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MEMORANDUM

ATTENTION Senate **DATE** February 9, 2017

FROM Stephen Spector, Chair **PAGES** 1/2
Senate Policy Committee on
Scholarships, Awards and Bursaries

RE: Annual Report REVISED

I am pleased to submit the Annual Report of the Senate Policy Committee on Scholarships, Awards and Bursaries (SPCSAB) for the fiscal year 2015-2016.

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 2015-16 period are detailed in Table 1.

Attachments

Table 1
Appendix 1, 2

Table 1

September 2015	C.D. Nelson Memorial Prize	Change to the Terms of Reference for the C.D. Nelson Memorial Prize, removing the requirement that the prize be used for the purchase of a work of art and to change the name of the department where nominations are received.
September 2015	Undergraduate Open Scholarship	Students who took courses in Summer 2015 will have their institutional Financial Aid and Award eligibility assessed and disbursed based on term grade point averages and cumulative grade point averages as determined by courses given standard grades. All other eligibility requirements appropriate for the institutional Financial Aid and Awards apply. Funding will not be revoked once final grades have been released. Students who become eligible for institutional Financial Aid and Awards after the final grades are released, will have their funding disbursed based on the normal assessment process.
February 2016	Graduate Dean Entrance Scholarship	Terms of reference for the Graduate Dean Entrance Scholarship.
February 2016	Aboriginal Graduate Entrance Scholarship	Increasing the value of the Aboriginal Graduate Entrance Scholarship to \$18,000 for up to two years for master's students and \$21,000 per year for up to four years at the doctoral level.
February 2016	Entrance Award/Bursary	changes to in-course scholarship regulations to include eligibility for Entrance Award and/or Entrance Bursary recipients
February 2016	SFU Piping Band Award	Change terms of reference.
March 2016	Course enrollment requirement – entrance awards	change to the current course enrollment requirement for all undergraduate entrance awards from twelve (12) SFU standard graded units to nine (9) SFU standard graded units per term as an eligibility requirement to apply or receive an entrance award effective Fall 2016
March 2016	Course enrollment requirement – in-course scholarships	change to the current course enrollment requirement for all in-course undergraduate scholarships from nine (9) SFU standard graded units to twelve (12) SFU standard graded units per term and that applicants/recipients must have completed at least twelve (12) SFU standard graded units before being considered eligible for these scholarships. Recipients, who enroll in fewer than twelve (12) SFU standard graded units or subsequently drop below twelve (12) standard graded units in the term, may have their scholarship cancelled
July 2016	Aboriginal Community Engagement Awards	Awards are available annually to full-time undergraduate and graduate Aboriginal students attending Simon Fraser University. Undergraduate students must have completed at least 18 units at the University in order to be eligible to apply. Students must have a demonstrated connection to the Aboriginal community. Applicants must be in good academic standing, and have also demonstrated excellence in one or more of: community service and/or cultural contributions to

		<p>the University, Aboriginal and/or general community at large. This award will be granted by the Senate Undergraduate Awards Adjudication Committee based upon the recommendations of a sub-committee chaired by the Director, Indigenous Student Centre.</p> <p>Aboriginal peoples of Canada are defined in the Constitution Act, 1982, Section 35 (2) as including the Indian, Inuit and Métis peoples of Canada. This definition has been taken from Statistics Canada, 2013'</p>
July 2016	Students with Disabilities course Enrollment (information)	<p>A student with a disability is eligible to receive institutionally administered financial aid funding managed by the Financial Aid and Awards office, if the student is enrolled in less than 9 units but no less than 6 units and meets all other eligibility requirements. The student has to provide a letter from SFU's Centre for Students with Disabilities confirming that the student is approved, by the institution, to study at a reduced course load. This will apply to all bursaries, work-study, in-course scholarships, awards, bursaries, and entrance scholarships, awards, and bursaries.</p>
July 2016	Undergraduate Open Scholarship	<p>complete at least 30 units of standard graded courses over the last three terms of enrollment in such courses. For students who fall short of the 30 unit requirement because one term's enrollment 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. A student with a disability who is approved, by the institution, to study at a reduced course load must complete at least 30 units of standard graded courses over the last five terms of enrollment in such courses</p>

SFU

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. 2014/2015

Type of Financial Aid Support	FY 2014/2015		FY 2015/2016	
	# of Awards Disbursed	Total Disbursements	# of Awards Disbursed	Total Disbursements
INTERNALLY MANAGED FINANCIAL AID AND AWARDS				
Entrance Scholarships (University funded)	1,158	\$ 3,692,238	1,122	\$ 3,599,458
Entrance Scholarships (Annual/Endowed)	96	\$ 277,250	135	\$ 352,000
Subtotal	1,254	\$ 3,969,488	1,257	\$ 3,951,458
Open Scholarship (Undergraduate)	1,514	\$ 1,839,970	1,584	\$ 1,708,340
In-Course Awards (University funded)	455	\$ 440,850	424	\$ 394,307
In-Course Awards (Annual/Endowed)	253	\$ 311,838	341	\$ 424,442
In-Course Scholarships (Annual/Endowed)	428	\$ 413,195	470	\$ 471,220
Subtotal	2,650	\$ 3,005,853	2,819	\$ 2,998,309
Bursary (Open - Undergraduate - Domestic - University funded) ^a	1,577	\$ 2,146,568	1,576	\$ 1,988,705
Bursary (Open - Undergraduate - International - University funded)	1,030	\$ 1,602,535	1,106	\$ 1,519,604
Bursary (International Supplement - Undergraduate - University funded) ^b	-	-	879	\$ 864,062
Bursary (Open - Graduate - Domestic - University funded)	223	\$ 300,306	257	\$ 378,741
Bursary (Open - Graduate - International - University funded)	431	\$ 506,087	417	\$ 582,621
Bursary (Designated) ^c	190	\$ 410,236	132	\$ 289,633
Bursary (Credit Based Graduate Programs)	104	\$ 110,150	92	\$ 117,270
Bursary (Annual/Endowed - Undergraduate) ^d	3,428	\$ 893,613	4,037	\$ 1,332,716
Bursary (Annual/Endowed - Graduate)	56	\$ 67,708	72	\$ 97,159
Subtotal	7,039	\$ 6,037,203	8,568	\$ 7,170,511
Athletics Awards (University funding) ^e	456	\$ 856,782	392	\$ 620,541
Athletics Awards (Annual/Endowed) ^f	327	\$ 483,450	371	\$ 620,710
Subtotal	783	\$ 1,340,232	763	\$ 1,241,251
Work-Study Program (Undergraduate) ^g	367	\$ 455,310	354	\$ 544,426
Work-Study Program (Graduate) ^g	34	\$ 47,143	55	\$ 84,893
Subtotal	401	\$ 502,453	409	\$ 629,319
TOTAL INTERNALLY MANAGED FINANCIAL AID AND AWARDS	12,127	\$ 14,855,229	13,816	\$ 15,990,848
EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS				
StudentAid BC Loans and Grants ^h	29,695	\$ 50,366,645	26,965	\$ 45,536,804
Subtotal	29,695	\$ 50,366,645	26,965	\$ 45,536,804
Out of Province Loans and Grants	1,246	\$ 4,251,037	1,310	\$ 4,810,261
U.S. Loan Awards	313	\$ 1,168,114	276	\$ 1,027,554
Subtotal	1,559	\$ 5,419,151	1,586	\$ 5,837,815
Aboriginal Emergency Assistance	48	\$ 33,600	74	\$ 51,760
Subtotal	48	\$ 33,600	74	\$ 51,760
Non-SFU Administered External Scholarships, Awards, and Bursaries ⁱ	206	\$ 415,759	325	\$ 482,945
Subtotal	206	\$ 415,759	325	\$ 482,945
Athletics Awards (B.C. Athletic Assistance Program)	57	\$ 54,906	62	\$ 54,571
Subtotal	57	\$ 54,906	62	\$ 54,571
TOTAL EXTERNALLY MANAGED OR SUPPORTED FINANCIAL AID AND AWARDS	31,565	\$ 56,290,061	29,012	\$ 51,963,895

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 for 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 for 2015/16)
(d) Now includes # of awards disbursed for SFSS BuildSFU Bursary which was initiated 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 for 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.



OFFICE OF GRADUATE STUDIES AND POSTDOCTORAL FELLOWS
SIMON FRASER UNIVERSITY

**Financial Summary of Graduate Scholarships/ Bursaries/ Awards (SBA) Budget
Fiscal Year 2015/2016**

BUDGET

Budget Allocation for FY2015/2016	6,947,236.00
Add: Scholarship funds carryforward Balance from FY2014/2015	966,393.57
Total SBA Budget for FY2015/2016	<u>7,913,629.57</u>

EXPENSES (by academic term)

Name of Award	Value of Award	Summer 2015		Fall 2015		Spring 2016		Total for FY2015/2016	
		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 FY15/16 (\$)
C.D. Nelson Scholarships (1)	\$15,000-\$18,000	55	297,000.00	80	474,000.00	65	361,250.00	109	1,132,250.00
Graduate Fellowships	\$3,125 or \$6,250 (per term)	274	1,459,375.00	340	1,953,250.00	202	1,072,500.00	816	4,485,125.00
Graduate Fellowships (Supplemental)	\$3,125 or \$6,250 (per term)	12	62,500.00	9	65,000.00	15	94,250.00	36	221,750.00
President's PhD Scholarship	\$6,250 (per term)	14	87,500.00	13	84,500.00	21	136,500.00	48	308,500.00
Special Graduate Entrance Scholarships - General	\$1,000-\$10,000	6	37,250.00	60	244,100.00	14	71,000.00	80	352,350.00
Provost Scholarship (2)	\$5,000 annually	96	169,011.00	111	202,304.00	98	169,016.00	148	540,331.00
Travel & Minor Research Awards	varies (average \$500)	247	181,145.00	76	44,962.00	138	92,601.00	461	318,708.00
Graduate International Research Travel Awards	\$2,650-\$6,250	11	49,750.00	1	3,000.00	6	24,677.00	18	77,427.00
Dean's Leadership Award	1,000.00	1	1,000.00					1	1,000.00
Graduate Aboriginal Travel Stipends	varies					2	1,922.98	2	1,922.98
Totals		716	2,344,531.00	690	3,071,116.00	561	2,023,716.98	1,719	7,439,363.98

Total Expenses in FY2015/2016 **7,439,363.98**

BALANCE

Net Balance at Fiscal Year End (March 31, 2016) **474,265.59**

NOTES

(1) C.D. Nelson Scholarships are paid over multiple terms. 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.

(2) The Provost Scholarship is a top-up award for major scholarship recipients including those students who received one of the tri-council awards and is paid over multiple terms. 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.

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2013/2014 through 2015/2016

Name and Type of Award	FY2015/2016			FY2014/2015			FY2013/2014		
	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⁾	8,000-18,000	109	1,132,250.00	8,000-18,000	87	931,333.00	15,000-18,000	62	753,000.00
Graduate Fellowships ⁽²⁾	3,125-6,500	816	4,485,125.00	3,125-6,250	806	4,206,250.00	3,125-6,250	835	4,321,875.00
Graduate Fellowships Supplemental	3,125-6,500	36	221,750.00	3,125-6,250	17	103,125.00	3,125-6,250	13	71,875.00
President's PhD Scholarships	6250-6500	48	308,500.00	6,250	87	543,750.00	6,250	121	756,250.00
Special Graduate Entrance Scholarships	500-8,000	80	352,350.00	500-8,000	85	341,017.00	1,000-10,000	97	381,455.00
Provost Scholarship	4,000 to 5,000	148	540,331.00	4,000 to 5,000	138	463,241.00	5,000 annually	104	348,781.00
Travel & Minor Research Awards ⁽³⁾	varies (avg 500)	461	318,708.00	varies (avg 500)	431	290,553.00	varies (avg 500)	421	357,876.00
Graduate International Research Travel Awards	500-6,250	18	77,427.00	2,450-6,250	24	121,590.00	2,650-6,250	19	91,266.00
Graduate Student Research Award	0	0	0.00	0	0	0.00	2,000-7,500	128	722,125.00
Dean's Leadership Award	1,000	1	1,000.00	0	0	0.00	1,000	4	4,000.00
Graduate Aboriginal Travel Stipends	up to 1,000	2	1,922.98	1,000	5	5,000.00	varies	varies	5,000.00
Graduate scholarships/fellowships/awards funded by Graduate SBA budget		1,717	7,439,363.98		1,675	7,005,859.00		1,804	7,813,503.00
Graduate scholarships/fellowships funded by Faculties/Schools									
Faculty of Applied Sciences Graduate Fellowships	3,125	17	54,750.00	3,125	22	68,750.00	3,125	18	56,250.00
Faculty of Business Administration Graduate Scholarships	2000-5000	25	74,000.00	750-10000	28	108,900.00	2,000-13,300	30	117,800.00
Faculty of Communication, Art & Technology Graduate Fellowships	3,125	7	22,500.00	3,125	8	25,000.00	3,125-6250	15	48,438.00
Faculty of Education Graduate Scholarships	1000-6250	8	29,250.00	3,125-6250	7	25,000.00	3,125	9	28,125.00
Faculty of Health Sciences Graduate Scholarships	3,125-6250	72	189,850.00	3,125-6250	51	166,500.00	305-6,250	60	196,640.00
School of Computing Science Graduate Fellowships/Scholarships	3000-6500	46	292,000.00	0	0	0.00	3,000	9	27,000.00
School of Interactive Arts and Technology Graduate Fellowships	6,250	0	0.00	6,250	1	6,250.00	6,250	1	6,250.00
Global Communication Scholarship	5,750-11,500	12	45,999.00	5,750-11,500	7	57,498.00	5,750-11,500	6	38,332.00
Graduate Liberal Studies Scholarship	2,300-6,000	7	19,500.00	2,300-6,000	5	20,300.00	0	0	0.00
SFU Research Partnership Scholarship	17,560	1	17,560.00	0	0	0.00	0	0	0.00
Ben-Gurion University / SFU Joint Scholarship	2,000	1	2,000.00	0	0	0.00	0	0	0.00
Graduate scholarships/fellowships funded by Faculties/Schools		196	747,409.00		129	478,198.00		148	518,835.00
Other internally-funded awards									
Additional Graduate Fellowships (from UPF funds)	0	0	0.00	0	0	0.00	3,125-6,250	40	250,000.00
Graduate Aboriginal Entrance Scholarships	15,000-18,000	7	90,000.00	15,000-18,000	5	73,000.00	15,000-18,000	5	55,000.00
Private Awards (supported by endowments & annual donations)	210-27,000	330	1,261,450.00	210-27,000	297	1,116,625.00	210-27,000	290	1,056,956.00
CTEF Graduate Fellowships (supported by Community Trust Endowment Fund)	6,250	11	84,500.00	6,250	15	93,750.00	6,250	15	93,750.00
VPR-Climate Justice Project Graduate Fellowships (funded by VP Research)	3,125	0	0.00	3,125	0	0.00	3,125	2	6,250.00
VPR- USRA Science ⁽⁴⁾	4,500	58	261,000.00	4,500	80	340,570.47	4,500	57	249,468.75
VPR-USRA Social Science and Humanities ⁽⁴⁾	2,250-4,500	42	141,750.00	2,250-4,500	54	169,171.91	2,250-4,500	41	105,159.15
Other internally-funded awards		448	1,838,700.00		451	1,793,117.38		450	1,816,583.90
TOTAL INTERNALLY-FUNDED GRADUATE AWARDS		2,361	10,025,472.98		2,255	9,277,174.38		2,402	10,148,921.90

Expense Summary of Graduate Award Funds Administered by Dean of Graduate Studies
Three-Year Overview: Fiscal Years 2013/2014 through 2015/2016

Name and Type of Award	FY2015/2016			FY2014/2015			FY2013/2014		
	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	17,500-50,000	85	1,702,016.00	17,500-50,000	85	1,567,667.00	17,300-50,000	102	1,963,481.00
NSERC Industrial Post-Grad Scholarships (excludes industrial portion)	15,000	12	131,250.00	15,000	15	158,750.00	15,000	15	185,000.00
SSHRC Graduate Scholarships	17,500-50,000	145	2,772,117.00	17,500-50,000	151	2,757,935.69	17,500-50,000	170	3,111,822.00
CIHR Graduate Scholarships	1,7500-50,000	42	764,175.00	1,7500-50,000	48	877,831.00	17,500-50,000	31	644,330.00
Canada Graduate Scholarships-M. Smith Foreign Study Supplements	5,300-6,000	5	28,749.00	5950	1	5,950.00	5,250-6,000	10	60,000.00
NSERC Undergraduate Student Research Awards	4,500	72	324,000.00	4,500	71	313,143.75	4,500	75	331,760.34
National scholarships funded by Federal funding agencies		361	5,722,307.00		371	5,681,277.44		403	6,296,393.34
Major scholarships funded by Provincial funding agencies									
MSFHR Graduate Trainee Awards	-	-	-	-	-	-	-	-	-
Pacific Century Graduate Scholarships	-	-	-	-	-	-	-	-	-
Pacific Leaders Graduate Student Fellowships	-	-	-	-	-	-	-	-	-
Pacific Institute Climate Solutions Graduate Fellowships	12,000-18,000	8	137,500.00	12,000-18,000	12	109,000.00	12,000-18,000	9	105,000.00
Major scholarships funded by Provincial funding agencies		8	137,500.00		12	109,000.00		9	105,000.00
Other externally-funded awards and grants									
NSERC IPGS Industrial Sponsorships (contributed by industrial partners)	6,000	12	52,500.00	6,000	15	63,500.00	6,000	15	86,626.76
External Awards	varies	36	205,175.00	varies	49	276,996.00	varies	58	438,963.00
Northern Scientific Training Program Grants	varies	8	15,661.40	varies	5	11,839.80	varies	5	9,679.27
Centre for Digital Media Scholarships (MDM program)	2,000-8,100	36	317,500.00	2,000-8,100	35	355,752.00	1,230-8,100	33	208,412.00
NSERC & SSHRC GGSF Expenses (6)	varies	varies	45,646.37	varies	varies	43,824.42	varies	-	-
CIHR Health Professional Student Awards	4,251	7	24,900.00	4,251	4	17,004.00	4,251	3	12,753.00
Other externally-funded awards		99	661,382.77		108	768,916.22		114	756,434.03
TOTAL EXTERNALLY-FUNDED GRADUATE AWARDS		468	6,521,189.77		491	6,559,193.66		526	7,157,827.37
TOTAL GRADUATE AWARD FUNDS EXPENSED BY FISCAL YEAR		2,829	16,546,662.75		2,746	15,836,368.04		2,928	17,306,749.27

NOTES

- (1) C.D. Nelson Scholarships are paid over multiple terms. 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. Starting Fall 2015, the value for one GF increased to \$6,500 (\$3,250 for half GF)
- (3) 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.
- (4) 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.
- (5) The NSERC & SSHRC GGSF expenses for FY2015-2016 consists of expenses for SSHRC award adjudication meeting, and reimbursement for GF supplemental awards spending.



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 2012/2013 through 2016/2017**

FY2012/2013 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2012/2013:</i>	
Add: University Priority Funding	450,000
FY2012/2013 Graduate Students Unique headcount (based on IRP data)	5,363
FY2013/2014 Base Budget - approved by BoG	6,772,236
<i>Adjustments for FY2013/2014:</i>	
Add: University Priority Funding	250,000
FY2013/2014 Graduate Students Unique headcount (based on IRP data)	5,422
FY2014/2015 Base Budget - approved by BoG	6,772,236
<i>No adjustments for FY2014/2015</i>	
FY2014/2015 Graduate Students Unique headcount (based on IRP data)	5,339
FY2015/2016 Base Budget - approved by BoG	6,947,236
<i>No adjustments for FY2015/2016</i>	
FY2015/2016 Graduate Students Unique headcount (based on IRP data)	5,368
FY2016/2017 Base Budget - approved by BoG	6,947,236
<i>Adjustments for FY2016/2017:</i>	
Add: additional support from VPA	820,000