed immigrant status and becomes eligible for other funding. The University pays for tuition up to 12 credit hours each semester, the \$30 athletic and recreation fee, the \$18 student services fee, residence fees (dorms only), and a \$500 start-up bursary. The Simon Fraser Student Society is meant to pay the \$55.81 student society fee, a \$250 text allowance each semester, a \$225 living allowance each month, and a bus pass. Unfortunately, the SFSS did not fulfill their full commitment this year, although they did waive the student society fee for the student.

The third table below records the bursary dollars awarded to international students as work-study funds. A small program was established to assist international students in financial need who have difficulty accepting grant funding. These students must meet the same financial need requirements as the other bursary recipients and work on projects organized through the Centre for International and Exchange Student Services. The Program was not used in 2000-01.

*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.

- 2 -

BURSARIES

Undergraduate Bursaries

	SFU Open (domestic)		SFU Open (international)		SFU Daycare		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
00/01	1,023	470,892	136	93,100	5	2,116	517	441,997
99/00	891	415,511	163	127,540	10	4,263	538	425,061
98/99	818	414,171	158	122,258	5	1,107	514	393,825
97/98	777	420,692	116	116,833	12	3,142	436	355,159
96/97	623	411,120	112	115,015	12	1,935	417	347,342
95/96	608	381,443	176	145,325	30	6,540	429	316,235
94/95	535	289,518	152	117,014	65	12,695	477	329,135

Graduate Bursaries

	SFU Open (domestic)		SFU Open (international)		SFU Daycare		Annual and Endowed	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
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

SFU Funded Work Study (International)** - Undergraduate/Graduate

	Number of Awards	Total \$ Awarded
00/01	0	0
99/00	4	5,300
98/99	5	6,700
97/98	7	9,750
96/97	4	4,000
95/96	12	9,716
94/95	6	2,817

**Program is restricted to limited use for international students.

submitted by C. French, July 2001

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

External Scholarships, Awards and Bursaries 2000-01

Each year Simon Fraser University students receive scholarships, awards and bursaries that are administered and adjudicated by organizations and corporations external to the University. Tracking of these awards began in 1997-98 when new procedures to capture information about these awards was developed. Scholarships, awards and bursaries in this category include: Canadian Merit Scholarship Foundation Awards, Canadian Millennium Merit Awards, Royal Canadian Legion Bursaries, Terry Fox Humanitarian Awards, Canada Trust Scholarships, awards administered by the Association of Universities and Colleges of Canada, and many others.

Reported below are the number and value of the scholarships, awards and bursaries that Simon Fraser University disburses to our students on behalf of other organizations. 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 endeavour or a combination of criteria. In the 2000-2001 year, Simon Fraser undergraduates received 267 external scholarships, awards and bursaries totaling \$274,831, an increase of 18% over the 1999-2000 year.

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 consisting of \$4,000 from the Foundation and a tuition waiver of a maximum of \$4,000 from the consortium university attended annually. In 2000-01, Simon Fraser had 3 National Scholarship winners (2 in second year and 1 in first year), 1 Regional winner (\$1500 one time), and 1 Provincial winner (\$500 one time). Included in the table below are the funds received by students from the Foundation. Simon Fraser's disbursements for tuition are reported with the Scholarships for In-Course Undergraduate Students.

Also included in the numbers below are recipients of the Canada Millennium Foundation Merit Awards. These scholarships were established two years ago when the Federal government established the Canada Millennium Scholarship Foundation. In 2000-01 there were 11 Canada Millennium Merit Award recipients attending Simon Fraser: 1 National Award winner (\$4,800 renewable for 4 years), 3 Provincial/Territorial Award winners (\$4,000 renewable for 4 years), and 7 Local Award winners (\$4,000 one time). This is an increase from the 1999-2000 year when 2 National Award recipients and 1 Regional Award recipient were in attendance.

Financial Assistance also actively promotes the availability of and assists students with the application process for numerous other external awards that are not reported in the table below. These awards support students' educational goals during and after studies at Simon Fraser University but are not disbursed through the University. These awards programs include the Rhodes Scholarship, the Queen Elizabeth II BC Centennial Scholarship, NRC Women in Engineering and Science Scholarship, and many others.

UNDERGRADUATE EXTERNAL

	External Scholarships		External Awards		External Bursaries	
	Total # of Scholarships	Total \$	Total # of Awards	Total \$	Total # of Bursaries	Total \$
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 \$
00/01	5	6,300	0	0	3	1,400
99/00	8	6,550	0	0	2	980
98/99	8	8,500	0	0	2	1,076
97/98	4	4,900	0	0	9	21,768

Note: all statistics are for the academic year May 1 to April 30.

Submitted by Charlotte French, July 2001

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

Government Student Assistance 2000-01

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 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 8% of our full-time graduate students and 22% of all undergraduate students received their primary funding through government student assistance in the Fall 2000 semester. Without this funding they would not be able to attend the University.

The tables below report the number of government assistance awards and the total dollars of assistance received by SFU students during the 2000-01 award year. The first two tables report numbers for students who are considered residents of British Columbia and are receiving funding through the BC government. Simon Fraser students received \$2.4 million more dollars in government student assistance through BC in 2000-01 compared to 1999-2000. According to the governments statistics Simon Fraser has moved from being the third largest user of the assistance programs to the second. This is a reflection of the growing financial challenges that our students are facing.

The second set of tables report students who are receiving funding through other Canadian provinces or territories and from the United States. Although there is a noticeable decrease in the number of awards and total value of assistance being received by students from other provinces and territories there is a large increase for undergraduate students from the United States. The decrease for students from other parts of Canada may reflect increased financial barriers to attending Simon Fraser and therefore the choice to stay in the home province or territory. For U.S. students the lower cost of attending Simon Fraser compared to staying in the U.S. may be an enticement to attendance. Our U.S. students are taking advantage of their U.S. government assistance and requesting maximum values on all government loan programs available to them.

From province to province, government funding for student assistance varies with regard to the mix of student loan versus grant and the value of disbursements. Over the last ten years governments increased the proportion of assistance given as loan and decreased or eliminated grant aid. The outcome was a dramatic increase in the total debt with which students graduated from their post-secondary programs. The average debt of students in their fourth year of studies receiving BC Student Assistance in 1996-97 was \$19,000. Estimates for 1998-99 were quoted as high as \$25,000. Concerns regarding the increasing debt load of new graduates prompted new programs to re-introduce grants and to assist repayment of loans for students after degree completion.

The Canada Millennium Scholarship Foundation awards were introduced in 1999-2000. There are two components to the Millennium Scholarship program, Bursary Awards and Merit Awards. In accordance with the legislation that created the Foundation, 95% of the funds available are directed to grants for students with financial need and 5% are directed to scholarships for students on the basis of leadership,

- 2 -

community service, innovation and academic achievement. Simon Fraser students who have received Merit Awards are included in the External Awards report. Students who have received Bursary Awards are included in the tables following under the heading of BC/Federal Grant and Provincial/Federal Grant.

The Millennium Foundation Bursary Awards are administered in conjunction with the provincial authorities assessing Canada and provincial student assistance programs. The Millennium Bursary awards are available to students in the second, third and fourth year of their first undergraduate degree. All Bursary awards are disbursed in January of each year to qualified students who applied for two semesters of government student assistance the previous August. SFU students prefer to apply for student loans one semester at a time in order to consider participation in Co-operative Education semesters, exchange programs, and other special semesters. This disqualifies them from Millennium Foundation Bursary awards. Simon Fraser University pointed out from the beginning that this requirement disadvantaged our students. The BC government also anticipated this problem among semesterized institutions and attempted to mitigate the situation by revamping the BC Grant program. BC chose to maintain their first year grant program and reinvest displaced second year grant funds by extending eligibility to third and fourth year students in order to fill some of the holes that the Canada Millennium Bursary Awards created.

During 1999-2000, the federal and provincial governments attempted to re-negotiate the student loan risk sharing agreements with the lending agencies. A number of banks had been threatening to withdraw from the government student loan programs and in the end all of the participating lenders did withdraw. In order to keep the student loan programs operating, the BC government signed an agreement with a service provider to administer the loans on their behalf with the government providing the capital rather than the banks. The federal government eventually came to the same arrangement. The banks maintained involvement with the BC Loan program until November 2000 and the Canada Student Loan program until February 2001. As of December 2000 for B.C. Loans and February 2001 for Canada Student Loans, students have had to take their loan documents to designated Canada Post outlets in order to have them submitted for processing. The documents are then forwarded to loan agencies that work on behalf of the governments to administer the loans. There was concern that the change of process part way through the year would be confusing for students and would not be implemented well given the problems that had occurred with previous process changes (see the Emergency Loan report). The change went relatively smoothly for Simon Fraser students with most students receiving their funds in a timely fashion and with minimal difficulty or confusion.

The B.C. government is considering introducing another change to student loan and grant delivery for the 2002-03 academic year. Originally planned for 2001-02, the idea has been delayed pending resolution of numerous concerns regarding financial hardship to students as well as workload and debt impacts to post-secondary institutions. The Government would like to change the disbursements of B.C. loans and grants from lump sum payments at the beginning of a semester to incremental disbursements throughout a semester. The problem for students is that the bulk of their semester costs occur at the start of the semester, specifically tuition, book and supply costs. Incremental disbursements would mean that the post-secondary institutions would have to carry outstanding tuition debt until the students received additional payments. Demand on the Emergency Loan program would increase to pay for books and supplies. The Government believed they would save money with this change in administration. However, the post-secondary institutions and students demonstrated sufficient problems with the plan that implementation was delayed for one year. Simon Fraser will need to consider how to manage the change when it is implemented.

- 3 -

BC Residence - Federal and Provincial Assistance**Undergraduate**

	Canada Student Loan		British Columbia Loan		B.C./Federal Grant		Totals	
	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$
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		B.C./Federal Grant		Totals	
	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$
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

*Grant program did not include graduate students prior to 1997/98.

- 4 -

Out of Province and U.S. Students**Undergraduate**

	Federal Student Loan		Provincial Loan		Provincial/Federal Grant		U.S. Student Loans	
	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$
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		U.S. Student Loan	
	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$	# of Awds	Total \$
00/01	60	215,651	62	142,727	4	2,194	14	125,933
99/00	64	264,926	73	193,164	4	9,435	13	75,190
98/99	80	293,106	83	181,735	4	7,217	21	96,653
97/98	86	373,940	106	309,576	3	5,840	20	79,989
96/97	78	304,785	119	229,914	5	4,955	16	59,996
95/96	88	362,150	157	340,064	5	5,560	10	43,143
94/95	96	359,216	144	271,116	1	1,000	5	21,182

submitted by C. French, July 2001

**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 2000-01**

Scholarships for In-Course Undergraduate Students

Scholarships funded through endowments and annual gifts from donors are available to continuing, full-time undergraduate students who meet specified criteria and have a minimum cumulative grade point average of 3.50. To be considered, students must submit applications to Financial Assistance by the end of the second week of classes of the semester the scholarship is offered. Endowed and Annual Scholarships are adjudicated directly by the Senate Undergraduate Awards Adjudication Committee (SUAAC). A few of these scholarships are selected by nomination of the academic department and confirmed by the SUAAC. Information about these scholarships is published in the University Calendar and listed on the web site in a search capable format.

In 1999-2000 an increase of approximately 32%, or \$47,015, occurred in the Endowed/Annual Scholarships for undergraduate students primarily because of a one-time donation from the Kaiser Foundation that funded 16 scholarships valued at \$2,000 each for students in Engineering Science. The Kaiser Foundation did not renew the scholarship this year and the number and total dollars disbursed to students in this category reflects the decrease. It should be noted that the Kaiser Foundation did make a \$40,000 contribution to the Engineering Science Project Award endowment in lieu of this donation. The Project Award is discussed below.

Nine new donor funded scholarships, 6 annual donations and 3 endowments, were established this year.

Academic and Service Awards for the University Community

Academic and Service Awards are given to students, faculty or staff for outstanding performance in an academic area or outstanding service to the University or the community at large. These awards include the Terry Fox Gold Medal, the BC Sugar Achievement Award, the C.D. Nelson Award, Contemporary Arts Awards, History Book prizes and many others. Academic and Service Awards reported in the table below are funded through donor based endowments and annual gifts or by University operating dollars.

The Annual/Endowed Awards have increased by 20% in number and value since 1998-99. This change is due in large part to the Engineering Science Undergraduate Project Awards. The Engineering Science Undergraduate Student Society established an award to assist project teams with the cost of building their designs. The awards are not large in value but are awarded each semester to many teams. The endowment is well supported by the students and external donors. In addition 2 new endowed awards were established this year.

There has been no increase to the University funded awards budget for over eight years. The fluctuations year to year in the number of SFU funded awards disbursed primarily reflects decisions by the School for Contemporary Arts regarding the number and value of awards given to their students from the annual budget. This year some additional items are included in the SFU Funded Awards category. Simon Fraser University had three Canadian Merit Scholarship Foundation National Scholars in attendance during 2000-01. Each of these students receive funding of tuition costs for two, fifteen credit hour semesters a year for four years. A consortium of selected Canadian universities works with the Foundation and provides tuition for their National Scholars who receive the remainder of their funding from the Foundation (see the External Awards report for more information). These three scholars received a total of \$7,469 in tuition awards.

MERIT BASED AWARDS

	Endowed/Annual Scholarships		Endowed/Annual Awards.		SFU Funded Awards	
	# of Awards	Total \$	# of Awards	Total \$	# of Awards	Total \$
00/01	227	171,825	144	51,934	101	50,287
99/00	232	194,705	119	44,430	102	49,757
98/99	203	147,690	115	41,435	92	43,907
97/98	184	138,503	68	30,670	113	45,009
96/97	179	131,125	66	27,161	87	45,900
95/96	169	114,870	59	24,720	87	46,307
94/95	165	117,290	52	12,330	84	44,250

Submitted by C. French, July 2001

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

Government Part-time Student Assistance and Canada Study Grants 2000-01

Government Part-time Student Assistance

To be eligible for the federal governments Part-time Student Loans and Grants, students must be registered in less than nine credit hours and have a demonstrated financial need. In order to be eligible for grant funding, students must also meet specific criteria for not studying full-time. The list of acceptable conditions for maintaining part-time studies includes: permanent disability; single parent; caring for an elderly dependent; and requiring less than nine credit hours to fulfill graduation requirements. In August of 1996, the federal government implemented the grant program to supplement the already existing federal student loan program for part-time students. Prior to 1996-97, the British Columbia government administered a part-time grant program that was discontinued when the federal program was implemented

Students receiving a Part-time Loan they must start making payments on the interest immediately, while they are still in studies. Most students who are in search of additional support cannot afford to make the payments. As a result, the loan program is not well used by Simon Fraser students. Most applicants do not cash the loans even when they are awarded. In 2000-01, 39 of the 76 students who applied for Part-time Student Loan and Grant (one application covers both programs), having a total assessed financial need of \$75,321, qualified for the Part-time Loan and Grant or Loan only. Of the 39 eligible students, 13 asked to have the loan issued and only 8 actually cashed the loan document. This is an increase from last year when 6 students asked for the loan to be issued and only 2 of those students cashed their loan. The table below appears to show a very large decline in the number of students who receive Part-time Student Loans. However, government procedures for processing Part-time Loans have changed such that students do not have to be considered for Part-time Loan when they are applying for the Part-time Grant. Subsequently students who are not interested in the Loan option are no longer assessed and awarded funding under the Loan program.

The Part-time Grant program has a maximum award value of \$1200 a year and is well used by Simon Fraser students. In 2000-01, 76 students applied for the Part-time Loan/Grant. Of these applicants, 54 students having a total calculated need of \$63,708 received \$51,014 in grant funding.

PART-TIME CANADA STUDENT LOAN

	# of Awards	Total \$ Awarded
00/01	13	10,700
99/00	45	24,480
98/99	36	26,103
97/98	45	46,550

PART-TIME CANADA STUDY GRANT

	# of Awards	Total \$ Awarded
00/01	54	51,014
99/00	83	73,072
98/99	108	112,407
97/98	70	65,365
96/97	52	48,989
95/96*	61	45,480
94/95*	65	39,285

*indicates years funded by BC Part-time Student Assistance Program

Canada Study Grant for Female Doctoral Students

Six years ago, the federal government introduced 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.

In 1998-99, three students received \$8,876 in total funding. The program has doubled in size in two years. This year, 2000-01, 9 students applied for the program and 6 students received 7 awards totaling \$17,781.

	# of Awards	Total \$ Awarded
00/01	7	17,781
99/00	6	13,966
98/99	3	8,876
97/98	1	1,769
96/97	0	0
95/96	3	6,387

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

Submitted by Charlotte French July 2001

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

Emergency Loan Program 2000/01

Short term (60 day), interest-free loans are available to students who require interim emergency funding while awaiting funds from other sources. To receive an emergency loan a student must demonstrate a guaranteed source of repayment, for example an assessed government student loan awaiting documents or confirmation of part-time employment. Emergency loan values are usually no more than \$500 but individual award values depend on the specific circumstances of the student. Some students may receive more than one Emergency Loan during a semester. Students must meet with a Financial Assistance Advisor as part of the assessment process.

Making the first rent payment for a new semester is the most common reason for students funded by government assistance to access the Emergency Loan Program. Lenders are not allowed to disburse government assistance funds until the first day of classes, which usually falls after rents are due. Students who hold part-time jobs are most likely to access the Program in mid-semester to cover rent or food if scheduled work hours have been lower than expected.

In the 1998-99 reporting year there was a significant increase in Emergency Loan disbursements and the total dollars disbursed to students due to difficulties arising from both the implementation of an electronic confirmation of enrollment process for BC Government Assistance and the centralization of government student loan processing by two of the participating banks. In 1999-2000 problems in timelines of disbursements of loans by the banks continued and resulted in continued difficulty for some students trying to access their student loan funds in time to meet their expenses. The decline in Emergency Loan disbursements in 2000-01 reflects a relatively smooth year in the administration of the government assistance programs. Although significant administrative changes did occur (see Government Student Loan report) they resulted in much fewer problems than expected and sufficiently fewer delays for students to allow return of the Emergency Loan Program to previous levels of usage.

The adjudication criteria for this program were tightened significantly six years ago to deal with the increasing number and value of loans that were being sent to collection. In the 1999-2000 year 7 students with a total of \$4,650 in out standing Emergency Loans were sent to collections. So far for the 2000-01 year one student with an out standing Emergency Loan total of \$1,200 has been sent to collection.

EMERGENCY LOANS (Undergraduate/Graduate)

	Number of Loans	Total \$ Awarded
00/01	256	152,354
99/00	359	217,139
98/99	433	246,828
97/98	345	157,825
96/97	352	160,716
95/96	527	265,472
94/95	674	317,329

submitted by C. French, July 2001

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

Work-Study Program 2000-01

Work-Study

The Work-Study program is part of the provincial governments BC Student Assistance Program. Work-Study is targeted to those graduate and undergraduate students who are B.C. residents and have an assessed financial need above the maximum funding allowance through Canada Student Loan, Canada Millennium grant, BC Student Loan and BC Grant. The purpose of the Work-Study program is to supplement the assistance these students are already receiving. Work-Study funding is the only supplemental funding that will not affect a student's government loan and grant disbursement. Only BC residents are eligible for the Program.

Over the past five years Simon Fraser University's allotment of funds from the BC Government for the Work-Study program has been decreasing due to an increase in the number of participating post-secondary institutions. In the 1995-96 program year Simon Fraser University was allotted \$460,000. The budget for 2000-2001 program year was \$359,370 and in 2001-02 it will be \$344,995 despite an increase in the number of students at Simon Fraser who are applying for and receiving B.C. Student Assistance.

Simon Fraser University is among the very few post-secondary institutions in British Columbia that does not supplement the government funding for the Work-Study program. Other institutions supplement the funds by budgeting institutional money to increase the number of awards, to allow inclusion of students from other provinces, or to increase the hourly pay rate. The maximum fundable pay rate through the Government is \$8.75 per hour.

At Simon Fraser, individuals interested in submitting projects for Work-Study students are invited to complete and submit a request form to Financial Assistance through the web by the deadline, usually one month prior to the start of each semester. When approved, projects automatically appear on the posting search website which is available only to approved Work-Study students. Students are notified of their eligibility to participate in the program beginning two weeks prior to each semester. Despite the decrease in funding, the number of requests for Work-Study students has not changed and is now significantly higher than funding allows.

The BC Work-Study budget year is September to August of the following year. The numbers in the chart below are based on a reporting period of May to April. Because of the difference between reporting periods, the numbers can be very inconsistent year over year in this report. Included in the 1997/98 reported year were higher than normal summer expenditures for 97-2 and a one time addition to the budget for 98-1.

Students Aiding Students

Until August 2000, a portion of the Work-Study funding from the government, approximately ten percent, was allocated for a program called Students Aiding Students. This program provides funding for full-time students who wish to assist students with permanent disabilities. The majority of students hired through this program take class notes on behalf of the student they are aiding. Others assist students to access materials and services in the library. The Government agreed to change the Students Aiding Students program for the 2000-01 academic year to be administered directly by the Centre for Students with Disabilities and adjust regulations accordingly. The table below includes Students Aiding Students participants until August 2000. For the 2000-01 reporting year the table includes only 2 students who received a total of \$476 through Students Aiding Students.

GOVERNMENT FUNDED WORK-STUDY- Undergraduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
00/01	346	385,120	310,655
99/00	498	481,140	343,689
98/99	344	301,300	246,503
97/98	612	668,121	542,932
96/97	481	420,211	353,804
95/96	561	501,661	438,850
94/95	499	429,672	361,879

Note: these numbers include expenditures for the Students Aiding Students program until August 2000.

GOVERNMENT FUNDED WORK-STUDY - Graduate

	Number of Awards	Total \$ Awarded	Total \$ Spent
00/01	2	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

submitted by Charlotte French, July 2001

SIMON FRASER UNIVERSITY

DEAN OF GRADUATE STUDIES

Memorandum

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

FROM: Jonathan C. Driver
Dean

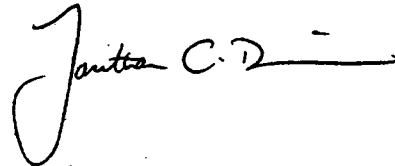
SUBJECT: Annual Report: SPCSAB

DATE: October 1, 2001

I am pleased to enclose a summary of the graduate award disbursements in fiscal year 2000-2001 in tabular form, for inclusion in the SPCSAB report to Senate.

Disbursement Totals by Award:

Graduate Fellowship	\$1,668,000
President's Ph.D. Research Stipend	\$325,000
C.D. Nelson Entrance	\$192,655
Special Entrance	<u>\$ 51,200</u>
	\$2,236,855



c: Sarah Dench
Enclosure

GRADUATE AWARDS IN FY 2000-2001

	AWARD NAME	NUMBER	VALUE	TOTAL
Semester 00-2	GF Master's	73	\$4,400	\$321,200
	GF Ph.D.	42	\$5,000	\$210,000
	Stipend	26	\$5,000	\$130,000
	Nelson	11	\$5,666	\$62,326
	Entrance	1	varies	\$2,200
	SUBTOTAL			
Semester 00-3	GF Master's	84	\$4,400	\$369,600
	GF Ph.D.	58	\$5,000	\$290,000
	Stipend	19	\$5,000	\$95,000
	Nelson	12	\$5,666	\$67,992
	Entrance	10	varies	\$49,000
	SUBTOTAL			
Semester 00-1	GF Master's	63	\$4,400	\$277,200
	GF Ph.D.	40	\$5,000	\$200,000
	Stipend	20	\$5,000	\$100,000
	Nelson	11	\$5,666	\$62,337
	Entrance	0		\$0
	SUBTOTAL			
TOTAL EXPENDITURES				\$2,236,855
Base Budget FY 2000-2001				\$2,518,455
FY 99-00 NEGATIVE CARRYOVER				(\$168,103)
BALANCE AVAILABLE FOR AWARDS				\$2,350,352
BALANCE AT MARCH 31, 2001 (Surplus Carryover for fy 2001-02)				\$113,497

01/10/2001