

The SFU logo consists of the letters 'SFU' in white, bold, sans-serif font, set against a red rectangular background.

SIMON FRASER UNIVERSITY  
THINKING OF THE WORLD

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# Institutional Merit-based Aid

The effects on student aspirations, choice, & participation © 2010

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Introduction

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# Agenda

- Little research on institutional merit-based aid in Canada
- Little known about students who receive scholarship offers and whether the offer effected their aspirations, choice, and participation

## Introduction

- The effect of student/parent aspirations on being offered an entrance scholarship
- Understand how entrance scholarships effect the choice and participation to attend a comprehensive Canadian university
- Whether there are differences by student type: first-generation learner, immigrant, non-immigrant

## Research Purpose

What is the effect of merit-based institutional financial aid on student aspirations, choice, and participation at a comprehensive Canadian university?

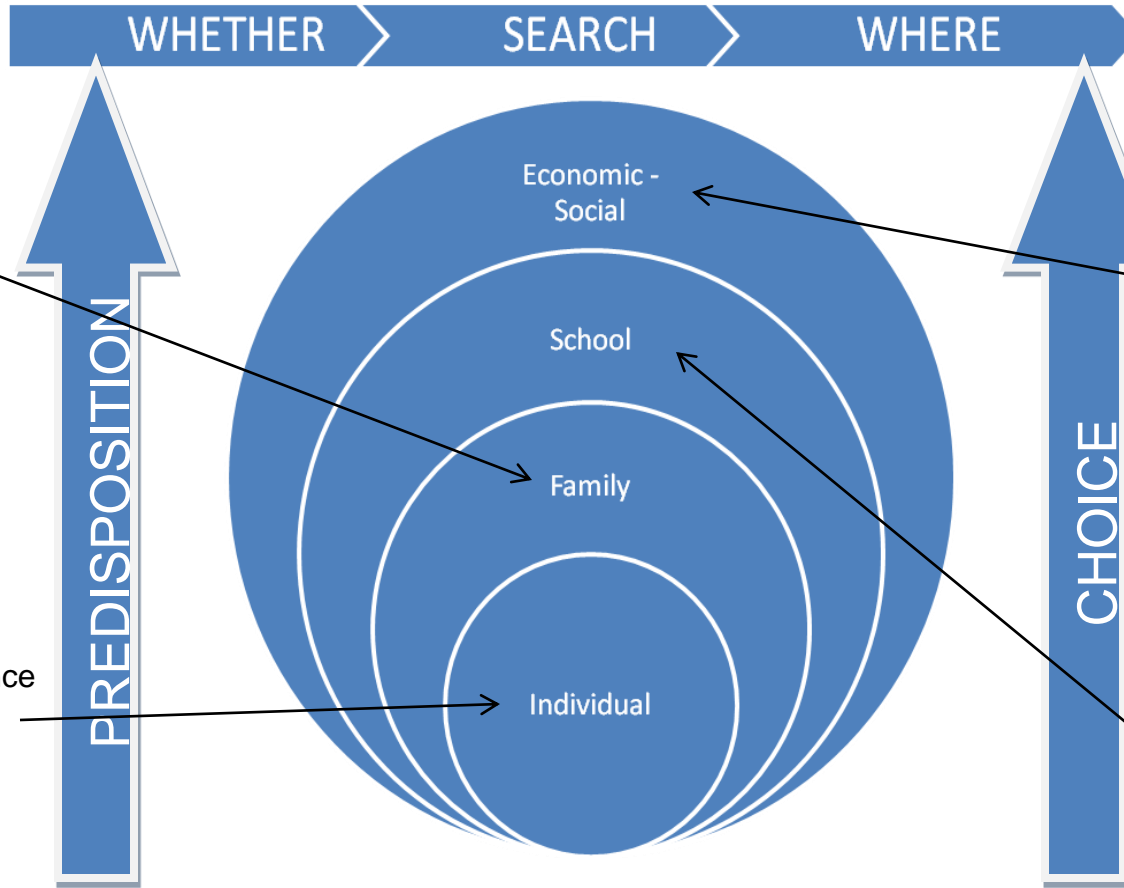
Research Question

- Concurrent triangulation mixed methods design  
(Creswell, 2008)
- Quantitative methods has been norm in FA research & qualitative methods may help provide new insights  
(Perna, 2008; St. John, 2006)
- On-line survey using forced-choice and open-ended questions
- Parallel mixed analysis

# Methodology

Characteristics of Merit-Aid Recipients	Survey Population		Survey Respondents	
	N	P	N	P
Merit-aid Level				
Small	1607	75.34%	424	67.19%
Medium	467	21.89%	165	26.15%
Large	59	2.77%	41	6.50%
Unknown	0		1	0.16%
Total	2133	100.00%	631	100.00%
Merit-aid Type				
Applied	152	7.13%	106	16.64%
Automatic	1981	92.87%	524	83.20%
Unknown	0		1	0.16%
Total	2133	100.00%	631	100.00%
Gender				
Male	859	40.65%	178	28.32%
Female	1254	59.35%	452	71.52%
Other	0		1	0.16%
Total	2113	100.00%	631	100.00%

# Survey Population



**Layer Two**  
SES—family income  
Level of education  
Aspirations  
Citizenship

**Layer One**  
Academic Performance  
Offer of scholarship  
Aspirations  
Citizenship

**Layer Four**  
National and provincial  
Financial aid policy  
Immigration policy  
Institutional policy

**Layer Three**  
Support in high school  
Cost of attendance  
Financial aid policy  
Proximity  
Program Choice

# Combined Theoretical Framework



- No federal Ministry of Education
- Federal financial aid policy primarily a student loan program plus federal tax credits for students and savings plans in place for parents
- BC tuition cap in place since mid-2000's & recent cuts to provincial scholarships
- Canada's immigration policy – skilled workers class in effect since 2008

## Social, Political & Economic Context

- 40% of Census Metro Area (CMA) population immigrants – location of major campus – over 50% (Stats Can 2006)
- 55% of city population identify themselves as a visible minority (CMA – 42%) & 53% of university population identified themselves as a visible minority (CUSC, 2008)
- Predominantly commuter campuses – research intensive
- Admission average range from 80% to 92%

## School/Community Context

- 63.07% both parents immigrants & 36 to 38% of parents English is their first language
- Before tax median family income is \$64,710
- 66.49% live in Metro Vancouver + 27.70% rest of BC
- 85.90% family encouraged student to do well to gain entrance to university
- 75.58% family encouraged student to do well to receive a scholarship

## Family Context

- 30.34% of respondent's who accepted offer are immigrants themselves
- 58% of respondent's first language is English
- 80.82% agreed or strongly agreed that knowing they could receive a scholarship pushed them to achieve higher grades in high school
- 76.70%, agreed or strongly agreed that it made them work harder in high school

## Individual Context

A scholarship does not have a direct aspiration effect of its own; the primary influence or relationship is more likely the effect of grade attainment on aspirations

(Christofides, Hoy, Li, & Stengos, 2008)

## Individual Context - Aspirations

- “...started thinking about attending university since early on in elementary school (seriously).”  
(Received Medium Automatic Scholarship)
- “...always had the idea of attending university in the back of my mind when I first started high school, ...”  
(Received Medium Applied Scholarship)
- “Petrified, felt like high school ended too fast, no sense of direction, didn’t know where and what I wanted to do,...”  
(Received Small Automatic scholarship)

## Individual Context - Aspirations

- Receiving an admission offer from a first-choice institution is the critical decision factor and the scholarship secondary.

“As a working student coming from a middle class background, any financial assistance I can get in my post-secondary education is greatly appreciated. ...already considering Simon Fraser as my primary choice, their being the highest entrance scholarship offer merely cemented my preferences. (Received small automatic scholarship)

## Individual Context - Choice

- A scholarship offer has a more direct effect on choice for rural or out of province students dependent on whether the size of the scholarship is sufficient to meet their increased post-secondary expenses due to living costs (Kirby and Conlon, 2005) .

“ . . . only offer that made it financially feasible for me to go to university without requiring me to attend... my hometown university.”

(Received large applied scholarship)

“...decided that I should start off my post-secondary education at NIC (to save \$) before going to SFU...”

(Received small automatic and small applied scholarship)

## Individual Context - Choice



- A student's 'choice set' relates to their SES with parental level of education and income creating a more wide ranging geographically and reputation oriented first choice (Cabrera & La Nasa, 2000; Hossler & Gallagher, 1987).
- Students who received three or more offers tended to have a combination of higher parental education and higher before tax median family income with parental education level being the more important of the two.

## Individual Context - Choice

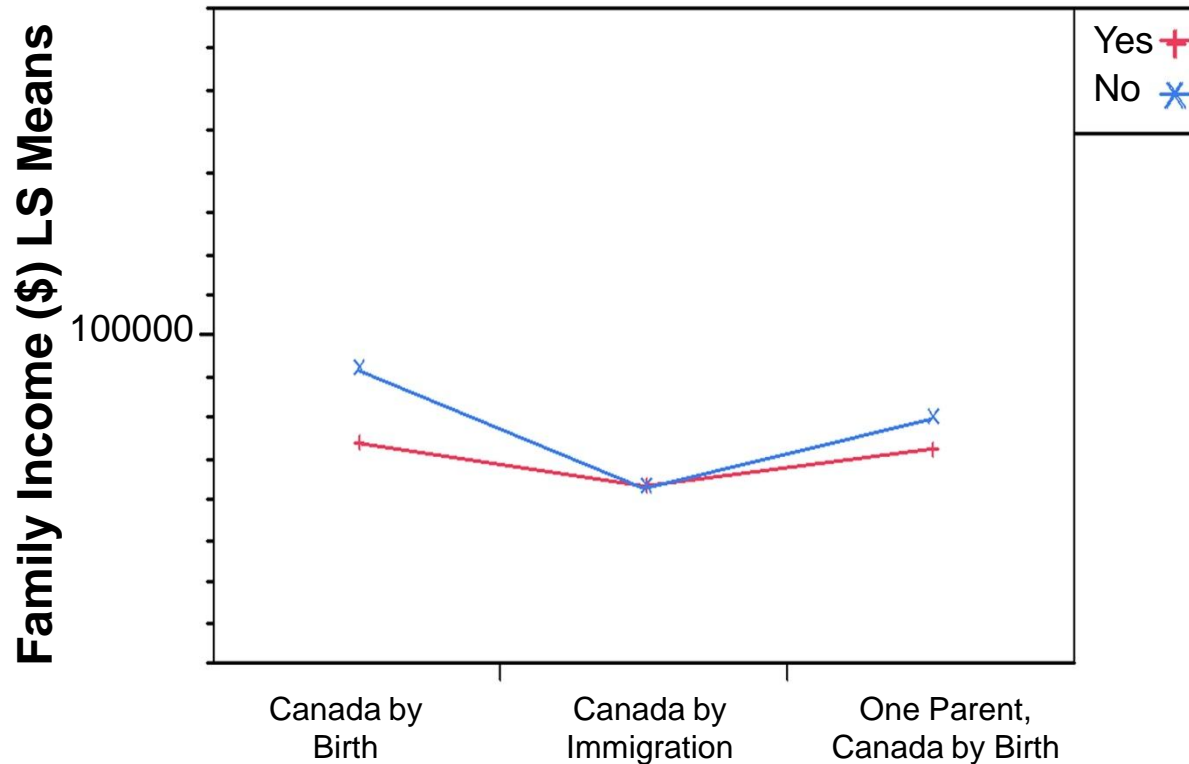
- Scholarship offer provides a positive sense of self
- Reduces the overall net price of university attendance
- A scholarship becomes a necessity to assist with the cost of attendance.

## Individual Context - Participation

- Parents first aspiration is for their child to receive admission to university
- Parents are primary motivational force for a scholarship offer with mothers being the greater of the two parents
- An immigrant effect was found in achieving eligibility for a scholarship and investing in their child's education to ensure their success

## Family Context - Aspirations

## Paid Tutor, Parent Citizenship and before Median Tax Family Income



# Family context - Aspirations

- 43% of the students who accepted SFU's scholarship offer come from families where they are the first to either attend university (15%) or will be the first to complete university (28%)
- Students whose parent with the highest education was high school or less were the only group to more likely accept the medium value scholarship than not.

## Family Context - Participation

- Slightly more than half of those who accepted the scholarship are below the CMA of \$64,000
- A scholarship offer provides external validation of parental efforts
- In the case of immigrant families it provides a signal of the families ability to re-establish their human capital (Finnie & Mueller, 2009).

## Family Context - Participation

- SFU is supporting financial need through its merit-based scholarship program.

“It meant the world to my mother, she cried she was so happy, this is because in reality we would never have been able to afford my attending of university without the scholarship I was offered.”

(Received medium applied scholarship)

## Family Context - Participation

- Planning 10 provides an important milestone in formulating students institutional “choice set” during the search stage

“I started to truly plan it once I entered Grade 10 in high school. Going through the mandatory graduation requirements program, including a year's worth of planning 10 courses, got me to focus on the future.”

(Received large applied scholarship)

## School Context - Aspirations



- SFU is the top scholarship offer for 86% of the students resulting in an overall yield rate of 56% across all scholarship categories when SFU is the top offer.
- Majority of scholarship students apply to two institutions and receive scholarship offers from both.

## School Context - Choice

- proximity influences choice and participation for the majority of students in this study  
(Davies & Hammack, 2005; Frenette, 2002; Kirby & Conlon, 2005).
- applied for & large scholarships have the highest yield rates
- medium level scholarships have very poor yield rates, especially for children of immigrants

## School Context - Choice

- Over 18% of students learned about the scholarship through their admission letter
- The effect of scholarships on choice of institution is best described as ‘it depends’.

## School Context - Choice

- Students who receive automatic scholarships appreciate the recognition of their academic ability

“It showed me that the school saw me as a desirable student based on my grades. The amount offered showed that this particular school (SFU) desired me as a student more than the other universities I applied to.”

(Received medium automatic scholarship)

## School Context - Participation

- disappointment at not being recognized for attributes other than grades or offer not large enough

...grateful...but I felt that I was not recognized for my community service and grades in High school. ...an 89% average while doing part-time work and volunteer work, I was not eligible for most scholarships and was disappointed.

(Received small applied scholarship)

...didn't accept because I wanted the bigger scholarships that SFU offered...I therefore decided that I should start off my post-secondary education at NIC (to save \$) before going to SFU to finish the last two years...

(Received small automatic and small applied scholarship)

## School Context - Participation

1. Develop an institutional assessment model
2. Examine whether there is a need and/or desire to shape student/family aspirations and choice prior to grade eleven
3. Review present goals of the entrance scholarship program - both applied and automatic scholarship initiatives.

## Recommendations

4. Review the effectiveness of the automatic entrance scholarships
5. Analyze whether scholarship students who have financial need are accessing other sources of aid

## Recommendations

6. Review the present policy of providing a “top-up” to scholarship students who reside outside the metro Vancouver area
  
7. Examine the scholarship continuance policy to recognize the significant population of first generation post-secondary and university scholarship recipients

## Recommendations





# Questions

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