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# Bursary Policy

## Policy Information

Oversight Body: Budget and Finance Committee

Date Passed by Council: September 13,  
2021; Amended on April 5, 2024

Date of Next Review: May 2025

Title of Related Policies, Bylaws, Legislation: Financial Policy

## Definitions

**Disability:** An umbrella term, covering impairments, activity limitations, and participation restrictions. An impairment is a problem in body function or structure; an activity limitation is a difficulty encountered by an individual in executing a task or action; while a participation restriction is a problem experienced by an individual in involvement in life situations.

**Fiscal Year:** The period beginning on April 01 of a given calendar year and ending on March 31 of the following calendar year.

**International Student:** A member of the Dalhousie Student Union who is registered as an international student with Dalhousie University.

**Office:** The DSU Sustainability Office (DSUSO), the Equity and Accessibility Office (E&A), or the Dalhousie Student Advocacy Service (DSAS).

**Union:** The Dalhousie Student Union

## Purpose

This policy outlines the authority and process for the distribution of bursaries offered by the Union.

## Scope

This policy applies to bursary funds distributed by the Union and its Offices.

## Policy Statement

### 1. Bursary Funds

- 1.1. Bursaries offered by the Union on a permanent basis must be drawn from a specific Bursary Fund established by a referendum or through an agreement with Dalhousie University or another external group.
- 1.2. Bursary Funds will be restricted to the uses laid out in this policy and in their relevant agreements and/or levy questions.
- 1.3. The Union may offer bursaries on a temporary basis by allocating monies from the Operating Fund or other approved Funds. Such bursaries must be provided for in the yearly budget approved by Council.
  - 1.3.1. Temporary bursaries must be governed by a set of terms that align with the values of the organization and are approved by Council. The terms must stipulate the purpose of the bursary, the line of the budget or fund it will come from, the funding limit per applicant, and any unique eligibility and/or assessment criteria.
- 1.4. Offices of the DSU may establish their own bursary programs. These bursaries will be offered by the given Office and not the Union and will therefore not be subject to the regulations laid out in this policy except where specifically indicated.
  - 1.4.1. Office-administered bursaries must be accounted for in the Office's yearly budget and approved by the Offices Steering Committee on a yearly basis.
- 1.5. The International Student Emergency Bursary Fund ("the ISEBF") is established to provide one-time bursaries to international students in emergency financial need.
- 1.6. The Student Accessibility Fund ("the SAF") is established to provide bursary funding for under and post graduate students with a disability enrolled full and part time at Dalhousie University.
- 1.7. Should an additional permanent bursary fund be established, this policy will be revised accordingly. In the period between the establishment of a new Bursary Fund and the revision of this policy, the new bursary may be

distributed by a committee that adheres to both the general regulations of this policy and any specific terms and agreements governing the new fund.

1.8. Distribution of funds from any Bursary Fund must comply with the Union's Financial Policy.

## 2. Bursary Committees

- 2.1. All bursary committees overseeing permanent bursaries will be standing committees of the Union formed each year in accordance with this policy and other relevant governing documents.
- 2.2. Any temporary bursaries will be overseen by an ad hoc committee formed in accordance with this policy and other relevant governing documents.
- 2.3. Meetings and minutes of all bursary committees are strictly confidential to protect information about members' financial circumstances. All meeting minutes and other documents must be securely filed by the Director of Operations in accordance with Union policy.
- 2.4. Bursary committees will review applications for the relevant bursary and allocate funding in accordance with this policy.
- 2.5. The ISEBF will be overseen by the International Student Emergency Bursary Committee ("the ISEBC").
- 2.5.1. The ISEBC will be formed by June 30 of each fiscal year.
- 2.5.2. Membership of the ISEBC will be: the Vice President, Finance and Operations who will serve as chair; one other Executive Officer to be determined by the Executive Committee each year; an international student; and the International Students' Community Representative or, should they refuse the seat or if the Council seat is vacant, another Community Representative on Council to be appointed by the Executive Committee.
- 2.5.3. ISEBC members' terms will continue until new committee members are appointed to ensure that there is no lapse in funding approvals.
- 2.5.4. A designated full-time staff person will be a non-voting advisory member of the ISEBC.
- 2.6. The SAF will be overseen by the Student Accessibility Fund Committee ("the SAFC").
- 2.6.1. Membership of the SAFC will be: the Vice President, Internal who will serve as chair; two (2) Councillors to be appointed by Council; and two (2) general members of the Union to be appointed by Council.

2.6.2. Students with disabilities will be prioritized for membership on the SAFC.

2.6.3. SAFC members' terms will continue until new committee members are appointed to ensure that there is no lapse in funding approvals.

2.6.4. A designated full-time staff person will be a non-voting advisory member of the SAFC.

### 3. Application Process

3.1. Applications for bursaries will be submitted to the chair of the appropriate bursary committee using a standardized online form.

3.1.1. Alternate formats for applications (e.g. audio recording; interview) will be considered for applicants who are unable to complete the standardized form due to disability or language barrier. Bursary committee chairs will ensure that alternate application options are made available as needed.

3.2. Each bursary committee chair will review and update the relevant application form on a yearly basis, in consultation with the Director of Operations, and will ensure that it is published on the Union's website.

3.3. Each bursary committee chair will work with the communications team and relevant student societies to ensure adequate promotion and advertisement of the bursaries.

3.4. All bursary applications must include:

3.4.1. The applicant's full name, student number, year of study, and Dalhousie email address;

3.4.2. Proof of enrollment at Dalhousie University;

3.4.3. The amount of funding sought through the bursary;

3.4.4. A description of the reason(s) for seeking bursary funding;

3.4.5. A void cheque or direct deposit form;

3.4.6. The amount of the applicant's current financial need;

3.4.7. The applicant's personal budget and/or living expenses;

3.4.8. The applicant's current income and/or other sources of financial aid.

3.5. ISEBF applications must also include:

3.5.1. An explanation of the circumstance causing emergency financial need;

3.5.2. Documentation of the applicant's international student status, for example, copy of a student visa.

3.6. SAF applications must also include:

3.6.1. Medical documentation of disability and/or self-declaration that the applicant identifies as a Disabled student and/or student with a disability;

3.6.2. Documentation to support the bursary funding request which may include, but is not limited to: receipts, quotes, or invoices for disability-related services and equipment;

3.6.3. The name of the applicant's health insurance provider, if applicable;

3.6.4. Documentation of any disability-related grant or bursary funding received through government assistance or other avenues.

#### 4. Eligibility Criteria

4.1. Bursaries may not be used to pay academic or non-academic fees to Dalhousie University or any other post-secondary institution. For further clarity and without restricting the generality of this statement, bursaries may not be used towards the payment of a student's tuition, ancillary, or auxiliary fees.

4.1.1. In the case that an applicant does not have a bank account in their own name, their awarded funds may be deposited into a Dalhousie University student account, at the discretion of the bursary committee and after all other options have been exhausted.

4.2. Applicants must have a Canadian bank account in their own name.

4.2.1. In the case that an applicant does not have a Canadian bank account, their awarded funds may be deposited into a foreign bank account under their name, at the discretion of the bursary committee. Any and all foreign banking fees will be automatically deducted from the applicant's awarded bursary amount.

4.3. Only applications submitted by current Dalhousie students will be accepted.

4.4. The ISEBF has the following additional eligibility criteria:

4.4.1. Only applications submitted by full-time international students will be accepted.

4.4.2. The bursary must be requested for a situation of one-time emergency financial need.

4.4.3. No applicant may receive more than two thousand dollars (\$2000.00) from the ISEBF within a single fiscal year. Applicants who have already reached this limit will not be considered.

4.5. The SAF has the following additional eligibility criteria:

4.5.1. Only applications submitted by students with disabilities and/or Disabled students will be accepted.

4.5.2. While applicants are welcome to submit documentation of their disability(ies), the Union recognizes that many students may be unable to access official diagnoses for a variety of reasons. Therefore, determination of eligibility will be based on self-identification and applicants do not need to be registered with the University as students with disabilities in order to be considered.

4.5.3. No applicant may receive more than one thousand dollars (\$1000.00) from the SAF within a single fiscal year. Applicants who have already reached this limit will not be considered.

## 5. Assessment Process

5.1. Bursary committees will meet at least once every four (4) weeks and will review applications submitted up to one (1) business day prior to each meeting. Submission deadlines will be published on the Union's website at the outset of each semester.

5.2. In the interest of countering the potential effects of unconscious bias or conflict of interest, the chair must remove all names and identifying information from applications before circulating them to the bursary committee. For accounting purposes, the chair of each committee will be able to view applicants' names and identifying information.

5.3. Applications will be reviewed in the order that they were received.

5.4. In the event that a bursary committee is unable to review all applications submitted up to the most recent submission deadline within one meeting, the chair will schedule a follow-up meeting within two (2) weeks to review any remaining applications.

5.5. The bursary committee chair will update each applicant on the status of their funding within five (5) weeks of the date that their application was submitted.

- 5.6. Bursary committees will make decisions about the distribution of bursaries based on the amount and urgency of the applicant's financial need and the availability of funds.
- 5.7. Priority will be given to first-time applicants.
- 5.8. Priority will be given to applicants who have attempted to access or exhausted other sources of funding.
- 5.9. Bursary committees may deprioritize or reject applications in the event an applicant did not provide enough information or did not thoroughly convey their eligibility and financial need. The applicant is welcomed to reapply and may be prioritized upon second submission.
  - 5.9.1. The chair will inform applicants whose applications are rejected of the reason(s) for said rejection upon request.
- 5.10. Bursary committees may award the full amount of the bursary requested or a part thereof.
- 5.11. Bursary committees may develop additional assessment criteria in the interest of ensuring fairness and distributing funds in an equitable manner. Such additional criteria must comply with both the provisions and the spirit of this policy.
- 5.12. Additional assessment criteria for the SAF includes:
  - 5.12.1. The amount of funding awarded may be impacted by what is covered in the applicant's health insurance plan. If an applicant is applying to the SAF for an item that is covered by their health insurance provider, the bursary committee may award a part of the funding requested.

## 6. Funding Limits and Restrictions

- 6.1. Bursaries may be awarded in amounts of up to:
  - 6.1.1. Two thousand dollars (\$2000.00) for bursaries drawn from the ISEBF.
  - 6.1.2. One thousand dollars (\$1000.00) for bursaries drawn from the SAF.
  - 6.1.3. For short-term bursaries, an amount set out in the bursary terms approved by Council.
- 6.2. A member may be awarded multiple bursaries within the same fiscal year, provided:
  - 6.2.1. A separate application is completed for each bursary requested;
  - 6.2.2. In each instance, the financial need meets the criteria laid out in this policy and is assessed according to this policy;

6.2.3. The total amount of bursary funding awarded to the member throughout the fiscal year does not exceed any funding limits laid out in this policy.

6.3. Being awarded or denied any bursary offered by the Union will not impact an applicant's eligibility for other bursaries or funding opportunities offered by the Union or its Offices.