

The following Motions and Documents were considered by the Board Learning, Research and Student Experience Committee at its Friday, November 29, 2019 meeting:

Agenda Title: **Student Financial Support Policy Suite and Rescission of the Awards and Bursaries for Students Policy Suite**

APPROVED MOTION: THAT the Board Learning, Research, and Student Experience Committee, on the recommendation of General Faculties Council, recommend that the Board of Governors approve the new Student Financial Support Policy Suite, as set forth in Attachments 2, 3, 4 and 5, and the concurrent rescission of the existing Awards and Bursaries for Students Policy Suite in UAPPOL, to take effect upon final approval.

Final recommended item: 5.

**Governance Executive Summary
Action Item**

Agenda Title	Student Financial Support Policy Suite and Rescission of the Awards and Bursaries for Students Policy Suite
---------------------	--

Motion

<p>THAT the Board Learning, Research, and Student Experience Committee, on the recommendation of General Faculties Council, recommend that the Board of Governors approve the new Student Financial Support Policy Suite, as set forth in Attachments 2, 3, 4 and 5, and the concurrent rescission of the existing Awards and Bursaries for Students Policy Suite in UAPPOL, to take effect upon final approval.</p>
--

The motion is pending recommendation from General Faculties Council on November 25, 2019.

Item

Action Requested	<input type="checkbox"/> Approval <input checked="" type="checkbox"/> Recommendation
Proposed by	Melissa Padfield, Interim Vice-Provost and University Registrar
Presenter(s)	Steven Dew, Provost and Vice-President (Academic) Melissa Padfield, Interim Vice-Provost and University Registrar

Details

Responsibility	Provost and Vice-President (Academic)
The Purpose of the Proposal is <i>(please be specific)</i>	To seek approval of the new Student Financial Support Policy Suite, and the rescission of the existing Awards and Bursaries for Students Policy Suite in UAPPOL.
Executive Summary <i>(outline the specific item – and remember your audience)</i>	<p>The Office of the Registrar, in consultation with the several stakeholder groups, has developed a new Student Financial Support Policy Suite to replace the existing Awards and Bursaries for Students Policy and its procedures in UAPPOL.</p> <p>The purpose of the revisions to the policy and procedures is to:</p> <ul style="list-style-type: none"> • Create alignment between institutional commitment with administrative practice; • Reflect current practices, authorities, and roles; • Be inclusive of graduate student financial support; and • Allow the University to be agile and adaptive to changes in the post-secondary, provincial, and global environments.
Supplementary Notes and context	

Engagement and Routing (Include meeting dates)

<p>Consultation and Stakeholder Participation (parties who have seen the proposal and in what capacity)</p>	<p><u>Those who are actively participating:</u></p> <ul style="list-style-type: none"> • The Office of the Provost and Vice-President (Academic) • Faculty of Graduate Studies and Research (FGSR) • The Office of the Registrar <p><u>Those who have been consulted:</u></p> <ul style="list-style-type: none"> • Office of the Provost and Vice-President (Academic) • Faculty of Graduate Studies and Research (FGSR) • University Governance
<p><For information on the protocol see the Governance</p>	

Item No. 5

<p>Resources section Student Participation Protocol></p>	<ul style="list-style-type: none"> • Office of Advancement • Students' Union (SU) • Graduate Students' Association (GSA) • Scholarship Network • GFC UABC Chair Dr. Frank Robinson • Dean of Students Dr. Andre Costopoulos • Advisory Committee on Undergraduate Financial Support (ACUS) • Vice-Provosts' Council (VPC) • Undergraduate Awards and Bursaries Committee (UABC) • Committee on Student Affairs (COSA) • Deans' Council • PEC-O <p><u>Those who have been informed:</u></p> <ul style="list-style-type: none"> •
<p>Approval Route (Governance) (including meeting dates)</p>	<p>Undergraduate Awards and Bursaries Committee (UABC) Oct 8, 2019 GFC Academic Planning Committee October 23, 2019 GFC Executive Committee November 4, 2019 General Faculties Committee November 25, 2019 Board Learning, Research and Student Experience Committee (BLRSEC) November 29, 2019 Board of Governors December 13, 2019 (approval)</p>

Strategic Alignment

<p>Alignment with <i>For the Public Good</i></p>	<p>Build <i>Objective 1: Build a diverse, inclusive community of exceptional undergraduate and graduate students from Edmonton, Alberta, Canada, and the world.</i> <i>Strategy 4: Ensure that qualified undergraduate and graduate students can attend the university through the provision of robust student financial support.</i></p> <p>Sustain <i>Objective 21: Encourage continuous improvement in administrative, governance, planning and stewardship systems, procedures, and policies that enable students, faculty, staff, and the institution as a whole to achieve shared strategic goals.</i> <i>Strategy 4: Facilitate easy access to and use of university services and systems; reduce duplication and complexity; and encourage cross-institutional administrative and operational collaboration.</i></p>
<p>Alignment with Core Risk Area</p>	<p>The new policy suite outlines clear authorities and roles and will help mitigate risks surrounding:</p> <ul style="list-style-type: none"> • Enrolment management; • Student success; • Financial support management; • Harm to reputation; and • Misalignment with stakeholder expectations (students, Government and donors) <p>by allowing the University to be agile and adaptive to changes in the post-secondary, provincial and global environments.</p> <p>The proposed suite reflects accepted administrative and academic processes and will further reduce these same risks by supporting alignment between the decision makers, administrative and academic</p>

Item No. 5

	units that provide, support, and administer student financial supports at the University of Alberta	
	<input checked="" type="checkbox"/> Enrolment Management <input type="checkbox"/> Faculty and Staff <input checked="" type="checkbox"/> Funding and Resource Management <input type="checkbox"/> IT Services, Software and Hardware <input type="checkbox"/> Leadership and Change <input type="checkbox"/> Physical Infrastructure	<input checked="" type="checkbox"/> Relationship with Stakeholders <input checked="" type="checkbox"/> Reputation <input type="checkbox"/> Research Enterprise <input type="checkbox"/> Safety <input checked="" type="checkbox"/> Student Success
Legislative Compliance and jurisdiction	Post-secondary Learning Act GFC Terms of Reference GFC UABC Terms of Reference GFC APC Terms of Reference BLRSEC Terms of Reference	

Attachments

1. Case for Action (pages 1 - 5)
2. Proposed Student Financial Support Policy (pages 1 - 3)
3. Proposed Creation of New Student Financial Support Procedure (pages 1 - 4)
4. Proposed Undergraduate Student Financial Support Procedure (pages 1 - 6)
5. Proposed Graduate Student Financial Supports Procedure (pages 1 - 6)

Prepared by: Fiona Halbert, Assistant Registrar Student Financial Support, Fiona.halbert@ualberta.ca

Case for Action: New Student Financial Support Policy Suite (and rescission of the Awards and Bursaries for Students Policy)

Context:

The current Awards and Bursaries for Students Policy Suite was established in 2011 when Section 21 of the GFC Policy Manual was rescinded and placed into UAPPOL. Aside from reorganization of information contained within Section 21 and minor updates to reflect the current practices at the time, the policy and four procedures were primarily direct extrapolations from Section 21.

The existing policy suite only promises that the University will "*marshal* awards and bursaries for students to support learning and alleviate financial need to the extent that financial resources permit" but stops short of meeting an important institutional goal outlined within *For the Public Good*, (Build, Strategy 4), to "Ensure that qualified undergraduate and graduate students can attend the university through the provision of robust student financial support."

The lack of a statement of specific institutional goals within the existing policy suite poses several challenges when questions around how allocation of new and existing funds should be managed. This foundation is also necessary in order to support the fundraising goals of the University of Alberta.

In addition, the existing policy suite is silent on the role of graduate student financial support and the role of the Faculty of Graduate Studies and Research in student financial support.

The existing policy suite is also out of alignment with the stated goals of the President of the University of Alberta, Dr. David Turpin, and his colleagues in the Council of Post-secondary Presidents of Alberta (COPPOA). In a recent and widely distributed position paper¹, COPPOA confirmed that student financial support has never been more both necessary and relevant than it is today in Alberta. The University of Alberta is fundamental to building Alberta's future, but access to post-secondary education for society's most vulnerable learners remains a real threat.

Over the past ten months, members of the Office of the Provost and Vice-President (Academic), the Office of the Registrar, the Faculty of Graduate Studies and Research (FGSR) and the Office of Advancement have conducted a thorough review of the policy and the four procedures, and drafted an updated UAPPOL Student Financial Support Policy Suite. The proposed suite aligns with the current financial support administrative priorities and processes, clarifies authorities and roles, and allows the university to be agile and adaptive to changes in the post-secondary, provincial and global environments (see Appendix A - Overview of Changes).

A recent report from an external consultant commissioned by the Office of the Vice-Provost and University Registrar identified policy development as a primary recommendation. The report identified the need for policy statements that would provide a foundation for decision-making, align with enrolment management and recruitment goals, and would update existing out-of-date UAPPOL policy and procedures. This proposed student financial support policy suite directly addresses the need for the alignment of policy to fundamental institutional goals and delineates the foundations for decision making.

¹ [Post-secondary Education Position Paper](#), The Council of Post-secondary Presidents of Alberta (COPPOA)

Key Changes:

- The proposed policy contains language reflective of the University's commitment to providing and optimizing robust student financial supports in order to ensure that academically qualified students can attend the University.
- The proposed policy suite includes usage of an industry-standard umbrella term "student financial support" intended to represent the whole range of student financial support normally available to post-secondary learners.
- The proposed policy suite now contains a procedure dedicated to graduate student financial support.
- The proposed policy suite has been streamlined into three areas intended to outline the process of the creation of student financial support, as well as the processes relevant to the administration and approval of separate undergraduate and graduate student financial support.
- The proposed procedures have been drafted retaining relevant and accurate pieces of the current suite of procedures, and have been adjusted to reflect current practices, authorities, and roles.

Desired Outcomes:

- Alignment between the University of Alberta's policies and procedures around student financial support and institutional goals.
- Mitigation of the current risks surrounding student success, as identified by the 2018-2019 Institutional Risk Summary, which include: reduced student success, harm to reputation, reduced ability to recruit, misalignment with Government expectations, and failure of the university mission.
- Establishment of an updated institutional policy and suite of procedures that are easy to understand, transparent, and outline clear authorities and roles.
- Establishment of an updated institutional policy and suite of procedures that reflect accepted administrative and academic processes.
- Revised institutional policy and procedures that allow the University to be agile and adaptive to changes in the post-secondary, provincial and global environments.
- Better alignment between the Board of Governors, General Faculties Council, the Office of the Vice-Provost and University Registrar, the Office of Advancement, individual Faculties, and the Faculty of Graduate Studies and Research to provide, support, and administer student financial supports at the University of Alberta.

Appendix A - Overview of Changes

UAPPOL Creation of New Student Financial Support Procedure

The Creation of New Student Financial Support Procedure now informs how both undergraduate and graduate new student financial supports are created (previously, this procedure only referenced undergraduate awards and bursaries).

The scope of this procedure has been refined to include only the creation of new supports and clarifies the authorities, roles and responsibilities of the Office of the Registrar, Faculty of Graduate Studies and Research, the Office of Advancement, the GFC Undergraduate Awards and Bursaries Committee (UABC) and the Graduate Scholarship Committee (GSC).

Section Name	Key Changes
1. ADMINISTRATION (new section)	The section now outlines how new undergraduate and graduate student financial supports are created and the roles of the Office of the Registrar, Faculty of Graduate Studies and Research, the Office of Advancement, the GFC Undergraduate Awards and Bursaries Committee (UABC) and the Graduate Scholarship Committee (GSC) in the creation of new financial supports.
2. RESTRICTIONS ON RECIPIENT SELECTION	Minor edits were made to clarify language, but overall content is unchanged.
3. INCLUSIVITY IN SELECTION CRITERIA	<ul style="list-style-type: none"> ● An inclusivity statement was added to support the creation of broad terms of reference that aid annual selection for the student financial support. ● The Office of Safe Disclosure & Human Rights was consulted to update language on section 3A. HUMAN RIGHTS. ● 3B. MEMBERSHIP: minor updates to sanctioned groups, but overall content is unchanged.
4. APPROVAL	<ul style="list-style-type: none"> ● 4A. TERMS OF REFERENCE: added a statement that terms of reference once approved may not be changed by the donor. This is to provide clarity for donors when frontline fundraisers are engaging with them. ● Detailed procedures related to existing terms of reference have been moved to the Undergraduate Student Financial Support Procedure. ● 4B. MINIMUM VALUES: amended to focus on the requirements for the minimum value of a new student financial support.
5. ANNUAL SPENDING (new section)	This section outlines the general spending practices for new student financial supports, providing a framework and reference point for frontline fundraisers and donors.

Appendix A - Overview of Changes Continued

UAPPOL Undergraduate Student Financial Support Procedure

The Undergraduate Student Financial Support Procedure amalgamates three existing procedures (Awards for Undergraduate Student Procedure, University Medal Requirements Procedure, and Bursaries for Students Procedure) into a single document that outlines the administrative processes for undergraduate student financial supports.

Section Name	Key Changes
1. ADMINISTRATION	<ul style="list-style-type: none"> The section outlines the roles of the Office of the Registrar, faculties / departments / units and the Office of Advancement in the administration of undergraduate student financial supports. The section speaks to a collaborative process for administration, specifically when dealing with restrictive terms of reference.
2. MAINTENANCE OF TERMS OF REFERENCE FOR STUDENT FINANCIAL SUPPORTS	<ul style="list-style-type: none"> The section refers to the process for amending existing student financial supports, including the roles of the Office of the Registrar and the Office of Advancement (moved from the former Creation of New Awards and Bursaries Procedure). 2C. ANNUAL VALUE SETTING: outlines the roles of the units in setting the annual value of undergraduate student financial supports, providing transparency of authority and demonstrating our commitment to being responsible stewards of donor and university resources.
3. MERIT-BASED STUDENT FINANCIAL SUPPORTS	<ul style="list-style-type: none"> 3B. ELIGIBILITY: increased flexibility in recipient selection by removing references to full normal course load that previously imposed restrictions on nominating units. 3E. ACADEMIC TRANSCRIPT: section has been changed to state that all merit-based student financial supports will appear on the academic transcript (need-based and hybrid awards will not).
4. NEED-BASED STUDENT FINANCIAL SUPPORTS	<ul style="list-style-type: none"> The details of the administrative processes for need-based student financial supports have been significantly expanded to create greater transparency. 4B. ELIGIBILITY: provides details about the common assessment practice and the guidelines used to determine the size of a financial shortfall.
5. HYBRID AWARDS	<ul style="list-style-type: none"> The concept of hybrid awards is new, replacing the previous procedures for support where demonstrated financial need was a secondary criteria for awards.

	<ul style="list-style-type: none">• The section addresses longstanding concerns about inconsistency in the assessment of financial need for awards with both merit and need components within different nominating units across the university. Financial need will now be evaluated through a common assessment practice.• The section addresses need and merit components (and secondary requirements) to best fit the intent of the financial support.• The addition of this section addresses a fundraising gap identified by the Office of Advancement as donors have shown high interest in funding this type of student financial support.
6. ANNUAL REPORTING	<ul style="list-style-type: none">• This section outlines the Office of the Registrar's commitment to annual reporting of undergraduate student financial supports.

U of A Policies and Procedures On-Line (UAPPOL)

Original Approval Date:

Most Recent Approval Date:

Most Recent Editorial Date:

Student Financial Supports Policy

Office of Accountability:	Provost and Vice-President (Academic)
Office of Administrative Responsibility:	Office of the Registrar Faculty of Graduate Studies and Research Office of Advancement
Approver:	Board of Governors
Scope:	<p>Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf (Appendix A https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf and Appendix B https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf: Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.</p>

Overview

The *Post-Secondary Learning Act* of Alberta gives the Board of Governors authority to “manage and operate the public post-secondary institution in accordance with its mandate,” and to “develop, manage and operate, alone or in co-operation with any person or organization, programs, services and facilities for the economic prosperity of Alberta and for the educational or cultural advancement of the people of Alberta,” (section 60(1)(a) and (b)).

The *Post-Secondary Learning Act* of Alberta gives GFC responsibility, subject to the authority of the Board of Governors, over “rules and regulations respecting academic awards” (section 26(1)(m)).

GFC has delegated responsibility for graduate awards to the Faculty of Graduate Studies and Research Council (FGSR).

Purpose

To articulate the University’s position on **student financial supports** for the institution.

U of A Policies and Procedures On-Line (UAPPOL)
POLICY

The University of Alberta is committed to providing and optimizing robust student financial supports, in order to ensure that academically qualified **students** can attend the university. These **student financial supports** will align with institutional priorities and values, including those outlined in the institutional strategic plan. The University recognizes that access to affordable education is a shared responsibility between the University, the student, and government. The associated procedures outline how the University will ensure that its responsibilities to all stakeholders, including students, **government**, and **donors**, are met.

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [▲ Top]	
Student Financial Supports	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries loans, and emergency funding.</p> <p>Hybrid awards require academic performance and demonstrated financial need, and will be titled as “Awards”.</p>
Student	An individual currently enrolled (full-time or part-time) in undergraduate or graduate studies.
Government	The government representing a jurisdiction and associated governmental agencies tasked with administering student financial supports.
Donor	An individual or organization who makes a charitable donation to the University of Alberta. A charitable donation is a voluntary transfer of property with intent to donate and without benefit or advantage to the donor. Charitable donations can include gifts-in-kind.

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [\[▲ Top\]](#)

[Office of the Provost and Vice-President \(Academic\)](#) (University of Alberta)

[Office of the Registrar](#) (University of Alberta)

[Faculty of Graduate Studies and Research](#) (University of Alberta)

[University Governance](#) (University of Alberta)

[Financial Management and Practices Policy](#) (University of Alberta)

[Strategic Plan for Equity, Diversity, and Inclusivity](#) (University of Alberta)

PUBLISHED PROCEDURES OF THIS POLICY

Undergraduate Student Financial Supports Procedure

Graduate Student Financial Supports Procedure

Creation of New Student Financial Supports Procedure

Parent Policy: Student Financial Supports Policy

Creation of New Student Financial Supports Procedure

Office of Administrative Responsibility:	Office of the Registrar Faculty of Graduate Studies and Research Office of Advancement
Approver:	General Faculties Council
Scope:	Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy < https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf > (Appendix A < https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf > and Appendix B < https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf >: Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.

Purpose

To provide the procedure by which new **student financial supports** at the University of Alberta are created.

PROCEDURE

1. ADMINISTRATION

The Office of Advancement will work with donors to establish student financial supports for academically qualified students.

The Office of Advancement will engage with the Office of the Registrar (RO) and/or the Faculty of Graduate Studies and Research (FGSR), as appropriate, to draft terms of reference. The RO and/or the FGSR will provide recommendations and will consult with Faculties, departments and administrative units on campus as necessary when drafting terms of reference. The RO and FGSR seek to establish terms of reference for student financial supports that include selection criteria that support a diverse pool of eligible applicants. The selection criteria must be sufficiently broad to allow the university to award the funds every year.

Faculties, departments and other administrative units will be consulted to provide advice and to ensure proper application and selection supports are in place during the creation of a new student financial support.

The RO and FGSR will facilitate the approval process for new student financial supports with the appropriate governance committee. New undergraduate scholarships, awards, medals, bursaries and prizes are approved by the GFC Undergraduate Awards and Bursaries Committee (UABC). New graduate scholarships and fellowships, awards, prizes, medals, and bursaries are approved by the Graduate Scholarship Committee (GSC) in FGSR.

Terms of reference and selection criteria drafted and approved prior to this procedure are not precedent for new financial supports.

2. RESTRICTIONS ON RECIPIENT SELECTION

Policies and Procedures On-Line (UAPPOL)

Donors to the University of Alberta or their agents cannot be the **nominator** or participate in the recipient selection process for student financial supports for which they are the donor.

3. INCLUSIVITY IN SELECTION CRITERIA

The University of Alberta seeks to demonstrate the values of equity, diversity, and inclusivity in the creation and administration of its student financial supports. This is achieved through establishing new student financial supports that include selection criteria that support a diverse pool of eligible applicants. The selection criteria must be sufficiently broad to allow the university to award the funds every year.

A. HUMAN RIGHTS

Selection or eligibility criteria will not include any criterion defined as discriminatory under the Alberta Human Rights Act or the University of Alberta Discrimination and Harassment and Duty to Accommodate Policy unless the financial supports or the condition at the time of establishment could reasonably be viewed as justifiable discrimination intended to create equity for any equity seeking group (as identified in the protected grounds definition of the Discrimination, Harassment and Duty to Accommodate policy).

If the student financial support is accepted under this provision, it will be reviewed at intervals not greater than 15 years by the Office of the Registrar and / or the Graduate Scholarship Committee and brought to the appropriate authority for consideration. The restriction will be dropped if the group is no longer reasonably perceived as disadvantaged. A specific student financial support can be reviewed at any time by a Faculty or the Office of the Registrar and / or the Graduate Scholarship Committee.

B. MEMBERSHIP

Membership in a particular association cannot be a selection criteria requirement with the exception of:

1. Teams at the University of Alberta sanctioned by the University Sports (U Sports) and/or the Canadian Colleges Athletic Association (CCAA) and the Alberta Colleges Athletic Conference (ACAC).
2. Student groups registered at the University of Alberta overseen by the Dean of Students that
 - a. conform with University of Alberta mission, values and policies;
 - b. have clear and transparent membership criteria;
 - c. are without sanction or are not facing disciplinary action by the University at the time of creation of the student financial support; and
 - d. are without sanction or are not facing disciplinary action by the University at the time of administration of the student financial support.

4. APPROVAL**A. TERMS OF REFERENCE**

The **terms of reference** established for student financial supports represent a formal agreement between the donor and the University of Alberta.

Descriptions for new student financial supports submitted for approval must include general selection and eligibility criteria.

Each new student financial support will be considered on its own merits. Terms of reference for all new undergraduate **scholarships, awards, prizes, University medals, and bursaries** are referred to the GFC UABC for approval.

Terms of reference for new graduate scholarships and fellowships, awards, prizes, medals, and bursaries are referred to the Graduate Scholarship Committee (GSC) in FGSR for approval.

If in the future it becomes necessary, advisable, or preferable for changes to be made to the approved terms, in doing so, the University will remain governed by the original intent as expressed at the time of the creation of this award.

B. MINIMUM VALUES

Policies and Procedures On-Line (UAPPOL)

Minimum values for new annually funded undergraduate student financial supports are approved by GFC UABC.

Minimum values for new annually funded graduate student financial supports are approved by the GSC.

5. ANNUAL SPENDING

In any given year, if invested funds do not provide sufficient income to disburse an endowed student financial support, payment of the student financial support may be reduced or withheld until sufficient funds accrue.

The University reserves the right to withhold student financial supports donated by individuals or organizations where the required funds have not yet been received by the University.

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [▲Top]	
Student Financial Supports	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding.</p> <p>Hybrid awards require academic performance and demonstrated financial need, and will be titled as "Awards".</p>
Donor	An individual or organization who makes a charitable donation to the University of Alberta. A charitable donation is a voluntary transfer of property with intent to donate and without benefit or advantage to the donor. Charitable donations can include gifts-in-kind.
Nominator	A nominator is the individual or group (i.e., committee) responsible for selecting the recipient(s) of an award or bursary and must not be a person or group external to the University of Alberta.
Selection and Eligibility Criteria	Selection and eligibility criteria are the standards or conditions by which a student qualifies and is chosen to receive a financial support. Criteria may be defined in such areas as academic performance, leadership, community service, athletics, or demonstrated financial need.
Terms of Reference	The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be dispersed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.
Scholarship	A scholarship is a student financial support given to a student on the basis of overall superior academic achievement in a Faculty, Department, or degree program. Secondary selection criteria may also be used. A degree program may be defined as a full multi-year degree program within a Faculty or Department, or as one or more specific years within a full multi-year degree program.

Policies and Procedures On-Line (UAPPOL)

Award	An award is a student financial support that does not meet the definitions for scholarships, prizes or University medals and has as its primary criterion satisfactory academic performance.
Prize	A prize is a student financial support given to a student on the basis of superior academic achievement in a course or specific set of courses in a Faculty, Department, or in some other subdivision of a Faculty. Additional non-academic secondary selection criteria may also be used.
University Medal	A University medal is a student financial support is given to a student on the basis of overall superior academic achievement in a Faculty, Department or some other subdivision of a Faculty, or in the University overall. Additional selection criteria will not normally be used.
Bursary	A bursary is a student financial support given to a student primarily on the basis of demonstrated financial need.

FORMS

There are no forms for this Procedure. [[▲Top](#)]

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

[Discrimination, Harassment and Duty to Accommodate Policy](#) (UAPPOL)

[Office of Safe Disclosure and Human Rights](#) (University of Alberta)

[Strategic Plan for Equity, Diversity, and Inclusivity](#) (University of Alberta)

[Office of the Registrar](#) (University of Alberta)

[Faculty of Graduate Studies and Research](#) (University of Alberta)

U of A Policies and Procedures On-Line (UAPPOL)
Original Approval Date: **Most Recent Approval Date:**
Most Recent Editorial Date:
Parent Policy: Student Financial Supports Policy

Undergraduate Student Financial Supports Procedure

Office of Administrative Responsibility:	Office of the Registrar
Approver:	General Faculties Council
Scope:	<p>Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf (Appendix A https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf and Appendix B https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf: Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.</p>

Purpose

To provide information about undergraduate **student financial supports** at the University of Alberta.

The purpose of this procedure is to ensure consistency in fundamental financial support practices and procedures across the institution, while allowing academic units sufficient flexibility to administer their financial supports in a manner appropriate to their individual needs and objectives and in alignment with institutional objectives.

PROCEDURE

1. ADMINISTRATION

Merit-based student financial supports are normally administered by the Office of the Registrar (RO) as specified in the **terms of reference** of the financial supports. Some recipients for merit-based student financial supports are nominated to the Office of the Registrar by Faculties, departments or groups on campus as specified in the terms of reference.

Need-based student financial supports are normally administered by the RO as specified in the terms of reference of the need-based financial support.

Hybrid awards are normally administered by the RO as specified in the **terms of reference** of the hybrid awards. Some recipients for hybrid awards are nominated to the Office of the Registrar by Faculties, departments or groups on campus as specified in the terms of reference.

U of A Policies and Procedures On-Line (UAPPOL)

The RO will communicate with the Office of Advancement on recipient selection for donor funded student financial supports. The RO and Office of Advancement will work collaboratively to ensure administrative procedures align with the original purpose of the financial support.

Faculties, Departments and other administrative units who are responsible for nominating recipients to the RO will administer selection practices that meet the eligibility and selection criteria outlined in the terms of reference of the financial support. Nominating units will inform the RO when they have identified that selection criteria no longer support a diverse pool of eligible applicants or become too restrictive to allow the university to award the funds every year. The RO will work with the nominating unit and the Office of Advancement to explore options for changing the selection criteria to address the limitations.

The RO will coordinate with Financial Services as necessary to ensure proper financial management and disbursement of student financial supports.

2. MAINTENANCE OF TERMS OF REFERENCE FOR STUDENT FINANCIAL SUPPORTS

A. GENERAL ELIGIBILITY

Student financial supports are tenable only at the University of Alberta unless otherwise stated in terms of reference. Student financial supports specific to a particular Faculty are generally tenable only in that Faculty.

B. AMENDING TERMS OF REFERENCE

When terms of reference can no longer be satisfied, the University may amend the terms to best meet the original purpose of the financial support, while still ensuring that the benefit of such financial supports continues. For example, amendments to existing terms of reference may be necessary when there are no longer eligible students due to changes in University programming. Amendments to the general selection and eligibility criteria in terms of reference previously approved by GFC Undergraduate Awards and Bursaries Committee (UABC) must be forwarded to GFC UABC for approval. The Office of the Registrar is responsible for monitoring financial supports requiring amendment and will consult with the appropriate stakeholder(s) before forwarding to GFC UABC.

C. ANNUAL VALUE SETTING

For donor funded student financial supports held by the Office of the Registrar, the Office of the Registrar will determine the annual value to be expended in consultation with the Office of Advancement.

For donor funded student financial supports held by Faculties, the Faculty will determine the annual value to be expended by the Office of the Registrar.

3. MERIT-BASED STUDENT FINANCIAL SUPPORTS

A. SELECTION CRITERIA

Primary selection criteria for merit-based student financial supports will be based on **undergraduate academic performance**. Secondary selection criteria may include, but are not limited to, community service, leadership, and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

B. ELIGIBILITY

Merit-based student financial supports established by the University will normally be available to meritorious students who have completed a minimum 24 credits over the most recent September to April period, unless otherwise specified in the terms of reference of the financial support or the merit-based competition program.

C. DISBURSEMENT

U of A Policies and Procedures On-Line (UAPPOL)

Merit-based student financial supports are normally disbursed to the **student tuition account**. The first charge against any financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Merit-based student financial supports are normally payable only when students are in **full-time attendance** at the University in the term during which funds are disbursed. Merit-based student financial supports that are awarded prior to the commencement of or within the Fall Term will be divided evenly between the Fall Term and the Winter Term. The student financial support value will normally be prorated if the attendance of the student changes.

Merit-based student financial supports awarded to a convocating student at the time of convocation will normally be disbursed to the student's account following convocation.

D. MAJOR AWARD

In order that funds may be broadly distributed, a student may hold only one University of Alberta **major award** per category (leadership, academics, athletics) in any one year. The total value of merit-based student financial supports already received by students may be taken into consideration in selections for open award competitions.

E. ACADEMIC TRANSCRIPT

Merit-based student financial supports approved by GFC UABC and administered by the Office of the Registrar will be listed on the academic transcript. Need-based and hybrid awards will not appear on the academic transcript.

4. NEED-BASED STUDENT FINANCIAL SUPPORTS

The Office of the Registrar administers need-based financial supports including bursaries and **emergency funding** for students. The Office of the Registrar also provides advising and program support for government financial support programs. The procedures outlined in this section do not refer to how government financial support programs are supported.

A. SELECTION CRITERIA

Primary selection criteria for need-based student financial supports will be based on **demonstrated financial need**. Secondary selection criteria may include, but are not limited to, community service, leadership, experiential learning, and undergraduate academic performance as long as the undergraduate academic performance requirement stated in the terms of reference does not exceed a 3.0 GPA.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

B. ELIGIBILITY

Need-based student financial supports established by the University, unless otherwise specified by the terms of reference of the financial support, will normally be available to students with full-time attendance and have demonstrated financial need for the current academic year.

Demonstrated financial need will normally be assessed through a common assessment practice as defined by the Office of the Registrar using a student's expenses and resources. The Common Assessment Practice is derived from provincial and federal loan guidelines. The Common Assessment Practice will also allow for exceptional student situations where the Common Assessment Practice does not reflect the true need of eligible students or does not address the institutional, diversity, or equity priorities of the University.

Domestic students are normally expected to access the maximum government student loan available to them in the current academic year. Assessed need that cannot be met by this loan may be met through University need-based student financial supports up to an annual maximum as determined by the University.

International students are required by the federal government of Canada to demonstrate sufficient resources to meet their cost of attendance at University in order to qualify for a study permit. International students

U of A Policies and Procedures On-Line (UAPPOL)

experiencing an emergency or exceptional circumstances may be considered for need-based student financial supports if their planned financial resources have changed by completing a financial need assessment.

C. DISBURSEMENT

Need-based student financial supports are normally disbursed to the student tuition account. The first charge against any financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Need-based student financial supports are normally payable only when students are in full-time attendance at the University in the term during which funds are disbursed. Need-based student financial supports will normally be applied to a single term of enrolment in the academic year in which the financial need assessment was evaluated. The student financial support value will normally be re-evaluated if the attendance or enrollment of the student changes.

5. HYBRID AWARDS

A. SELECTION CRITERIA

Primary selection criteria for hybrid awards will be based on a combination of undergraduate academic performance and **indicated financial need** as long as the undergraduate academic performance requirement stated in the terms of reference does not exceed a 3.0 GPA.

Secondary selection criteria may include, but are not limited to, community service, leadership and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

B. ELIGIBILITY

Hybrid awards established by the University, unless otherwise specified by the terms of reference of the financial support, will normally be available to students with full-time attendance and have indicated financial need in either the current or previous academic year.

Indicated financial need will normally be assessed through defined indicators of financial need as established by the Office of the Registrar. Defined indicators of financial need are derived from elements of the Common Assessment Practice.

C. DISBURSEMENT

Hybrid awards are normally disbursed in accordance with disbursements outlined in section 3C of this procedure.

6. ANNUAL REPORTING

Each academic year, the Vice-Provost and University Registrar will present an annual report on Undergraduate Student Financial Support to GFC and the Board of Governors. The report serves as an overview of undergraduate financial supports and services administered by Student Financial Support (SFS) within the Office of the Registrar (RO).

DEFINITIONS

Definitions should be listed in the sequence they occur in the document (i.e. not alphabetical).

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. [▲ Top]

U of A Policies and Procedures On-Line (UAPPOL)

Student Financial Supports	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding.</p> <p>Hybrid awards require undergraduate academic performance and indicated financial need, and will be titled as “Awards”.</p>
Terms of Reference	<p>The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be disbursed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.</p>
Hybrid Awards	<p>Hybrid awards are financial supports whose primary selection criteria is a combination of both undergraduate academic performance and indicated financial need.</p>
Undergraduate Academic Performance	<p>Undergraduate academic performance refers to the academic requirements for student financial supports and is categorized as superior academic achievement or satisfactory academic standing.</p> <p>Superior academic achievement in the context of student financial supports will normally mean either of the following:</p> <ol style="list-style-type: none"> i. GPA of 3.5 or higher in the University or; ii. standing in the upper 10% of comparable students in a Faculty, School, Department or other subdivision of a Faculty. <p>Superior academic achievement in the context of student financial supports for entrance scholarships will normally mean a minimum average of 80% on marks used at the time of assessment.</p> <p>Satisfactory academic standing in a Faculty means satisfactory as defined within the <i>University Calendar</i> by the Faculty in question. If no such definition has been made by the Faculty, satisfactory academic standing means being eligible to continue in or graduate from the program in which the student is registered exclusive of those students allowed to continue on a probationary basis.</p> <p>For entrance awards, a student will be deemed to have achieved satisfactory academic standing provided they have been granted admission to a program of study at the University of Alberta.</p>
Demonstrated Financial Need	<p>Demonstrated financial need is a calculation of overall financial shortfall available for a student's academic and basic living costs for the current academic year. The calculation will normally be based on the Common Assessment Practice.</p>
Indicated Financial Need	<p>Indicated financial need is used in instances where a determination of full financial shortfall is unnecessary, as in Hybrid awards. Indicated</p>

U of A Policies and Procedures On-Line (UAPPOL)

	financial need is determined through review of a student's financial situation based on a subset of criteria taken from indicators based on the Common Assessment Practice and does not require a full financial shortfall assessment.
Student Tuition Account	The student tuition account is the receivable account by which charges (including tuition and fees), and payments are processed. Students access their account details through Bear Tracks.
Full-Time Attendance	Full-time attendance as defined within the <i>University Calendar</i> .
Major Award	A major award, as defined by the GFC UABC, is any financial support with a value equal or greater to the full course load tuition and any related differential fees charged to a student within a given academic year.
Emergency Funding	Emergency funding is a financial support given to a student primarily on the basis of demonstrated financial need and who have demonstrated emergent financial challenge. Emergency funding can either be repayable or non-repayable.

FORMS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

No forms for this procedure.

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

[Office of the Provost and Vice-President \(Academic\)](#) (University of Alberta)

[Office of the Registrar](#) (University of Alberta)

[University Governance](#) (University of Alberta)

U of A Policies and Procedures On-Line (UAPPOL)
Original Approval Date: **Most Recent Approval Date:**
Most Recent Editorial Date:
Parent Policy: Student Financial Supports Policy

Graduate Student Financial Supports Procedure

Office of Administrative Responsibility:	Faculty of Graduate Studies and Research
Approver:	Graduate Scholarship Advisory Committee
Scope:	<p>Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf (Appendix A https://policiesonline.ualberta.ca/PoliciesProcedures/Procedures/Recruitment-Policy-Appendix-A-Definition-and-Categories-of-Academic-Staff-Administrators-and-Colleagues.pdf and Appendix B https://policiesonline.ualberta.ca/policiesprocedures/procedures/recruitment-policy-appendix-b-definition-and-categories-of-support-staff.pdf: Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers.</p>

Purpose

To provide information about graduate **student financial supports** at the University of Alberta.

The purpose of this procedure is to ensure consistency in fundamental financial support practices and procedures across the institution, while allowing academic units sufficient flexibility to administer their financial supports in a manner appropriate to their individual needs and objectives and in alignment with institutional objectives.

PROCEDURE

1. ADMINISTRATION

Merit-based student financial supports are normally administered by the Faculty of Graduate Studies and Research (FGSR) as specified in the terms of reference. Recipients of merit-based student financial supports are nominated to the Faculty of Graduate Studies and Research by Faculties, departments or units on campus as specified in the terms of reference.

Need-based student financial supports are normally administered by the Office of the Registrar as specified in the terms of reference.

U of A Policies and Procedures On-Line (UAPPOL)

The FGSR will communicate with the Office of Advancement on recipient selection for donor funded student financial supports. The FGSR and Office of Advancement will work collaboratively to ensure administrative procedures align with donor intent.

Faculties, Departments and other administrative units who are responsible for nominating recipients to the FGSR will administer selection practices that meet the eligibility and selection criteria outlined in the terms of reference. Nominating units will inform the FGSR when they have identified that selection criteria no longer support a diverse pool of eligible applicants or become too restrictive to allow the university to award the funds every year. The FGSR will work with the nominating unit and Office of Advancement to explore options for changing the selection criteria to address the limitations.

The FGSR will coordinate with Financial Services as necessary to ensure proper financial management and disbursement of student financial supports.

2. MAINTENANCE OF TERMS OF REFERENCE

A. GENERAL ELIGIBILITY

Student financial supports are tenable only at the University of Alberta unless otherwise stated in the **terms of reference**. Student financial supports specific to a particular Faculty are generally tenable only in that Faculty.

B. AMENDING TERMS OF REFERENCE

When the terms of reference become prohibitive to fulfill through obsolescence, then the University may amend the terms to carry out the nearest possible original intent of the donor, while still ensuring that the benefit of such financial supports continues. For example, amendments to existing terms of reference may be necessary when there are no longer eligible students due to changes in University programming. Amendments to the general selection and eligibility criteria in the terms of reference previously approved by the Graduate Scholarship Committee (GSC) must be forwarded to GSC for approval. The Faculty of Graduate Studies and Research is responsible for monitoring these financial supports requiring amendment and will consult with the appropriate stakeholder(s) before forwarding to GSC.

C. ANNUAL VALUE SETTING

For donor funded student financial supports for which the FGSR holds administrative responsibility, the FGSR will determine the annual value to be expended unless indicated in the terms of reference.

3. MERIT-BASED FINANCIAL SUPPORT

A. SELECTION CRITERIA

Primary selection criteria for merit-based student financial supports will be based on **graduate academic performance**. Secondary selection criteria may include, but are not limited to, community service, leadership, and experiential learning.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

B. ELIGIBILITY

Students registered in master's programs are eligible to hold awards during the first four years of their program unless stated otherwise in the terms of reference for the award. Consideration for funding for the fifth year of a master's program may be considered if a compelling explanation (ie. illness, parental leave, personal catastrophe) outlined in a letter of support from the department is provided.

Students registered in doctoral programs are eligible to hold awards during the first six years of their program unless stated otherwise in the terms of reference for the award. Consideration for funding for the seventh year of a doctoral program may be considered if a compelling explanation (ie. illness, parental leave, personal catastrophe) outlined in a letter of support from the department is provided.

U of A Policies and Procedures On-Line (UAPPOL)*Full-time Registration*

Full-time thesis-based students are required to be registered full-time in each term for the duration of the award.

Ineligible Student Categories

Part-time students are not typically eligible, unless specified in the terms of reference for the award. If a student is selected as the recipient of one of the limited number of awards for which part-time students are eligible, the student is required to register in each term for the duration of the award.

Students registered in Graduate Certificate and Diploma programs are not typically eligible, unless specified in the terms of reference for the award. If a student is selected as the recipient of one of the limited number of awards for which Graduate Certificate and Diploma students are eligible, the student is required to register in each term for the duration of the award.

Qualifying students, students on academic probation, visiting students and students in cost-recovery programs are not eligible to hold FGSR-administered awards, unless specified in the terms of reference for the award.

C. DISBURSEMENT

Graduate student financial supports are normally processed through direct deposit payroll, unless otherwise specified in the terms of reference. Recipients are responsible for setting up their direct deposit information in order to receive payment.

Merit-based student financial supports are normally payable only when students are registered full time at the University in the term during which funds are disbursed, unless otherwise specified in the award terms of reference.

Merit-based student financial supports up to and including the value of \$6,000 are paid in one payment during the timeframe outlined in the award letter of offer.

Merit-based student financial supports whose values are between \$6,000 and \$11,999.99 are either paid in two equal sums in consecutive terms (ie Fall and Winter) or disbursed as per the semi-monthly payroll schedule over the duration of twelve months. Students receiving term-based funding who no longer meet the eligibility criteria in the second term may have their payment terminated, and students receiving semi-monthly funding may have their payment terminated the month in which they complete their degree requirements.

Merit-based student financial supports whose values are greater than \$12,000 will be disbursed as per the semi-monthly payroll schedule over the duration of twelve months. If a student no longer meets the eligibility requirements of the financial support remaining payments may be terminated.

Changes to a student's status which render the recipient ineligible to hold all or some specific portion of an award, may result in the requirement to repay all or a portion of the award. These changes include but are not limited to: being placed on academic probation, withdrawal from the program, change in registration status, change in program, accepting another award which precludes holding concurrent awards.

D. ACADEMIC TRANSCRIPT

Scholarship and Prize student financial supports approved by GSC and administered by the Faculty of Graduate Studies and Research will be listed on the academic transcript. Need-based student financial supports will not appear on the academic transcript.

4. NEED-BASED FINANCIAL SUPPORT

The Office of the Registrar administers need-based financial supports including bursaries and **emergency funding** for students. Additional bursaries are administered through the Graduate Student's Association and University of Alberta International. The Office of the Registrar, also provide advising and program support for government financial

U of A Policies and Procedures On-Line (UAPPOL)

support programs. The procedures outlined in this section do not refer to how government financial support programs are supported.

A. SELECTION CRITERIA

Primary selection criteria for need-based student financial supports will be based on **demonstrated financial need**. Secondary selection criteria may include, but are not limited to, community service, leadership, experiential learning, and graduate academic performance, as long as the graduate academic performance requirement does not exceed a 3.0 GPA.

If selection cannot be made by applying both primary and secondary selection criteria, selection will be based on a combination of primary criteria and criteria that most closely fulfills the original purpose of the financial support.

B. ELIGIBILITY

Need-based student financial supports established by the University, unless otherwise specified by the terms of reference of the financial support, will normally be available to students with full-time enrollment and have demonstrated financial need for the current academic year.

Demonstrated financial need will normally be assessed through a common assessment practice as defined by the Office of the Registrar using a student's expenses and resources. The common assessment practice is derived from provincial and federal loan guidelines. The common assessment practice will also allow for exceptional student situations where the common assessment does not reflect the true need of eligible students or does not address the institutional, diversity, or equity priorities of the University.

Domestic students are expected to access the maximum government student loan available to them in the current academic year. Assessed need that cannot be met by this loan may be met through University need-based student financial supports up to an annual maximum as determined by the University.

International students are required by the federal government of Canada to demonstrate sufficient resources to meet their cost of attendance at University in order to qualify for a study permit. International students experiencing an emergency or exceptional circumstances may be considered for need-based student financial supports if their planned financial resources have changed by completing a financial need assessment.

C. DISBURSEMENT

Need-based student financial supports are normally disbursed to the **student tuition account**. The first charge against any financial support is to pay outstanding University fees including tuition, incidental fees and other university-related fees.

Need-based student financial supports are normally payable only when students are in full-time attendance at the University in the term during which funds are disbursed. Need-based student financial supports will normally be applied to a single term of enrolment in the academic year in which the financial need assessment was evaluated. The student financial support value will normally be re-evaluated if the attendance or enrollment of the student changes.

5. ANNUAL REPORTING

Each academic year, the Vice-Provost and Dean of FGSR will present an annual report on Graduate Student Financial Support to FGSR council and then to the GFC. The report serves as an overview of graduate financial supports and services administered by the Faculty of Graduate Studies (FGSR).

DEFINITIONS

Definitions should be listed in the sequence they occur in the document (i.e. not alphabetical).

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use. ▲ Top

U of A Policies and Procedures On-Line (UAPPOL)

Student Financial Supports	<p>Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference.</p> <p>Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding.</p> <p>Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding.</p>
Terms of Reference	<p>The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be disbursed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.</p>
Graduate Academic Performance	<p>Graduate academic performance refers to the academic grading requirements for student financial supports and are categorized as superior academic achievement or satisfactory academic standing.</p> <p>Superior academic achievement will normally mean the following:</p> <ul style="list-style-type: none"> i. GPA of 3.5 or higher in the University <p>Superior academic achievement for entrance scholarships will normally mean a minimum GPA of 3.5 based on marks used at the time of assessment.</p> <p>Satisfactory academic standing is defined as:</p> <ul style="list-style-type: none"> i. GPA of 3.0 for newly admitted graduate students ii. GPA of 2.7 or greater for continuing students <p>Satisfactory academic achievement for entrance scholarships will normally mean a minimum GPA of 3.0 based on the marks used at the time of assessment.</p>
Demonstrated Financial Need	<p>Demonstrated financial need is a calculation of overall financial shortfall available for a student's academic and basic living costs for the current academic year. The calculation will normally be based on the common assessment practice.</p>
Full-Time Attendance	<p>Full-time attendance as defined within the <i>University Calendar</i>.</p>
Emergency Funding	<p>Emergency funding is a financial support given to a student primarily on the basis of demonstrated financial need and who have demonstrated emergent financial challenge. Emergency funding can either be repayable or non-repayable.</p>
Student Tuition Account	<p>The student tuition account is the receivable account by which charges (including tuition and fees), and payments are processed. Students access their account details through Bear Tracks.</p>

U of A Policies and Procedures On-Line (UAPPOL)**FORMS**

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

No forms for this procedure.

RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca. [[▲Top](#)]

[Office of the Provost and Vice-President \(Academic\)](#) (University of Alberta)

[Office of the Registrar](#) (University of Alberta)

[University Governance](#) (University of Alberta)

[Faculty of Graduate Studies and Research](#) (University of Alberta)