



<b>SUBJECT</b>	Student Affordability Task Force Update
<b>SUBMITTED TO</b>	Board of Governors
<b>MEETING DATE</b>	March 27, 2024
<b>SESSION CLASSIFICATION</b>	Recommended session criteria from Board Meetings Policy: OPEN
<b>REQUEST</b>	For information only - No action requested
<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 Rella Ng, Associate Vice-President Enrolment Services and Registrar Hillary Gosselin, Associate Vice-President Development & Alumni Engagement Dale Mullings, Associate Vice-President Students, UBC Okanagan Samantha Reid, Executive Director, Office of the Vice-President Students Janet Kalesnikoff, Director, Academic Strategic Initiatives, UBC Okanagan

#### PRIOR SUBMISSIONS

At the March 2023 Board meeting, a highlight update was provided on this subject, entitled "[Student Affordability Task Force Update](#)"

#### EXECUTIVE SUMMARY

##### *Student Affordability Update*

In 2019, UBC committed to developing a comprehensive plan to address affordability challenges that students face. This work was led by the Student Affordability Task Force (SATF), a task force of students, staff, and faculty from both campuses. The task force developed 10 recommendations with short-, medium-, and long-term approaches towards achieving them. In March 2022, the Board of Governors approved the SATF report and recommendations.

In August 2022, a Student Affordability Task Force Implementation Committee was established with representation of students, faculty, and staff from both campuses. Leads or co-leads were identified for each recommendation, and each lead/co-lead is responsible for the oversight and implementation of the recommendation. Each recommendation is at different places in their implementation and advancement, with differing timelines. This update aims to provide a progress update on each recommendation.

SATF Objectives	Recommendations	Lead(s)
1: Enhance Student Financial Decision Making	1. Develop a multi-year tuition framework	Rella Ng, Associate Vice-President, Enrolment Services and Registrar
	2. Provide tools to help students make informed financial decisions	Rella Ng, Associate Vice-President, Enrolment Services and Registrar Annie Yim, Deputy Registrar, UBCV
2: Engage Students in Decisions Regarding Tuition	3. Revise the annual tuition consultation process	Samantha Reid, Executive Director, Office of the Vice-President Students Dale Mullings, Associate Vice-President, Students, UBCO

3: Support Financial Wellness	4. Minimize costs of educational materials	Simon Bates, Vice Provost and Associate Vice President, Teaching and Learning, UBCV Heather Berringer, Associate Provost, Academic Operations and Services UBCO Christina Hendricks, Vice-Provost and Associate Vice-President, Teaching and Learning Pro Tem, UBCV
	5. Address cost of living challenges (food security, housing and childcare)	Andrew Parr, Associate Vice-President Student Housing and Community Services
	6. Update student aid processes and procedures	Rella Ng, Associate Vice-President, Enrolment Services and Registrar Annie Yim, Deputy Registrar, UBCV
	7. Expand need-based aid for continuing international students	Rella Ng, Associate Vice-President, Enrolment Services and Registrar Damara Klassen, Executive Director, International Student Initiative
	8. Increase fundraising for need-based aid	Hillary Gosselin, Associate Vice President, Development and Alumni Engagement
4: Advocate for Student Affordability	9. Advocate for increased student financial assistance programs at the provincial and federal government level	Adriaan de Jager, Associate Vice President, Government Relations and Community Engagement
5: Focus Efforts Through Incisive Metrics	10. Develop indicators to monitor and assess student affordability over time	Lesley Charter-Smith, Director, Strategy and Decision Support Stephanie McKeown, Chief Institutional Research Officer, Planning and Institutional Research

In addition, a Graduate Student Working Group, led by Peter Simpson, Dean, College of Graduate Studies, UBCO, and Julian Dierkes, Senior Associate Dean, Students, UBCV was established.

The content of this update has been prepared by the SATF Implementation Committee for the UBC Board of Governors and the UBC Community.

### **Student Affordability Task Force Recommendations Update**

#### **Recommendation 1: Develop a multi-year tuition framework**

##### *Recommendation*

The purpose of this recommendation is to reduce uncertainty around tuition increases for students by considering setting Board of Governors approved tuition rates over multiple years so that admitted students can plan for their tuition costs for all the years of their degree. Understanding how tuition costs will change will help students develop a financial plan, particularly international students whose tuition is not covered by the province's tuition limit policy.

##### *Progress to date*

- Recommendation is on schedule as per the proposed timeline with progress being made on the completion of an environmental scan of which Canadian Post-Secondary Institutions (PSIs) offer a multi-year tuition framework.
- A draft proposal that identified the scope and objective of the multi-year tuition framework and 4 proposed models has been developed for further review and financial modelling; we will align this with the tuition transparency rule from the Ministry of Post-Secondary Education and Future Skills'.

### *A look ahead*

- With the recent announcement from the Ministry of Post-Secondary Education and Future Skills regarding tuition transparency where public PSIs will be required to post tuition levels for students for the entire time they are studying, further research will be conducted to learn and explore how other BC PSIs intend to implement tuition transparency for international students.
- Detailed analysis of risks associated with each of the proposed models and recommendation on the multi-year tuition framework.

### **Recommendation 2: Provide tools to help students make informed financial decisions**

#### *Recommendation*

This recommendation aims to continue or enhance information on university costs provided to prospective students and financial planning services offered to all UBC students. These may include financial wellness workshops; a UBC cost calculator expansion to calculate multi-year costs; a financial wellness module in Academic Essentials (Vancouver) and UBC101/105 (Okanagan) and a course offered to newly admitted undergraduate students.

#### *Progress to date*

Progress has been made on the Vancouver campus in the following areas:

- In the past year, 23 Financial Wellness Workshops were offered on the Vancouver campus with over 2500 student attendees. The content of the workshops was updated with new material compared to the previous year based on feedback from students. In addition, the material is also updated based on ‘current’ financial information need and support students require.
- Updated the Financial Fundamentals workshops with focus on Indigenous Students, and Students with Disabilities.
- Successfully implemented new content within [Academic Essentials](#) programming. This resulted in a "Money Matters" module under the "Live Well to Learn Well (LW2LW)" course for incoming undergraduate students which went live for student registration in July 2023.
- Department to Department Information Sessions with 2 sessions scheduled between SSA Leadership and ISA, and Sauder Advising.
- The following webpages were created:
  - The "[How to Budget – a step-by-step guide on how to budget](#)" website was created, using the "[Spending Plan template](#)" as a foundation
  - [Financial Resources Workshops page](#), providing links to upcoming workshops and a Financial Resources Canvas page with past workshop recordings.
- Collaboration with Student Communication Services (SCS) team to develop and implement a communication strategy to promote financial wellness resources with details as follows:
  - Social Media Engagement:
    - Promoted financial wellness resources, events, and other content on @ubclife social channels (Instagram, TikTok, X/Twitter).

- SCS experimented with new strategies to engage students with content related to finances and food security on social media with short-form video content, photography, and tactics led by student content creators
- These strategies have seen high engagement, and SCS will be taking these learnings to build on this success in future financial wellness content
- New Student Onboarding:
  - The 'New to UBC' newsletter campaign includes a comprehensive suite of financial wellness editorial content
  - Introduced new students to key concepts around financial wellness and financial literacy
  - Onboarded new students to financial supports and resources available to them at UBC
- Audience Research:
  - SCS engaged a research agency to do detailed research on the student audience, their current communications behaviors, expectations, and perceptions.
  - This research has played a key role in better aligning content related to related areas like food security, financial planning, and support resources.
- Collaboration with Student Housing and Community Services (SHCS) Communicators:
  - SCS works closely with the SHCS communications and marketing team to improve student access and awareness of affordability issues, particularly concerning food and housing.

Progress has been made on the Okanagan campus in the following areas:

- Two sessions were hosted on student loans and the UBC general bursary, and specific sessions were hosted for Centennial award recipients. 9 sessions are scheduled for specific audiences or as part of Destination UBC through until July 2024.
- Weekly drop-in financial information sessions launched in fall 2023. Of the 9 office hour sessions, 3 were attended.
  - Drop-in offices hours (2 hours per week) are continuing through 2023/2024 term two.
  - In September 2024, there will be collaborative sessions with Orientation to give new students this information.
- Included a financial wellness module “Personal Financial Matters” in UBC101. 65% of students reported that the financial module was timely, and delivered when they needed the information the most.
- Revisions and enhancements to resources on the Student Services website which includes:
  - [Payment due dates](#)
  - [How to pay your tuition and fees](#)
  - [Financial support services](#)
  - [Awards, scholarships, and prizes](#)
  - [Budgeting basics](#) which include resources on creating a budget, feeding yourself on a budget, what will my first-year cost? among others

### *A look ahead*

- UBC cost calculator expansion to provide students greater clarity and guidance to estimate multi-year costs. Work is estimated to be completed within the next fiscal year (April 2024-March 2025).
- Continue to promote and disseminate targeted information about tuition costs, scholarships, Band funding, student loans and bursaries with related timelines.
- Continuous improvements in information dissemination tactics for resources and timelines of funding opportunities, and clear and transparent communication to international, domestic, and Indigenous prospective students.
- Continuous improvements and refinements to Vancouver Financial Wellness Workshops. Consideration of offering smaller workshops where the sessions are recorded and posted on Canvas for students to watch as their schedule and interest permits.
- An online “Spending Reset” financial wellness session is planned for February and November 2024 (Okanagan)

### **Recommendation 3: Revise the annual tuition consultation process**

#### *Recommendation*

The purpose of this recommendation is to deepen engagement with elected student leaders through the university’s budget process to understand priorities, financial restraints and trade-offs and engage in in-depth discussions regarding tuition; develop a robust student survey to better understand their financial position and needs in order to inform the university budget, priorities, and tuition and mandatory fee increases; and implement a comprehensive communications strategy to keep all students informed of the university’s budget.

#### *Progress to date*

Progress has been made in the following areas:

- Developed a revised annual student survey to better understand the students’ financial position and needs to inform the university budget, priorities, tuition and mandatory fee increases.
- Enhanced and focused engagement with elected student leaders to understand administrative and academic operations, student priorities, tuition proposals and university budget.
- Development and launch of a year-round [tuition engagement website](#).
- Creation of [Budget 101 webpage](#) – series of meetings with student leadership and in partnership with finance team on both campuses to provide students in-depth understanding on university budget.

### *A look ahead*

- Continuous monitoring and engagement with student leaders and UBC students in the overall annual tuition consultation process
- FY-24-25 tuition engagement will be executed as per LR 4 policy with continued, enhanced and focused engagement with elected student leaders.

### **Recommendation 4: Minimize costs of educational materials**

#### *Recommendation*

This recommendation aims to develop a formal policy to limit the required cost of Digital Learning Materials through the Academic Policy Committee of the Vancouver Campus, to align with UBCO Policy O-131.2; ensure continuation of funding streams for the adoption of Open Educational Resources into credit-based courses and

resource an annual award to incentivize the use of open educational resources; and create a cross-campus working group to explore opportunities for large-scale publisher negotiations on textbooks and/or digital assessment resources, resulting in reduced costs for students

#### *Progress to date*

Progress has been made in the following areas:

- A formal policy to limit the required cost of digital learning materials was proposed by the Academic Policy Committee of the Vancouver campus and passed by the Vancouver Senate in March 2023, effective Sept. 2023, Policy V-131. It aligns in many respects with UBCO Policy O-131.2
- Funding was secured for the following:
  - Open Education Resources (OER) for both campuses - 250k for Vancouver campus and 50k for the Okanagan campus per year - until 2027, to continue the adoption, adaptation, creation and/or integration of OER into credit-based courses.
  - Open Education Excellence and Impact awards - 2 awards on each campus (one individual, one team), 10k per campus per year -until 2027

#### *A look ahead*

- Creation of a cross-campus roundtable (tentative name: Learning Resources Roundtable) endorsed by SATF to explore potential collaborative opportunities to further reduce students' educational materials costs (whether textbooks or digital assessment tools) through additional initiatives.

### **Recommendation 5: Address cost of living challenges (food security, housing and childcare)**

#### **Food Insecurity**

##### *Recommendation*

This recommendation aims to open and operate permanent spaces for ongoing physical Food Hubs on both campuses; expand UBC's Meal Share Program; and initiate Community-Led Food Security Grant Program, among others.

##### *Progress to date*

Progress has been made in the following areas:

- Completion of the student-led community engagement which informed the development of the Community Food Hub plan.
- Temporary Food Hub spaces piloted on both campuses
  - 3-Year Pilot Program (2022-2025) for [Picnic](#) launched on the Okanagan Campus: Space opened in January 2023. The initiative encompasses a range of programs, including food skill workshops, a breakfast program, community meals, a farmers' market, and a nutrition education program. Strategic partnerships have been established with the Student Union Okanagan (SUO) for funding support and collaboration on their Pantry program. Additionally, Food Services has contributed to the initiative by providing the Picnic space on loan.
  - 3-Year Pilot Program (2022-2025) for the Food Hub [Market](#) on the Vancouver campus that opened summer 2022. The program includes a low-cost grocery store, food literacy and food skills programs, and resources to advance food security. The program is co-led by Student Health and Wellbeing staff, co-op students and over 40 student volunteers. Strategic partnership with Food Services and the Centre for Interactive Research and Sustainability allows space use. A cost analysis and sustainability model are currently being explored.

- Implementation and evaluation of the Meal Share program completed on both campuses.
  - UBC Okanagan Meal Share program relaunched Oct. 2023 running through Apr. 24.
  - UBC Vancouver Meal Share launched in Feb 2024 and will be evaluated to ensure equitable access.
- One-time funding secured for the community-led food security grant program. \$800,000 one-time funding allocated to Food Security Initiatives for 23/24.
  - \$120,000 allocated to the Okanagan campus was used to fund the [Picnic Food Hub](#) and the Campus Partner Grocery Card program. The Campus Partner Grocery Card program provides at-risk students with grocery cards and administered via Campus Wellness & Education. Campus Wellness & Education worked with student leadership at Student Union Okanagan to determine the allocation of \$120K as follows.
    - \$61K for campus partner grocery card program and food security support. \$10K was provided to Athletics and Recreation to support the establishment of a food hub satellite site for student athletes in the Gymnasium. The remaining \$51K was used to purchase grocery cards and distributed as follows:
      - \$10K – Indigenous Programs and Services
      - \$10K – Global Engagement Office
      - \$8K – Student Wellness
      - \$5K – Disability Resource Centre
      - \$5K – Sexual Violence Prevention & Response (SVPRO)
      - \$5K – Graduate students (distributed via Picnic)
      - \$1K – Ombudsperson
      - \$7K – Student Union Okanagan of UBC Advocacy Office
    - Grocery cards are distributed by the departments to students who need food support. The amount given is at the department's discretion. Cards are in increments of \$50 and \$100.
    - \$34K for programming supplies for Picnic food programming and \$25K for student staff support to help lead food programming. As a result of this funding (in addition to several other funding sources):
      - Six food and nutrition programs: grab and go breakfast program, food skills workshops, community meals, a campus farmer's market, wellness outreach cart, and nutrition education programming.
      - Approximately 700-900 students visit every week for these programs.
        - Averaging 110 students each morning for breakfast program
        - Averaging 100 students each community meal (1-2 meals per week)
        - Approx. 20 students each week via food skills workshops
        - Farmer's market attracts between 100-200 people per market (every two weeks)
        - Wellness outreach cart supports 50-150 students each time (approx. once per week)
        - Nutrition education programming supports students on an as needed basis
    - All programs are student-led and student leaders are mentored and supported by the Campus Health Dietitian. This year, 15 student staff leaders have taken a lead in program development and implementation. In addition, two dietetic program interns and one human kinetics practicum student have taken part in supporting food programming in Picnic.

- \$680,000 allocated to the Vancouver campus provides funding to the [AMS Food Bank](#), [GSS Acadia Food Hub](#), [GSS meal subsidy plan](#), [AMS Sprouts](#), and [Meal Share](#). A Food Security Initiative Funding Allocation Advisory<sup>1</sup>, facilitated by Student Health and Wellbeing, decided on allocation of funds as follows:
  - AMS Food Bank: \$450,000
  - UBC Sprouts: \$59,000
  - GSS Acadia Food Hub: \$82,000
  - UBC Meal Share: \$39,000
  - GSS Meal Subsidy: \$50,000
- The number of students served by the different food security initiatives are as follows:
  - AMS Food Bank: 2006 unique service users/students.
  - GSS Acadia Food Hub (infant and child supplies): each month varies 110 to 363 unique households.
  - Meal Share: 245 unique students.
  - AMS Sprouts served 1900 students (Free produce market - 1000 students and Free Meal Cards - 900 students).
- To open and operate permanent spaces for ongoing physical Food Hubs
  - Completed on the Vancouver campus with the caveat that CIRS and food services union continues to approve the use of space and service annually.
  - [UBC Okanagan Picnic](#) space is on loan via partnership with Food Services until March 2026 for use as Food Hub Space.

#### *A look ahead*

- To determine stable, ongoing funding levels and best approach.

#### *Changes to the food insecurity approach*

- Both campuses are reviewing the meal share program. UBC Vancouver has applied to participate in the Food 4 U Program in partnership with UGuelph and PHAC. UBC Okanagan is moving fully to Campus Partner Grocery Card Program.

### **Housing**

#### *Recommendation*

The purpose of this recommendation is to increase existing need-based housing initiatives for first-year students who live on-campus, in line with the annual housing fee increase; prioritize spaces for need-based and/or emergency housing; create a new long-term student housing strategy for both campuses; advocate to the provincial government to allow institutions to obtain competitive borrowing rates to finance new student housing to reduce the cost of borrowing and, as a result, rents, among others.

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<sup>1</sup> The Advisory is comprised of AMS and GSS executive and the representatives of their food security programs and services (AMS Food Bank and Sprouts), and UBC Student Health and Wellbeing.



### *Progress to date*

Progress has been made in the following areas:

- UBC invested more than \$670 million to add 5,500 new student housing beds across our two campuses between 2010-2022. 318 new beds were opened to UBC Vancouver students in Fall 2023 and another 280 beds will be completed in summer 2024.
  - Currently student housing rates range from 13-23% below the local market, and in the middle of the pack relative to peer institutions across Canada
- Creation of a new long-term student housing strategy for both campuses through the Campus Vision 2050 on the Vancouver campus and Campus Master Plan process currently underway on the Okanagan campus will result in a long-term plan for the campus that supports the needs of the university and community.
- The Housing Action Plan (HAP) 5-year review includes:
  - Additional growth over the next 12-15 years of 4,300 (3,300 new and 1,000 replacement) on the Vancouver campus and 500 new beds on the Okanagan campus.
  - Policy on affordable student housing includes providing housing below market rates and placing a cap on annual increases do not exceed CPI plus 2%.
  - Campus Vision 2050 on the Vancouver campus includes commitment to higher density student and neighborhood rental housing in campus master planning process.

### *A look ahead*

- Advocate with the provincial government to allow institutions, where the business case allows, to borrow from the marketplace to obtain competitive borrowing rates.
- Increase 'Nano units' offerings in future student housing developments.

### *Changes to the housing approaches*

- Introduce a new housing bursary to support continuing international students living off campus, tied to the annual rate of increase in rent. In collaboration with Enrolment Services, and Student Financial Aid Implementation Leads, review and analysis were completed, and it was recommended not to move forward.
  - The analysis conducted showed that in times of normal inflation, the bursary awarded per student is very low and would not make a significant impact in addressing a student's cost of living off campus. As there isn't a standardized method of assessing financial need for international students, we were unable to use a more targeted approach to award a greater bursary amount to certain students. Administering such a widely available bursary will also require additional staff to review applications and address student concerns. Therefore, it is not recommended to proceed with this version of an international housing bursary. A more targeted approach when a financial need assessment mechanism for international students is created could lead to a more impactful bursary.
- Low-cost (or co-op) student housing - this would be AMS/GSS and students-at-large led, student-invested, student-run, low-cost, no frills student housing alternative. This model may be able to offer lower rates, but land values, construction costs and operating costs would be a significant challenge.
  - AMS decided this is not feasible under current conditions, largely for the challenges noted in the statement.

- As needed, consider prioritizing additional bedspaces for need-based and/or emergency housing.
  - In terms of emergency housing, Student housing has 56 emergency housing units that are used for a variety of emergencies, some generated for maintenance or cyclical renovation issues within Student housing and, occasionally, used for short term stays for students with other needs, including financial hardship.

## **Childcare**

### *Recommendation*

The purpose of this recommendation is to expand the inventory of UBC-operated childcare; initiate UBC-operated childcare and expand childcare on the UBC Okanagan campus; continue advocacy with the provincial and federal governments to expand \$10 per day childcare and enhance low-income bursaries for families in need and provide capital funding to support affordable growth of childcare spaces, among others.

### *Progress to date*

Progress has been made in the following areas:

- Transition to UBC-operated childcare on the Okanagan campus has occurred.
- Every infant and 3–5–year center is \$10 a day on the Vancouver campus.
  - Compared to pre-\$10/day, a student with an infant or toddler now saves \$1155 per month while a student with a 3-5 yr. old saves \$1320 per month.
  - Scenario: a student with a 1 yr. old and 4 yr. child in UBCCCS is now saving \$2475 per month. Additionally, students who are eligible for the provincial low-income childcare subsidy can now receive childcare for free.
- The UBC Vancouver Childcare expansion plan completed. 2 new centres (12 infant toddler and 25 3-5-year spaces) will open at Brock Commons in summer 2024. A new centre is in development at Orchard Commons and 2 new centres (37 spaces) are programmed into the St Johns College site student housing redevelopment project.
- A second centre is currently being built on the Okanagan campus.

### *A look ahead*

- The childcare expansion plan update.
- Expansion of the \$10 a day childcare to UBCO.

## **Recommendation 6: Update student aid processes and procedures**

### *Recommendation*

The purpose of this recommendation is to launch an online emergency funding application on the Vancouver campus and assess the need to extend the availability of one for the Okanagan campus; strengthen communications around financial resources, combat student loan misinformation and lower barriers for students to access financial aid; maintain flexibility in bursary funding to support students as new situations arise, such as technology supports and mandatory quarantine assistance; and include a student financial profile component in IRP Student to measure and evaluate student financial need.

### *Progress to date*

Progress has been made in the following areas:

- Online Emergency Bursary application launched on the [Vancouver](#) and [Okanagan](#) campus.
- The online application for Vancouver was not overly successful, as it often confused students. From February 2022 to December 2023, 341 online applications were submitted but only 120 were funded. During that period, 706 emergency bursaries were funded. Many of the applications were unnecessary as the students had already met with their Enrolment Services Advisor. There were many instances where the same student submitted multiple applications and applications from non UBC students. In addition, more than 50% of the students were declined as they had no financial need; the students indicated they did not want to use their own finances and other resources.
- Extension of the availability of an online application for emergency funding (Okanagan campus). Handling emergency funding related to the wildfires allowed the development of an online tool to streamline and more consistently request information from applicants and increase the processing speed with the help of Enrolment Services teams on the Vancouver campus. 891 students affected by wildfire were supported.

### *A look ahead*

- Review of the current communications strategy to identify gaps, new opportunities, and combat misinformation.
- Maintain a lower barrier approach to supporting students in financial distress through flexible bursary funding.
- Implement the Learner Financial Support: IRP Student to support the development of student financial profiles outlining financial costs and resources and will be a valuable tool for Enrolment Services to measure and evaluate student financial need.

### **Recommendation 7: Expand need-based aid for continuing international students**

#### *Recommendation*

The purpose of this recommendation is to investigate how UBC can support international students who have financial need through possible amendments to *Policy LR10* or through the implementation of a separate policy; explore reallocating merit-based funding for first-year and continuing international students towards continuing international students to support need-based financial support; and determine a mechanism to assess financial need for international students and also financial resources available to them and how to support them equitably.

#### *Progress to date*

Progress has been made in the following areas:

- Housing bursary analysis and recommendation completed. Recommendation is to not proceed with the Int'l Undergraduate Housing bursary for ISI students living off-campus.
  - Using a price index to calculate the annual rate of increase for rent for international undergraduate students living outside of UBC residences, students could be considered for a supplemental bursary anywhere in the range of CAD \$7-82/month in the Okanagan and \$9-104/month in Vancouver. This translates to an annual (the 8 months of the Winter Session) bursary subsidy of between \$60-840 per student.
  - The assumption in the model is that every student who applies for the bursary would receive it if they were living off-campus in non-UBC housing and are an international undergraduate student.

- The administrative burden of completing a full financial need assessment on each candidate is such that it is not feasible to do so. Furthermore, it is unlikely that a student with financial need would have need levels at only and precisely \$60-840/academic year. The higher end of the need range constitutes about 1% of the student's overall annual cost of tuition and living as an international undergraduate at UBC.
- The combination of the small amount of housing subsidy that international undergraduate students may be eligible for if they live in non-UBC housing with the administrative burden to implement the subsidy leads us to the conclusion that this recommendation is neither feasible nor advisable to implement. The funding (an estimated total of \$353,000/year for the Okanagan and \$2.6M for Vancouver) that would be used to support students with a small amount, also considering that these students may not actually have any financial need, could be used to provide greater impact in other existing or new award programs for current international undergraduate students.
- Exploration of merit funding reallocation for first-year entrance /continuing international students for need based financial support. The recommendation raised several critical questions, and after a thorough examination and analysis, it is advised to not move forward from merit to need-based funding as it would impact enrolment target. Below is a summary of the key findings and conclusions:
  - Question #1: Are current merit-based international undergraduate awards supporting students with financial need?
    - A budget of approximately \$16.63M across both campuses is allocated to merit-based entrance/continuing awards. About 30% of all commencing new international undergraduate students receive a merit-based entrance award.
    - Student survey results indicate that existing merit-based awards for new and continuing international undergraduate students do support students with financial need, in addition to rewarding merit.
    - It is recommended to continue with the approved discontinuation of the TREK/DVC awards for international undergraduate continuing students. The funds would be reallocated to more impactful awards programs for continuing students. The recommendation was at the request of students.
  - Question #2: Can funding for merit-based international undergraduate awards, particularly entrance awards, be reduced without negatively impacting international undergraduate enrolment? (Note: a reduction in international student enrolment reduces the overall student financial assistance and funding for other key initiatives funded by the international undergraduate tuition fees).
    - Merit-based entrance awards play a crucial role in recruiting and enrolling top international undergraduate students.
    - Reducing merit-based entrance awards would negatively impact enrolment, as they help attract and retain high-achieving students.
    - Any reduction in the number of admitted international students would directly impact the funding available for international undergraduate student financial assistance, affecting affordability for many students.
  - Question #3: Are hybrid entrance awards meeting international undergraduate students' financial need?
    - Hybrid entrance awards, which consider academic achievements and financial need, represent a significant investment in supporting the financial needs of international undergraduate students. The budget allocation is approximately \$10M, about 25% of the ISI SFA budget.

- Question #4: Are emergency bursary funds currently set aside for continuing international undergraduate students (in)sufficient?
  - The current allocation of international student financial assistance toward emergency bursaries is more than sufficient to cover the needs of international undergraduate students.
  - Historical data shows that the average emergency bursary provided to students has remained consistent.
- Policy LR10 review
  - Progress on possible amendments is predicated on a few analyses to be done which are described above:
    - Explore the possibility of an international housing bursary
    - Explore the possibility of reallocating merit-funding for first-year entrance/continuing international students towards continuing international students to support need-based financial support
  - The outcome of the analyses as noted above were not to move forward.
  - Advice from the Office of the University Counsel indicated that given the outcomes of the analyses are complete and the recommendations are not to move forward, there is no need to make amendments to LR10 at this time. The recommendation that suggested a review of LR10 was looking at expanding need-based aid for continuing international students and investigating the feasibility of establishing a bursary program for international students. There is no need to amend the current LR10 to establish a bursary program for international students. The current policy does not prevent UBC from implementing financial aid systems outside of the policy for international students. To implement a bursary program for international students requires significant amount of funding that is currently not available.

*A look ahead*

- Propose an international bursary mechanism to support international students with financial need and determine mechanism to assess financial need for international students and how to support them equitably when there is funding to establish an international bursary program
- Implement international bursary model using the new Student Financial Assistance point solution being implemented as part of IRP Student upon approval and funding available. Timeline for Student Completion is from Dec 2024 to March 2027.

**Recommendation 8: Increase fundraising for need-based aid**

*Recommendation*

The purpose of this recommendation is to create the \$100M Student Affordability Initiative fundraising plan for FORWARD, the campaign for UBC; implement a \$2 million matching program to incentivize philanthropy; and prioritize need-based funding (bursaries and hybrid awards) for fundraising for student awards, among others.

*Progress to date*

Progress has been made in the following areas:

- Executed numerous broad-based appeals to UBC's alumni and donor community for the \$100M Student Affordability Initiative fundraising for FORWARD, the campaign for UBC.
- Over \$33.39 million raised as of Mar 18, 2024, with over 6,000 donors – supporting over 1,400 needs-based awards at UBC.
- Implemented and fully subscribed to a \$2 million matching program to incentivize philanthropy.

- Developed an inventory of stories and quotes, and updates to existing and new fundraising materials.
- Identified and converted 1,500 new need-based donors as of Mar 2024.
- Selection of the wide range of students being supported by donors:
  - A new endowed award is set to begin providing support to Bachelor of Commerce students with disabilities related to neurodiversity and/or mental health.
  - Since October 2022, funding has been provided to 48 IBPOC students who have demonstrated outstanding leadership abilities in athletics and/or recreation.
  - A global foundation is supporting 351 international graduate students over the next nine years, who would not have had access to an education at UBC otherwise.
  - As a result of the growth of our donor community, a bursary for students with disabilities on the Okanagan campus has grown from supporting one student to nine this year.
  - An annual award has begun providing support to Bachelor of Commerce students who identify as 2SLGBTQIA+ and have demonstrated an interest in community service and leadership.
  - An emergency fund has been endowed to provide support for undergraduate students facing an unexpected financial challenge that impacts their well-being and/or ability to continue their education.

*A look ahead*

- Identification of new prospective donors with the next acquisition focused solicitation: Giving Day coming up April 4, 2024.
- Increase annual fundraising support for need-based aid to a new level on an ongoing, and sustainable basis.
- Continue to work with Enrolment Services to identify priority award types for better allocation solutions.
- Continue to work towards raising \$100M for Forward: Student Affordability Initiative by campaign end in 2029.

**Recommendation 9: Advocate for increased student financial assistance programs at the provincial and federal government level**

*Recommendation*

This recommendation aims to ensure more students benefit from access to sufficient aid by advocating at the provincial and federal government level for expanding and extending existing government programs and increasing loan maximums and award amounts; and to build a coalition with post-secondary institutions and student groups to advocate for larger-scale student financial aid reform.

*Progress to date*

Progress has been made in the following areas:

- Advocated for student aid improvements committed in mandate letters at the federal level. Canada Student Loans and Canada Apprentice Loans interest permanently eliminated in 2022 Fall Economic Statement and Repayment Assistance Threshold raised for \$40k and indexed to Inflation in November 2022.
- Advocated for the provincial government to continue to expand need-based, up-front grants while also raising loan maximums. BC Budget 2023 doubled BC student loan maximums from \$110 to \$220 per week for individuals and from \$140 to \$280 per week for students with dependents, while also raising the loan repayment threshold to \$40K and lowered loan repayment amounts to 10% of family income to match changes to the federal loan repayment scheme.

- Advocated at the federal level for the permanent expansion of the Canada Student Grant program. Budget 2023 permanently increased CSG amounts to 40% above pre-pandemic levels. Although grants will be higher than pre-pandemic levels, since the temporary doubling of CSG amounts expired in July 2023, students in financial need are receiving less than for the past three years. UBC's federal pre-budget submission for Budget 2024 advocates for returning Canada Student Grant award amounts to 2022-2023 levels and indexing future CSG amounts to inflation. This request will be echoed in UBC's submission to the Federal Department of Finance's 2024 pre-budget consultation.

#### *A look ahead*

- Continue to engage with StudentAidBC to understand the current state and proposed trajectory of IT modernization, and engagement to determine integration with SISC and Workday.
- Continue to advance and advocate on the recommendation for the federal government to increase award amounts and Canada Graduate Scholarships (CGS). UBC and sector partners have prioritized CGS as a budget ask for Budget 2024.
- Continue to advocate for expansion and permanent reinvestment in the BC Graduate Scholarship Program. The Future Ready Action Plan, released in May 2023, committed \$15 million to graduate scholarships. In August 2023, Minister Robinson announced that this \$15 million invested over three years would add \$2,500 to each new graduate scholarship award. This brings the award value of BCGS to \$17,500, supporting students with rising costs, and extends the life of the program for another three years. However, the government has not made the program permanent and overall annual funding for the program is lower than when the scholarship was first launched.

### **Recommendation 10: Develop indicators to monitor and assess student affordability over time**

#### *Recommendation*

This recommendation aims to establish metrics for all approved SATF recommendations to provide a baseline against which to measure UBC's progress towards addressing student affordability and to support decisions that ensure finite funds are invested in areas that have the biggest impact and that reach students who need support.

#### *Progress to date*

Progress has been made in the following areas:

- Guiding principles and scope definition.
- Inventory of existing student affordability initiatives that support the SATF recommendations and identification of existing metrics, data sources, and data gaps.

#### *A look ahead*

- Development of financial affordability metrics addressing students in different circumstances. Timeline for completion May 2024.
- Gap analysis and designing an approach for gathering the data or identifying alternative sources. Timeline for completion May 2024.
- Identification of data pieces and completion of a reporting dashboard plan. Timeline for completion June 2024.
- Identification of benchmarks and a baseline measurement for each metric where available or perform an initial baseline measurement where one is non-existent. Timeline for completion December 2024.
- Measurement plan and communication strategy development. Timeline for completion 2025.

## **SATF Graduate Student Working Group**

### **Leads:**

Julian Dierkes, Senior Associate Dean, Students, UBCV

Peter Simpson, Dean, College of Graduate Studies, UBCO

In March 2023 recognizing that graduate students required special focus and expertise, the SATF Graduate Student Working Group was established with representation of students, faculty, and staff from both campuses. The working group began meeting in the Summer 2023 and is focused on two goals:

1. To understand how affordability challenges impact graduate students
2. To develop recommendations to address the challenges that UBC graduate students face in terms of affordability

A detailed recommendations report will be finalized and shared in fall 2024.

### **Priority Areas for the SATF Implementation Committee for FY24-25**

In conclusion, the SATF Implementation Committee remains steadfast in its commitment to addressing affordability challenges encountered by UBC students. For FY24/25, our priority will center on key areas including the multi-year tuition framework, fundraising initiatives, student financial aid, and tackling the cost of living, which encompasses food security. This work is cyclical and will continue to draw insights from comprehensive data collected through institutional surveys and ongoing engagement via student listening sessions.

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## **PRESENTATIONS**

1. Student Affordability Task Force (SATF) Implementation Update





# STUDENT AFFORDABILITY TASK FORCE (SATF) IMPLEMENTATION UPDATE

March 2024

**AINSLEY CARRY, VICE-PRESIDENT, STUDENTS**  
**GAGE AVERILL, PROVOST AND VICE-PRESIDENT, ACADEMIC**  
**REHAN SADIQ, PROVOST AND VICE-PRESIDENT, ACADEMIC, UBCO**



# STUDENT AFFORDABILITY

**2019**

UBC committed to developing a comprehensive plan to address student affordability challenges

**2022 (March)**

UBC Board of Governors approved the SATF report and ten recommendations

**2023 & 2024 (March)**

Annual progress update on the status of each recommendation.



TIMELINE

**2021**

The SATF was established with representation from students, staff, and faculty from both campuses.

**2022 (August)**

SATF Implementation Committee was established. Leads or co-leads responsible for the oversight and implementation of each recommendation were identified.

# SATF RECOMMENDATIONS & IMPLEMENTATION LEADS

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



# **SATF RECOMMENDATIONS HIGHLIGHT UPDATES**



# RECOMMENDATION 1

## DEVELOP A MULTI-YEAR TUITION FRAMEWORK

ACTION	STATUS
<b>Environmental scan</b> of Canadian Post-Secondary Institutions (PSIs) offering a multi-year tuition framework.	Completed
<b>Draft proposal</b> with FOUR proposed models has been developed for further review and financial modelling	Completed



## RECOMMENDATION 2

# PROVIDE TOOLS TO HELP STUDENTS MAKE INFORMED FINANCIAL DECISIONS

- Updated Financial Wellness **Workshops**
  - Vancouver: 23 workshops with over 2500 student attendees.
  - Okanagan: 2 sessions hosted, 9 office hour sessions, 9 scheduled sessions
  - Updated the Financial Fundamentals workshops with focus on Indigenous Students, and Students with Disabilities
- Multi-year **calculator** update
- Financial Wellness **modules** added to *Academic Essentials* (UBCV) and *UBC 101* (UBCO) Programming
- New **websites**:
  - [“How to Budget – a step-by-step guide on how to budget”](#)
  - [“Financial Resources Workshops page”](#)



# RECOMMENDATION 5

## ADDRESS COST OF LIVING CHALLENGES

### Food Insecurity

- \$800,000 allocated to Food Security Initiatives for 23/24.
  - UBCO: Campus Wellness & Education worked with Student Union Okanagan leadership to determine the allocation of funds.
  - UBCV: A Food Security Initiative Funding Allocation Advisory committee (including elected Student Leadership) determined the allocation of funds.



### Breakdown of Funding Allocation:

Okanagan (\$120,000)	Vancouver (\$680,000)
<ul style="list-style-type: none"><li>• Campus Partner Grocery Card Program: \$61,000</li><li>• <u>Picnic</u> programming supplies: \$34,000</li><li>• Student Staff Support: \$25,000</li></ul>	<ul style="list-style-type: none"><li>• <u>AMS Food Bank</u>: \$450,000</li><li>• <u>GSS Acadia Food Hub</u>: \$82,000</li><li>• <u>GSS meal subsidy plan</u>: \$50,000</li><li>• <u>UBC Sprouts</u>: \$59,000</li><li>• <u>Meal Share</u>: \$39,000</li></ul>

# RECOMMENDATION 5

## ADDRESS COST OF LIVING CHALLENGES

### Childcare

- Every infant and 3–5–year center is **\$10 a day** on the Vancouver campus.
  - A student with an infant or toddler now saves **\$1155 per month**
  - A student with a 3-5 yr. old saves **\$1320 per month.**
  - Scenario: a student with a 1 yr. old and 4 yr. child in UBCCCS is now saving **\$2475 per month.**
- The UBC Vancouver Childcare **expansion** plan completed.
  - 2 new centres at Brock Commons in summer 2024.
  - A new centre is in development at Orchard Commons
  - 2 new centres (37 spaces) planed for St Johns College student housing redevelopment project.
- **UBC-operated childcare on the Okanagan** campus has occurred and a second centre is currently being built on the Okanagan campus.





## RECOMMENDATION 7

# EXPAND NEED-BASED AID FOR CONTINUING INTERNATIONAL STUDENTS

- Housing bursary analysis and recommendation completed
- Exploration of merit funding reallocation for first-year entrance/continuing international students for need based financial support
- Policy LR 10



## RECOMMENDATION 8

### INCREASE FUNDRAISING FOR NEED-BASED AID

- Executed broad-based appeals to UBC's alumni and donor community for the [\\$100M Student Affordability Initiative fundraising for FORWARD](#), the campaign for UBC.
- Over **\$33.39 million** raised as of Mar 18, 2024, with over 6,000 donors – supporting over 1,400 needs-based awards at UBC.
- Implemented and fully subscribed to a **\$2 million matching** program to incentivize philanthropy.
- Identified and converted 1,500 new need-based donors as of Mar 2024.



## RECOMMENDATION 10

# DEVELOP INDICATORS TO MONITOR AND ASSESS STUDENT AFFORDABILITY OVER TIME

- Guiding principles and **scope defined**.
- **Inventory** of existing student affordability initiatives **completed**.
  - **Gap analysis** and data collection methodology      May 2024
  - **Data collection** and reporting      June 2024
  - **Benchmarks** and a baseline measurement      December 2024
  - **Communication** strategy      March 2025



# CONCLUSION

## Remaining Priority Areas

- **Student Financial Aid** engagement in Food Insecurity
- Complete **Multi-year tuition** framework
- **Assessment** of student affordability challenges and opportunities over time
- SATF **Graduate Student Working Group** Recommendations



This work is cyclical and will continue to draw insights from data collected through institutional surveys and ongoing student engagement.



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