Parent Policy: Student Financial Supports Policy

Creation of New Student Financial Supports Procedure

| Office of Administrative Responsibility: | Office of the Registrar  
Faculty of Graduate Studies and Research  
Office of Advancement |
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<td>Approver:</td>
<td>General Faculties Council</td>
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| Scope:                                  | Compliance with this University policy extends to all academic, support and excluded staff, postdoctoral fellows, and academic colleagues as outlined and defined in the Recruitment Policy <https://policiesonline.ualberta.ca/policiesprocedures/policies/recruitment-policy.pdf> (Appendix A  
Definitions and Categories); undergraduate, graduate and Faculty of Extension students; emeriti; members of the Board of Governors; visitors to campus, including visiting speakers and scholars; third party contractors; and volunteers. |

Purpose
To provide the procedure by which new student financial supports at the University of Alberta are created.

PROCEDURE
1. ADMINISTRATION

The Office of Advancement will work with donors to establish student financial supports for academically qualified students.

The Office of Advancement will engage with the Office of the Registrar (RO) and/or the Faculty of Graduate Studies and Research (FGSR), as appropriate, to draft terms of reference. The RO and/or the FGSR will provide recommendations and will consult with Faculties, departments and administrative units on campus as necessary when drafting terms of reference. The RO and FGSR seek to establish terms of reference for student financial supports that include selection criteria that support a diverse pool of eligible applicants. The selection criteria must be sufficiently broad to allow the university to award the funds every year.

Faculties, departments and other administrative units will be consulted to provide advice and to ensure proper application and selection supports are in place during the creation of a new student financial support.

The RO and FGSR will facilitate the approval process for new student financial supports with the appropriate committee. New undergraduate scholarships, awards, medals, bursaries and prizes are approved by the RO. New graduate scholarships and fellowships, awards, prizes, medals, and bursaries are approved by FGSR.

Terms of reference and selection criteria drafted and approved prior to this procedure precedents are not precedent for new financial supports. In the event that terms of reference set new precedents and require discussion related to the rules and regulation over academic awards, they shall be referred to the appropriate GFC body.
2. RESTRICTIONS ON RECIPIENT SELECTION

**Donors** to the University of Alberta or their agents cannot be the **nominator** or participate in the recipient selection process for student financial supports for which they are the donor.

3. INCLUSIVITY IN SELECTION CRITERIA

The University of Alberta seeks to demonstrate the values of equity, diversity, and inclusivity in the creation and administration of its student financial supports. This is achieved through establishing new student financial supports that include selection criteria that support a diverse pool of eligible applicants. The selection criteria must be sufficiently broad to allow the university to award the funds every year.

A. HUMAN RIGHTS

*Selection or eligibility criteria* will not include any criterion defined as discriminatory under the Alberta Human Rights Act or the University of Alberta Discrimination and Harassment and Duty to Accommodate Policy unless the financial supports or the condition at the time of establishment could reasonably be viewed as justifiable discrimination intended to create equity for any equity seeking group (as identified in the protected grounds definition of the Discrimination, Harassment and Duty to Accommodate policy).

If the student financial support is accepted under this provision, it will be reviewed at intervals not greater than 15 years by the RO and / or FGSR and brought to the appropriate stakeholders to provide a lens for equity, diversity and inclusivity in student financial supports. The restriction will be dropped if the group is no longer reasonably perceived as disadvantaged. A specific student financial support can be reviewed at any time by the RO and / or FGSR.

B. MEMBERSHIP

Membership in a particular association cannot be a selection criteria requirement with the exception of:

1. Athletic teams at the University of Alberta sanctioned by the University Sports (U Sports) and/or the Canadian Colleges Athletic Association (CCAA) and the Alberta Colleges Athletic Conference (ACAC).
2. Student groups registered at the University of Alberta overseen by the Dean of Students that conform with the University’s mission, values and policies; have clear and transparent membership criteria; are without sanction and/or not facing disciplinary action at the time of creation and/or the administration of the student financial support.

4. APPROVAL OF TERMS OF REFERENCE

The terms of reference established for student financial supports represent a formal agreement between the donor and the University of Alberta.

Descriptions for new student financial supports submitted for approval must include general selection and eligibility criteria.

Each new student financial support will be considered on its own merits. Terms of reference for all new undergraduate scholarships, awards, prizes, University medals, and bursaries are referred to the RO for approval.

Terms of reference for new graduate scholarships and fellowships, awards, prizes, medals, and bursaries are referred to the FGSR for approval.

In rare occurrences where consensus between the RO or FGSR and the Office of Advancement on terms of reference can not be achieved, the terms will be brought forward to the Academic Planning Committee (APC) for discussion and resolution.

If in the future it becomes necessary, advisable, or preferable for changes to be made to the approved terms, in doing so, the University will remain governed by the original intent as expressed at the time of the creation of this award.
5. MINIMUM VALUES AND ANNUAL SPENDING

Minimum values for new annually funded student financial supports are determined by the RO, Advancement and FGSR. The University reserves the right to withhold student financial supports donated by individuals or organizations where the required funds have not yet been received by the University.

Minimum values for new endowed student financial supports will adhere to the UAPPOL Endowment Management Policy and Procedure. In any given year, if invested funds do not provide sufficient income to disburse an endowed student financial support, payment of the student financial support may be reduced or withheld until sufficient funds accrue.

DEFINITIONS

Any definitions listed in the following table apply to this document only with no implied or intended institution-wide use.

| **Student Financial Supports** | Student financial supports are items of monetary and/or other value awarded to a student by the University of Alberta or by donors through the University on the basis of completion of requirements outlined in the selection criteria or terms of reference. Merit-based student financial supports include, but are not limited to, awards, scholarships, prizes, and University medals. Merit-based financial supports are competitive; successful completion of the requirements does not guarantee receipt of the funding. Need-based student financial supports include, but are not limited to, bursaries, loans, and emergency funding. Hybrid awards require undergraduate academic performance and indicated financial need, and will be titled as “Awards”.
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| **Donor** | An individual or organization who makes a charitable donation to the University of Alberta. A charitable donation is a voluntary transfer of property with intent to donate and without benefit or advantage to the donor. Charitable donations can include gifts-in-kind.
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| **Nominator** | A nominator is the individual or group (i.e., committee) responsible for selecting the recipient(s) of an award or bursary and must not be a person or group external to the University of Alberta.
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| **Selection and Eligibility Criteria** | Selection and eligibility criteria are the standards or conditions by which a student qualifies and is chosen to receive a financial support. Criteria may be defined in such areas as academic performance, leadership, community service, athletics, or demonstrated financial need.
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| **Terms of Reference** | The terms of reference of a student financial support provide all relevant information regarding how the student financial support will be dispersed, including the financial terms, the selection and eligibility criteria, and any other information pertinent to the administration.
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| **Scholarship** | A scholarship is a student financial support given to a student on the basis of overall superior academic achievement in a Faculty, Department, or degree program. Secondary selection criteria may also be used. A degree program may be defined as a full multi-year degree program within a Faculty or Department, or as one or more specific years within a full multi-year degree program. |
### Policies and Procedures On-Line (UAPPOL)

#### Award
An award is a student financial support that does not meet the definitions for scholarships, prizes or University medals and has as its primary criterion satisfactory academic performance.

#### Prize
A prize is a student financial support given to a student on the basis of superior academic achievement in a course or specific set of courses in a Faculty, Department, or in some other subdivision of a Faculty. Additional non-academic secondary selection criteria may also be used.

#### University Medal
A University medal is a student financial support given to a student on the basis of overall superior academic achievement in a Faculty, Department or some other subdivision of a Faculty, or in the University overall. Additional selection criteria will not normally be used.

#### Bursary
A bursary is a student financial support given to a student primarily on the basis of demonstrated financial need.

### FORMS

There are no forms for this Procedure.

### RELATED LINKS

Should a link fail, please contact uappol@ualberta.ca.

- [Discrimination, Harassment and Duty to Accommodate Policy](UAPPOL)
- [Office of Safe Disclosure and Human Rights](University of Alberta)
- [Strategic Plan for Equity, Diversity, and Inclusivity](University of Alberta)
- [Office of the Registrar](University of Alberta)
- [Faculty of Graduate Studies and Research](University of Alberta)
- [Endowment Management Policy]
- [Endowment Management Procedure]