

SUBJECT	LEGACY RULES (MULTI-YEAR TUITION GUARANTEES) AND TUITION ASSESSMENTS FOR INTERNAL TRANSFER UNDERGRADUATE AND GRADUATE STUDENTS
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MEETING DATE	DECEMBER 5, 2017
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Forwarded to the Board of Governors on the Recommendation of the President

APPROVED FOR SUBMISSION



Santa J. Ono, President and Vice-Chancellor

FOR INFORMATION

Report Date	October 11, 2017
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Presented By Andrew Szeri, Provost and Vice-President Academic
 Andrew Simpson, Vice-President Finance & Operations
 Deborah Buszard, Deputy Vice-Chancellor and Principal, UBC Okanagan
 Cynthia Mathieson, Provost and Vice-Principal Academic, UBC Okanagan

EXECUTIVE SUMMARY

Legacy rules for multi-year tuition guarantees have been implemented in practice as administrative procedures, by Enrolment Services, but have not been formally approved and are not transparent for students. Two attachments outlining standardized practices to address these shortcomings have now been approved by the President:

- 1) Legacy Rules for Undergraduate Programs – Impact on International Tuition Fee Assessments
- 2) Legacy Rules and Tuition Assessments for Internal Transfer Graduate Students

These guidelines apply to both UBC Vancouver and UBC Okanagan students.

INSTITUTIONAL STRATEGIC PRIORITIES SUPPORTED

Learning
 Research
 Innovation
 Engagement (Internal / External)
 International
 or Operational

DESCRIPTION & RATIONALE

Legacy rules for multi-year tuition guarantees have been implemented in practice as administrative procedures, by Enrolment Services, but have not been formally approved and have not been transparent for students. Two attachments outlining standardized practices have now been approved by the President:

- 1) Legacy Rules for Undergraduate Programs – Impact on International Tuition Fee Assessments
- 2) Legacy Rules and Tuition Assessments for Internal Transfer Graduate Students

These guidelines apply to both UBC Vancouver and UBC Okanagan campuses. Please refer to the attachments for further details.

BENEFITS Learning, Research, Financial, Sustainability & Reputational	The legacy rules are intended to provide consistency and transparency for international students, to ensure that students make decisions based on what is best for them, independent of tuition considerations. The legacy rules are intended to protect international students from tuition increases of an unexpected magnitude once they have commenced their studies at UBC.
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CONSULTATION Relevant Units, Internal & External Constituencies	Because these are administrative procedures, an extensive consultation was not conducted. The UBC Alma Mater Society (AMS) and UBC Students' Union Okanagan (UBCSUO) were informed of these procedural rules on September 27, 2017. The Graduate Student Society (GSS) was informed of these rules on September 30, 2017, and the International Students' Association (ISA) was informed on October 3, 2017. All parties were given an opportunity to provide feedback.
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Legacy Rules for Undergraduate Programs Impact on International Tuition Fee Assessments

Beginning in 2011/12, when international undergraduate tuition was increased, the Board of Governors (BoG) approved multi-year tuition guarantees for international students that resulted in differentiated tuition assessments, depending on the student's year of initial registration with the university.

Tuition Guarantees Approved by the BoG 2011/12 to 2015/16:

Approval Date	Tuition Increase per annum (%)	Years Guaranteed	Subsequent Period Covered	International Undergraduate Students Covered
February 7, 2011	2%	3	2012/13, 2013/14, 2014/15	New to UBC in 2011/12 and students currently enrolled in 2011/12
April 3, 2012	2%	3	2013/14, 2014/15, 2015/16	New to UBC in 2012/13
April 3, 2013	2%	3	2014/15, 2015/16, 2016/17	New to UBC in 2013/14
April 14, 2014	2%	3	2015/16, 2016/17, 2017/18	New to UBC in 2014/15
December 2, 2014	3%	4	2016/17, 2017/18, 2018/19, 2019/20	Entering degree program in 2015/16
December 3, 2015*	Up to 5%	4	2017/18, 2018/19, 2019/20, 2020/21	Entering degree program in 2016/17
December 3, 2015	Up to 5%	4	2018/19, 2019/20, 2020/21, 2021/22	Entering degree program in 2017/18
December 3, 2015	Up to 5%	4	2019/20, 2020/21, 2021/22, 2022/23	Entering degree program in 2018/19

*On December 6, 2016, the Board approved an increase of 3% for students who entered their degree program in 2016/17 for the 2017/18 tuition assessment year.

To provide consistency and transparency in the treatment of the legacy rules for all international undergraduate students, regardless of cohort (i.e., year of initial registration), the following implementation guidelines were developed:

Start Year Determination

- The legacy rules are based on the international undergraduate student's first registered session in an undergraduate degree program or in a Vantage College program.
 - For example, an international student admitted in 2016 winter session, but who deferred admission to 2017 winter session, would be considered part of the 2017/18 cohort year for tuition assessment purposes.

Internal Transfer Students

- Students who transfer from one undergraduate degree program (or from Vantage College program) to another undergraduate degree program will be assessed the international tuition rate that continuing students in the same cohort year are assessed.

- For example, an international student who started in the BSc program, in 2015/16, and then transferred to the BCOM program, starting 2017 winter session, would be assessed the same international tuition rate as a BCOM student who started in 2015/16.

Tuition during the Guaranteed Years (as approved by the BoG)

3. Tuition guarantees apply to the four years immediately following a student's first registered session, regardless of cohort year.
 - For example, an international student who started in 2013/14 and requires a fifth year to complete their degree program, in 2017 winter session, would have the 2% tuition increase guarantee applied, even though the tuition guarantee approved in April 2013 was for only three years after the year of entry to UBC.

Tuition after the Guaranteed Years (as approved by the BoG)

4. There will be five international tuition rates, at most, for each undergraduate program, depending on the student's cohort. Students who do not complete their undergraduate degree programs in five years will be assessed the same international tuition rate, for their sixth and subsequent years, as students who are in their fifth year in the same undergraduate degree program are assessed.
 - For example, an international BA student who started in 2012/13 and requires another year to complete their degree program in 2017 winter session (i.e., the sixth year) will be assessed the same international tuition rate as a BA student who started in 2013/14.

Partnership Programs

5. Some programs involve the completion of part of the program at another university, in Canada or in another country. Students in these programs may start their studies at the partner university. When students are registered in the program, at UBC, and undertaking their studies and paying fees at another university, they will be assessed the international tuition rate assessed of students in the same cohort year, when they return to UBC to take UBC courses.
 - For example, an international BA student in the Sciences Po program has a continuous UBC registration starting in 2015/16, but took courses and paid fees only to Sciences Po for 2015/16 and 2016/17. The student returns to UBC in 2017/18 to take UBC courses and will be assessed the same international tuition rate as a BA student who started in 2015/16.

Second Undergraduate Degree Program or Post-Baccalaureate Program

6. The legacy rules apply only to the first undergraduate degree program. When a student completes one undergraduate program and then subsequently enters a second undergraduate program or a post-baccalaureate program, the student will pay the same international tuition rate as new to UBC incoming students.
 - An international BA student started in 2012/13 and completed their BA program in 2015/16. The student was admitted to the JD program in 2016/17 and would be assessed the same tuition as a JD student who started at UBC in 2016/17.

Non-Continuous Student Registration

7. International students with more than a three-year continuous gap in their studies during the course of their undergraduate degree program will be subject to the same international tuition rate as new to UBC incoming students. International students with a gap of three continuous years or less (at most six winter and summer sessions) will pay the international rate as students in the same cohort year.

- For example, an international BCOM student has registrations in 2014/15, returned to his home country for mandatory military service for 2015/16 and 2016/17. He returned to UBC and registered in the 2017 winter session. This student would be assessed the same international tuition rate as a BCOM student who started in 2014/15.
- For example, an international BSc student started in 2013/14 (2013 winter session). He did not register for any courses from 2014 summer to 2017 summer session (a gap of 7 sessions). He returned to UBC and registered in the 2017 winter session. The student would be assessed the same international tuition rate as new to UBC incoming students.

Legacy Rules and Tuition Assessments for Internal Transfer Graduate Students

These legacy rules and tuition assessments for graduate programs are designed to be rules-based, fair, consistent, and transparent, and to provide the greatest benefit to students. The rules are intended to ensure that graduate students are facilitated in availing themselves of the range of graduate programs offered or choices available, and to make decisions based on what is best for them, independent of tuition considerations. The legacy rules are intended to protect graduate students from tuition increases of an unexpected magnitude once they have commenced their graduate studies at UBC.

In general, when an adjustment to a tuition instalment amount is required because of a change in program, to ensure that the student is not over-assessed, an adjustment will be made to the final instalment amount and only after the responsible Faculty has requested the adjustment. For internal transfer students, when previously paid instalments for the original graduate program (or initial student classification) are to be fully or partially credited towards the new graduate program (or subsequent student classification), after notification from the responsible Faculty, the instalment number (or step) will be changed in the new graduate program (or subsequent student classification). For example, if a graduate program has a minimum number of instalments of six, and it is determined that the transfer student is required to pay three more minimum instalments, then the instalment number (or step) will be changed to 4, which means that the student will be assessed instalment numbers 4, 5, and 6 in the new graduate program (or subsequent student classification).

Legacy Rules and Tuition Assessments for Internal Transfer Graduate Students

1. Change in Student Classification – Transfer from Full-Time to Part-Time

1.1. Standard Graduate Programs

In general, graduate students in standard graduate programs are automatically assessed fees according to Schedule A (full-time study). Students may choose to undertake part-time study (Schedule B for Master's or Schedule C for Doctoral) after obtaining the proper approvals. Typically, students are not permitted to switch from full-time to part-time after the due date of the first instalment. However, there are some situations where the Faculty of Graduate and Postdoctoral Studies will approve the transfer of a student's classification from full- to part-time, generally within the first year of the student's studies.

Graduate students in standard graduate programs who transfer from full-time to part-time classification will have their fees retroactively assessed as though they had selected part-time status at the time of their first instalment payment. There would be no change to the number of instalments or to the instalment amount.

1.2. Specialized Master's Degree Programs with no Minimum Program Fee

Some specialized master's degree programs with no minimum program fee have options for full-time study and part-time study, such as the Master of Engineering, Master of Kinesiology, Master of Archival Studies, and other programs. There are instances when the responsible Faculty that administers the graduate program approves a transfer of classification from full-time to part-time, or vice versa.

Graduate students in specialized graduate programs with no minimum program fee who transfer from full-time to part-time classification, or vice versa, will have part of their previously paid fees credited towards the fees in their new student classification. This will result in a smaller number of instalments that the student is required to pay in the new student classification, and no adjustment to the instalment amount.

1.3. Specialized Master's Degree Programs with a Minimum Program Fee

For specialized master's degree programs with a minimum program fee and with options for full-time and part-time study, such as the Master of Business Administration program, when the responsible Faculty has approved a change in classification, from full-time to part-time, or vice versa, transfer students will have the full amount of their previously paid tuition credited towards the tuition for their new student classification. This will result in a smaller number of minimum instalments the student is required to pay for their new student classification and a change to the final instalment amount. This final instalment amount will be adjusted to ensure that the student is assessed an amount equal to the minimum program fee, prior to assessing any continuing fees.

For specialized graduate programs with a minimum program fee and with differentiated fees, such as the Master of Business Administration program, depending on the cohort year, transfer students will be assessed the same minimum program fee based on their entry into the graduate program, regardless of their classification.

2. Transfer from a Single Graduate Program to another Single Graduate Program

2.1. New Graduate Program is Related to Original Graduate Program

For students transferring from a graduate program (such as the Master of Forestry or Master of Applied Science programs) to a related graduate program (such as the Master of International Forestry or Master of Engineering programs, respectively), where the responsible Faculties have approved the transfer, the students will have part of their previously paid tuition, for the original graduate program, credited towards the tuition for the new graduate program. Partially crediting previously paid tuition will result in a smaller number of minimum instalments the student is required to pay for the new graduate program, and there will be no change to the instalment amount. This rule applies whether or not the new graduate program has a minimum program fee.

For specialized graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student would pay the same international tuition rate as new incoming students entering the (new) graduate program.

2.2. New Graduate Program is Unrelated to Original Graduate Program

For students transferring from a graduate program (such as the Master of Arts program) to an unrelated graduate program (such as the Master of Physical Therapy program), when the Faculty has approved the transfer, previously paid tuition for the original graduate program will not be credited towards the tuition for the new graduate program. This is considered a withdrawal from the original graduate program and application to the new graduate program. Students will be assessed the full minimum number of instalments for the new program with no change in the instalment amount. This rule applies whether or not the new graduate program has a minimum program fee.

For specialized graduate programs with differentiated fees, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students entering the (new) graduate program.

3. Transfer from a Single Program to a Dual Degree Graduate Program

3.1. Transfer from a Post-Baccalaureate Program or from a Single Graduate Program to a Dual Degree Graduate Program with a Minimum Program Fee when the Single Program is one of the programs of the Dual Degree Graduate Program

For students transferring from a post-baccalaureate program (such as the Juris Doctor – JD program) to a dual degree graduate program with a minimum program fee (such as the Dual Master of Business Administration/Juris Doctor – MBA/JD program), when the responsible Faculty has approved the transfer, students will have the full amount of their previously paid tuition in the post-baccalaureate program credited towards the tuition in the dual degree program. This will result in a smaller number of minimum instalments the student is assessed for the dual degree program and a change to the final instalment amount. The final instalment amount will be adjusted to ensure that the student is assessed an amount equal to the minimum program fee, prior to assessing any continuing fees. *Note:* This specific rule does not apply to JD students transferring to the MBA/JD starting 2017W or later. These students follow a specific payment schedule approved by the Board for transfer students.

The same rule applies when students transfer from a single graduate program (such as the Master of Public Health program) to a dual degree graduate program (such as the Combined Master of Public Health/Master of Science in Nursing Dual Degree Option).

For international students in both of the above situations, the minimum program fee for the transfer student is the same fee assessed to new incoming students in the dual degree graduate program during the year of transfer.

3.2. Transfer from a Post-Baccalaureate Program or from a Single Graduate Program to a Dual Degree Graduate Program with no Minimum Program Fee when the Single Program is one of the programs in the Dual Degree Graduate Program

For students transferring from a post-baccalaureate program (such as the Doctor of Medicine program) to a dual degree graduate program with no minimum program fee (such as the Combined Doctor of Philosophy and Doctor of Medicine), when the responsible Faculty has approved the transfer, students will have part of their previously paid tuition in the post-baccalaureate program credited towards the tuition for the dual degree program. A full year of fees assessed for the post-baccalaureate program equates to three instalments for the dual degree program. A term of fees assessed for the post-baccalaureate program equates to one instalment for the dual degree program. Partially crediting previously paid fees will result in a smaller number of minimum instalments the student is assessed for the dual degree program, and there will be no change to the instalment amount.

The same rule applies when students transfer from a single graduate program (such as the Master of Public Health program) to a dual degree graduate program (such as the Combined Master of Public Health/Diploma in Dental Public Health).

For specialized dual degree graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students in the dual degree program during the year of transfer.

3.3. Transfer from a Post-Baccalaureate Program or from a Single Graduate Program to a Dual Degree Graduate Program when the Single Program is unrelated to the Dual Degree Graduate Program

For students transferring from a graduate program (such as the Master of Science program) to an unrelated dual degree graduate program (such as the Combined Master of Public Health/Diploma in Dental Public Health program), when the responsible Faculty has approved the transfer, previously paid tuition for the original graduate program will not be credited towards the tuition for the new dual degree graduate program. Students will be assessed the full minimum number of instalments for the dual degree graduate program with no change in the instalment amount. The same rule applies whether or not the dual degree graduate program has a minimum program fee.

For specialized dual degree graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students in the dual degree program, during the year of transfer.

4. Transfer to/from a Graduate Program with a Different Fee Type

4.1. Transfer from a Graduate Program with Course-Based or Per Credit Tuition Fees to a Related Graduate Program with Instalment-Based Tuition Fees

For students transferring from a graduate program with course-based or per credit tuition fees (such as the Master of Educational Technology program) to a related graduate program with instalment-based fees (such as the Master of Education in Adult Learning and Global Change program), when the responsible Faculty has approved the transfer, students will have part of their previously paid fees for the original graduate program credited towards their tuition for the new graduate program. Partially crediting previously paid fees will result in a smaller number of minimum instalments the student is assessed for the new graduate program, and there will be no change to the instalment amount. The same rule applies whether or not the new graduate program has a minimum program fee.

For specialized graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students in the new graduate program during the year of transfer.

4.2. Transfer from a Graduate Program with Course-Based or Per Credit Fees to an Unrelated Graduate Program with Instalment-Based Fees

For students transferring from a graduate program with course-based fees (such as the Master of Educational Technology program) to an unrelated graduate program with instalment-based fees (such as the Master of Applied Science program), previously paid tuition for the original graduate program will not be credited towards the tuition for the new graduate program. Students will be assessed the full minimum number of instalments for the new graduate program with no change in the instalment amount. The same rule applies whether or not the new graduate program has a minimum program fee.

For specialized graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students in the new graduate program during the year of transfer.

4.3. Transfer from a Graduate Program with Instalment-Based Fees to a Graduate Program with Course-Based or Per Credit Fees

For students transferring from a graduate program with instalment-based fees (such as the Master of Education program) to a graduate program with course-based fees (such as the Master of Educational Technology program), when the responsible Faculty has approved the transfer, previously paid tuition for the original instalment-based graduate program will not be credited towards the course-based fees for the new graduate program. The transfer student will be assessed the course-based fees for the new graduate program, as normal. The same rule applies whether or not the original graduate program is related to the new graduate program.

For specialized graduate programs with differentiated tuition, depending on the year of entry into the program, the international transfer student will be assessed the same international tuition as new incoming students in the new graduate program with course-based fees, during the year of transfer.

5. Standard Calculation of Starting Step in New Graduate Program or New Student Classification

When tuition fees are either partially or fully credited for a student who has transferred into a new graduate program or classification, the following formula is used to determine the starting instalment number or step:

Sum all previously paid tuition fees for the original graduate program or initial student classification, then

Divide by the Instalment Amount of the new graduate program or student classification, then

Round down the quotient to the nearest integer, and

Add 1.

The resulting number is the starting instalment number or step number.

6. Additional Legacy Rules for International Graduate Students

6.1. Length of Guaranteed Years

The Board of Governors approved a maximum 3% increase in tuition, per year, until graduation from the current degree program for new international non-thesis-based graduate students entering their degree programs in 2016-17, 2017-18, or 2018-19. The tuition guarantee does not include a maximum number of years for an international graduate student to complete the program; however, for administrative purposes, the guarantee is expected to be equal to the length of time students are expected to complete their respective graduate programs from their initial registration. The maximum tuition guarantee for international students will then be:

6.1.1. Specialized master's degree programs, both full-time and part-time – Five years

6.1.2. Specialized doctoral degree programs, full-time – Six years

To facilitate the administration of the legacy rules and recognizing that most international students typically complete their degree programs within the expected range: from normal program length to two years after the minimum number of instalment for the program, then all documentation (Board docket, websites) and system implementation will reflect the legacy rules extending to two full years after the minimum number of instalments for the program. International students intending to complete their programs after this date will need to self-identify to their Faculty or Enrolment Services in order for their tuition assessment to be manually updated.

6.2. Original Degree Program

The legacy rules apply only to the original UBC degree program. In each of the following cases, students will be assessed the same international tuition rate as new to UBC incoming students.

- 6.2.1. Students complete an undergraduate degree program and subsequently register in a graduate degree program
- 6.2.2. Students complete a post-baccalaureate degree program and subsequently register in a graduate degree program
- 6.2.3. Students complete a graduate degree program and subsequently register in another graduate degree program

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MEMORANDUM

TO: Dr. Santa J. Ono, President and Vice-Chancellor 

FROM: Dr. Andrew Szeri, Provost and Vice-President, Academic 

DATE: October 11, 2017

RE: **Legacy Rules (Multi-Year Tuition Guarantees) and Tuition Assessments for Internal Transfer Undergraduate and Graduate Students**

Your approval is requested for the formal implementation of the following:

- (1) Legacy Rules for Undergraduate Programs – Impact on International Tuition Fee Assessments
- (2) Legacy Rules and Tuition Assessments for Graduate Internal Transfer Students

These rules have been implemented in practice as administrative procedures, by Enrolment Services, but have not received formal approval and are currently not transparent for students. The Student Financial Services team of Enrolment Services has documented their practice, which addresses the BoG approved tuition fee guarantees for continuing international students and that standardizes the approach to tuition assessment for students who change programs midstream. These standardized rules apply to both UBC Vancouver and UBC Okanagan students. They will be presented to the Board as an information item.

Because these are administrative procedures, an extensive consultation was not conducted. The UBC Alma Mater Society (AMS) and UBC Students' Union Okanagan (UBCSUO) were informed of the tuition assessment rules on September 27, 2017. The Graduate Student Society (GSS) was informed on September 30, 2017, and the International Students' Association (ISA) was informed on October 3, 2017. All parties were given an opportunity to provide feedback. To date, none has been received.

Cc: Dr. Kathleen Ross
Dr. Deborah Buszard
Dr. Cynthia Mathieson