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| SUBJECT | Student Support Initiative Update |
| SUBMITTED TO | Finance Committee |
| MEETING DATE | November 19, 2021 |
| SESSION CLASSIFICATION | Recommended session criteria from Board Meetings Policy: OPEN |
| REQUEST | For information only - No action requested |
| LEAD EXECUTIVE | Peter Smailles, Vice-President Finance & Operations |
| SUPPORTED BY | Ainsley Carry, Vice-President Students Karamjeet Heer, Comptroller Samantha Reid, Executive Director, Office of the Vice-President Students David Shorthouse, Executive Director, Academic Initiatives Matt Boydston, Assistant Comptroller |

PRIOR SUBMISSIONS

Allocation of incremental 2020-2021 tuition revenue was most recently considered by the Finance Committee in [September 2021](#).

EXECUTIVE SUMMARY

At the April 2021 meeting, the UBC Board of Governors approved allocation to student support initiatives of incremental revenue arising from 2020-2021 Board-approved tuition rate increases (\$18 million comprising \$15.2 million at UBCV and \$2.8 million at UBCO). The Board also provided direction that up to \$4 million may be spent through Academic Excellence Funds (AEF) specific to Quarantine Bursaries.

The monthly forecasting and reporting process ensures that funds remain fully allocated as well as capturing potential new initiatives in anticipation of fully spending the funds by year end. Ongoing monitoring will ensure that a repository of opportunities to re-purpose unspent funds where appropriate is maintained.

Any unspent funds will be re-purposed based on the same criteria originally used to allocate the \$18 million, outlined below:

- The request must be for Student Financial Aid, cost of living support (housing, food security) and hybrid learning initiatives
- The request must be for new initiatives to support student facing COVID-19 related expenses
- The expenditure must be unplanned and/or is an unforeseeable deviation from the FY22 approved budget
- The request must be a *one-time* expenditure
- Reimbursements of prior year deficits will not be considered
- All requests must receive pre-approval prior to expenditures. Reimbursements of prior expenditures will not be considered

As of September 30, 2021, both UBCV and UBCO allocations remain fully committed against the entire \$18 million in funding for FY21-22.

PRESENTATIONS

1. Student Support Initiatives - 2021-2022 Fiscal Year Forecasted Spend



STUDENT SUPPORT INITIATIVES 2021-2022 FISCAL YEAR FORECASTED SPEND

FINANCE COMMITTEE
NOVEMBER 19, 2021



STUDENT SUPPORT INITIATIVES: FY21/22



- In April 2021 the UBC Board of Governors approved that incremental tuition rate increases of \$18m (UBCV: \$15.2m and UBCO: \$2.8m) will be allocated towards student support priorities.
- Board also provided direction that up to \$4m may be spent through Academic Excellence Funds (AEF) specific to Quarantine Bursaries.
- As of September 30th, both UBCV and UBCO allocations remain fully committed against the entire \$18m in funding for FY21/22.

STUDENT SUPPORT INITIATIVES: FORECAST



FY21/22 STUDENT SUPPORT COVID IMPACTED PRIORITIES

| | Original Board Approval - June 2021 | Forecasted Requirement - Sep 30th** |
|--------------------------------------------------------------|-------------------------------------|-------------------------------------|
| Student Financial Aid | 7,100,000 | 9,089,500 |
| Cost of Living | 2,912,000 | 2,562,000 |
| Delivery of Hybrid Teaching & Student Programs and Services* | 5,188,000 | 3,548,500 |
| STUDENT SUPPORT COVID IMPACTED PRIORITIES - UBCV | 15,200,000 | 15,200,000 |
| Student Financial Aid | 945,000 | 945,000 |
| Cost of Living | 1,080,000 | 1,080,000 |
| Delivery of Hybrid Teaching & Student Programs and Services | 775,000 | 775,000 |
| STUDENT SUPPORT COVID IMPACTED PRIORITIES - UBCO | 2,800,000 | 2,800,000 |
| Student Financial Aid | 8,045,000 | 10,034,500 |
| Cost of Living | 3,992,000 | 3,642,000 |
| Delivery of Hybrid Teaching & Student Programs and Services | 5,963,000 | 4,323,500 |
| STUDENT SUPPORT COVID IMPACTED PRIORITIES - UBC TOTAL | 18,000,000 | 18,000,000 |

Monthly forecasting and reporting process ensures that funds remain fully allocated as well as capturing potential new initiatives in anticipation of re-directing funds where appropriate to fully spend the funds by year end.

Notes:

*Original Approval included \$2m contingency as part of hybrid teaching category.

**UBCV Forecasted September 30th requirement includes approximately \$3m in Quarantine Bursary. September YTD spend is approximately \$1.6m and account is being monitored closely in case of changing government regulations around quarantine requirements.



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| SUBJECT | Student Affordability Task Force - Update |
| SUBMITTED TO | Finance Committee |
| MEETING DATE | November 19, 2021 |
| SESSION | Recommended session criteria from Board Meetings Policy: OPEN |
| REQUEST | For information only - No action requested |
| LEAD EXECUTIVE | Ainsley Carry, Vice-President Students |
| SUPPORTED BY | Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver Ananya Mukherjee Reed, Provost and Vice-President Academic, UBC Okanagan |

EXECUTIVE SUMMARY

The Student Affordability Task Force (SATF) began meeting in June 2021 and has hosted eight meetings since that time. Task force membership includes students, faculty, and staff (see list below) from both the Vancouver and Okanagan campuses.

Discussion topics and presentations have focused on two sets of related questions. The first concerns a conceptual understanding of student affordability and an understanding of the scope of the university's commitments towards affordability. Given the complexity involved in this exercise, task force members are working through the various aspects of the question in an iterative manner, taking into account various stakeholder perspectives and the available literature.

The second set of issues for the task force comprise the known challenges UBC students face in terms of affordability. These include: the financial aid process; food insecurity; housing costs; cost of educational materials (over and above tuition and fees); the availability of scholarships; the allocation of financial aid between merit-based and need-based criteria, tuition and aid for international students; student loan and debt burden; and, financial literacy and proper distribution of finance-related information to students so as to enable optimal financial decisions.

The task force has identified the following focus areas for formulating its first set of recommendations:

1. Develop a multi-year tuition framework
2. Revise the annual tuition consultation process
3. Minimize costs of educational materials wherever possible (beyond course fees + tuition)
4. Address cost of living challenges (food, housing, child care, etc.) through needs-based aid
5. Update processes and procedures for the implementation of financial aid
6. Devote the next phase of the Blue & Gold Campaign to need-based aid
7. Advocate for increased and improved student financial assistance programs at the provincial and federal government level
8. Consider the expansion of Board of Governors Policy LR10 eligibility (Financial Aid Policy) to address international student needs
9. Develop appropriate mechanisms and tools for enabling students to make informed financial decisions
10. Link student survey data and administrative data to provide the administration with more real-time insight on affordability concerns and trends

Some of the recommendations can be developed and implemented in the short-term while others require a longer-term approach. Some of them will require additional funding and some require process improvements.

The SATF will continue to meet through the end of the calendar year to finalize recommendations and determine funding and implementation requirements. Its recommendations will then be brought to the Board as they are formulated and implementation will follow Board approval.

Anticipated Timeline

November 2021: Update on the work of the Task Force to date, indicating areas of requested feedback and potential recommendations to the Board

December 2021 to February 2022: Further analysis, costing and prioritization of recommendations

March 2022: Presentation of report and recommendations to the Board of Governors

SATF co-chairs

Ainsley Carry, Vice-President Students, UBC

Ananya Mukherjee Reed, Provost and Vice-President Academic, UBC Okanagan

Andrew Szeri, Provost and Vice-President Academic, UBC Vancouver

SATF members

Ahmed Ahmed, Undergraduate student representative, SUO VP External, UBCO

Eshana Bhangu, Undergraduate student representative, AMS Vice-President Academic and University Affairs, UBCV Senate Student representative, UBCV

Lesley Charter-Smith, Director, Strategy and Decision Support

David Green, Professor, Vancouver School of Economics

Karamjeet Heer, Comptroller

Kimani Karangu, Graduate student representative, GSS President, UBCV

Stephanie McKeown, Chief Institutional Research Officer, Planning and Institutional Research (PAIR)

Dale Mullings, Associate Vice-President Students, UBCO

Pam Ratner, Vice-Provost and Associate Vice-President Faculty Planning, UBCV

Samantha Reid, Executive Director, Office of the Vice-President Students, UBCV

Kate Ross, Associate Vice-President Enrolment Services & Registrar

Teresa Tsang, Associate Registrar and Director of Finance, Student Financial Management, UBCV

Illustrative list of materials considered by the SATF

Task force discussions have been informed by an extensive set of materials considered by the task force.

1. 2020 Annual Report on Student Retention
2. Retention and Gradation DASHBOARD
3. 2020-21 Report on Student Financial Support
4. 2020 Tuition peer comparisons and benchmarking
5. 2019 Okanagan Graduate New to UBC survey
6. Undergraduate Experience Survey (UES) 2021_Student Finance & Affordability UBCO
7. Undergraduate Experience Survey (UES) 2021_Student Finance & Affordability UBCV
8. AMS Academic Experience Survey (AES)
 - 2021 AES Summary Report
 - AES Supplemental Data
9. FY2021 Emergency Bursary Data
10. Student Aid BC 2021-22 Student Guide
11. UBC Supports for Students with Disabilities