



SUBJECT	Student Affordability Task Force - Update
SUBMITTED TO	Finance Committee
MEETING DATE	February 17, 2022
SESSION CLASSIFICATION	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 Rehan Sadiq, Provost and Vice-President Academic pro tem, UBC Okanagan

EXECUTIVE SUMMARY

The Student Affordability Task Force (SATF), membership of which includes students, faculty, and staff (see list below) from both the Vancouver and Okanagan campuses, began meeting in June 2021. In the period between June 2021 and the February 17, 2022 Finance Committee meeting, the SATF will have hosted 12 meetings.

Task force discussion topics and presentations have focused on two sets of related questions, by an extensive set of materials considered by the task force (see list below). 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, the 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.

As a result of these deliberations, the task force has identified the following focus areas for formulating its set of recommendations:

1. Develop a multi-year tuition framework
2. Provide tools to help students make informed financial decisions
3. Revise the annual tuition consultation process
4. Minimize costs of educational materials
5. Address cost of living challenges (food security, housing, and childcare)
6. Update processes and procedures for the implementation of student aid
7. Further expand need-based aid to continuing international students
8. Increase fundraising for need-based aid
9. Develop indicators to monitor and assess student affordability over time
10. Advocate for increased student financial assistance programs at the provincial and federal government level

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 bring its recommendations to the Board in March 2022, with implementation to follow Board approval.

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

* Rehan Sadiq assumed the role of Okanagan Provost and Vice-President Academic pro tem on February 1, 2022, succeeding Ananya Mukherjee Reed, and is now supporting the work of the SATF.

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

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

Student Affordability Task Force (SATF)

Ainsley Carry, Vice-President Students

Andrew Szeri, Provost and Vice-President Academic, UBCV

February 17, 2022



Student Affordability Task Force (SATF)



Goals:

- Understand affordability issues at UBC
- Prioritize recommendations for consideration by the administration and the Board of Governors
- Identify the scope of responsibility between students and the university in addressing affordability

SATF membership



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

Project Management

Janet Kalesnikoff Senior Manager, Strategic Projects, UBCO

SATF membership



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

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SATF recommendations



1. Develop a multi-year tuition framework
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5. Address cost of living challenges (food security, housing, and childcare)
6. Update processes and procedures for the implementation of student aid
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10. Advocate for increased student financial assistance programs at the provincial and federal government level

SATF recommendations



Objectives	Recommendations
Enhance Student Financial Decision Making	<ol style="list-style-type: none">1. Develop a multi-year tuition framework2. Provide tools to help students make informed financial decisions
Engage Students in Decisions Regarding Tuition	<ol style="list-style-type: none">3. Revise the annual tuition consultation process
Support Financial Wellness	<ol style="list-style-type: none">4. Minimize costs of educational materials5. Address cost of living challenges (food security, housing and child care)6. Update processes and procedures for the implementation of student aid7. Further expand need-based aid to continuing international students8. Increase fundraising for need-based aid
Focus Efforts Through Incisive Metrics	<ol style="list-style-type: none">9. Develop indicators to monitor and assess student affordability over time
Advocate for Student Affordability	<ol style="list-style-type: none">10. Advocate for increased student financial assistance programs at the provincial and federal government level

Develop a multi-year tuition framework



Set tuition (and other related fees, if possible) for all the expected years of the student's degree program at the time the student is admitted

- Group students by cohort based on program and admission date

Provide tools to help students make informed financial decisions



Improve financial planning and wellness offerings on both campuses

- Approaches focus on enhancing and promoting financial wellness workshops (and offering them at UBCO), changing the first-year cost calculator to a multi-year calculator, and creating an online module as part of Academic Essentials

Revise the annual tuition consultation process



Support increased/deeper engagement with elected student leadership to:

- Understand student priorities linked to budgetary needs (**inform university**)
- Allow for a deep dive into the university's budget and budget process (**inform students**)

Minimize costs of educational materials



Ensure that: 1) the cost of educational materials is not a barrier to student success; and 2) UBC students have confidence that their educational materials costs are fair

- Approaches focus on costs of Digital Learning Materials, Open Education Resources (OERs), and opportunities for large-scale publisher negotiations on textbooks and/or digital assessment resources

Address cost of living challenges (food security, housing, and child care)



Develop research and a long-term strategy to learn more about systemic and comprehensive solutions to address food, housing, and child care costs

- Approaches focus on Food Hubs, a need-based housing bursary, a low-cost housing initiative that considers co-op housing and nano units, growth of university operated child care, and advocacy with the Provincial and Federal government (expand \$10/day child care, etc.)

Update processes and procedures for the implementation of student aid



Ensure students are aware of financial resources available to them, combat student loan misinformation, and lower barriers for students to access financial aid

- Approaches focus on online applications for emergency funding, a review of the current communication strategy, flexible bursary funding, and addition of a student financial component (IRP student)

Further expand need-based aid to continuing international students



Investigate the feasibility of establishing a bursary program for International students

- Approaches focus on an LR10 policy review, exploring the possibility of an international housing bursary and reallocation of merit-based vs. need-based funding

Increase fundraising for need-based aid



Prioritize need-based funding (bursaries and hybrid awards) when fundraising for student awards

- Implement a \$2 million matching program to serve as an incentive for donors to give more and larger gifts to priority award types
- Build awareness and support for need-based aid as a key feature of the upcoming comprehensive campaign

Develop indicators to monitor and assess student affordability over time



Ensure metrics assess the efficacy of initiatives and funds directed to supporting student affordability

- Approaches focus on utilizing metrics to raise awareness of current initiatives and assure the campus community that the University is a responsive and responsible steward of funds

Combine data sets (where possible and appropriate) to reveal new insights and provide a more comprehensive understanding of student affordability at UBC

Advocate for increased student financial assistance programs at the provincial and federal government level



Ensure more students benefit from access to sufficient aid

- Approaches focus on expanding and extending existing government programs, increasing loan maximums and award amounts, and building a coalition with post-secondary institutions and student groups to advocate for larger-scale student financial aid reform

SATF Budget Requests



	Recommendation	Budget Request	Notes
1	Develop a multi-year tuition framework	TBD; No budget request this FY	
2	Provide tools to help students make informed financial decisions	TBD; No budget request this FY	
3	Revise the annual tuition consultation process	TBD; No budget request this FY	
4	Minimize costs of educational materials	TBD; No budget request this FY	OER - \$250K (UBCV) and \$50K (UBCO) allocated this FY
5	Address cost of living challenges (food security, housing and child care)	Food hub - \$425K (one time); \$265K (ongoing)	Housing - Housing subsidy - \$1.5M (currently in place)

SATF Budget Requests



	Recommendation	Budget Request	Notes
6	Update processes and procedures for the implementation of student aid	TBD; No budget request this FY	
7	Further expand need-based aid to continuing international students	TBD; No budget request this FY	
8	Increase fundraising for need-based aid	\$2M matching funds - \$500K FY23	FY24 - \$750K FY25 - \$750K
9	Develop indicators to monitor and assess student affordability over time	TBD; No budget request this FY	
10	Advocate for increased student financial assistance programs at the provincial and federal government level	TBD; No budget request this FY	