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<b>SUBJECT</b>	Student Affordability Task Force Update
<b>SUBMITTED TO</b>	Finance Committee
<b>MEETING DATE</b>	March 22, 2023
<b>SESSION CLASSIFICATION</b>	Recommended session criteria from Board Meetings Policy: OPEN
<b>REQUEST</b>	For Information
<b>LEAD EXECUTIVE</b>	Ainsley Carry, Vice-President Students
<b>SUPPORTED BY</b>	Gage Averill, Provost and Vice-President Academic, UBC Vancouver Rehan Sadiq, Provost and Vice-President Academic, UBC Okanagan Heather McCaw, Vice-President Development & Alumni Engagement Samantha Reid, Executive Director, Office of the Vice-President Students Rella Ng, Associate Vice-President Enrolment Services & Registrar

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#### PRIOR SUBMISSIONS

At the December 2022 Board meeting a highlight update was provided on this subject, entitled [Tuition Engagement 2023-2023 and Student Affordability Task Force](#).

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#### EXECUTIVE SUMMARY

##### *Student Affordability Update*

In March 2022, the Board of Governors approved the Student Affordability Task Force (SATF) report. The final report included ten recommendations to advance the student affordability, including proposals for housing, food, textbooks, tuition, student aid, and continued research on affordability. The goals of the Student Affordability Task Force were focused on:

- Understanding 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

This update aims to provide a progress update on each of the recommendations. Much progress has been made since the approval including:

- Establishment of a SATF Implementation Committee including staff representation from across the two campuses and students.
- Implementation and advancement of the recommendations including assessment, scoping, establishment of working groups, and implementation
- Establishment of a Graduate Student Focused Working Group and a SATF Communications Working Group

In August 2022 a Student Affordability Task Force Implementation Committee was established with representation of students, faculty, and staff from both campuses. Additionally, leads were identified for each recommendation, and each co-lead is responsible for the oversight and implementation of the recommendation. Each of the recommendation are at different places in their implementation as some require a phased approach or differing timelines.

Objectives	Recommendation	Lead(s)
Enhance Student Financial Decision Making	1. Develop a multi-year tuition framework	Yale Loh, Matt Boydston, Frank Laezza
	2. Provide tools to help students make informed financial decisions	Rella Ng, Annie Yim, Bert Annear
Engage Students in Decisions Regarding Tuition	3. Revise the annual tuition consultation process	Samantha Reid, Dale Mullings
Support Financial Wellness	4. Minimize the costs of educational materials	Simon Bates, Heather Berringer
	5. Address cost of living challenges (food security, housing and child care)	Andrew Parr
	6. Update student aid processes and procedures	Rella Ng, Annie Yim, Bert Annear
	7. Expand need-based air for continuing international students	Rella Ng, Annie Yim, Bert Annear, Damara Klassen
	8. Increase fundraising for need-based air	Hillary Gosselin
Focus Efforts Through Incisive Metrics	9. Advocate for increased student financial assistance programs at the provincial and federal government level	Adriaan de Jager
Advocate for Student Affordability	10. Develop indicators to monitor and assess student affordability over time	Lesley Charter- Smith, Stephanie McKeown
Support Financial Wellness	11. <b>NEW</b> Reduce and/or eliminate unnecessary/ unwarranted fees	Gage Averill, Simon Bates

The content of the SAFT update has been prepared by the Student Affordability Task Force for the UBC Board of Governors and the UBC Community.

**PRESENTATIONS**

1. Student Affordability Task Force (SATF) Implementation Update





# Student Affordability Task Force (SATF) Implementation Update

March 2023





# STUDENT AFFORDABILITY TASK FORCE (SATF)



## Observations:

- Grapple with the changing **scope of responsibility** between students and the university
- Understand **affordability** at UBC, specifically
- **Inaccurate interpretations data** driving narrative. **Additional data required**
- Recommendations **process improvement** (no cost) and investments (costs)

# STUDENT AFFORDABILITY TASK FORCE (SATF)



## Facts:

- **UBC is the second largest provider of student financial aid** as a percentage of tuition revenue
- **UBC's domestic tuition is the lowest** of the research institutions in the peer group, with the exception of Thompson Rivers University
- **UBC's international tuition is lower than that of the University of Toronto and McGill University** and the highest of its BC peers
- **UBC housing rates** are below the local rental market and lower than comparator universities
- Average **student loan debt** in Canada is \$26,000 and \$11,000 in BC.
- UBC provided \$2.4m in **food insecurity support**, the most of any Canadian university.

# SATF RECOMMENDATIONS & IMPLEMENTATION LEADS



Recommendations	Lead(s)
1. Develop a multi-year tuition framework	Yale Loh, Matt Boydston
2. Provide tools to help students make informed financial decisions	Rella Ng, Annie Yim, Bert Annear
3. Revise the annual tuition consultation process	Samantha Reid, Dale Mullings
4. Minimize costs of educational materials	Simon Bates, Heather Berringer
5. Address cost of living challenges (food security, housing and child care)	Andrew Parr
6. Update student aid processes and procedures	Rella Ng, Annie Yim, Bert Annear
7. Expand need-based aid for continuing international students	Rella Ng, Annie Yim, Bert Annear, Damara Klassen
8. Increase fundraising for need-based aid	Hillary Gosselin
9. Advocate for increased student financial assistance programs at the provincial and federal government level	Adriaan de Jager
10. Develop indicators to monitor and assess student affordability over time	Lesly Charter-Smith, Stephanie McKeown
<b>New</b> Reduce and/or eliminate unnecessary/unwarranted fees	Gage Averill, Simon Bates



# **SATF RECOMMENDATIONS UPDATE**

# RECOMMENDATION 1

## DEVELOP A MULTI-YEAR TUITION FRAMEWORK



- **Reduce uncertainty** around tuition increases for students by considering setting approved tuition rates over multiple years.
  - **Not yet implemented**
  - Working Group will be **established March 2023** and kick off meeting to be held April 2023.



## RECOMMENDATION 3

### REVISE THE ANNUAL TUITION CONSULTATION PROCESS



- A revised tuition consultation process **has been implemented** for 2023-2024. Focused on two key areas:
  - Increased **engagement** with student governance
  - A **year-round tuition engagement** with student body

## RECOMMENDATION 3

# REVISE THE ANNUAL TUITION CONSULTATION PROCESS



### A look ahead:

- **Reviewing feedback** in collaboration with student leaders on new elements
- Tuition consultation focused on (1) understanding **affordability pressures** and (2) “**yes/no**” question

## RECOMMENDATION 4

### MINIMIZE COSTS OF EDUCATIONAL MATERIALS



- **Progress has been made** on reducing the costs of educational materials.
  - A **draft policy** to limit the required costs of digital learning materials is going through the Academic Policy Committee UBCV to align with UBCO Policy.
  - Funds have been made available to create, extend, and reuse **open educational resources**.

## RECOMMENDATION 4

### MINIMIZE COSTS OF EDUCATIONAL MATERIALS



#### A look ahead:

- A **budget ask** to support **OER Impact Awards** (\$10K per campus, per year for 4 years)
- A **budget ask** for continued **OER funding** for UBCV at \$250K per year for 4 years. At UBCO continue excellence funding beyond current allocation



## RECOMMENDATION 5

# ADDRESS COST OF LIVING CHALLENGES - FOOD INSECURITY



### Food Insecurity

- **\$1.6 million in student financial aid** is available for food insecurity needs
- \$800K in support food insecurity initiatives will be funded via cash reserves in FY23/24
- **On-going funding** to support food insecurity initiatives will be funded via cash reserves and student financial aid

# RECOMMENDATION 5

## ADDRESS COST OF LIVING CHALLENGES - HOUSING



### Housing

- Housing Action Plan (HAP) review underway; **focus is on policies** associated with affordability, access via growth, and diversity of units to allow for a wider range of pricing.
- Advocating for **lower cost borrowing options** for capital developments with provincial government.
- **Need-based bursary programs** are available to students

# RECOMMENDATION 5

## ADDRESS COST OF LIVING CHALLENGES - CHILD CARE



### Childcare

- UBCO will transfer to **UBC-operated child care on April 1, 2023**; one additional centre will open in late-summer 2023
- UBCCCS has applied for and received **\$10/day childcare** in all infant & toddler program centres. New, lower rates will go into effect December 1, 2022. This represents a monthly savings of over \$800 per child.
- **Affordable Child Care Benefit** now available for low income families

# RECOMMENDATION 5

## ADDRESS COST OF LIVING CHALLENGES



### A look ahead

- Establish a 5-year plan and **stable funding for food insecurity** on both campuses
- Applying for **\$10 per day childcare** during the next application intake period, focusing on all 3-5 year old centres.
- Apply for **childcare capital funding** grants on a project by project basis.
- Maintain **below market housing rates**





## RECOMMENDATION 9

### DEVELOP INDICATORS TO MONITOR AND ASSESS STUDENT AFFORDABILITY OVER TIME

- A working group has been established with representation from staff, students across both campuses.
  - A set of guiding principles to support decision making throughout the process and a confirmed scope is being finalized



## RECOMMENDATION 9

# DEVELOP INDICATORS TO MONITOR AND ASSESS STUDENT AFFORDABILITY OVER TIME

### A look ahead

- **Complete an inventory** of existing student affordability initiatives that support the SAFT recommendations (Fall 2023)
- A comprehensive set of metrics and identified data to measure the recommendations contained in the SAFT report (Summer 2024)
- A measurement and sustainment plan (Winter 2024)

## RECOMMENDATION 10

# ADVOCATE FOR INCREASED STUDENT FINANCIAL ASSISTANCE



### Implemented:

- Through federal and provincial budget submissions, the provincial PSE funding review, campus visits and bi-lateral meetings with government officials, **UBC has advocated for increased grant and scholarship aid for undergraduate and graduate students.**
- Provincial and federal governments have **eliminated interest on student loans and repayment thresholds increased;**
- **BC Graduate Scholarship funding** was extended and **eligibility for BC Access Grant** expanded



## RECOMMENDATION 2

# PROVIDE TOOLS TO HELP STUDENTS MAKE INFORMED FINANCIAL DECISIONS

- Financial planning services
  - 2022W T1 hosted 5 financial wellness/planning workshops
  - 2022W T2 hosted 2 financial wellness/financial planning workshops with departments
  - Created new webpages
    - How to Budget – a step by step guide
    - Upcoming workshop page
    - Financial Resources Canvas page with past workshop recordings
  - Completed analysis of including financial wellness module in Academic Essentials





## RECOMMENDATION 2

# PROVIDE TOOLS TO HELP STUDENTS MAKE INFORMED FINANCIAL DECISIONS

### A look ahead

- 7 workshops scheduled from March to August 2023
- Research and investigate the cost and scope to rebuild new platform for cost calculator
- Target Summer 2023 to incorporate financial wellness modules in Academic Essentials

## RECOMMENDATION 6

# UPDATE STUDENT AID PROCESSES AND PROCEDURES



- Launched online Emergency Bursary application
- Collecting one year's worth of data from emergency bursary application
  - Data collection will be complete by Summer 2023
- Reviewed current communication strategies to ensure students are aware of financial resources are available to them
  - New webpage being developed to inform students of holistic resources will be complete by March 2023

## RECOMMENDATION 6

# UPDATE STUDENT AID PROCESSES AND PROCEDURES



### A look ahead

- Ongoing review of web pages related to financial supports will be complete by Summer 2023
- Student financial profiles outlining financial costs and resources
  - June 2024 with the implementation of IRP



## RECOMMENDATION 7

# EXPAND NEED-BASED AID FOR CONTINUING INTERNATIONAL STUDENTS

- Investigate the feasibility of an international housing bursary
  - Analysis complete and recommendation is to not proceed with International Undergraduate Housing Bursary for international students living off campus
- Investigate the feasibility of reallocating merit-based funding to need-based funding
  - Analysis in progress and target to be done by April 2023

## RECOMMENDATION 7

# EXPAND NEED-BASED AID FOR CONTINUING INTERNATIONAL STUDENTS



## A look ahead

- Review Financial Aid Policy LR10



## Project Summary

- In response to the need identified in the Student Affordability Task Force Report and Recommendations, and in support of UBC's Financial Aid Policy (LR10).
- Goal to raise **\$100-million** - addressing affordability challenges students face.
- Focus will be on need-based aid such as bursaries and hybrid awards, as well as supporting affordability programs and services, such as food security.
- Donor engagement and increased giving will be encouraged through a UBC commitment of **\$2-million** in matching funds from UBC.

# KEY PRIORITIES

Increase donor investment to:

- Support more students facing affordability challenges on Vancouver and Okanagan campuses – all faculties & schools, undergraduate & graduate, international & domestic

Increase the number and value of donor funded awards through the:

- Establishment of new need-based and hybrid awards

Utilize matching funding to incentivize donors, as well as encourage more and larger gifts to need-based giving





# FUNDRAISING PLAN

Launched September 24 with FORWARD, the campaign for UBC

Reengage Blue & Gold donors to focus on need-based awards

Use match as an incentive to build major gift pipeline in the early public phase of campaign creating time and opportunities for next gift conversation before end of campaign

Engage new and existing audiences



# RESULTS & NEXT STEPS

\$9,090,337 raised (as of Feb 24) from  
3,398 donors

Participating in Student Affordability  
Task Force

Ongoing fundraising including Giving Day -  
April 5







“All that I want to accomplish, my hopes and dreams, are possible in no small thanks to you.”  
Ahmed Masood, 4<sup>th</sup> year Kinesiology student



THE UNIVERSITY  
OF BRITISH COLUMBIA

# **NEW GRADUATE STUDENT WORKING GROUP**



Establishment of a graduate student working group focused on:

- Understanding how affordability challenges impact graduate students
- Graduate Student funding resources requires special focus and specific expertise.
- Co- leads:
  - Julian Dierkes Senior Associate Dean, Students, UBCV
  - Peter Simpson Dean, College of Graduate Studies, UBCO
- Working group composed of staff, faculty, and student representatives from across both campuses.

# COMMUNICATIONS WORKING GROUP



Working group to develop a comprehensive communications strategy for student affordability.

- Co- leads have been identified
- Working group kick off meeting is scheduled
- Working group membership includes representation across both campuses