

# 47<sup>th</sup> Semi-annual general meeting e Assemblée générale semestrielle

Ottawa • May 19-22, 2005 • du 19 au 22 mai 2005

## AGENDA

### Budget Committee

May 2005 National General Meeting

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#### DAY ONE

#### 1. PREPARATION FOR COMMITTEE DELIBERATIONS

##### a. Ratification of the Committee Chair(s)

Standing Resolution 1, Section 4, Committee Chairperson states that:

As its first order of business each standing general meeting committee shall either:

- a. ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or
- b. elect a committee chairperson from within its membership.

##### b. Roundtable Introductions

##### c. Review of the Committee Agenda

##### d. Review of the Committee's Terms of Reference

Committee members should be familiar with the responsibilities of the Budget Committee as established in the Federation's Standing Resolutions. At the spring general meeting the Committee shall:

- develop a draft budget for the upcoming fiscal year for submission to the closing plenary of the semi-annual general meeting;
- assess the availability of funds for proposed projects and/or purchases, including donations; and
- discuss the Federation's long-term financial planning.

#### 2. REVIEW OF FINANCIAL DOCUMENTS AND ISSUES

##### a. Orientation to the Finances of the Federation

- i. Revenue Sources
- ii. Areas of Spending
- iii. Funds and Fund Balances

##### b. Overview of Current Financial Realities/Pressures (In-camera)

##### c. Review of 2004-2005 Budget and Year-to-date Statements

The Committee will review the 2004-2005 budget and the comparative year-to-date statement of revenue and expenditures.

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**DAY TWO**

**3. REVISION OF THE 2005-2006 BUDGET**

**a. Presentation of Draft Budget**

The first draft of the 2005-2006 budget, as prepared by the National Executive, will be presented.

**b. Consideration of Amendments**

The Committee will consider amendments proposed to the 2005-2006 budget.

**4. OTHER BUSINESS**

**5. ADJOURNMENT**

## **AGENDA**

### **Campaigns and Government Relations Forum**

May 2005 National General Meeting

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#### **1. PREPARATION FOR FORUM DELIBERATIONS**

- a. Roundtable Introductions**
- b. Review of the Forum Agenda**

#### **2. DEVELOPMENT OF THE NATIONAL CAMPAIGNS PLAN**

##### **a. Presentation of the 2005 Federal Election Guide**

A federal election addendum to the 2005-2006 draft Campaigns Strategy will be presented.

##### **b. Presentation of Draft 2005-2006 Campaigns Strategy**

The Campaigns Strategy forms the basis for the Federation's campaigns and government relations work for the year to follow. Each year, prior to the May national general meeting, the National Executive prepares a draft Campaigns Strategy, for presentation to the general meeting for consideration.

A presentation about the issues addressed in the draft strategy will be provided.

##### **c. Revision of Draft 2005-2006 Campaign Strategy**

The Committee will revise the draft of the 2005-2006 campaigns strategy for submission to the closing plenary.

#### **3. MOTIONS REFERRED FROM OPENING PLENARY**

The following motions will likely be referred to the Campaigns and Government Relations Forum by the opening plenary.

##### **2005/05:N09 MOTION**

Local 24/

Whereas post-secondary institutions are not just academic sites of learning, teaching, and research but they are also living and meeting places; and

Whereas Canadian student populations are increasingly culturally, religiously, and ethnically diverse; and

Whereas university and college administrations have a responsibility to provide resources and support for the religious and cultural needs of all students; therefore

Be it resolved that member locals be encouraged to actively assist those members who are part of religious or cultural campus clubs and groups in lobbying for the creation of accessible and suitable multi-faith prayer space on campus where no such facilities currently exist.

##### **2005/05:N10 MOTION**

Local 24/

Whereas students' unions and post-secondary institutions across the country purchase thousands of dollars in apparel and promotional items each year for students on their campuses and this apparel is often used to promote either the students' union or the institution; and

Whereas it is in the interests of students' unions and their respective institutions to purchase goods and services from responsible manufacturers that provide quality products and services at competitive prices; and

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Whereas there are many companies in the garment, apparel, and promotional industry that have faced numerous incidents and documented reports of workers' rights abuses and sweatshop conditions such as poverty wages, excessive work hours, discrimination, abuse, and harassment, child and forced labour, and failure to provide the minimum statutory benefits for workers; and

Whereas sweatshop abuses flourish when the conditions of workers are hidden, kept private and where information on employment conditions is not made available to consumers, including individual students' unions and post-secondary institutions; and

Whereas students on various campuses throughout the United States and Canada have taken strong stances promoting worker's rights and ethical purchasing policies and in many cases they have successfully campaigned to pressure their institutions to adopt effective codes of conduct that impose apparel purchasing policies against products produced in sweatshop and illegal conditions; and

Whereas withholding student and institutional dollars from unethical apparel, garment, and promotional item companies is an effective way to exert pressure on the industry to reform hiring conditions and eliminate sweatshop practices; therefore

Be it resolved that member locals be encouraged to adopt "no sweat" purchasing policies for their respective students' unions and to make a firm commitment to purchase "sweat-free" apparel and goods wherever possible, with the goal of having such policy take effect prior to purchasing promotional items and clothing for the Fall 2005 orientation; and

Be it further resolved that member locals be encouraged to adopt "anti-sweatshop" campaigns to pressure their respective post-secondary institutions to join the 13 other Canadian post-secondary institutions in adopting codes of conduct or ethical purchasing policies against sweatshop made goods and that these campaign efforts be aimed at generating awareness and wide-spread public support and escalating pressure on institutional administrations using such lobbying tactics as petitions, letter-writing, sweatshop fashion shows and sit-ins, as necessary; and

Be it further resolved that anti-sweatshop campaign materials be produced and/or distributed to member locals to assist with local organising efforts.

### **2005/05:N12 MOTION**

Local 24/

Whereas many students face additional financial barriers that are not directly related to educational fees, such as transit, books, housing and other living expenses; and

Whereas campus student residence spaces are often too expensive or too limited to accommodate all students and, therefore, many students are forced to commute to campus in order to save on housing costs; and

Whereas the Federation has been successful in bringing students together to realise savings through bulk-purchasing programmes and services such as the common handbook, Studentsaver and the National Student Health Network, all of which have served to directly save money for students and students' unions; and

Whereas the Federation has already successfully lobbied for international and domestic student travel discounts on VIA Rail, Air Canada and Greyhound Bus Lines, available through the International Student Identity Card (ISIC); and

Whereas the Federation has established policy and practice that supports and encourages members to utilise and support publicly-run services; and

Whereas several students' unions across the country have successfully negotiated student discounts on municipal and regional transit systems; therefore

Be it resolved that member locals be encouraged to collaborate with other member locals and non-member campus students' unions in their respective regions to develop a transit campaign and to lobby for discounted municipal and regional student passes for public transit systems; and

Be it further resolved that member locals that have successfully negotiated similar discount passes with public transit systems be encouraged to share their experiences and resources to assist other member locals to obtain transit discounts for students on other campuses and in other regions.

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### **2005/05:N13 MOTION**

Local 8/

Whereas the Federation organises the "Where's the Justice?" campaign in support of Aboriginal peoples' rights; and

Whereas Aboriginal women's rights should be of particular concern when it comes to human rights in Canada; and

Whereas according to the Stolen Sisters campaign Indigenous women in Canada between the ages of 25 and 44, with status under the Indian Act, are five times more likely than all other women of the same age to die as the result of violence; and

Whereas the purpose of Stolen Sisters, to call on all levels of government to work closely and urgently with Indigenous peoples' organisations, and Indigenous women in particular, to institute plans of action to stop violence against Indigenous women reflects the spirit of the "Where's the Justice?" campaign; and

Whereas more information about the Stolen Sisters campaign is available on the Internet at [www.amnesty.ca/stolensisters/index.php](http://www.amnesty.ca/stolensisters/index.php); therefore

Be it resolved that the Stolen Sisters campaign be endorsed and incorporated into the "Where's the Justice?" campaign;

Be it further resolved that materials relating to the campaign be distributed to member locals and provincial offices; and

Be it further resolved that member locals be encouraged to work with relevant groups in their community, to support and mobilise for the Stolen Sisters campaign.

### **2005/05:N14 MOTION**

Local 38/

Whereas little research has been done on funding for minority-language post-secondary education; and

Whereas funding for minority-language post-secondary institutions is provided through different levels of government and a number of distinct ministries; and

Whereas to ensure student representation within the ministries that fund their education work must be undertaken; therefore

Be it resolved that national research on funding for minority-language post-secondary education be undertaken.

### **2005/05:N15 MOTION**

Local 38/

Whereas the Federation recognises a person's right to education and services in his or her first language; and

Whereas the Federation recognises as an injustice the fact that Anglophones in Canada have fewer barriers to overcome than non-Anglophones with regard to access to education and services in their first language; and

Whereas it is essential that minorities have access to post-secondary education, for social, cultural and economic reasons, as well as to prevent students from turning their backs on their culture; and

Whereas little research has been done on students who study in the language of the minority; therefore

Be it resolved that research on minority-language education be undertaken; and

Be it further resolved that the research focus on, among other things, program availability, accessible teaching tools, university research possibilities in the institutions, and provide an analysis of the direct effects of these factors on the students.

### **2005/05:N16 MOTION**

Local 98/

Whereas on the 23rd of June 1985 a bomb blew up in the Narita Airport, Japan killing two baggage handlers and 55 minutes later a second bomb blew up on Air India Flight 182 killing 329 people; and

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Whereas it has been proven that the bombs originated from Vancouver; and  
Whereas the majority of the victims were Canadian and of South Asian descent who were travelling to India to visit their loved ones; and  
Whereas 80 children under the age of twelve were killed as were 20 families; and  
Whereas there is clear evidence that the government of India had warned then-Canadian Prime Minister Brian Mulroney about an impending attack on the aviation industry; and  
Whereas the Canadian government took no precautionary measures; and  
Whereas the Canadian Security and Intelligence Service destroyed 150 hours of surveillance tapes without transcribing them; and  
Whereas the Royal Canadian Mounted Police failed to engage in 24 hour surveillance of one of the prime suspects; and  
Whereas 20 years later many questions remain unanswered in the largest case of mass murder involving Canadians; and  
Whereas these facts have given rise to allegations against the Canadian justice system of racism and deferential treatment of victims based on their ethnicity or place of origin; and  
Whereas a public inquiry would assist in answering such questions and help to bring about progressive improvements in the Canadian intelligence and justice systems; therefore  
Be it resolved that a letter be written to Prime Minister Paul Martin calling for a public inquiry into the Air India Bombings and the conduct of the Canadian intelligence system; and  
Be it further resolved that member locals be encouraged to write similar letters; and  
Be it further resolved that member locals be encouraged to collect signatures on the Air India Victims' Families Association petition; and  
Be it further resolved all relevant campaign materials be distributed to member locals as they become available.

**2005/05:N17 MOTION**

Local 34/

Whereas tuition fees in Nova Scotia have more than doubled in the past decade, making Nova Scotia's tuition fees the highest in the country; and  
Whereas in December 2004 the universities in Nova Scotia signed a Memorandum of Understanding with the Government of Nova Scotia which caps tuition fee increases at 3.9% in each of the next three years, at which time average undergraduate tuition fees in Nova Scotia will exceed \$6700; and  
Whereas international students, dentistry students, medical students, and full-cost recovery students are not included in the tuition fee cap; and  
Whereas Nova Scotian students were not consulted during the development process of the Memorandum of Understanding; therefore  
Be it resolved that member locals be encouraged to send letters stating their discontent regarding the Nova Scotia Memorandum of Understanding; and  
Be it further resolved that copies of the letters be sent to the Federation's Maritimes office.

**2005/05:N18 MOTION**

Whereas the Canadian Millennium Scholarship Foundation was established in 1998 with an endowment of \$2.5 billion with the stated purpose of reducing student indebtedness;  
Whereas then-Finance Minister Paul Martin promised that the Foundation would reduce student debt by \$3000 per student for those in need, but most students have seen virtually no debt reduction since the creation of the Foundation;  
Whereas the Foundation also has a \$10 million research budget that has been used to campaign for higher tuition fees and student debt;  
Whereas the Federation has expressed concerns with the secretive, informal bidding process that the Foundation employs to award research contracts, and has bestowed lucrative, "no bid" contracts to former Foundation employee Alex Usher;

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Whereas the Foundation is not subject to public accountability standards and Canada's Auditor General has recently expressed concern that Foundations are sitting on billions of dollars of taxpayer money but are exempt from "value for dollar" audits that determine the effectiveness of spending decisions;

Whereas the Foundation has mysteriously found money for a new grants program but is taking an ad hoc approach to spending and as a result is continuing to distribute funds unequally between students in different provinces; and

Whereas the Foundation has already signed agreements with the Governments of Quebec and British Columbia, but has not yet approached the Government of Newfoundland and Labrador to initiate negotiations to create similar grants for students in this province, despite the fact that Newfoundland and Labrador students have the largest debts loads in Canada; therefore

Be it resolved that a letter be sent to the Foundation demanding that negotiations be initiate with every province to create low-income grants for students beginning in fall 2005.

### **4. ADJOURNMENT**



# CAMPAIGN GUIDE

## Grants Not Loans

### Background

In Canada, more than half of all post-secondary students require some financial assistance. Three-quarters of those receiving student loans believe they would be unable to participate in higher education without this assistance. A national system of needs-based grants would reduce daunting levels of student debt and improve access to universities and colleges.

In 1998, the federal government belatedly acknowledged the student debt crisis by creating the Millennium Scholarship Foundation (MSF). The Foundation was endowed with \$2.5 billion to disburse by 2009.

Regrettably, the Foundation has proven to be an ineffective public relations stunt, and under the guise of "research", a campaign machine that advocates for higher tuition fees and higher student debt.

As a result of the Foundation's politicised research project and inability to provide student financial assistance, *the Foundation must be wound down and its endowment used to fund a national system of needs-based grants.*

### Implementation

**Research:** The Federation will produce a fact sheet that outlines how a national system of grants would be funded and administered. The Federation will also continue to publicise the biased nature of the Millennium Scholarship Foundation's

research and communications efforts.

**Government Relations:** The Federation will lobby federal decision-makers to convert the MSF into a national system of needs-based grants. The Federation will also lobby for the augmentation of the federal low-income grant.

**National Awareness and Media:** The Federation will develop a comprehensive media strategy designed to highlight the inefficiencies and ineffectiveness of the current Canada Student Loan Program. The Federation will seek to publish research and opinion pieces in national publications.

**Membership Mobilisation:** The Federation will encourage member locals to continue to highlight the impact of student debt in their communities.

The Federation will investigate the possibility of hosting a national conference on student financial aid in order to, among other things, maintain a national dialogue about what must be done with the Millennium Scholarship Foundation.

In addition, the Federation will launch a national petition drive that will serve both to educate the membership and influence decision-makers.

**Coalition Work:** The Federation will continue to build widespread awareness among coalition partners about the importance of winding down the Millennium Scholarship Foundation in favour of grants.

### Campaign Goal

The Federation seeks the establishment of a national system of grants.

# GUIDE DES CAMPAGNES

## Un système national de bourses

### Objectifs de la campagne

La Fédération veut la création d'un système national de bourses.

### Contexte

Au Canada, plus de la moitié de toutes les étudiantes et les étudiants du postsecondaire ont besoin d'aide financière. Les trois quarts des personnes qui reçoivent de l'aide financière aux études croient qu'il leur serait impossible de faire des études postsecondaires sans cette aide. Un système national de bourses accordées selon le besoin réduirait le niveau important de l'endettement étudiant et améliorerait l'accès aux universités et aux collèges.

En 1998, le gouvernement fédéral a reconnu tardivement la crise de l'endettement étudiant en créant la Fondation canadienne des bourses d'études du millénaire. La Fondation disposait d'un fonds de 2,5 milliards de dollars à dépenser d'ici 2009.

Malheureusement, la Fondation s'est avérée un artifice publicitaire inefficace et sous l'apparence de la « recherche », une machine de campagne qui favorise des frais de scolarité plus élevés et une dette étudiante encore plus élevée.

En raison du projet de recherche politisé de la Fondation et de son incapacité de fournir de l'aide financière aux étudiantes et aux étudiants, la Fondation doit être abolie et l'argent dont elle dispose doit servir à financer un système national de subventions fondées sur les besoins.

### Mise en oeuvre

**Recherche :** La Fédération produira une info-fiche décrivant la façon dont on pourrait financer et gérer un système national de bourses. La Fédération continuera aussi de publiciser la nature biaisée des efforts de recherche et de communication de la Fondation canadienne des bourses d'études du millénaire.

### Relations avec le gouvernement :

La Fédération fera des pressions auprès des décideurs fédéraux en faveur de la conversion de la Fondation des bourses d'études du millénaire en un système national de bourses accordées en fonction du besoin. La Fédération exercera également des pressions en faveur de l'augmentation de la subvention fédérale aux étudiantes et étudiants de faible revenu.

### Travail de sensibilisation et médias :

La Fédération élaborera une stratégie médiatique complète pour souligner les inefficacités du Programme canadien de prêts aux étudiants actuel. La Fédération tentera de diffuser de la recherche et des articles dans des publications nationales.

### Mobilisation des membres :

La Fédération encouragera les associations membres à poursuivre leur travail de sensibilisation sur les conséquences néfastes de l'endettement étudiant dans leurs communautés.

La Fédération examinera la possibilité d'organiser une conférence nationale sur l'aide financière aux étudiantes et étudiants notamment afin de maintenir un dialogue national sur ce qu'il faut faire avec la Fondation canadienne des bourses d'études du millénaire.

De plus, la Fédération lancera une campagne nationale de pétitions qui servira à informer les membres et à influencer les décideurs.

**Travail de coalition :** La Fédération continuera à sensibiliser tous ses partenaires de coalition à l'importance de remplacer la Fondation canadienne des bourses d'études du millénaire par des subventions.

# CAMPAIGN GUIDE

## Income Contingent Repayment

### Background

In 1955, the U.S. economist Milton Friedman devised Income Contingent Loan Repayment Schemes (ICR) as a way to reduce the role of the state in financing education. Instead of public funding, Friedman proposed that tuition fees be full cost-recovery. In order for students to pay for these vastly higher tuition fees, he proposed that they have access to larger loans and that repayment be based on an individual's level of income after graduation (i.e. income contingent).

More recently, former Ontario Premier Bob Rae has called for the national implementation of ICR. Rae's vision of ICR flows directly from Friedman's founding premise that the individual should be responsible for all or most of the cost of a post-secondary education.

Under an ICR scheme, borrowers repay their loans as a percentage of their incomes upon completion of study. Thus, graduates with lower levels of income repay their loans over a longer period of time, while those in high-paying jobs repay their loans quicker and pay less compound interest. Those who can afford to pay their tuition fees up-front avoid extended compound interest payments after graduation, thereby paying less for their education than students who must borrow to pay for tuition fees.

Where ICR models that have been implemented in other parts of the world tuition fees have increased dramatically. In fact, ICR schemes attempt to facilitate fee hikes and hasten the underfunding of

education. Most models replace loan plans that are interest-free during the period of study (such as Canada Student Loans) with loans that collect interest from the moment they are provided.

### Implementation

**Research:** The Federation will continue to monitor the effects of ICR schemes in those jurisdictions outside of Canada where they have been implemented.

**Government Relations:** The Federation will continue to lobby governments that present ICR schemes as a form of "student aid". The Federation will implement the campaign provincially to ensure that Income Contingent Loan Repayment schemes are not introduced in provincial budgets. The Federation will continue to lobby the federal government to expressly exclude ICR schemes as a prerequisite to any future harmonisation agreements or service provider contracts.

**National Awareness and Media:** The Federation will investigate the possibility of hosting a national conference on student financial aid and present the current evidence about ICR's effects on student debt.

**Membership Mobilisation:** Member locals will be encouraged to submit to campus and local newspapers features about the problems associated with Income Contingent Loan Repayment schemes and the negative effect of student debt on access to education. A draft opinion editorial shall be circulated to member locals for the purpose of submitting it to campus, community, and local corporate newspapers.

### Campaign Goal

The Federation seeks to halt any government initiatives to implement Income Contingent Loan Repayment schemes.

# GUIDE DES CAMPAGNES

## Remboursement de prêts d'études en fonction du revenu

### Objectifs de la campagne

La Fédération veut mettre fin aux initiatives gouvernementales de mise en œuvre des modèles de prêts remboursables en fonction du revenu.

### Contexte

En 1955, l'économiste américain Milton Friedman a conçu les prêts remboursables en fonction du revenu (PRR) pour réduire le rôle de l'État dans le financement de l'enseignement. Au lieu d'un financement public, Friedman a proposé que les frais de scolarité soient entièrement récupérés. Et, pour que les étudiantes et étudiants puissent payer ces frais de scolarité extrêmement plus élevés, il a proposé de leur donner accès à des prêts plus importants et que le remboursement soit fondé sur le niveau de revenu de la personne après ses études (donc en fonction du revenu).

Dernièrement, l'ancien premier ministre Bob Rae a souhaité la mise en œuvre du remboursement en fonction du revenu. La vision d'un remboursement en fonction du revenu de Bob Rae émane directement du principe de base de Friedman qui dit que l'individu doit être responsable de la totalité ou de la plus grande partie du coût de son éducation postsecondaire.

Dans un plan de remboursement en fonction du revenu, les emprunteurs remboursent leurs prêts sous la forme de pourcentage de leur revenu après avoir terminé leurs études. Ainsi, les diplômé(e)s dont le revenu est moins élevé remboursent leurs prêts sur une plus longue période de temps, tandis que ceux et celles qui ont des emplois plus rémunérateurs remboursent leurs prêts plus rapidement et paient moins d'intérêts composés. Celles et ceux qui peuvent payer leurs frais de scolarité directement évitent de payer des intérêts composés longtemps après la fin de leurs études et payent ainsi moins pour leur éducation que les étudiantes et étudiants qui doivent emprunter pour payer leurs frais de scolarité.

Dans les autres parties du monde où des programmes de remboursement des prêts en fonction du revenu ont été mis en œuvre, les frais de scolarité ont augmenté de façon spectaculaire. En fait, les plans de remboursement des prêts en fonction du revenu cherchent à faciliter les augmentations des frais de scolarité

et accélèrent le sous-financement de l'enseignement. La plupart des modèles remplacent les plans de prêts sans intérêt au cours de la période d'études (comme le Programme canadien de prêts aux étudiants) par des prêts qui collectent de l'intérêt dès qu'ils sont remis.

### Mise en œuvre

**Recherche :** La Fédération continuera d'étudier les conséquences des modèles des plans de remboursement en fonction du revenu dans les juridictions où ils ont été mis en œuvre hors du Canada.

**Relations avec le gouvernement :** La Fédération continuera de faire des pressions auprès des gouvernements qui présentent des modèles de prêts remboursables en fonction du revenu comme étant une forme « d'aide aux étudiantes et étudiants ». La Fédération mettra la campagne en œuvre au niveau provincial pour s'assurer que les modèles de PRR ne seront pas inclus dans les budgets provinciaux. La Fédération continuera de faire des pressions auprès du gouvernement fédéral pour exclure expressément les PRR en tant que condition préliminaire à toute entente sur l'harmonisation ou les contrats de prestation de services.

**Travail de sensibilisation et médias :** La Fédération examinera la possibilité d'organiser une conférence nationale sur l'aide financière aux étudiantes et étudiants et de présenter les preuves courantes sur les effets des PRR sur l'endettement étudiant.

**Mobilisation des membres :** Il faudra encourager les sections membres à prendre contact avec les journaux sur le campus et les journaux locaux pour leur proposer la publication d'articles ou de reportages sur les problèmes liés aux modèles de prêts remboursables en fonction du revenu et les effets négatifs que l'endettement des étudiantes et étudiants aura sur l'accès à l'éducation. La Fédération diffusera un modèle d'article de journal que les sections membres pourront proposer à leurs journaux étudiants et communautaires, et aux quotidiens de leur région.

# CAMPAIGN GUIDE

## Federal Funding

### Background

For more than two decades, the Federation has called for the establishment of a national system of standards for post-secondary education and research. The Federation proposes that a Ministry of Post-Secondary Education and Research be established and that a Post-Secondary Education Act, modelled on the principles of the Canada Health Act, be developed and implemented. A new Ministry will provide the federal government with a coherent national vision for post-secondary education and research.

Since the introduction of the Canada Health and Social Transfer (CHST) in 1996, accountability and transparency for federal post-secondary education transfers has diminished significantly. Even under the Canada Social Transfer, introduced to replace the CHST in April 2004, there are no criteria that establish the amount that provincial governments are expected to spend on post-secondary education.

In June 2004 under the pressure of an election campaign, Prime Minister Paul Martin promised to allocate \$7 to \$8 billion to a dedicated transfer payment.

### Implementation

**Research:** The Federation will track the continued under-investment in federal transfers measured against inflation, population growth, and economic growth.

**Government Relations:** The Federation will meet with provincial and federal decision-makers to promote a clear vision for administering post-secondary education in Canada. Special emphasis will be placed on seeking the support of the Council of Ministers of Education.

Meetings to lobby for federal-provincial negotiations on a post-secondary education act that will have the goal of establishing a dedicated post-secondary education transfer payment and corresponding legislation shall be initiated jointly with the Canadian Association of University Teachers.

### National Awareness and Media:

The Federation will implement a communications strategy in order to keep Prime Minister Paul Martin's 2004 election promise of a dedicated transfer payment in the public consciousness. Member locals will be encouraged to make use of local and campus media for similar purposes.

**Membership Mobilisation:** A draft letter to Members of Parliament supporting the creation of a dedicated transfer tied to tuition fees and a federal act will be circulated to member locals. Member locals will be encouraged to approach university and college Boards of Governors, Senates, and Education Councils, institution presidents, and faculty and staff unions to send similar letters supporting the Federation's campaign.

### Campaign Goal

The Federation will continue to seek the establishment of:

- a dedicated cash transfer payment for post-secondary education;
- a federal Ministry of Post-Secondary Education and Research;
- a Post-Secondary Education Act; and
- a system of national guidelines for quality and accessibility in post-secondary education and research that includes special recognition for the needs of Québécois and First Nations students.

# GUIDE DES CAMPAGNES

## Financement fédéral

### Objectifs de la campagne

La Fédération continuera à rechercher la création :

- d'un paiement de transfert spécial pour l'enseignement postsecondaire;
- d'un Ministère fédéral de l'enseignement et de la recherche postsecondaires;
- d'une Loi sur l'enseignement postsecondaire;
- d'un système de directives nationales pour la qualité et l'accessibilité de l'enseignement et de la recherche au niveau postsecondaire qui inclut la reconnaissance spéciale des besoins des étudiantes et étudiants du Québec et des Premières Nations.

### Contexte

Depuis plus de deux décennies, la Fédération exige l'établissement d'un système national de normes pour l'enseignement et la recherche postsecondaires. La Fédération propose qu'un Ministère de l'enseignement et de la recherche postsecondaires soit établi et qu'une Loi sur l'enseignement postsecondaire soit élaborée et mise en œuvre, ayant pour modèle les principes de la Loi canadienne sur la santé. Un nouveau Ministère offrira au gouvernement fédéral une vision nationale cohérente pour l'enseignement et la recherche postsecondaires.

Depuis l'introduction du Transfert canadien en matière de santé et de programmes sociaux en 1996, l'obligation de rendre compte et la transparence dans les transferts fédéraux pour l'enseignement postsecondaire ont diminué considérablement. Même en vertu du Transfert social canadien, introduit pour remplacer le Transfert canadien en matière de santé et de programmes sociaux en avril 2004, il n'y a pas de critères établissant le montant que les gouvernements provinciaux sont censés dépenser pour l'enseignement postsecondaire.

En juin 2004, sous la pression d'une campagne électorale, le premier ministre Paul Martin a promis d'affecter entre sept et huit milliards de dollars à un paiement de transfert spécial.

### Mise en oeuvre

**Recherche :** La Fédération surveillera le sous-investissement continu dans les transferts fédéraux comparativement à l'inflation, à la croissance de la population et à la croissance économique.

### Relations avec le gouvernement

: La Fédération rencontrera les

décisionnaires provinciaux et fédéraux pour promouvoir une vision claire de l'administration de l'enseignement postsecondaire au Canada. Elle cherchera particulièrement à obtenir le soutien du Conseil canadien des ministres de l'Éducation.

La Fédération entreprendra avec l'Association canadienne des professeures et professeurs d'université des rencontres en vue d'exercer des pressions en faveur de la tenue de négociations entre le gouvernement fédéral et les provinces concernant l'élaboration d'une loi sur l'enseignement postsecondaire dont le but serait d'établir un paiement spécial de transfert en matière d'éducation postsecondaire et les règles afférentes.

### Travail de sensibilisation et médias :

La Fédération mettra en œuvre une stratégie de communication pour faire en sorte que le public garde à l'esprit la promesse électorale faite par le premier ministre Paul Martin en 2004 de créer un paiement de transfert spécial. On encouragera les associations locales à utiliser les médias locaux et ceux des campus aux mêmes fins.

### Mobilisation des membres :

Un projet de lettre aux députés réclamant la création d'un paiement de transfert spécial lié aux frais de scolarité et l'adoption d'une loi fédérale connexe sera distribué aux associations membres. On encouragera les associations locales à s'adresser aux conseils des gouverneurs des universités et des collèges, aux Sénats, aux Conseils de l'éducation, aux présidents des institutions, aux enseignantes et enseignants et aux syndicats des employés pour les convaincre d'envoyer des lettres semblables soutenant la campagne de la Fédération.

# CAMPAIGN GUIDE

## Reduce Tuition Fees

### Background

The Federation has galvanised public support for freezing and reducing tuition fees. Increased awareness about the effects of tuition fee increases on access to post-secondary education has helped shift public opinion such that recent polling indicates that over 80% of Canadians oppose further tuition fee increases and that roughly half support a reduction in fees.

The challenge for the Federation is to maintain the momentum towards lower tuition fees in provinces where freezes and reductions have already occurred and create pressure in other provinces to reverse recent increases.

### Implementation

**Research:** The Federation will compile information describing different systems of post-secondary education in countries where no tuition fees exist. Also, research will be collected on the effects of tuition fees in countries where they have recently been introduced.

In particular the Federation will rebut the research disseminated by proponents of higher tuition fees such as the Millennium Scholarship Foundation, the Educational Policy Institute, and others.

**Government Relations:** The Federation will lobby for the restoration of federal transfer payments for post-secondary education in meetings with federal and provincial officials. The Federation will continue to lobby provincial premiers to issue a statement from the annual Premier's Conference calling for increased federal funding for post-secondary education as a catalyst to reduce tuition fees.

The Federation will articulate the positive benefit of expanding access for international students by eliminating differential fees.

**National Awareness and Media:** Tuition fees and equitable access to university and college will remain the core of virtually all Federation communications, including but not limited to federal and provincial elections.

The Federation will also seek to expose the regional disparity with respect to access to post-secondary education and continue to build public support for the elimination of fees nation-wide.

**Membership Mobilisation:** The Federation will encourage member locals to continue to campaign against tuition fee hikes for both Canadian and international students.

### Campaign Goal

The Federation seeks:

- the progressive reduction of tuition and ancillary fees at public post-secondary institutions across the country with the ultimate goal of eliminating user fees;
- to address the exclusion of marginalised groups from post-secondary education caused by rising tuition fees;
- the elimination of differential fees for international students and an end to the growing trend among university administrators to regard international students as revenue opportunities for colleges and universities.

# GUIDE DES CAMPAGNES

## Réduction des frais de scolarité

### Objectifs de la campagne

La Fédération vise les objectifs suivants :

- la réduction progressive des droits de scolarité et des frais afférents dans les établissements d'études postsecondaires partout au pays, en vue d'éliminer tous les frais;
- le règlement de la question de l'exclusion des groupes marginalisés de l'enseignement postsecondaire en raison de l'augmentation des frais de scolarité;
- l'élimination des frais différentiels pour les étudiantes et étudiants étrangers et halte à la tendance croissante de l'administration des universités qui perçoit cette population étudiante comme des possibilités de revenu pour les collèges et les universités.

### Contexte

La Fédération a galvanisé l'appui du public pour le gel et la baisse des droits de scolarité. En effet, la population est de plus en plus consciente des répercussions associées à la hausse des droits de scolarité. D'après des sondages réalisés récemment, plus de 80 % des Canadiens et Canadiennes s'opposent à toute autre augmentation des droits de scolarité et environ la moitié de la population est en faveur d'une baisse des droits de scolarité.

La Fédération devra poursuivre ses efforts pour réduire les droits de scolarité dans les provinces qui ont déjà gelé ou abaissé leurs droits de scolarité, et elle devra exercer des pressions dans les autres provinces pour inverser les dernières hausses.

### Mise en oeuvre

**Recherche :** La Fédération compilera des données sur des modèles d'éducation postsecondaire dans des pays où les étudiantes et étudiants ne paient pas de frais de scolarité. Elle réunira également des études sur les effets des frais de scolarité dans les pays où ils viennent d'être introduits.

La Fédération réfutera en particulier les analyses des partisans des droits de scolarité plus élevés, notamment celles de la Fondation canadienne des bourses d'études du millénaire et du Educational Policy Institute.

### Relations avec le gouvernement :

La Fédération fera des pressions

en vue de rétablir les paiements de transfert du gouvernement fédéral destinés aux études postsecondaires au cours de réunions avec les responsables fédéraux et provinciaux. La Fédération continuera de presser les premiers ministres provinciaux à appuyer la publication d'une déclaration de la Conférence annuelle des premiers ministres exigeant l'augmentation du financement fédéral pour l'éducation postsecondaire afin de réduire les droits de scolarité.

La Fédération fera connaître les avantages de l'élargissement de l'accès à la population étudiante internationale en éliminant les frais différentiels pour les étudiantes et étudiants étrangers.

### Travail de sensibilisation et médias

**Travail de sensibilisation et médias :** Les frais de scolarité et l'accès équitable à l'université et au collège demeureront au centre de pratiquement toutes les communications de la Fédération, incluant sans s'y limiter les élections fédérales et provinciales.

La Fédération cherchera également à exposer la disparité régionale concernant l'accès à l'éducation postsecondaire et continuera de réunir le soutien public en faveur de l'élimination des droits de scolarité à la grandeur du pays.

**Mobilisation des membres :** La Fédération encouragera les sections membres à poursuivre leur campagne contre les hausses des frais de scolarité pour les étudiantes et étudiants du Canada et de l'étranger.

# CAMPAIGN GUIDE

## Stop the GATS

### Background

In 1995, the Government of Canada became a signatory to the General Agreement on Trade in Services (GATS) through its membership in the World Trade Organization (WTO). The GATS forms the basis for any new trade in private and public services. It will potentially cover all services, except those "provided in the exercise of governmental authority" if they are also "supplied neither on a commercial basis nor in competition with one or more service suppliers." Because public education and private education co-exist in Canada, the provision above does not necessarily protect the public system from inclusion under the GATS. Essentially, GATS regulations threaten to infringe on the ability of all levels of government to provide and democratically regulate services, including public education.

To-date, Canada has not put education on the table for negotiations, but there has been no commitment made that it will not be introduced in the future.

### Implementation

**Research:** The Federation will continue to participate in the Trade Initiative Research Project (TIRP). TIRP is a consortium of researchers who meet quarterly to review government trade agreements and the global literature devoted to analyzing and critiquing global trade agreements. An updated GATS factsheet will be released.

**Government Relations Strategy:** The Federation will lobby the federal government to end all negotiations on publicly offered services. In addition, the Federation will lobby municipal councils to adopt resolutions that oppose trade liberalisation agreements that threaten locally provided services. The Federation will continue to monitor international organisations such as the Organization for Economic Co-Operation and Development (OECD) and gather information about possible trade liberalisation trends effecting Canada.

**Membership Mobilisation:** Member locals will be encouraged to participate in a letter-writing campaign to the Minister of Industry and the Prime Minister, expressing concern about the impacts of existing trade and intellectual property agreements on public post-secondary education. Ministers will also be encouraged to make Canada a leader in opposing "free market" education at negotiations.

**Coalition Work:** National coalition work will be conducted through continued membership and participation in the Common Frontiers, an organisation of non-governmental groups opposed to trade liberalisation. The Federation will also work through the International Union of Students to build international links promoting accessible, high quality public post-secondary education.

### Campaign Goal

The Federation seeks to halt Canadian trade negotiations on post-secondary education and other public services.

# GUIDE DES CAMPAGNES

## Arrêtez le GATS

### Objectif de la campagne

La Fédération veut mettre un terme aux négociations commerciales du Canada sur l'enseignement postsecondaire et les autres services publics.

### Contexte

En 1995, le gouvernement du Canada a été un des signataires de l'Accord général sur le commerce des services (GATS) en sa qualité de membre de l'Organisation mondiale du commerce (OMC). Le GATS – qui est à la base de tout nouveau commerce de services – englobe potentiellement tous les services, sauf ceux qui sont fournis dans l'exercice de l'autorité gouvernementale à condition qu'ils ne soient fournis ni sur une base commerciale ni sur une base compétitive avec un ou plusieurs fournisseurs de services. En raison de la coexistence de l'éducation publique et privée au Canada, cette disposition ne protège pas le système public de l'inclusion dans le GATS. Avant tout, les règlements du GATS menacent d'enfreindre la capacité qu'ont les gouvernements et les municipalités à fournir des services comme l'éducation publique, et de les réglementer de façon démocratique.

Jusqu'ici, le Canada n'a pas placé l'éducation à la table pour les négociations, mais il n'existe pas d'engagement voulant que cela ne soit pas introduit plus tard.

### Mise en oeuvre

**Recherche** : La Fédération continuera de participer au Projet de recherche sur le commerce et l'investissement (Trade Initiative Research Project - TIRP). Il s'agit d'un consortium de chercheurs progressistes qui se rencontrent tous les trois mois pour examiner les ententes commerciales conclues par le gouvernement ainsi que la documentation mondiale consacrée à l'analyse et à la critique des ententes commerciales mondiales. L'info-fiche décrivant les conséquences de l'AGCS sur l'éducation postsecondaire sera mise à jour.

### Stratégie des relations avec le

**gouvernement** : La Fédération fera des pressions auprès du gouvernement fédéral pour qu'il cesse toutes les négociations ayant trait au commerce des services. La Fédération fera des pressions auprès des élus municipaux pour adopter des résolutions exigeant que les accords commerciaux internationaux n'entravent pas les services fournis au niveau local. Enfin, les membres de la Fédération continueront de surveiller les organismes internationaux comme l'Organisation de coopération et de développement économiques (OCDE) et d'assister à des réunions en tant qu'observateurs pour rassembler de l'information stratégique sur la libéralisation du commerce concernant le Canada.

**Mobilisation des membres** : La Fédération encouragera ses sections membres à participer à la campagne de lettres adressées au ministre de l'Industrie et au premier ministre pour exprimer leurs inquiétudes concernant les accords sur le commerce et la propriété intellectuelle, et leurs conséquences pour l'éducation postsecondaire publique. Les ministres seront également encouragés à faire en sorte que le Canada soit un chef de file de l'opposition contre « le libre marché » de l'éducation au cours des négociations.

**Travail de coalition** : La Fédération poursuivra son travail de coalition au niveau national en continuant d'adhérer et de participer au groupe Front commun, une organisation de groupes non gouvernementaux opposés à la libéralisation du commerce. La Fédération continuera à travailler avec l'Union internationale des étudiants en vue de bâtir des liens dans le monde entier pour la promotion d'une éducation postsecondaire accessible et de haute qualité.

# CAMPAIGN GUIDE

## Student Loan Bankruptcy

### Background

On June 18, 1998, amendments to sections 178(1)(g)(ii) and 178(1.1) of the Bankruptcy and Insolvency Act R.S.C. 1985, c.B-3 took effect, making student loans non-dischargeable for a period of ten years after a student has ceased full or part-time studies. These provisions create a distinction between student debtors and consumer debtors in general.

Before the 1998 changes, student loan holders who lacked sufficient funds to repay their debt could, as a last resort, apply for bankruptcy protection and a discharge of all remaining debts.

This protection was in place to ensure that, even though most debtors pay back their student loans despite hardship, there was a way out for those who were destitute. In 1996, of those declaring consumer bankruptcy where the primary debt was student loans, the annual median income was \$14,211.

On December 7, 2000, the Federation filed a legal challenge to the Bankruptcy and Insolvency Act (BIA). The case was heard on June 16, 2004, in the Ontario Superior Court. Unfortunately, as of May 2005 no decision has been rendered in the challenge.

### Implementation

**Research:** The Federation will produce a fact sheet dispelling commonly held myths regarding student loan default rates, student

loan debtors and bankruptcy protection.

**Government Relations:** The Federation will continue to lobby MPs and Senators to eliminate the prohibition. In particular, the Federation will support a Private Member's Bill by Liberal Senator Wilfred Moore during the early stages of the legislative process. Senator Moore's Bill only reduces the prohibition to five years, but the Federation will lobby Members of Parliament and Senators to reduce the prohibition further at the committee stage.

In addition, the Federation will pressure the next Parliament to consider the recommendations of the Senate Committee on Banking and Commerce. Though the Committee issued its report in November 2003, it has not yet been formally considered by Parliament.

**National Awareness and Media:** A comprehensive media strategy has been developed in anticipation of the decision. Special consideration will be given to ensuring that the media exposure resulting from the Charter challenge complements the Federation's work in the next federal election.

**Membership Mobilisation:** Member locals are encouraged to continue to gather names and contact information of students and recent graduates willing to discuss the student debt crisis with the media, and forward that information to the national office.

### Campaign Goal

The Federation seeks the repeal of the ten-year ban on student loan bankruptcy.

# GUIDE DES CAMPAGNES

## La loi sur la faillite

### Objectifs de la campagne

La Fédération veut l'abolition de l'interdiction de dix ans pour les faillites reliées aux prêts étudiants.

### Contexte

Aux termes des modifications apportées le 18 juin 1998 au sous-alinéa 178(1)g(ii) et au paragraphe 178(1.1) de la Loi sur la faillite et l'insolvabilité S.R.C. 1985, c. B-3, les étudiantes et étudiants ne peuvent se libérer de leur prêt étudiant en vertu d'une faillite pour une période de dix ans suivant la fin de leurs études à plein temps ou à temps partiel. On a établi ainsi une distinction entre les débiteurs étudiants et les débiteurs consommateurs en général.

Avant les modifications de 1998, les emprunteurs étudiants qui n'avaient pas assez de moyens financiers pour rembourser leur dette, demandaient en dernier recours la protection de la loi sur les faillites et l'acquittement du reste de leurs dettes.

Rappelons que cette loi devait protéger les débiteurs privés de ressources et incapables de payer leurs dettes, bien que la plupart d'entre eux remboursent leurs prêts d'études malgré leurs problèmes financiers. En 1996, parmi les personnes qui se sont déclarées en état de faillite civile, où la dette principale consistait de prêts d'études, le revenu annuel moyen était de 14 211 \$.

Le 7 décembre 2000, la Fédération a intenté une contestation de la Loi sur la faillite et l'insolvabilité. La contestation de la Fédération a été entendue par la Cour supérieure de l'Ontario, le 16 juin 2004. Malheureusement, la décision n'a pas encore été rendue en mai 2005.

### Mise en oeuvre

**Recherche :** La Fédération produira une info-fiche pour réfuter les mythes que tout le monde croit quant au nombre de personnes qui ne remboursent pas

leur prêt étudiant, sur les débiteurs de prêt étudiant eux-mêmes et sur la protection de la loi sur la faillite.

**Relations avec le gouvernement :** La Fédération continuera d'exercer des pressions auprès des députés et des sénateurs pour éliminer l'interdiction. En particulier, la Fédération appuiera un projet de loi privé du sénateur libéral Wilfred Moore au cours des premières étapes du processus législatif. Le projet de loi du sénateur Moore réduit seulement la durée de l'interdiction à cinq ans, mais la Fédération exercera des pressions auprès des députés et des sénateurs pour que la durée de l'interdiction soit réduite encore plus à l'étape des comités.

En outre, la Fédération exercera des pressions auprès du prochain Parlement pour qu'il se penche sur les recommandations du Comité sénatorial permanent des banques et du commerce. Le Comité a publié son rapport en novembre 2003, mais il n'a pas encore été considéré de façon formelle par le Parlement.

**Travail de sensibilisation et médias :** Une stratégie médiatique complète a été élaborée en anticipation de la décision. On s'assurera surtout que l'attention des médias portant sur la contestation en vertu de la Charte complètera le travail de la Fédération lors des prochaines élections fédérales.

**Mobilisation des membres :** Il faut encourager les sections membres à continuer de prendre en note les noms et les coordonnées des étudiantes et étudiants et des nouveaux diplômés et diplômées qui seraient disposés à discuter de la crise de l'endettement étudiant avec les médias et à transmettre cette information au bureau national.

# 47<sup>th</sup> Semi-annual general meeting e Assemblée générale semestrielle

Ottawa • May 19-22, 2005 • du 19 au 22 mai 2005

## AGENDA

### National Education and Student Rights Committee

May 2005 National General Meeting

#### 1. PREPARATION FOR COMMITTEE DELIBERATIONS

##### a. Ratification of the Committee Chair(s)

Standing Resolution 1, Section 4, *Committee Chairperson*, states that:

As its first order of business each standing general meeting committee shall either:

- a. ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or
- b. elect a committee chairperson from within its membership.

##### b. Roundtable Introductions

##### c. Review of the Committee Agenda

##### d. Review of the Committee's Terms of Reference

Committee members should be familiar with the responsibilities of the National Education and Student Rights Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3 c) *National Education and Student Rights Committee* states that:

"The National Education and Student Rights Committee shall review and make recommendations to closing plenary on proposed amendments to the issues policy of the Federation, as proposed by Committee members and member locals on plenary floor."

#### 2. CURRENT POLICY ISSUES DISCUSSION

The Committee will discuss policy issues related to post-secondary education in Canada. The discussion will be facilitated by Researcher Michael Conlon.

#### 3. MOTIONS REFERRED FROM OPENING PLENARY

The following motions will likely be referred to the National Education and Student Rights Committee by the opening plenary:

##### 2005/05:N06 MOTION

Local 24/

Whereas it is important that students' unions maintain an independent relationship and voice from their college or university administrators and that students' unions work to maintain student controlled space on campuses to ensure student-run and student-focused services are created and maintained; and

Whereas many students across the country have paid millions of dollars in levies to help fund student services and student centres but in many cases continue to have little or no democratic control over these student-funded spaces; and

Whereas it is the role of students' unions to act as representative agents for the best interest of students on their respective campuses today and in the future; therefore

Be it resolved that the following policy motion be adopted:

##### Student Ownership of Campus Student Centres

##### Preamble

On many campuses, students have responded to the lack of available student space for clubs, services, and events by collecting separate student levies to fund the construction, development and operation of campus

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student centres. As such, campus student centres can provide a nexus for student life on campus and added value to the student experience on a given campus. For that reason, many college and university administrations have attempted to take an active role in supporting the construction of campus student centres in order to ensure that they maintain some degree of administrative control over these student-funded buildings and related services once operational.

Across the country, a wide a range of ownership and administrative models for campus student centres have been developed. One such model includes the creation of a third-party corporation that is not wholly owned and operated by students' unions to take over the management of the student campus centre. In some cases, these corporations begin to act as "shadow" students' unions, providing services that were previously offered through campus students' unions and thereby reducing the relevance and responsiveness of campus students' unions to their members.

### Policy

The Federation supports campus student centres that:

- promote campus student life;
- promote the visibility and profile of campus students' unions;
- provide space for student clubs, groups, and services;
- are wholly owned and operated by campus students' unions; and
- maintain students' union autonomy over governance, structure, space allocation, and programming.

The Federation opposes the creation of campus student centres that:

- are owned and operated by private, for-profit companies;
- remove or replace the general operations or services of campus students' unions;
- place control in the hands of campus administrations or third party corporations that are not wholly owned and operated by campus students' unions.

## 2005/05:N07 MOTION

Local 24/

Whereas post-secondary institutions are increasingly turning towards private sponsorship and corporate funding partnerships to build new buildings and to improve existing facilities; and

Whereas on most university and college campuses buildings, auditoriums, classrooms, benches, and elevators now bear the name of corporate entities or private donors; and

Whereas students need to play a role in working to limit the corporate and private presence on, and control of, our campuses; and

Whereas given the extent that public institutions are engaging in private fundraising, specifically through benefactor naming rights, it is important that students work to ensure that there is student input over the development of naming policies and the allocation of naming rights; therefore

Be it resolved that the following policy be adopted:

### Institutional Naming Rights

#### Preamble

Systemic underfunding of Canadian college and university campuses has forced many public post-secondary education institutions to turn towards private sponsorship and corporate funding partnerships to finance the construction of new academic programs, and buildings and to improve existing facilities. Increasingly, buildings, auditoriums, class rooms, programmes, departments and other campus sites now bear plaques proclaiming the names of various corporate sponsors or private donors. These benefactor names are, in many cases, replacing the names of prominent academics and community members that served as reminders of the institution's history, academic mission and community orientation. In addition, benefactor names serve to entrench a culture of commercialisation on campus and reflect the privatisation of public institutions.

#### Policy

The Federation supports campus building, space, and academic unit naming policies that:

- reflect the academic mandate and broader social mission of the institution;
- are determined by academic bodies within that institution where there is guaranteed participation from duly elected representatives of students, faculty, and staff; and
- ensure that individual naming decisions are made by similarly representative academic bodies.

The Federation opposes campus building, space naming, and academic unit naming policies that:

- enshrine benefactor naming rights;
- undermine the academic mandate and broader social mission of the institution;

## NATIONAL EDUCATION & STUDENT RIGHTS COMMITTEE AGENDA – PAGE 3

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- exclude duly elected representatives of students, faculty and staff from the naming process; and
- allow additional conditions or influence to accompany naming rights.

### 2005/05:N08 MOTION

Local 24/

Whereas post-secondary institutions are not just academic sites of learning, teaching, and research but are also living and meeting places; and

Whereas Canadian student populations are increasingly culturally, religiously, and ethnically diverse; and

Whereas university and college administrations have a responsibility to provide resources and support for the religious and cultural needs of all students; therefore

Be it resolved that the current policy under the heading "Religious Freedom" be given the sub-title "Religious/Spiritual Holidays".

Be it further resolved that the policy entitled "Religious Freedom" be amended to include the following subsection:

#### Campus Prayer Space

The Federation supports the right of students to have access to multi-faith prayer space on campus that is stable, accessible, adequate, and respectful to the religious needs of all students.

### 2005/05:N11 MOTION

Local 24/

Whereas Federation members understand the importance of working together to collectively defend student rights; and

Whereas the Federation has adopted and taken a strong stance on the illegal and immoral human rights abuses of students and community members both locally and internationally; and

Whereas students should choose to allocate purchasing dollars ethically in order to promote worker's rights, human rights, and social justice; therefore

Be it resolved that the following policy be adopted:

#### Ethical Purchasing

The Federation supports:

- joining and working with the Workers Rights Consortium to ensure effective implementation of Code of Conducts on apparel, textile and swag purchasing;
- the purchase of apparel, textiles, and promotional items that are produced by companies and subcontractors that uphold international labour standards in workplaces, promote workers' rights and their right to initiate unionisation drives;
- the purchase of apparel, textiles and promotional items that are produced by companies and subcontractors that promote labour practices that are fair, equitable, free of harassment and discrimination, and create healthy work environment for the workers.

The Federation opposes the purchase of apparel and promotional items that:

- are made using sweatshop labour or under unfair or forced labour conditions;
- are produced by a company or a sub-contractor that has been identified by the Workers' Rights Consortium to violate international labour standards; and
- are produced by private corporations who have a proven record of compromising labour standards, workplace safety or worker rights in order to promote increased profit.

## 4. OTHER BUSINESS

## 5. ADJOURNMENT



# 47<sup>th</sup> Semi-annual general meeting e Assemblée générale semestrielle

Ottawa • May 19-22, 2005 • du 19 au 22 mai 2005

## AGENDA

### Organisational Development Committee

May 2005 National General Meeting

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#### DAY ONE

#### 1. PREPARATION FOR COMMITTEE DELIBERATIONS

##### a. Ratification of the Committee Chair(s)

Standing Resolution 1, Section 4, *Committee Chairperson* states that:

As its first order of business each standing general meeting committee shall either:

- a. ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or
- b. elect a committee chairperson from within its membership.

##### b. Roundtable Introductions

##### c. Review of the Committee Agenda

##### d. Review of the Committee's Terms of Reference

Committee members should be familiar with the responsibilities of the Organisational Development Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3 d) *Organisational Development Committee* states that:

The Organisational Development Committee shall:

- i. review and make recommendations to closing plenary on the national structure of the Federation, including:
  - the National Executive;
  - the national staffing;
  - the national office; and
  - all other national structures of the Federation;
- ii. review and make recommendations to closing plenary on the national programmes of the Federation;
- iii. review the development of the 'profile' of the Federation within member local associations;
- iv. review and make recommendations to closing plenary on the national communication tools of the Federation;
- v. review and make recommendations on development of new members;
- vi. review and make recommendations to the closing plenary on proposed amendments to the Constitution and Bylaws, Standing Resolutions and Operations Policy.

#### 2. REVIEW OF FEDERATION SERVICES

##### a. Preparation for the 2005-2006 Handbook Project and Communications Kit

###### Handbook Project

This coming year, 53 students' unions in ten provinces are participating in the Federation's handbook project and over 285,000 handbooks will be printed. The Committee will discuss the progress of the project and ideas for the future.

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### **Communications Kit**

Each year the Federation produces a Communications Kit that provides potential content for member locals to include in their handbooks, newsletters and other materials, and on their web sites. The kit contains information about Federation campaigns, research and services, as well as image-ready graphics. The 2005-2006 Communications Kit will be distributed to member locals shortly after the May 2005 national general meeting.

The Committee will review the Kit and discuss possible improvements for the 2005-2006 year.

### **b. ISIC/Studentsaver Discount Programme**

The Federation has run a national student discount program since its founding in 1981. The service utilises two discount cards: the International Student Identity Card (ISIC), which only full-time students are eligible to receive; and the Studentsaver card, which is available to all full- and part-time students belonging to the Federation. Following a brief orientation to the discount programme, the Committee will discuss strategies for improving and promoting the service.

### **Studentphones**

The Federation has partnered with Studentphonestore to secure discounts on cellular telephone service. A presentation on the progress of the service will be provided.

### **Free On-Line Tax Filing Arrangement**

In April the Federation offered through its web site free income tax filing with Ufile, an on-line tax filing service. The Federation is in discussions with Ufile about possibly extending the offer to future tax filing years. The Committee will discuss the service.

### **Travel CUTS**

Canadian Universities Travel Service (Travel CUTS) was established more than 30 years ago to provide discounted travel rates for students. A brief presentation on Travel CUTS' recent activities will be provided.

### **c. National Student Health Network**

The National Student Health Network is a buying consortium for student health and dental insurance plans that the Federation established more than fifteen years ago. Following a brief orientation to the service, the Committee will discuss strategies for improving and promoting the service.

### **d. Online Student Housing Service**

Homes4students.ca is the national online student housing database service that the Federation has operated for the past three years. Following a brief orientation to the service, the Committee will discuss strategies for improving and promoting the service.

### **e. Other**

## **DAY TWO**

### **3. MOTIONS REFERRED FROM OPENING PLENARY**

The following motions will likely be referred to the Organisational Development Committee by the opening plenary.

#### **2004/11:088 MOTION**

Local 26/Local 5

Whereas sharing locals, campaign activities, campaign ideas, and campaign progress quickly would be beneficial to all locals; and

Whereas Federation locals are constantly attempting to come up with new means of sharing gained knowledge; and

Whereas to increase communication between locals, executive, council, and membership is one of the core purposes for the founding of the Federation; and

Whereas member locals are proud of what they have accomplished and what the Federation is accomplishing; and

Whereas more students will have access to the national reports and the progress of the Federation and Federation locals if they were on the Internet; therefore

Be it resolved that from now onward National Executive Reports be posted on the national Federation website.

**2005/05:N02 MOTION**

Local 61/

Whereas prospective membership is described in Bylaw I as a "trial membership of limited duration"; and

Whereas prospective membership exists in order to provide an opportunity for a students' union to try membership before making a decision on full membership; and

Whereas in order to thoroughly and adequately try membership a students' union should fully participate in the campaigns, use the services and participate in the decision-making structures; and

Whereas currently Bylaw I.2.b.viii states that "a prospective members association must hold a referendum on full membership in the Federation, in accordance with Section 5 of this Bylaw, within five (5) months following its acceptance as a prospective member unless an extension is granted by the National Executive of the Federation"; and

Whereas five months provides insufficient time to adequately try membership, especially if trial membership is granted at a November national general meeting; therefore

Be it resolved that Bylaw I.2.b.viii be amended to read:

"A prospective members association must hold a referendum on full membership in the Federation, in accordance with Section 5 of this Bylaw, within twelve (12) months following its acceptance as a prospective member unless an extension is granted by the National Executive of the Federation".

**2005/05:N03 MOTION**

Local 61/

Whereas Standing Resolution 1, General Meeting Standing Committees states that the National Education and Student Rights Committee "shall review and make amendments to closing plenary on proposed amendments to the issues policy of the Federation, as proposed by Committee members and member locals on the plenary floor"; and

Whereas the current name of the committee does not clearly describe the role of the committee; and

Whereas this lack of clarity can lead to confusion amongst delegates at the general meeting; therefore

Be it resolved that the National Education and Student Rights Committee be renamed the "Policy Review and Development Committee" in all applicable Bylaws, Standing Resolutions, and Policies.

**2005/05:N04 MOTION**

Local 61/

Whereas review and discussion of Federation services, such as the annual Handbook project, Students' Union Directory, National Student Health Network, Federation discount project, on-line housing service, Student Work Abroad Program (SWAP) and Canadian Universities Travel Service (CUTS), is the responsibility of the Organisational Development Committee; and

Whereas the current name of the committee does not clearly describe the role of the committee; and

Whereas this can lead to confusion amongst delegates at the general meeting; therefore

Be it resolved that the Organisational Development Committee be renamed the "Organisational and Services Development Committee" in all applicable Bylaws, Standing Resolutions, and Policies; and

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Be it further resolved that references to “programmes” be replaced with “services” in the terms of reference for the committee.

**2005/05:N05 MOTION**

Local 61/

Whereas Standing Resolution 23, Provincial Allocations, was intended to establish financial allocations from the national budget for provincial components in provinces in which the Federation does not directly employ Federation staff; and

Whereas Standing Resolution 23 currently sets out allocations for the British Columbia, Newfoundland and Labrador, Ontario, Québec, and Saskatchewan Components; and

Whereas subsequent to the adoption of Standing Resolution 23 the Federation established nationally-funded employee positions in the province of Newfoundland and Labrador and in the region of Alberta and Saskatchewan; and

Whereas the funds currently being allocated to fund these employee positions exceeds the amount listed in the allocation; therefore

Be it resolved that Section 2, Newfoundland and Labrador Component Allocation, and Section 5, Saskatchewan Component Allocation, in Standing Resolution 23 be deleted.

**4. DISCUSSION OF MEMBERSHIP DEVELOPMENT STRATEGY**

**5. OTHER BUSINESS**

**6. ADJOURNMENT**

## **AGENDA**

### **National Aboriginal Caucus** May 2005 National General Meeting

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#### **1. ATTENDANCE AND INTRODUCTIONS**

An Elder from the community will provide welcoming remarks and delegates will have an opportunity to introduce themselves.

#### **2. ADOPTION OF THE AGENDA**

#### **3. REVIEW OF CAUCUS TERMS OF REFERENCE**

The Caucus will review Standing Resolution 17.2.

#### **4. ADOPTION OF THE MINUTES**

Delegates will consider the minutes of the previous meeting of the Caucus.

#### **5. REVIEW OF MOTIONS FOR CONSIDERATION**

The Caucus will review the motions that were served with notice for consideration at the May 2005 national general meeting.

#### **6. SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES**

Standing Resolution 1, Section 2, *Committee Composition* states that:

"Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

The Caucus will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- National Education and Student Rights Committee; and
- Organisational Development Committee.

#### **7. ROUNDTABLE DISCUSSION**

Delegates will provide an update of activities at their respective locals.

#### **8. EXECUTIVE REPORT**

The Executive will present a report on work undertaken since the previous Caucus meeting. Delegates will have an opportunity to ask questions about the work of the Executive.

**PAGE 2 — NATIONAL ABORIGINAL CAUCUS AGENDA**

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**9. REVIEW OF CAUCUS CAMPAIGNS**

**a. Review of Current Caucus Campaigns**

The meeting will review the status of current campaigns including the "Where's the Justice?" campaign.

**b. Other**

The following motion has been submitted by Local 101-University of Saskatchewan Graduate Students' Association for consideration by the Caucus:

"Whereas student research in Aboriginal communities is increasing; and

Whereas respectful research processes strive to build a collaborative, participatory, and culturally reflective research environment for students, researchers, and communities; and

Whereas university and federal ethical research guidelines do not always reflect Aboriginal protocol; and

Whereas student researchers are not always aware of community concerns and the expectations of the use of Indigenous Knowledge; therefore,

Be it resolved that research be undertaken on respectful research practices and approaches in Aboriginal communities; and

Be it further resolved that a fact sheet be produced and circulated on respectful research practices."

**10. OTHER BUSINESS**

**11. ADJOURNMENT**

# 47<sup>th</sup> Semi-annual general meeting e Assemblée générale semestrielle

Ottawa • May 19-22, 2005 • du 19 au 22 mai 2005

## **AGENDA** **National Graduate Caucus** May 2005 National General Meeting

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### **DAY 1 – Thursday, May 19, 2005**

#### **1. ROLL CALL OF MEMBER LOCAL ASSOCIATIONS**

- Local 23 Simon Fraser Student Society
- Local 89 University of Victoria Graduate Students' Society
- Local 21 University of Calgary Graduate Students' Association
- Local 09 University of Regina Students' Union
- Local 101 University of Saskatchewan Graduate Students' Association
- Local 96 University of Manitoba Graduate Students' Association
- Local 102 Brock University Graduate Students' Association
- Local 78 Carleton University Graduate Students' Association
- Local 62 University of Guelph Graduate Students' Association
- Local 32 Lakehead University Students' Union
- Local 94 University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s
- Local 27 Queen's University Society of Graduate and Professional Students
- Local 24 Ryerson Students' Union  
Trent Graduate Student Association\*
- Local 19 University of Toronto Graduate Students' Union
- Local 47 University of Western Ontario Society of Graduate Students
- Local 56 Wilfrid Laurier University Graduate Students' Association
- Local 48 University of Windsor Graduate Students' Society
- Local 84 York University Graduate Students' Association
- Local 83 Concordia University Graduate Students' Association
- Local 79 Post-Graduate Students' Society of McGill University
- Local 70 University of Prince Edward Island Graduate Student Association  
University of New Brunswick Graduate Students' Association\*
- Local 64 Acadia Students' Union
- Local 07 Students' Union of the Nova Scotia College of Art and Design  
Dalhousie Association of Graduate Students\*
- Local 34 Mount Saint Vincent University Students' Union
- Local 95 University College of Cape Breton Students' Union
- Local 100 Graduate Students' Union of the Memorial University of Newfoundland

\* Prospective Members

#### **2. ADOPTION OF THE AGENDA**

Changes or additions to the agenda may be proposed at this time.

#### **3. WELCOMING REMARKS AND INTRODUCTIONS**

#### **4. ADOPTION OF MINUTES FROM THE PREVIOUS MEETING**

The meeting will consider the minutes of the previous meeting of the Caucus.

## **PAGE 2 — NATIONAL GRADUATE CAUCUS AGENDA**

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### **5. SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES**

Standing Resolution 1, Section 2, *Committee Composition* states that:

“Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee.”

The Caucus will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- National Education and Student Rights Committee; and
- Organisational Development Committee.

### **6. REVIEW OF MOTIONS FOR CONSIDERATION**

The Caucus will review the motions that have been submitted with due notice for consideration at the national general meeting.

## **DAY 2 – Friday, May 20, 2005**

### **7. REPORT ON CAUCUS ACTIVITIES BY THE NATIONAL GRADUATE CAUCUS EXECUTIVE**

An overview of the work undertaken by the Caucus during the reporting period will be provided.

### **8. CAMPAIGNS AND GOVERNMENT RELATIONS REPORT**

The Caucus Executive will present an update on Caucus campaigns.

### **9. UPDATE FROM PLENARY SUB-COMMITTEES**

Caucus representatives on each plenary sub-committee will report on sub-committee deliberations.

## **DAY 3 – Saturday, May 21, 2005**

### **10. GUEST SPEAKER**

Tim Mark is the Executive Director of the Canadian Association of Research Librarians. He will provide delegates with an overview of Open Access publishing of electronic publications.

## **DAY 4 – Sunday, May 22, 2005**

### **11. REVIEW OF CAUCUS FINANCES**

### **12. PREPARATION FOR FEDERAL ELECTION**

### **13. UPDATE FROM PLENARY SUB-COMMITTEES**

Caucus representatives on each plenary sub-committee will report on sub-committee deliberations.

### **14. ROUNDTABLE DISCUSSION**

Caucus members will provide a local-by-local update on the status of implementation of Federation campaigns and services.

### **15. ADJOURNMENT**

Across Canada

Working Together

au Canada  
on travaille ensemble



The voice of **graduate students** in Canada

La voix des **étudiantes et étudiants** des 2<sup>e</sup> et 3<sup>e</sup> cycles du Canada

National Graduate Caucus  
of the Canadian Federation of Students

**annual report**

2004-2005

2004-2005

**rapport annuel**

Caucus national des 2<sup>e</sup> et 3<sup>e</sup> cycles  
de la Fédération canadienne des étudiantes et étudiants



# Letter to the Members

The Canadian Federation of Students unites over one-half million students from across the country to fight for an accessible system of high quality and affordable post-secondary education. The National Graduate Caucus provides a forum for students from 27 graduate students' associations to work on issues specific to graduate students, while advancing the common goals of the Federation.

As researchers, teachers, and students, there are many reasons why it is important for graduate students to work with students' associations across the country, as well as other campus and community groups. The current climate of "innovation" and increasing fees in graduate programmes, along with the ongoing work of developing the infrastructure and services of our students' associations, mean graduate students are faced with numerous challenges.

At this meeting we will be discussing many of those central issues facing graduate students. Professor Ann Clark from the University of Guelph will speak on the emergence of commercialisation in universities as it relates to agriculture and biotechnology.

Academic freedom in our universities is increasingly being undermined because of the lack of protection for researchers. The Caucus has been working to expose and defend the brave work of whistleblowers who stand up against interference from corporate sponsors and unethical research practices. Chris Radzinski will share his experiences "blowing the whistle" during his graduate studies at the University of Toronto.

The need for solidarity among academic labour unions is critical in Canadian universities today as universities are using more part-time and contract labour than ever before to instruct courses and supervise labs. This meeting will also include a panel to discuss the current activities among teaching assistant and sessional worker organising in Canada.

The renewal of the Copyright Act is posing threats to common uses of digital technology which will affect the way graduate students are able to undertake research and exchange knowledge. Laura Murray will join us to discuss the impact of these renewals in the academic setting. Increasing enrollment in universities is putting pressure on student supervisor relationships. These issues affect graduate students' day-to-day lives, and the university environment as a whole.

In the past year, the National Graduate Caucus has been working on a campaign directed at university administrators to maintain and restore post-residency fees—the fees paid by graduate students who have completed their course requirements. Graduate students used to pay reduced fees once their course work was completed, but this practice has been eliminated at many universities, greatly increasing the cost of graduate studies. Several member locals have been actively lobbying their administrators to restore or maintain post-residency fees. We will continue to fight to ensure graduate studies is accessible.

As we work towards the goals we have set, we can look back confidently at achievements won through student solidarity. This meeting will also allow us to assess and prepare for the daunting challenges ahead. Working together on issues of common concern will keep our graduate student associations effective and help us realise our collective goals.



# Introduction

The National Graduate Caucus exists as an entity within the Canadian Federation of Students whose primary objective is to promote the interests of graduate students nationally while working within the larger student movement for improvements in the quality of and access to public post-secondary education.

The Caucus is composed of all member locals of the Federation with graduate student members. In some cases these students' unions are fully autonomous with only graduate students members, and in others, students' unions may be comprised of graduate and undergraduate members. Graduate students' issues are both unique from and intertwined with those of other post-secondary students within the broader student movement.

The Caucus effectively unites over 60,000 graduate student members of the Canadian Federation of Students with one-half million other students attending public post-secondary institutions in Canada. By coming together within the Federation, graduate students champion graduate studies, teaching, and university research. Between meetings, the Caucus Executive oversees the day-to-day work of the Caucus. Current members of the Caucus Executive are Chairperson Kelly Holloway, Deputy Chairperson Philip Robinson, and National Executive Representative Tobias Whitfield.



# Campaigns & Government Relations

## Whistleblower Campaign

A primary role of the university in a democratic society is to provide a neutral space where both traditional beliefs and new ideas can be challenged by disinterested investigators. To ensure that academic integrity is maintained, research has traditionally been publicly-funded and subject to peer review. However, because of government cutbacks to higher education and public research granting programs, universities have a growing reliance on private sector funding, which is undermining public research institutions' ability to maintain their impartiality. As research becomes increasingly reliant on private sector money, commercial interests have a greater influence on the direction and publicly reported results of research.

The Whistleblower campaign recognises those researchers who "blow the whistle" in defense of the public interest. To draw attention to the negative effects of public-private partnerships on university research, a fact sheet and poster were produced and distributed to members.

A website has been posted at [www.cfs-fcee.ca/whistleblowers](http://www.cfs-fcee.ca/whistleblowers). The site contains campaign materials and provides background information on the issues of public-private partnerships in university research and academic freedom. Soon visitors to the site will be able to report on their specific situations or ask questions via email. The Caucus is currently working to develop a mechanism that will allow students to confidentially report experiences of corporate interference that conflict with their ethical obligations in the realm of academic research. Once collected, this information will inform future campaigns and research projects.

As a result of work on the Whistleblowers campaign, the Federation has been approached by a former graduate student

from the University of Toronto, Christopher Radziminski, who is seeking support in exposing several cases of research misconduct by his supervisors. Having received no support from his department or the University administration, Radziminski is interested in pursuing legislation to protect whistleblowers in Canada. His case reaffirms the need for the Federation to continue supporting whistleblowers in Canadian universities and especially to further investigate the extent to which graduate students are facing precarious situations in their research with virtually no protection.

The Federation's National Executive resolved to retain legal counsel and determine if there were merits Radziminski's allegations. A strategy is being developed to consider actions both at the University of Toronto and possibly two journals in question.

## Campaign to Restore/ Maintain Post-Residency Fees for Graduate Programs

'Post-residency fees' refers to a structure in which graduate students, upon completion of course work, pay reduced fees during the independent research and thesis writing stages of their degrees. Post-residency fees are known by a number of names that vary from university to university. Terms such as 'maintenance', 'continuing', 'continuance', 'post-program', 're-registration', and 'additional session' fees are synonymous with post-residency fees. Many universities in Canada have eliminated their post-residency fee systems, and others are currently in the process of doing so.

Restoring and maintaining post-residency fees would increase retention rates and reduce time-to-completion rates. Fewer financial barriers for graduate students would help improve the research and teaching capacity of universities and help ensure that there are qualified graduates to address the

## National Graduate Caucus - Campaigns

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anticipated faculty shortage.

At the annual general meeting of the National Graduate Caucus in February 2004, a proposal for a campaign on the restoration/maintenance of post-residency fees was unanimously adopted. The proposal called for the development of a pledge form for students that indicates that, as alumni, they would withhold donations to their university unless post-residency fees are retained or restored. Further, the pledge calls on Boards of Governors to actively and publicly lobby for reduced tuition fees and increased provincial and federal funding. Research on post-residency fee structures commenced in spring 2004 and a fact sheet was distributed to members in September 2004.

To-date, pledge forms have been designed for the following locals: Local 19-University of Toronto Graduate Students' Union, Local 27-Queen's University Society of Graduate and Professional Students, Local 78-Carleton University Graduate Students' Association, Local 84-York University Graduate Students' Association, Local 94-University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s, and Local 100-Graduate Students' Union of the Memorial University of Newfoundland. Several other locals have been circulating the fact sheet and promoting the campaign. Locals who are interested in customised pledges should contact the Caucus Executive.

### Graduate Student Debt

Current research on graduate student debt is sorely lacking in Canada. For several years, the Caucus has been lobbying Statistics Canada to include research on graduate student debt. In November 2004, Statistics Canada released data about graduate student debt for the first time. However, this research does not provide a comprehensive look at access to post-graduate education and student debt.

The Caucus recently met with Statistics Canada researcher Mary Allen. Allen

suggested that the new Statistics Canada is the first phase of a more in-depth project on the demographics of graduate study in Canada. Allen also pointed out that the preliminary debt figures for graduate students were lower than expected, this may be attributable to fact that those who finish their undergraduate degrees with large debt do not pursue graduate studies. It was agreed that more qualitative data was needed to test this hypothesis. The Federation is looking into ways that this research can be pursued.

### In-study Interest Relief Limits for Canada Student Loans

The Canada Student Loans Program (CSLP) widely advertises that, as long as a student maintains full-time status, she is eligible for in-study interest relief, no payments are required and the government will fully subsidise any accrued interest. In fact, students are required to start making payments on their loans no later than 520 weeks after their first loan allotment is issued, regardless of student status. This policy fails to account for those full-time students who have extended their studies, many of whom do so for financial reasons.

The effects of this rule are obviously exacerbated for students who pursue graduate studies. The policy makes no exception for Master's students and, in the case of PhD students, it only allows for an additional 60 weeks of interest free status. Affirming the extent to which this is a concern for PhD students, an internal study conducted by the Dean of Graduate Studies at Simon Fraser University found that the average completion time for a doctoral degree is six years. At this rate, even students who complete Bachelor and Master's degrees in six years will be in repayment fully two years before the completion of their studies. In fact, contrary to the government's oft-stated goal of increasing the number of graduates with doctoral degrees, this policy has resulted in students being forced to

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withdraw from their studies in order to make loan payments.

In past meetings, the Federation has raised concerns about in-study interest relief restrictions with officials of the Canada Student Loans Program who have responded favourably to the Federation's position that the policy should be amended. Director General of the CSLP David Cogliati agreed that changes must be made in order to ensure that students in good academic standing are not being forced to abandon their studies as a result of surpassing a limited time allotment. Cogliati committed to investigating potential policy amendments that will address the concerns of the National Graduate Caucus.

## Renewal of the Copyright Act

The federal Copyright Act is currently being amended, in part, to respond to digital technology. In spring 2004, the House of Commons Standing Committee on Canadian Heritage released "The Bulte Report" (named after the author of the report), which overwhelmingly favours the interests of copyright owners at the expense of the public. Researchers, university administrators, faculty, and students could be subject to privacy infringement, increasing fees, and restricted access to public digital materials if Bulte's recommendations become law. Legislation will likely be introduced in Fall 2005.

Industry Canada has been more skeptical of copyright reform than the Heritage Committee by articulating the need for researchers and scholars to access and share digital materials. In a report released by a policy branch of Industry Canada, *Assessing the Economic Impact of Copyright Reform in the Area of Technology-Enhanced Learning*, the argument is made that "the significant transaction costs involved in arranging licenses...are a deterrent to the use of digital content". Increasing levies paid to large (and generally American) industries,

along with restricting access to public materials, do not coincide with the interests of Canadian researchers. Rather, they are at a disadvantage to researchers in countries that have less restrictive copyright law, such as the United States, the United Kingdom, and Australia. Possible legislation may also infringe on individual privacy through the legislation of digital rights management (DRM)—software that would be legislated onto new computers and that would regulate what individuals are able to do with a work.

A membership advisory has been developed to inform members of the implications of restrictive copyright law. Members of the Caucus have met with the following members of parliament – Beth Phinney (Liberal), Mike Savage (Liberal and Chair of the Post-Secondary Education Caucus), and Brad Trost (Conservative and member of the Industry Committee). In addition, the Caucus has written letters to members of the Industry Committee and the Heritage Committee expressing concerns with Bulte's recommendations.

## COPYRIGHT CONFERENCE-UNIVERSITY OF TORONTO

On February 11, 2005, the National Graduate Caucus at a one-day academic conference "Sound Bytes/Sound Rights: Canada at the Crossroads of Copyright Law" on the Future of Copyright Law in Canada. The conference was hosted by the student-run Technology and Intellectual Property Group of the University of Toronto.

Speakers included musicians Paul Hoffert and Neil Leyton (Directory of Fading Ways Records), Michael Geist (Canada Research Chair of Internet and E-commerce Law at the University of Ottawa and author of the "Law Bytes" column in the *Toronto Star*), Bob Young (co-founder of Red Hat Software), Sarmite Bulte, MP (the chair of the 2004 Heritage Committee), lawyers Ron Dimock and Barry Sookman, Casey Chisick (professor of intellectual property law at the University of Toronto), and Graham

## National Graduate Caucus - Campaigns

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Henderson (president of the Canadian Recording Industry Association). Also speaking was William W. Fisher, director of the Berkman Center for Internet and Society at Harvard University and author "Promises to Keep: Law, Technology and the Future of Entertainment".

While the focus of the meeting was largely on copyright issues in connection with internet distribution of music files, there were also attendees representing research librarians, educators, software programmers, and freelance writers. A large segment of the audience also included well-known industry lobbyists, and at times, the discussion was heated. Close parallels were drawn between the music and scholarly publishing industries. In both cases copyrights over creators' works (musicians and researchers) are held within the near monopoly distribution/publishing industry. The result has been high cost to the using public. Both libraries and independent music labels, like Fading Ways Records, and software creators are experimenting with parallel 'open source' initiatives. The Creative Commons copyright is a concept increasingly being employed by software programmers and musicians, which allows for unlimited reproduction of work under the following conditions: the original author(s) must be accredited, copies must be for non-commercial use only, and alterations and transformations are permitted provided distribution of secondary-works only occur under an identical Creative Commons license to the original. Open archives of research material, including theses, papers, and monographs are in many ways the scholarly equivalent to the musicians, Creative Commons. Increasingly such initiatives like the Ontario Council of University Libraries' test project OZONE are being looked to as a solution to the high cost of archiving and distributing works through for-profit outfits.

Bulte's 2004 report issued recommendations for changes to the Copyright Act broadening copyright protections, including requirements for educational institutions to pay fees for

use of otherwise freely available materials from the internet. To the question of how the Heritage Committee is dealing with the outcry from the education sector over the inevitable costs associated with implementing these recommendations, Bulte's response was disquieting; likening the "price" of acquiring knowledge to that of other necessary expenditures, such as tables and chairs. Meanwhile, in the same year, the Canadian courts headed in the opposite direction by handing down important judgements recognising user rights.

This conference was an excellent opportunity for activists seeking copyright reform that would improve accessibility to creative and scholarly works to connect and explore legal issues from different perspectives. As researchers, graduate students have a special interest and ability in exercising their voice during the debate around copyright reform, and promoting alternatives that can help avert the crisis in scholarly publishing. The Caucus will continue to work with coalition partners on this important legislation in the next year.

### National Library of Canada - Theses Canada

When students complete their theses or dissertations, they have the opportunity to submit a copy to the National Library, which is mandated to enable access to these publications for research purposes. The National Library currently does not have the capacity to transfer paper documents to microfilm. To ensure theses and dissertations are distributed to those who want access to them, it contracts this service to UMI (University Microfilms) ProQuest, which makes a small profit on the distributions.

Member locals expressed concerns that a private company, ProQuest, provides access to these theses and dissertations on a for-profit basis. Royalties have not been paid to individual authors over the last few years, so an arrangement has been made to direct

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royalties into the theses program, reducing the cost of binding for all students who participate in the program.

The Library has created an electronic theses portal, through which all microfilmed theses will be available at no cost for research purposes. The project, including the creation of the portal, the microfilming of all theses and dissertations by the Library, creating guidelines for the electronic submission of theses, and successful advertising of the portal, is likely to take several years to reach completion. The first stage of the portal became operational in January 2004, enabling researchers to access dissertations published from 1998-2002. Over time, all PhD dissertations and Master's theses submitted to the Library will be available free-of-charge through this portal.

The Library and Archives Canada have developed an electronic theses processing system, which is currently being tested on data from the University of Waterloo and l'Université Laval. The University of Saskatchewan is also developing in-house theses processing capabilities. It is hoped that all Canadian universities will develop in-house theses processing capabilities over the next ten years, thereby eliminating the need for ProQuest.

On February 2, 2005, Theses Canada announced that it had signed a new contract with ProQuest. The two-year contract takes effect on April 1, 2005, and ends on March 31, 2007. This agreement does not alter the services provided by ProQuest, and the cost for electronic these processing remains the same for the first year at \$53.00. However, during the second year, the price will increase to \$55.00. This increase will be passed on to universities, some of which explicitly charge graduate students a fee for digitization.

Library and Archives Canada has indicated that it will continue to seek additional funding from within the federal government to subsidize improved service, including

funds to decrease the time period before theses are available on the electronic theses portal.

Caucus Deputy Chairperson Philip Robinson represents the Caucus on the Theses Canada Advisory Committee. The mandate of the Theses Canada Advisory Committee is to review policies and operations of Theses Canada and make recommendations on the transition from print to electronic theses both at Theses Canada and at Canadian universities.

## Granting Councils

The three granting councils provide funding for graduate students in Canada, both directly through fellowships and training programmes and indirectly through funds to students' supervisors. The Caucus maintains regular communications with representatives of the three councils.

The Caucus was invited to attend a conference on February 17 hosted by the Social Sciences and Humanities Research Council. Entitled the Knowledge Project, the conference was billed as Ottawa's first "ideas expo". The Project brought together 80 research teams in the social sciences and humanities to put their research on exhibit to connect researchers to each other and to Ottawa's policy-makers. A series of panel discussions will take place covering research issues ranging from the environment to business innovation. The Federation will be represented by Campaigns and Government Relations Coordinator Ian Boyko.



# Membership Development

The Federation has seen significant membership development over the last several years, in particular among graduate students' unions. Two more graduate students' unions applied for prospective membership-Trent Graduate Students Association and the Dalhousie Association of Graduate Students.

Graduate students' unions are smaller, often with less developed infrastructure than their undergraduate counterparts. As a result, for many graduate students' unions, offering even the most basic services and communicating with members often proves difficult. The Caucus has been working to support member locals in developing their own infrastructures, in part through facilitating the sharing of resources and ideas between member locals. The Caucus has developed "Manual of Best Practices" which catalogues the various models of graduate student organising in Canada.

In addition, the National Graduate Caucus has purchased advertising in "Peer Review" (a national magazine for graduate students) to publicise the Caucus' campaigns to its membership and to lend financial support to this important project.

## Newsletter

At different periods throughout its history, the National Graduate Caucus has published a newsletter. Given the growing size of its membership, the Caucus resolved to renew the newsletter project to help raise awareness about the ongoing work of the Federation on graduate student issues amongst the general membership. A newsletter has been published for the spring semester with plans to circulate approximately 12,000 copies to campuses across the country and make an electronic version available online. Resources permitting, the newsletter will be published twice annually and contain information about the campaigns and research of the Caucus.



# Services

## Online Housing Service – Homes4Students.ca

In many cities and towns across Canada vacancy rates have reached record lows, making it very difficult for students to find affordable accommodation. In response, an online student housing database be established as a means of at least partially addressing this problem. The website, Homes4Students.ca, allows students to search for and post available accommodation, and find roommates for free. Because many graduate students relocate for their studies, the service has been very successful among graduate students' unions.

Homes4Students.ca can be integrated into member locals' websites, enabling students' unions to showcase the site as a service of the local. The software that supports the website and web interface can be customised for a member local and customised to the community in which it is situated. Students' union branding with logo and other specifications can be incorporated into the localised site. Local 70-University of Prince Edward Island Graduate Students Association, Local 78-Carleton University Graduate Students' Association, and Local 101-University of Saskatchewan Graduate Students' Association have already added homes4students to their local sites.

## Common Handbook

The Federation's common handbook project is an extension of the very successful endeavour in British Columbia, which was originally conceived as a way for locals to reduce costs and improve the quality of the books they publish each year. In 2004-2005, 46 students' unions in nine provinces, including 44 member locals and two non-member unions participated in the project and 212,000 individual handbooks were produced. Once again, the Whistleblower

campaign was featured prominently in the national section of the handbook.

The project works as follows: member local handbook content is written and sent to Federation offices for formatting and editing. National and provincial content is developed in the respective Federation offices.

This project is of particular value to graduate student member locals, given that their smaller membership often makes the cost of producing a handbook prohibitive. Thirteen Caucus members participated in the 2004-2005 handbook project: Local 23-Simon Fraser Student Society, Local 27-Queen's University Society of Graduate and Professional Students, Local 34-Mount Saint Vincent University Students' Union, Local 48-University of Windsor Society of Graduate Students, Local 56-Wilfrid Laurier University Graduate Students' Union, Local 78-Carleton University Graduate Students' Association, Local 83-Concordia University Graduate Students' Association, Local 84-York University Graduate Students' Association, Local 89-University of Victoria Graduate Students' Society, Local 94-University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s, Local 95-University College of Cape Breton Students' Union, Local 100-Graduate Students' Union of the Memorial University of Newfoundland and Local 101-University of Saskatchewan Graduate Students' Association.

## National Student Health Network

The National Student Health Network is the Federation's student-owned and operated health and dental plan consortium that allows students' unions to have direct control over the services offered by their health and dental plans while often improving coverage and reducing costs. By utilizing the collective purchasing power of many member locals,

## National Graduate Caucus - Campaigns

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graduate students' unions, which are smaller than their undergraduate counterparts, have derived significant cost savings through the Network.

Currently, eleven of the 27 Federation members participating in the Network are graduate students' unions: Local 19-University of Toronto Graduate Students' Union, Local 27-Queen's University Society of Graduate and Professional Students, Local 47-University of Western Ontario Graduate Students' Society, Local 48-University of Windsor Society of Graduate Students, Local 56-Wilfrid Laurier University Graduate Students' Association, Local 78-Carleton University Graduate Students' Association, Local 84-York University Graduate Students' Association, Local 89-University of Victoria Graduate Students' Society, Local 94-University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s, Local 100-Graduate Students' Union of the Memorial University of Newfoundland, and Local 102-Brock University Graduate Students' Association.

The Federation also offers a free health and dental plan auditing service to member locals that use other brokers. As part of this service, the Federation will provide a quote based on the students' unions' existing health and dental plan.

# Coalition Work

## Canadian Association of University Teachers

The Canadian Association of University Teachers (CAUT) remains one of the Caucus' most valuable coalition partners. The Caucus collaborates regularly with CAUT on issues of mutual concern, such as academic freedom, intellectual property, tuition fees, and government innovation policy.

The Caucus is currently working with CAUT to obtain a legal opinion on intellectual property and ownership in the academic context. On January 13, Caucus representatives met with Paul Jones of the CAUT and David Fewer, an intellectual property lawyer, to begin developing protocol for the treatment of intellectual property arising from joint student-faculty research projects.

## Canadian Association for Graduate Studies

The Canadian Association for Graduate Studies (CAGS) is an umbrella organisation representing over 40 graduate schools. Membership in CAGS is open to all institutions with graduate programs as well as organisations with related interests, including research librarians and graduate students. The National Graduate Caucus (NGC) has been a full voting member of CAGS since membership was extended beyond graduate schools. Over the years, the Caucus has represented the interests of graduate students on a variety of issues including guaranteed funding, tuition fees, academic research, commercialisation, and the right to organise. On the issues of increased funding and graduate scholarships, graduate students have found much common cause with graduate deans. However, on many other issues, deans have resisted initiatives brought forward by graduate students. For example, CAGS has been resistant to formally recognising the right of teaching assistants to organise under

a union of their choice. Privately, many deans are hostile to unionisation and offer paternalistic advice about the merits of a "collegial environment" in which students do not have the right to collectively bargain. In this context, it should not be surprising that CAGS sat idly by while Bill 43 was introduced in Alberta, *banning* the right of graduate students to even hold a vote on union membership.

On the issue of commercialisation, CAGS has been silent about the threat to academic freedom posed by public-private partnerships and the increased corporate role in research through the Canada Foundation for Innovation. CAGS was also indifferent when it was revealed that the federal government and the Association of Universities and Colleges Canada (AUCC) signed a secret deal committing to triple the amount of commercialisation of university research by 2010. This indifference was repeated at the November 2004 conference when keynote speaker William Cochrane declared that universities should become more entrepreneurial by adapting to the demands and culture of business. No graduate deans objected and it was left to students to speak out in the name of academic freedom and the need for both commercialisable and non-commercialisable research. Due in large part to these differences, the issue of effective graduate student representation on the executive board of CAGS has become a contentious issue. In 1998, the Caucus successfully lobbied for a graduate student seat on the CAGS board. Unfortunately, the CAGS leadership has been reluctant to recognise the national voice of graduate students. CAGS has instead enforced an ad hoc rotation whereby the National Graduate Caucus only sits on the executive board once every three years.

At the November 2004 CAGS meeting, Caucus members challenged this structure and proposed that the student executive seat

either be rotated between the Caucus and its sister organization, le Conseil national des cycles supérieurs de la Fédération étudiante universitaire du Québec (CNCS-FEUQ) in Québec, or that a seat be allocated to each organisation. The CAGS executive rejected the idea and attempted to appoint its own candidate, ignoring the democratic decision of graduate students. After much acrimony, the student representative was put to a vote by only the deans, and the hand-picked student candidate was selected. The Caucus will be reviewing its participation in CAGS in the year ahead, and try to determine under what circumstances graduate students can collaborate with deans at the national level.

### **Coalition of Graduate Employee Unions**

The Coalition of Graduate Employee Unions (CGEU) is a coalition of labour unions in Canada and the United States that represent graduate students who are employed as teachers, researchers, and administrative staff. The Caucus is actively involved with the CGEU and has attended CGEU annual conferences, which are a great opportunity to network and build relationships with graduate employee unions from across North America. Graduate students are encouraged to sign up for the CGEU listserv through their website at [www.cgeu.org/index.html](http://www.cgeu.org/index.html).

At the last meeting of CGEU in August 2004, Canadian delegates discussed the possibility of forming a Canadian version of CGEU to deal with issues specific to graduate employees in Canada. Recently, the Canadian Union of Public Employees, Local 3902, at the University of Toronto has approached the National Graduate Caucus about initiating this coalition. The Caucus is working with CUPE Local 3902 to develop ideas for a Canadian coalition and to assist with organising a meeting of this new coalition to take place in the late spring or summer of 2005 in Toronto. This conference is open to graduate students across the country. Delegates will discuss

issues including the organization of sessional instructors, the effects of corporatisation on academic freedom, and barriers to organizing on campus.

### **Post-Graduates International Network (PI-Net)**

The Post-Graduates International Network (PI-Net) is a network of nationally recognised graduate students' unions, with members throughout the world. Its mandate is to facilitate communication between the members of the international post-graduate community. The Caucus has been a member since Spring 2003.

### **World Academy of Young Scientists**

The World Academy of Young Scientists (WAYS) was established by the United Nations Educational, Scientific and Cultural Organization (UNESCO) to encourage the creation of networks of young scientists and the involvement of young scientists in the science policy-making process. A young scientist is defined broadly to include those studying in the Social Sciences and Humanities.

A founding convention was held from December 11 to 13, 2004 at which the Caucus was represented. The meeting of the World Academy of Young Scientists brought together delegates from over a hundred countries and five continents to work towards global communication about science. Delegates represented a diverse group of young scientists from the ages of 15 to 40 years old from many disciplines, mainly in the natural sciences, who were primarily interested in improving communication and international co-operation among young scientists.

The general aims of WAYS include: promoting ethnic, cultural and gender equality and diversity amongst young scientists; encouraging global, ethical

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and social awareness among young scientists; providing a voice for young scientists and increasing participation in policy and decision-making on national and international levels; encouraging interdisciplinary approaches to science in response to the needs of society; promoting education in science to increase the understanding of science by the general public; facilitating access to careers in science for young scientists and encouraging international mobility; facilitating the emergence and sharing of scientific knowledge to reduce the gap between developed and less developed countries.

Despite the general theme of accessibility to science and research, very little attention was paid to funding for research. The Caucus has recommended that future meetings of WAYS incorporate more emphasis on public funding for scientific research to foster the goals of the academy.

The Caucus will continue to support the Academy in its early stages of development to in an effort ensure it develops as a democratic and effective organization.

Members of the Caucus are able to sign up to the WAYS list-serve (found at <http://www.waysnet.org>) to communicate about how young scientists can develop the organization in Canada.

## **Human Rights Complaint- Gwen Schwartz**

The 2004 national general meeting resolved an Ontario Human Rights complaint brought forward by Gwen Schwartz be supported. Schwartz is a graduate student at Local 19, the University of Toronto Graduate Students' Union. She has filed an Ontario Human Rights Commission complaint against the University of Toronto and the University Health Network regarding the sexual harassment, sexual solicitation, reprisal and denial of services, and the University's failure to actively support, protect, and investigate on behalf of Schwartz as a graduate student

at a University-affiliated hospital through meaningful mechanisms of address and resolution. A letter has been sent to Gwen Schwartz supporting her human rights complaints and calling on the University to provide her with an appropriate academic research environment to conduct her research and remit to Schwartz any research and data that she owns, so that she may continue her academic work. Member locals are encourage to send letters of support to Schwartz.



# MINUTES

National Graduate Caucus of the Canadian Federation of Students  
Friday, February 18 to Sunday, February 20, 2005

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## CALL TO ORDER—Friday, February 18, 2005

09:17 the meeting was called to order by National Graduate Caucus Chairperson Kelly Holloway.

### 1. ATTENDANCE ROLL CALL

Local 23	Simon Fraser Student Society	Present
Local 89	University of Victoria Graduate Students' Society	Present
Local 21	University of Calgary Graduate Students' Association	Present
Local 09	University of Regina Students' Union	Absent
Local 101	University of Saskatchewan Graduate Students' Association	Present
Local 96	University of Manitoba Graduate Students' Association	Absent
Local 102	Brock University Graduate Students' Association	Present
Local 78	Carleton University Graduate Students' Association	Present
Local 62	University of Guelph Graduate Students' Association	Absent
Local 32	Lakehead University Students' Union	Absent
Local 39	McMaster University Graduate Student Association	Present
Local 94	University of Ottawa Graduate Students' Association des étudiant-e-s diplomé-e-s de l'Université d'Ottawa	Present
Local 27	Queen's University Society of Graduate and Professional Students	Present
Local 24	Ryerson Students' Administrative Council	Present
Local 19	University of Toronto Graduate Students' Union Trent University Graduate Students Association*	Present Present
Local 47	University of Western Ontario Society of Graduate Students	Present
Local 56	Wilfred Laurier University Graduate Students' Union	Absent
Local 48	University of Windsor Graduate Students' Society	Absent
Local 84	York University Graduate Students' Society	Present
Local 83	Concordia University Graduate Students' Association	Present
Local 79	Post-Graduate Students' Society of McGill University	Present
Local 70	University of Prince Edward Island Graduate Students' Association	Present
Local 64	Acadia Students' Union	Absent
Local 95	University College of Cape Breton Students' Union Dalhousie Association of Graduate Students*	Absent Absent
Local 34	Mount Saint Vincent University Students' Union	Absent
Local 07	Students' Union of the Nova Scotia College of Art and Design	Absent
Local 100	Graduate Students' Union of the Memorial University of Newfoundland	Present

\* Prospective member

National Graduate Caucus Chairperson Kelly Holloway declared that quorum had been achieved.

### 2. ADOPTION OF THE AGENDA

#### 2005/02:01 MOTION

Local 84/Local 79

Be it resolved that the agenda be adopted.

**CARRIED**

### 3. WELCOMING REMARKS AND INTRODUCTIONS

Holloway provided opening remarks and welcomed delegates. She provided a brief overview of Robert's Rules of Order.

Delegates introduced themselves.

**4. ADOPTION OF NATIONAL GRADUATE CAUCUS MEETING MINUTES**

**2005/02:02 MOTION**

Local 84/Local 19

Be it resolved that the November 2004 National Graduate Caucus meeting minutes be adopted

Local 70 delegate Joy Elliott said that the update from Local 70 should be included in the roundtable report.

Local 78 delegate Tannis Bujaczek noted a spelling correction for Mathieu Rioux.

**2005/02:02 CARRIED**

**5. PREPARATIONS FOR ELECTIONS**

**a. Introduction of the Electoral Officer**

Holloway announced that the Caucus Executive had appointed Researcher Michael Conlon as the Electoral Officer for the elections to be conducted at the meeting.

**b. Overview of Election Schedule and Procedures**

Research Michael Conlon said that, in accordance with Federation Standing Resolution 18, elections for Caucus Chairperson and Caucus Deputy Chairperson would be held at the meeting. He explained that the elections were for the 2005-2006 term, which would commence at the adjournment of the Federation's 47<sup>th</sup> semi-annual national general meeting in May 2005.

Conlon said that the Caucus Executive was in receipt of a letter of resignation from National Executive Representative Tobias Whitfield, who had resigned due to time constraints. He said a by-election for the Graduate Student Representative on the National Executive would be conducted for the remainder of the 2004-2005 term.

Conlon noted that Philip Robinson had declared his intention to stand in election for National Executive Representative and, as such, he had submitted his resignation as Caucus Deputy Chairperson. He said that a by-election for the position of Caucus Deputy Chairperson for the remainder of the 2004-2005 term would be conducted.

Conlon encouraged delegates to review the electoral procedures and positions in Standing Resolution 18.

Conlon reviewed the nomination periods.

**6. PRESENTATION OF THE EXECUTIVE REPORT**

Holloway and Deputy Chairperson Philip Robinson highlighted sections of the Executive Report.

**Question and Answer**

Local 70 delegate Joy Elliott said that, while the Homes4Students website was valuable, students had experienced difficulty renewing their student account each month and had to post through the Local office.

Local 89 delegate Beverly Bouma said that there had been several requests of support for graduate students like Gwen Schwartz, who were fighting against harassment in their studies. She said that if her local was to write a letter, they would need more information or a draft letter. She asked if it would be possible to get more information.

Holloway said that both the Caucus Executive and Local 19 had sent letters and that these letters could be forwarded to the National Graduate Caucus listserv. She encouraged delegates who wanted to know more about the case to speak to Local 19 delegate Gina Trubiani since the Local had been actively supporting Schwartz with her complaint.

National Deputy Chairperson Angela Regnier added that the Caucus' letter of support and two news articles about Schwartz's case were included in Appendix B of the Executive Report. She added that, at the November general meeting, the Caucus had resolved to support Schwartz.

**2005/02:03 MOTION**

Local 78/Local 89

Be it resolved that the National Graduate Caucus Executive Report be adopted.

**CARRIED**

**7. PRESENTATION OF FEDERATION SERVICES**

Organiser Joel Duff presented on the National Student Health Network and the politics of student health plans.

**2005/02:04 MOTION TO RECESS**

Local 21/Local 101

Be it resolved that the meeting recess until 15:00.

**CARRIED**

14:10 the meeting recessed.

15:21 the meeting reconvened.

**8. PRESENTATION OF YOUR FUTURE: A GUIDE FOR POTENTIAL GRADUATE STUDENTS**

Caucus Deputy Chairperson Philip Robinson presented the Canadian Association of Graduate Studies (CAGS) guide for potential graduate students.

**Discussion**

Local 84 delegate Eric Newstadt said he had concerns about the direction of CAGS. He said that, at the November 2004 CAGS meeting, graduate deans had actively supported a commercialisation model of research. He said there were problems with the way graduate students were being represented on the CAGS executive. He said that, at the most recent CAGS general meeting, the CAGS executive had ignored the association bylaws requiring students to appoint their own representative and, instead, had graduate deans vote on a graduate student representative. He said that graduate students should start arranging meetings with their graduate deans individually to discuss these topics, with particular attention to graduate student representation on the CAGS executive.

**2005/02:05 MOTION TO RECESS**

Local 78/Local 47

Be it resolved that the meeting recess until 19:00.

**CARRIED**

18:06 the meeting recessed.

**CALL TO BACK TO ORDER**

19:14 the meeting reconvened.

**9. UPDATE ON COALITION WORK**

**Canadian Association of University Teachers**

National Deputy Chairperson Angela Regnier said that the Caucus had discussed the possibility of developing materials on faculty and graduate students' authorship and ownership of academic work with the Canadian Association of University Teachers. She said that there had been discussions about seeking a legal opinion on authorship and ownership to provide a basis by which joint policy could be developed. She said that the Caucus Executive would provide an update at the May meeting.

**10. WORKING GROUPS**

Robinson said that delegates would separate into working groups to discuss the following topics: copyright, academic freedom and commercialisation, unionisation, and academic advocacy. He said that many of the speakers throughout the meeting had addressed these topics and that the working groups were an opportunity for members to consider the Caucus' future strategies.

Delegates broke into the groups.

**2005/02:06 MOTION TO RECESS**

Local 94/Local 100

Be it resolved that the meeting recess until Saturday, February 19 at 9:00.

**CARRIED**

19:29 the meeting recessed.

**CALL TO BACK TO ORDER – Saturday, February 19, 2005**

09:30 the meeting was called back to order by Caucus Chairperson Holloway.

**11. REPORT BACK FROM WORKING GROUPS**

**a. Copyright**

Regnier reported that the copyright working group had discussed updates regarding copyright renewals. She said that the group had brainstormed ways to make the issue of copyright interesting to the average student. She reported that the group had discussed the importance of talking to other organisations, like teachers' associations, librarians and faculty at different campuses. She said that some members in the group had organised speaking events and conferences and there was agreement that member locals should organise similar events. She reported that the group thought member locals should make sure to share the successes of their events on the list-serv. She said the group discussed the possibility of the Caucus creating posters with quick slogans to put up on campuses, and postcards to send to the federal government. She said there was also a suggestion that radio ads could be placed on campus radio stations.

Regnier said that Ontario Chairperson Jesse Greener had reported to the group on a recent conference on copyright at the University of Toronto. She said that Greener had indicated that some people at a conference in Toronto had been interested in scholarly publishing and working with students. She said that Greener explained how the Open Archives initiatives would be infringed upon if unbalanced recommendations became legislation.

Regnier reported that the group discussed several possibilities for messaging. She said the group felt it was important that students understood that copyright changes could lead to increased student fees. She said the group felt there was a need to dispel the myth that students and young people were mere 'downloaders' and demonstrate that students used the Internet in productive, creative, and innovative ways. She said the group had discussed the importance of students understanding that current recommendations would put Canadian citizens at a disadvantage to those in other countries, such as the United States, the United Kingdom, and Australia. She said the group had discussed the need for greater understanding amongst students about the benefits of copyright law that balanced the interests of copyright owners and users.

Regnier said that the group proposed the development of a postcard and poster to complement the existing membership advisory and letter template that the Federation had developed for the campaign.

**b. Academic Freedom and Commercialisation**

Local 21 delegate Ian Graham reported that the Academic Freedom and Commercialisation group had focussed the discussion on two points: the current band-aid solutions to the compromises to academic freedom, and how to foster academic freedom in universities.

Graham said that there were several band-aid solutions utilised on campuses to address the risks in commercialisation. Graham said that several departments and colleges had conducted workshops to educate students on their rights. Graham said that the group felt that there was a need for universities to be much more proactive in preventing the risks related to commercialisation.

Graham said that the group had discussed the possibility of conducting an information campaign encouraging students to speak against violations of academic freedom on their campuses. Graham added that the group had emphasised the importance of students encouraging their graduate deans and the Canadian Association for Graduate Studies to defend academic freedom. Graham said that the group had discussed several methods of pressuring the graduate deans to take a stand on commercialisation and academic freedom, including the development of curricula so that schools of graduate studies could offer courses in academic freedom.

**c. Academic Advocacy**

Local 84 delegate Serife Tekin reported that the Academic Advocacy group had discussed the following issues: student space, student-supervisor relationships, international students, sexism, the role of a university ombudsperson, and access to post-secondary education.

She said that members of the working group had discussed the importance of adequate student space for graduate students, which had a significant effect on working conditions for graduate students. She said that Local 94 had been actively campaigning for adequate student space.

Tekin also reported that the group had discussed appropriate grievance procedures for graduate students. She said that the group had discussed the need for grievances to be presented to an unbiased person, such as an ombudsperson. She said that only two students' unions in the group reported having access to an ombudsperson.

Tekin said that the group had discussed the treatment of international students, particularly with respect to international graduate students who could be subject to abuse of power by a supervisor or an advisor. She reported that the group had discussed the exacerbated financial constraints of international students, which often lead to longer time-to-completion rates and other challenges.

Tekin said the group also discussed the role of students' unions in student advocacy.

Caucus Deputy Chair Robinson added that there had been much discussion on the role of the ombudsperson. He said the group discussed the need to have a person responsible for resolving student-supervisor disputes. He said that the Federation's student-supervisor relationship policy called for mediation services and that the Caucus should consider the role of the ombudsperson in relation to the policy.

**d. Unionisation**

Local 101 delegate Jonathan Anuik reported that the unionisation group had discussed the relationship between graduate students' unions and graduate employee union locals. He said the group had discussed some of the tensions that sometimes existed between the two organisations. He said that the group had discussed the Canadian Association of Graduate Studies refusal to support the right for teaching assistants to unionise. He said the Caucus had an important role to play in convincing CAGS to support graduate students' right to organise.

Anuik reported that the group had discussed the legislation adopted in Alberta that prevented students' right to organise. He said that the group had reported on tactics administrators used across the country to prevent students from organising.

Anuik said that the group discussed the problem of a lack of institutional memory among graduate students who had attempted to organise in the past. He said the group had discussed the importance of written accounts of organising to help with future organising attempts.

Anuik said that the group had discussed the possibility of creating a motion that encouraged unions to work more closely with local students' unions.

Anuik said that the group had discussed the existence of an active network of graduate student workers' unions in the United States, which would be a good model for a Canadian coalition of graduate employee unions.

Anuik reported that the group had discussed disparities in the working conditions for different graduate employees. He said that the group had discussed how teaching assistants who did marking were paid for much fewer hours than they worked. He added that research assistants were paid from different grants, which made them more difficult to organise than teaching assistants.

Anuik said that the group had considered what role the Caucus could play to support students' unions that were supporting unionisation drives on their campuses and existing teaching assistant unions. He said that the group had discussed the need for the Caucus to provide information and research to students' unions about unionisation. He said that the group had discussed strategies for informing graduate students that they had a right to organise with a union. He said that there was a need for students' unions to ease graduate students' fears and concerns regarding organising.

Anuik said the group had discussed the possibility of creating a comprehensive report on working conditions, wages, for student academic employees that took into consideration regional, socio-economic, and other disparities.

**2005/02:07 MOTION**

Local 101/Local 23

Be it resolved that research about university students employed as graduate student and undergraduate student teaching assistants be undertaken and a discussion paper produced; and,

Be it further resolved that a survey of the working conditions of teaching assistants be undertaken.

Anuik said that the motion had been developed as a result of discussions in the unionisation working group.

Local 47 delegate Aaron Keeler asked for clarification on the Caucus' current position on unionisation.

Regnier said that the Federation's policies on unionisation were in the general meeting binders and that the current policy supported the right of graduate employees to organise.

Robinson said that resources available to undertake a large scale survey were limited. He asked if anyone knew whether CUPE had done such surveys. He said that CUPE should be encouraged to undertake this type of research since they have more substantial resources.

Holloway said that the concern had come up in the discussion and the Federation could work with the labour movement to develop the discussion paper.

Local 79 delegate Mehdi El Ouali asked what the objectives of undertaking such a project were.

Anuik explained that the research would examine current working conditions for graduate employees. He said the research would include a review of the literature that currently exists. He said the objective was to examine student labour and student working conditions as a whole.

Local 79 delegate Adriana Decker said that while she agreed with the intention of the motion, she would prefer it to be more specific. She said the motion should be rephrased to include specific objectives; not just wages, but also working conditions and hours, and other issues.

Holloway said that the group felt that the document should be a discussion on the history of the labour movement, comparing legislation, and different teaching assistant unions in Canada. She said

that it could review information that had already been gathered by labour unions representing teaching assistants and it would serve as a manual for students' unions to gather information on the subject.

**2005/02:08 MOTION TO AMEND**

Local 101/Local 19

Be it resolved that Motion 2005/02:07 be amended to read:

"Be it further resolved that research be undertaken in conjunction with unions such as the Canadian Union of Public Employees (CUPE) and Public Service Alliance of Canada (PSAC) into the working conditions of undergraduate and graduate teaching assistants, specifically labour legislation in each province, and teaching assistant unions in other universities; and

Be it further resolved that the research be made available as a resource for member locals."

Anuik said that this amendment provided more direction and that it included work with labour unions.

Local 21 delegate Christine Johns said that she wanted to confirm that the motion was intended to include students who were not unionised. She said that it was important to examine their working conditions as well.

**2005/02:09 MOTION TO AMEND THE AMENDMENT**

Local 79/ Local 83

Be it resolved that Motion 2005/02:08 be amended to read:

"Be resolved that research be undertaken regarding the working conditions of unionised and non-unionised graduate and undergraduate teaching assistants, and labour legislation, using pertinent resources."

Newstadt said that he opposed the amendment. He said that the directive should be less specific.

Local 100 delegate Stefan Jensen said that the motion had become too unmanageable. He said the Federation needed more freedom in developing the project.

**2005/02:09 DEFEATED**

Newstadt said that that amendment should be defeated and the original motion should be postponed until later in the meeting.

**2005/02:08 DEFEATED**

**2005/02:10 MOTION TO POSTPONE**

Local 27/Local 84

Be it resolved that Motion 2005/02:07 be tabled until 17:30.

**2005/02:07 POSTPONED**

**2005/02:11 MOTION**

Local 23/Local 101

Be it resolved that a campaign to educate members on the proposed revisions to the Copyright Act be undertaken;

Be it further resolved that campaign materials include posters and postcards to be distributed to member locals; and

Be it further resolved that member locals be encouraged to educate their members by holding information sessions or workshops on the proposed revisions to the Copyright Act.

**005/02:12 MOTION TO AMEND**

Local 84/Local 79

Be it resolved that motion 2005/02:11 be amended to read:

"Be it resolved that a campaign to educate members on the proposed revisions to the Copyright Act be undertaken; and

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National Graduate Caucus of the Canadian Federation of Students  
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Be it further resolved that campaign materials include posters and postcards for distribution to members.”

Newstadt said that a separate motion to combine copyright and academic freedom would be presented.

**2005/02:12 CARRIED**

Keeler asked whether it was financially feasible to create postcards and posters.

Greener said that there were funds in the campaign budget to print posters and postcards. He added that there was already a fact sheet on the renewal of the Copyright Act that could aid in the development of the campaign.

**2005/02:11 CARRIED AS AMENDED**

**2005/02:13 MOTION**

Local 84/Local 79

Be it resolved that a roster of potential speakers on the subject of intellectual property law, research ownership, and academic freedom be compiled and distributed as a way to encourage member locals to conduct information workshops;

Be it further resolved that proposed wording for federal and provincial “whistleblowing” legislation be developed; and

Be it further resolved that an information package regarding students’ rights such as academic freedom, research ownership, intellectual property law, and best practices regarding publication procedures be developed.

**CARRIED**

**2005/02:14 MOTION**

Local 84/Local 19

Be it resolved that the outline of a research project that examines the commercialisation of universities and its effects in Canada, the US, and Europe be developed.

Local 21 delegate Christine Johns said she was concerned about the amount of work being directed to the research office. She said she wanted to hear from Michael Conlon whether these directives were realistic given the budget and resources of the research office.

Newstadt clarified that the directive was not for an actual project but the outline of a project. A proposal that member locals and other executive members can use to start filling in the blanks. He said that it was vital that the Caucus begin developing a long-term picture regarding what could be anticipated in universities in the future because of the effect of commercialisation.

**2005/02:15 MOTION TO AMEND**

Local 101/Local 23

Be it resolved that motion 2005/02:14 be amended to read:

Be it resolved that a research project that examines the commercialisation of universities and its effects in Canada, the US, Europe, Australia and New Zealand be outlined.

**2005/02:15 CARRIED**

Local 83 delegate Heather Fussell asked if an annotated bibliography could be included.

Conlon said that the research digest already included an annotated bibliography on issues related to tuition fees. He said it might be possible to include a section on commercialisation in the research digest.

**2005/02:14 CARRIED AS AMENDED**

**2005/02:16 MOTION TO RECESS**

Local 83/Local 101

Be it resolved that the meeting recess until 14:00.

**CARRIED**

12:48 the meeting recessed.

14:08 the meeting reconvened.

**2005/02:07 MOTION**

Local 101/Local 23

Be it resolved that research about university students employed as graduate student and undergraduate student teaching assistants be undertaken and a discussion paper produced; and,

Be it further resolved that a survey of the working conditions of teaching assistants be undertaken.

**DEFEATED**

**2005/02:17 MOTION**

Local 101/Local 23

Be it resolved that a research project be undertaken in conjunction with Canadian Union of Public Employees (CUPE) and other interested unions, organisations, and research bodies;

Be it further resolved that the research be based on a clearly defined set of questions regarding such things as working conditions and tuition fees of graduate and undergraduate teaching assistants; and

Be it further resolved that the research be conducted using a survey of the information presently available.

Newstadt asked what other organisations would be included.

Newstadt said that he opposed to the motion because it did not provide clear direction. He said that the motion did not include research assistants.

Anuik said that it would be too difficult to include research assistants because they were paid by different accounts, grants, and budgets and were therefore difficult to track.

Local 89 delegate Beverly Bouma said that every school had different structures. She said that the motion should not focus on specific budgets or structures.

Local 39 delegate Ben Doyle said that he supported the motion.

**2005/02:17 CARRIED**

**2005/02:18 MOTION**

Local 101/Local 23

Be it resolved that a survey of the working conditions of university student employees as graduate and undergraduate teaching assistants be developed; and

Be it further resolved that the survey be administrated by member locals.

**2005/02:19 MOTION TO AMEND**

Local 79/Local 101

Be it resolved that motion 2005/02:18 be amended to read:

“Be it resolved that a survey of the working conditions of post-secondary academic workers as graduate and undergraduate teaching assistants be developed; and

**PAGE 10—MINUTES**

National Graduate Caucus of the Canadian Federation of Students  
Friday, February 18 to Sunday, February 20, 2005

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Be it further resolved that the survey be administrated by member locals.”

**CARRIED**

Anuik said that there was a need for a better understanding of students’ ideas about unionisation. He said that the survey would be an important research source for the project.

Bouma said that she was concerned about the resources required to undertake such a survey.

Decker said that she supported the motion. She said the previous motion gave directive to conduct research on unionisation, and this one focussed on working conditions. She said there was a necessity to collect the data.

Robinson said it would be prudent to first see what research was uncovered before undertaking the survey.

Jensen asked about the magnitude of the proposed survey. He said that a comprehensive survey was huge and might not be timely. He said that a survey should be published and distributed to members.

Local 27 delegate Michael Rosenstock said that he supported the motion. He said he understood it to be a very informal survey and that it was preferable to the previous motion.

Conlon said that a scientific survey would be very rigorous and would take a great deal of resources. He said that the Federation already conducted polling during the year. He added that it would be more difficult for locals without staff or full-time executive members to administer the survey.

Elliott said that she was concerned about smaller locals that did not have full-time staff and would have difficulties administering such a survey. She said that the Caucus should wait until there were results from the first project before a survey was administered.

Greener said that member locals could be encouraged to conduct surveys on their own.

**2005/02:18 DEFEATED**

**2005/02:20 MOTION**

Local 79/Local 84

Be it resolved that the agenda be amended to include Other Business immediately preceding adjournment.

**CARRIED**

**2005/02:21 MOTION TO RECESS**

Local 83/Local 101

Be it resolved that the meeting recess until 9:00, Sunday, February 20, 2005.

**CARRIED**

18:13 the meeting recessed.

**CALL BACK TO ORDER-Sunday, February 20, 2005.**

9:21 Holloway called the meeting was called back to order by Caucus Chairperson Kelly Holloway.

**12. ATTENDANCE ROLL CALL**

Local 23	Simon Fraser Student Society	Present
Local 89	University of Victoria Graduate Students’ Society	Absent
Local 21	University of Calgary Graduate Students’ Association	Present
Local 09	University of Regina Students’ Union	Absent
Local 101	University of Saskatchewan Graduate Students’ Association	Present
Local 96	University of Manitoba Graduate Students’ Association	Absent
Local 102	Brock University Graduate Students’ Association	Present

Local 78	Carleton University Graduate Students' Association	Present
Local 62	University of Guelph Graduate Students' Association	Absent
Local 32	Lakehead University Students' Union	Absent
Local 39	McMaster University Graduate Student Association	Absent
Local 94	University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s de l'Université d'Ottawa	Present
Local 27	Queen's University Society of Graduate and Professional Students	Present
Local 24	Ryerson Students' Administrative Council	Present
Local 19	University of Toronto Graduate Students' Union	Present
	Trent University Graduate Students Association*	Present
Local 47	University of Western Ontario Society of Graduate Students	Present
Local 56	Wilfred Laurier University Graduate Students' Union	Absent
Local 48	University of Windsor Graduate Students' Society	Absent
Local 84	York University Graduate Students' Society	Present
Local 83	Concordia University Graduate Students' Association	Present
Local 79	Post-Graduate Students' Society of McGill University	Present
Local 70	University of Prince Edward Island Graduate Students' Association	Present
Local 64	Acadia Students' Union	Absent
Local 95	University College of Cape Breton Students' Union	Absent
	Dalhousie Association of Graduate Students*	Absent
Local 34	Mount Saint Vincent University Students' Union	Absent
Local 07	Students' Union of the Nova Scotia College of Art and Design	Absent
Local 100	Graduate Students' Union of the Memorial University of Newfoundland	Present

\* Prospective member

**13. ROUNDTABLE**

Delegates provided an update on the activities at their locals

**14. REVIEW OF CAUCUS FINANCES**

**a. Update on Expenditures**

Robinson reviewed the Caucus expenditures to-date.

**b. Review of 2004-2005 Budget**

Robinson highlighted aspects of the 2004-2005 budget and provided explanations about revenue and expenditures to-date.

**2005/02:22 MOTION**

Local 21/Local 84

Be it resolved that the revised 2004-2005 National Graduate Caucus Budget be adopted.

**CARRIED**

**15. COMMUNICATIONS**

**a. Update on the Status of the Caucus Website**

Holloway said that the website was still very new and it would continue to expand. She said the Whistleblowers website would be updated to enable graduate students to communicate their experiences with commercialisation.

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National Graduate Caucus of the Canadian Federation of Students  
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**b. Caucus Electronic Mailing List**

Holloway said that the listserv was an effective means by which locals could share information about campaigns and other activities on campus.

**16. CONSIDERATION OF THE ELECTORAL REPORT**

Conlon reported that Eric Newstadt had been elected Caucus Deputy Chair for the remainder of the 2004-2005 term.

**2005/02:23 MOTION**

Local 78/Local 21

Be it resolved that the Eric Newstadt (Local 84) be ratified as the Caucus Deputy Chair for the remainder of the 2004-2005 term.

**CARRIED**

Conlon reported that Phil Robinson had been elected Graduate Representative on the National Executive for the remainder of the 2004-2005 term.

**2005/02:24 MOTION**

Local 23/Local 100

Be it resolved that Phil Robinson (Local 78) be ratified as Graduate Representative on the National Executive for the remainder of the 2004-2005 term.

**CARRIED**

Conlon reported that Eric Newstadt had been elected Caucus Chairperson for the 2005-2006 term.

**2005/02:25 MOTION**

Local 21/Local 101

Be it resolved that Eric Newstadt (Local 84) be ratified as Caucus Chairperson for the 2005-2006 term.

**CARRIED**

Conlon reported that Michael Rosenstock had been elected Caucus Deputy Chairperson for the 2005-2006 term.

**2005/02:26 MOTION**

Local 79/Local 101

Be it resolved that Michael Rosenstock (Local 27) be ratified as Caucus Deputy Chairperson for the 2005-2006 term.

**CARRIED**

**2005/02:27 MOTION**

Local 19/Local 21

Be it resolved that the electoral report be adopted.

**CARRIED**

**17. OTHER BUSINESS**

El Ouali said that Local 79 had become actively involved in environmental issues on campus. He said that McGill University had been creating an environmental policy and that students had become actively involved. He said he was interested in hearing what initiatives were taking place on other campuses.

Robinson said that Carleton University had a sustainable campus initiative. He said that several campus groups had worked together to begin this initiative.

Local 78 delegate Tannis Bujaczek said that the Carleton University Students' Association had applied for funding under the federal government's "one-ton challenge".

Elliott reported that the University of Prince Edward Island was in the process of campus master planning. She said that students had initiated an energy saving campaign. She said that a student environmental group formed from this initiative and had been involved in energy conservation and was attempting to expand into other environmental initiatives.

Local 24 delegate Steve Norrie said that Local 24 had started an initiative for a sustainable environment. He said that the initiative was trying to do a sustainability assessment of residence. He also mentioned that the Sierra Youth Coalition had a sustainable campuses project to assist students in evaluating their campuses.

Local 23 delegate Hattie Aitken said that Local 23 had been working with the cafeteria to encourage it to return to dinnerware rather than disposable dishes and cutlery. She said that there had been a vegetarian dinner club but it had been shut down by a health officer. She said that the local was working to reopen the club.

A series of logistical announcements were made.

**18. ADJOURNMENT**

**2005/02:28 MOTION TO ADJOURN**

Local 101/Local 102

Be it resolved that the meeting be adjourned.

**CARRIED**

11:09 the meeting adjourned



## **AGENDA**

### **Caucuses: Colleges and Institutes, Large Institutes, and Small Universities**

May 2005 National General Meeting

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**1. INTRODUCTIONS and OVERVIEW OF CAUCUS MEETING**

- a. Roundtable Introductions
- b. Review of the Caucus Agenda
- c. Review of the Caucus Terms of Reference

**2. SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES**

Standing Resolution 1, Section 2, *Committee Composition* states that:

"Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

The Caucus will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- National Education and Student Rights Committee; and
- Organisational Development Committee.

**3. REVIEW OF MOTIONS FOR CONSIDERATION PACKAGE**

The Caucus will review the motions that were served with notice for consideration at the general meeting for the purpose of giving general direction to the Group's representatives on the committees.

**4. OTHER BUSINESS**

**5. ADJOURNMENT**



## **AGENDA**

### **Provincial Component Meetings**

May 2005 National General Meeting

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#### **1. PREPARATION FOR COMPONENT DELIBERATIONS**

- a. Roundtable Introductions**
- b. Review of the Component Agenda**

#### **2. PREPARATION FOR SUBCOMMITTEES**

- a. Overview of Subcommittees**
- b. Overview of Selection Process**
- c. Subcommittees Section Process**

Standing Resolution 1, Section 2, Committee Composition states that:

"Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

The Caucus will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- National Education and Student Rights Committee; and
- Organisational Development Committee.

#### **3. REVIEW OF MOTIONS FOR CONSIDERATION**

The Component will review the motions that were submitted with notice for consideration at the May 2005 national general meeting. The Component will develop recommendations for the motions.

#### **4. REVIEW OF MEETING LOGISTICS**

Any questions or concerns about meeting logistics should be addressed at this time. Meeting coordinators will provide an overview of the transportation schedule from the meeting site to the airport.

#### **5. OTHER BUSINESS**

#### **6. ADJOURNMENT**



# 47<sup>th</sup> Semi-annual general meeting e Assemblée générale semestrielle

Ottawa • May 19-22, 2005 • du 19 au 22 mai 2005

## AGENDA

### Constituency Groups

May 2005 National General Meeting

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#### 1. INTRODUCTIONS and OVERVIEW OF CONSTITUENCY GROUP MEETINGS

- a. Roundtable Introductions
- b. Review of the Constituency Group Agenda
- c. Review of the Constituency Group Terms of Reference

#### 2. SELECTION OF REPRESENTATIVES TO SERVE ON PLENARY SUB-COMMITTEES

Standing Resolution 1, Section 2, *Committee Composition* states that:

"Each caucus, constituency group and provincial component shall have the right to select one voting member to sit on each standing general meeting committee."

The Constituency Group will select representatives for each of the following plenary sub-committees:

- Budget Committee;
- National Education and Student Rights Committee; and
- Organisational Development Committee.

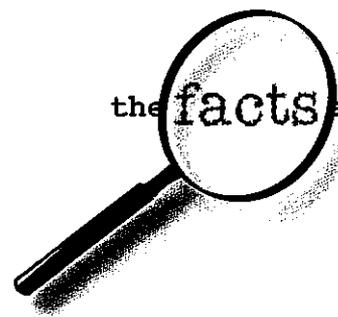
#### 3. REVIEW OF MOTIONS FOR CONSIDERATION PACKAGE

The Constituency Group will review the motions that were served with notice for consideration at the general meeting for the purpose of giving general direction to the Group's representatives on the committees.

#### 4. OTHER BUSINESS

#### 5. ADJOURNMENT





the **facts** about post-secondary education

# Post-Secondary Education Tax Credits Billions in Misdirected “Financial Aid”

## Background

Since the mid-1990s, the federal government has increasingly looked to tax expenditures as a substitute for directly allocated student financial assistance. As defined by the Department of Finance, tax expenditures include “exemptions, deductions, rebates, deferrals and credits” that serve “to advance a wide range of economic, social, environmental, cultural and other public policy objectives”. In total, federal tax expenditures for post-secondary students have grown from \$566 million in 1996 to more than \$1.46 billion in 2005. This represents a 213% increase (real dollars) and more than the total amount the federal government will spend on direct student financial aid this year.<sup>1</sup>

Despite their large price tag, federal tax expenditures are a very poor instrument to either improve access to post-secondary education or relieve student debt. Moreover, since everyone who participated in post-secondary education qualifies for tax credits regardless of financial need, the federal government is diverting vast sums of public funding where they are not necessarily required.

## A Confusing Patchwork

### Education Tax Credit

Students may claim a 16% tax credit for the accrued “education amount”. The education amount is equal to the number of months enrolled in post-secondary education multiplied by \$400 for full-time students and \$120 for part-time students.

### Tuition Fee Tax Credit

Students may claim a 16% tax credit for tuition fees and ancillary fees paid. In 1987, it became possible to transfer this credit to a spouse, parent, or grandparent. As of 1997, this credit may be carried forward for application in future tax returns.

### Student Loan Interest Tax Credit

Students may claim a 16% tax credit for the interest paid in a year during repayment of a Canada Student Loan and provincial student loan.

### Registered Education Savings Plans

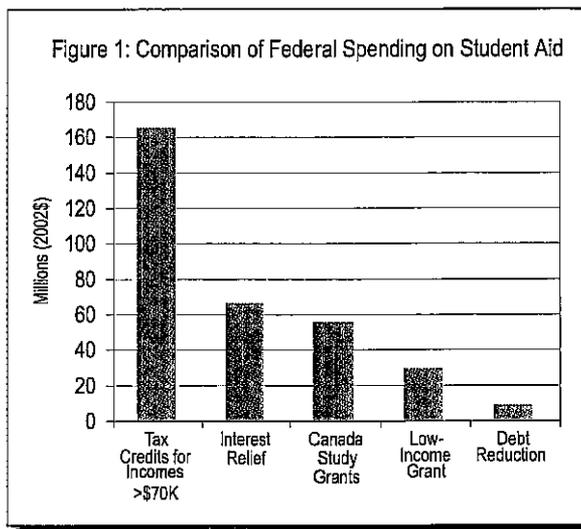
Contributions to Registered Education Savings Plans (RESPs) grow tax-free until the time that they are withdrawn, at

which point the saved amount is taxable as income for the beneficiary. For more information, see the Canadian Federation of Students’ Factsheet on the RESP program at [www.cfs-fcee.ca](http://www.cfs-fcee.ca)

## An Inferior Approach to Reducing Student Debt

The non-refundable education and tuition fees tax credits have been the most expensive and widely used federal tax measures for post-secondary education. In the 2002 tax year 2,235,870 students and their family members claimed the education and tuition fee credits, costing the federal government almost \$1.15 billion in foregone tax revenue.<sup>2</sup>

One would expect an expenditure of this magnitude to deliver significant improvements to the financial situation of Canadian students. For example, it is estimated that a non-repayable grant of \$4,000 for every student receiving Canada and Quebec Student Loans would cost \$1.5 billion per year.<sup>3</sup> In other words, if the amount of money the federal government spent on the tuition fee and education tax credit each year (\$1.15B) was simply shifted to the “front-end” in the form of grants through the Canada Student Loans Program, student debt could be reduced by 41%.



## Failing to Meet the Increased Costs of Education

Tax credits, in addition to diverting public funds to high income graduates, has not come close to offsetting soaring tuition fees. Figure 1 compares average Ontario

**\$1,426**

Gap between tuition fees and education related tax credits in 1988

**\$3,551**

Gap between tuition fees and education related tax credits in 2003

**41%**

Student debt reduction that could be realised by converting tax credits into needs-based grants

undergraduate tuition fees to the maximum federal education and tuition fee tax credit available to Ontario students in 1988, 1995 and 2003.

Despite increased government spending on the education and tuition fees credit, the gap between tuition fees and education tax credits had soared to \$3,551 by 2003—more than double the gap in 1988. Federal tax credits have clearly failed to compensate for the steep tuition fee increases that resulted from cuts to federal transfers for post-secondary education during the 1990s.

### Helping Those Who Need Help the Least?

In total, individuals with incomes over \$70,000 claimed more than \$164 million in federal education and tuition fee tax credits for the 2002 tax year, and most of this total was likely claimed as amounts transferred from students to family members. This \$164-million tax break to high-income parents is more than double the amount spent in 2002 on the federal Interest Relief program, and triple what the government spent on Canada Study Grants for high need students that year.<sup>4</sup>

With such a substantial portion of post-secondary education credits being claimed as amounts transferred to family members, there is no guarantee that the full value of these credits is even being applied to education-related expenses. The Department of Finance estimates that transferred amounts account for almost half the total value of education and tuition fee tax credits claimed.<sup>5</sup>

### The Student Loan Interest Credit

The Student Loan Interest Credit was introduced in the 1998 Federal budget with the professed aim of ensuring that, in the words of then Finance Minister Paul Martin, "Canadian students are not mired in a swamp of debt". Although the total cost of this credit was over \$62.4 million in 2002, the average amount claimed works out to only \$91.67 per year (\$7.64 per month) per claimant. Low-income claimants fared even worse, averaging only \$5.56 per month worth of debt and tax "relief".<sup>6</sup> Given that the monthly loan payment on the average student loan is at least \$237, the Student Loan Interest Credit cannot be considered a serious attempt to address the student debt crisis.

### Tax Credits Do Not Increase Access

In order to derive any benefit from the education tax credits, students and their families must first find the resources to pay for tuition fees and living expenses, and hope that a portion will be

refunded sometime in the future. Tax credits do nothing to address the up-front financial barriers that prevent many students from low-income backgrounds from enrolling in the first place. As a result, education tax credits are most likely to benefit those who already have enough money to afford post-secondary education.

A 2002 study by Harvard University professor Dr. Bridget Long found that this was precisely the case with education tax credits introduced in the United States. According to Dr. Long, "[a]lthough one goal of the tax credits was to increase access to higher education, this study found no evidence of increased postsecondary enrolment among eligible students".<sup>7</sup> These findings are consistent with an earlier US study that found education tax credits introduced in the state of Georgia actually "widened the gap in college attendance between blacks and whites and between those from low- and high-income families".<sup>8</sup>

### Conclusion

The evidence is clear: tinkering with the tax system is not an effective means of improving access to post-secondary education or reducing student debt. Federal tax measures have come nowhere near compensating for tuition fee increases brought on by long-term federal and provincial government under-funding of post-secondary education. Benefits derived from education tax credits disproportionately benefit higher income households and do little to help those most in need of financial assistance. Government funding currently directed at federal tax credits for post-secondary education would be better spent on up-front needs-based grants.

#### Endnotes:

1. Includes Education Tax Credit (present, carry-forward, and transferred), Tuition Fee Credit (present, carry-forward, and transferred), scholarship exemptions, Registered Education Savings Plans, and the Student Loan Interest Credit using the Department of Finance's Tax Expenditures and Evaluations 2004.
2. Canada Customs and Revenue Agency Income Statistics 2004 (2002 tax year).
3. Based on loan uptake calculations in the 2004 Actuarial Report of the Canada Student Loans Program.
4. Canada Student Loans Program Annual Report 2002-2003.
5. Department of Finance Canada Tax Expenditures and Evaluations 2004.
6. Canada Customs and Revenue Agency Income Statistics 2004 (2002 tax year).
7. Bridget Terry Long, "The Impact of Federal Tax Credits for Higher Education Expenses", Prepared for the National Bureau of Economic Research Volume and Conference: College Decisions: How Students Actually Make Them and How They Could, Harvard University, August 2002.
8. Susan Dynarski, "Hope for Whom? Financial Aid for the Middle Class and Its Impact on College Attendance", paper prepared for the Kennedy School of Government at Harvard University and the National Bureau of Economic Research, April 2000.

# Student Loan Designation

## Background

Designation is the process by which post-secondary education institutions are deemed eligible for certain government programs and funding. Currently, the provinces are responsible for the designation of post-secondary educational institutions. Applicable funding can take the following forms:

1. Federal and provincial student loans;
2. Canada Education Savings Grants and Registered Education Savings Plans;
3. Millennium Scholarships;
4. Canada Study Grants;
5. Education and tuition fee tax credits;
6. Loans and grants through the Employment Insurance program; and
7. Aboriginal student grants.

In March 2003 the Intergovernmental Consultative Committee on Student Financial Assistance introduced a designation policy framework. It is intended to "guide jurisdictions in the development of their designation policies". All of the provinces agreed to implement a designation policy that will "manage" the "financial risk" associated with student loans. Institutions that fail to meet guidelines within the framework run the risk of losing student loan designation. The framework was officially implemented in November 2004.

As the federal government negotiates new student loan agreements with each province in order to integrate federal and provincial loans ("harmonisation"), designation policies will be a part of any new agreements.

## The Wrong Approach

Designation policies are rooted in the notion that low quality programs or institutions produce unqualified graduates who in turn cannot find employment to pay back their student loans. By choking off access to "low quality" programs by making student loans unavailable, governments hope to pressure institutions to respond by increasing quality and post-graduate employment strategies. Yet, this logic ignores the fundamental causes of student loan default and the government's role in exacerbating the problem.

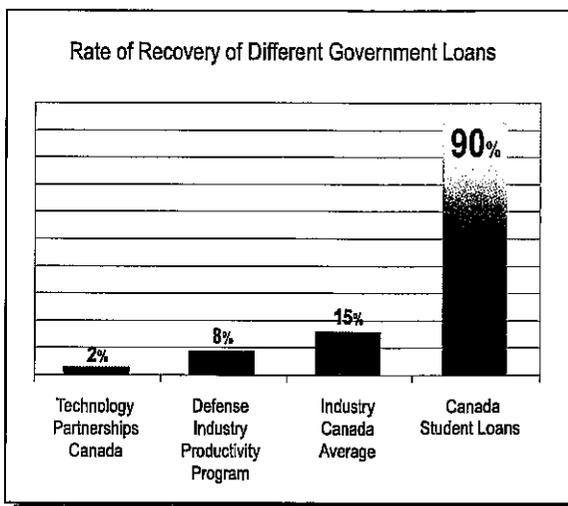
Between 1995 and 2005, the federal government cut nearly \$7 billion from transfers to the provinces for post-secondary education and training. As a direct result, tuition fees have more than doubled, causing student debt to climb to

unprecedented levels. Graduates of public universities and colleges who are unable to make monthly payments are in this position because of a mortgage-sized debt and an unstable job market, not because their education was of low quality.

If the federal government is truly committed to equality and student success, it would restore funding to public post-secondary education in ways that lower tuition fees and reduce student debt.

## A Short-Sighted Policy

In recent years, the federal government and most provinces have introduced several policies that ignore the role of post-secondary education in mitigating the effects of socio-economic inequality in Canada. Student loan designation—as with the ten-year bankruptcy prohibition and credit checks for Canada Student Loans—treats public investments in education like private investments in stock markets. The broader social value of public education cannot simply be measured by examining statistics about the most indebted graduates.



In fact, much of the statistical information upon which banks and service providers rely is deeply flawed. The complexity of repayment combined with the notorious service errors of lending institutions leads to default data that are unreliable. Furthermore, "default" rarely means that a loan does not get repaid, but simply that payments are missed. The vast majority of students eventually repay their loans: the rate of

**“Sham College Run Without Teachers: Instructors at Toronto vocational school absent for weeks at a time, ex-student says”**

Globe & Mail headline, September 6, 2003

## \$208 Million

Level of public subsidy to private career colleges each year in student loans

**“Concerns were expressed about [...] the debt loads of students as a result of high tuition fees, [and] what was seen as low standards for admission to many programs,”**

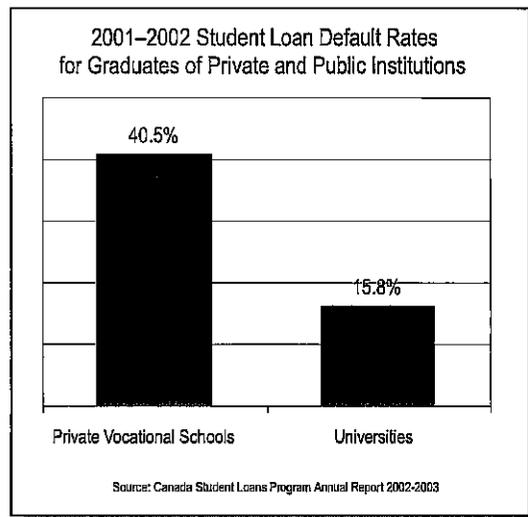
The Warren Report, Government of Newfoundland and Labrador, 1999

repayment for student loans exceeds 90%. This financial reality is not considered in designation data.

The obsession with student loan default rates is even more unreasonable given the standards in other government departments. Industry Canada corporate loans have a 15% repayment rate.<sup>1</sup>

### Holding Private, For-Profit Institutions Accountable

The student loan default rate at private institutions is approximately four times higher than that of public universities. De-designation is currently used in some jurisdictions to prevent millions of dollars of public funds from being used to support programs that do more to generate profit than provide skills training.



In Ontario, a designation policy is in place that details the type of information and support that private institutions must give to students using financial assistance and requires institutions to meet certain tests of financial stability. In 1997, a policy of institutional accountability for student loan defaults was introduced so that private educational institutions ensure that loan defaults among their graduates do not exceed specified targets. Schools at which defaults exceed these targets must pay a portion of the costs incurred from these defaults.

It has become clear in discussions with federal government officials that the primary target of

the designation policy framework is the fly-by-night, for-profit education industry. The industry currently collects a \$208-million public subsidy in the form of Canada Student Loans every year. These “career colleges” frequently go bankrupt and leave their students in limbo with no qualifications and no compensation.

Given the poor record of private institutions in Canada, the massive public subsidy to this industry is in dire need of review. Yet, if the primary goal of a designation policy is to curb the flow of public student loans to private colleges, its net is cast too wide. The answer to preventing profit-driven education shops from needlessly squandering public funds is to not subsidize them in the first place.

### Conclusion

Rather than recognising the social and economic benefits of an educated workforce, de-designation policies treat those in need of financial assistance with suspicion or even contempt. In the words of Intergovernmental Consultative Committee on Student Financial Assistance’s designation framework, designation will give provinces the assurance that “taxpayers will receive the appropriate return on their education investment”.

Accountability in the public post-secondary education system is accomplished through legislation and discipline-wide reporting mechanisms. In-house structures like boards of governors and senates are other ways by which academic integrity is assured. Canada should restore funding to the provinces for post-secondary education in recognition of the fact that Canada’s public community colleges are well positioned to offer high-quality education to those seeking a trade or skills development. In order to best promote the quality and integrity of post-secondary education in Canada, the federal government must act to restrict the for-profit private sale of education credentials.

### Endnotes

1. Canadian Taxpayer Federation, “Lies My Government Continues to Tell Me” January 2002.

# Registered Education Savings Plans

## A National System of Grants for the Wealthy

### Introduction

Federal funding cuts to post-secondary education during the 1990s resulted in massive tuition fee increases in every jurisdiction except Québec. Yet even in today's era of massive federal budget surpluses, the federal government has chosen not to restore the cuts. Instead, it favours an approach in which the individual pays for an increasing portion of the cost by spreading cost out over a lifetime:

Period	Individualised Cost-Bearing Mechanism
Pre-enrolment	Registered Education Savings Plans
Study	Access to debt (student loans)
Post-graduation	Income-contingent repayment

### The Registered Education Savings Plan

The Registered Education Savings Plan is an investment vehicle that allows a contributor to save for a child's post-secondary education. Unlike Registered Retirement Savings Plans (RRSPs), the RESP contributions are not tax deductible.

However, the savings grow tax-free until the beneficiary is ready to go full-time to college, university, or any other eligible post-secondary educational institution. Under the current rules, one can contribute a maximum of \$4,000 per year for a lifetime limit of \$42,000. Contributions can be made for 21 years and the plan must be collapsed after 25 years.

The RESP is in fact a national system of indirect grants: the income generated by the RESP has accumulated tax-free. The foregone tax revenue is tantamount to a grant payable only to RESP investors. Since 2000, the federal government has spent \$567 million on the RESP program.

### The Canada Education Savings Grant

RESPs became more attractive after the 1998 federal budget because in addition to an indirect grant in the form of foregone tax revenue, the federal government said it would offer a direct grant—the Canada Education Savings Grant (CESG)—to any parent who had sufficient income to purchase an RESP. The Government of Canada pays directly into a

beneficiary's RESP 20% of the first \$2,000 in contributions made on behalf of an eligible beneficiary each year.

This means the Grant can be as much as \$400 each year per beneficiary up to a lifetime maximum grant of \$7,200 per child. In other words, if you are wealthy enough to put aside \$2000 per year from the time your child is born until the end of the year in which your child turns 17, the government of Canada will give you a tax-free grant of \$7,200 towards your child's education.

If a beneficiary never attends post-secondary education, the Grant must be repaid, but not the income generated by the grant money, which has accumulated tax-free. Under certain circumstances, the money can be rolled over into the parent's RRSP.

### Two Billion Dollars and Counting

Since the CESG is a "statutory" expenditure, there is no predetermined budget for the program: if every single eligible Canadian invested in an RESP, the federal government would have to pay out as required.

From 1998 to 2004 the Government of Canada spent \$2.36 billion in Canada Education Savings Grants. In terms of what the Government of Canada is prepared to spend on CESGs, if every eligible parent participated in the CESG and invested the maximum \$2,000 per year, it would cost \$2,827,512,000 each year.<sup>1</sup>

### Benefiting Those Who Need Help the Least

Research on RESPs shows that high income Canadians benefit far more from this program than do low-income households. In 2001, children from

households in the lowest quintile (incomes under \$25,000) made up only 9.7% of families who were saving for post-secondary education. Households with incomes exceeding \$85,000 (the highest quartile) accounted for 31% of savers.<sup>2</sup> Average savings for high-income families was nearly \$7,000 in 2001, whereas low-income households only saved an average of 35% that amount.

Taken together, the RESPs and CESGs represent a substantial system of indirect and direct grants to primarily high-income families.

These plans came under heavy criticism in mid-July from the Ontario Securities Commission for their sometimes dodgy sales practices, early redemption penalties and loose portrayal of investment returns.

Jonathan Chevreau, *Financial Post*,  
August 28, 2004

**"Want to really make a kid's eyes really light up on Christmas morning? An RESP could be just the thing. Imagine how grateful that special girl or boy will be to receive a little something toward what will undoubtedly be an atrociously expensive post-secondary education"**

Rob Carrick, *The Globe and Mail, Money and Markets*, December 21, 1999

**"When Ottawa will pay you \$400 per year...simply for saving \$2000 per year yourself, who can refuse. Especially when getting the money is so simple."**

Geoff Kirbyson, *Pro: Why open an RESP, IE: Money*, August 1999

## **"Enhanced" CESGs and the Learning Bond**

In response to widespread criticism about the regressive nature of the RESP and CESG programs, the federal government attempted to make the programs more appealing for low-income Canadians by introducing program changes in the 2004 federal budget. The CESG payout will be adjusted on a sliding scale to be more generous to low-income recipients, and children born into a low-income family beginning in 2005 will receive

\$500 towards an RESP account ("Learning Bond") plus \$100 for every subsequent year the child's family qualifies as low-income. Rather

than acknowledge the real forces putting higher education out of reach for low-income families, the Learning Bond's proponents cling to a naïve vision for solving social ills: "Through savings incentives and supports such as financial literacy, low-income earners are encouraged to save for their future goals. With the right incentives the poor can and do save!"<sup>4</sup>

Nevertheless, speaking in purely financial terms, the amount of money that low-income Canadians may accumulate under a Learning Bond will be wholly inadequate to cope with the rapidly increasing costs of colleges and universities in most jurisdictions.

Government sponsored education savings vehicles also promote uneven spending in the regions. In regions where forward-looking governments have kept tuition fees low, such as Québec, parents will have less need to save. The federal government has openly conceded this point: "The lower RESP take-up rate in Quebec is likely attributable to the province's publicly funded college system (CEGEP) and relatively low university tuition fees for Quebec residents."<sup>4</sup>

**"CESGs give scarce public funds to the wrong households...[t]he CESG program should be discontinued".**

UBC Economist Kevin Milligan

The biggest winners of the increased emphasis on savings schemes are undoubtedly the RESP providers. The federal government has created cottage industry at the expense of real access to college and university. The education savings industry has repeatedly been the subject of criticism from both the Alberta and Ontario Securities Commission for its sales tactics.

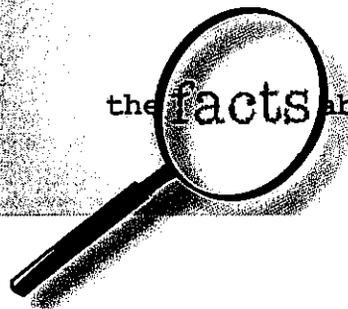
## **Conclusion: Towards an Effective and Fair Grants Program**

Savings-based access to education re-frames the question about affording high tuition fees as a question about the individual and their savings history, rather than on

Canada's collective resources and the collective responsibility to make education affordable to all. The federal government expects to spend \$615 million on the CESG in 2005—approximately what it would have cost to give a \$5,000 grant to one in three student loan recipients, thereby reducing the debt of current students by 22%. Students with financial need would be better served if the RESP and CESG programs were converted into a national system of needs-based grants.

### **Endnotes:**

1. Includes the Learning Bond.
2. *Planning and preparation: First results from the Survey of Approaches to Educational Planning (SAEP) 2002*. Statistics Canada.
3. Peter Nares, Executive Director of Social and Enterprise Development Innovations.
4. *Formative Evaluation of the Canada Education Savings Grant Program: Final Report Evaluation and Data Development Strategic Policy Human Resources Development Canada*, April 2003.



# Tuition Fees in Canada

## A Pan-Canadian Perspective on Educational User Fees

### The User Pay System:

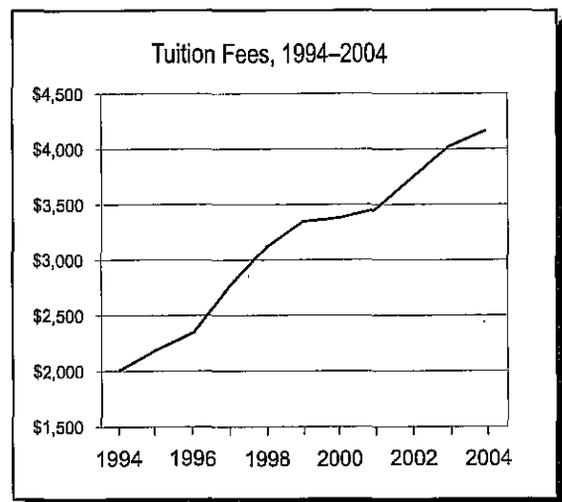
#### What Can You Afford?

The steady decline of federal funding for post-secondary education over the last 20 years has resulted in provincial governments and individual university and college administrations replacing the lost funds by relying heavily on tuition fees and other user fees from students.

In 1992 user fees accounted for an average of 17% of an institution's operating budget. The continual decline in government funding brought that average up to 28% by 2002, and much higher in some provinces. From 1995 to 2005 average undergraduate tuition fees have more than doubled, a rate of change four times faster than the rate of inflation. User fees at Canadian universities, adjusted for inflation, are at their highest relative levels in more than 60 years.

#### Student Debt is Soaring

The effect on student debt as a result of funding cuts has been devastating: on average, students completing a four-year program will incur \$25,000 of debt, an increase of 300% since 1990.



#### Access is suffering

Recent studies are painting a disturbing picture of the effect that high tuition fees have on access to post-secondary education for low- and middle-income Canadians. A study conducted at the University of Western Ontario demonstrated

that after graduate and professional user fees were deregulated in Ontario, the participation rates of low-income families were cut in half in those programs.

Researchers at UCLA found that for every \$1,000 increase in tuition fees, there was a 15% drop in enrolment coming "almost exclusively from minority and low-income students". The conclusion is simple: user fees are a barrier to access.

### Tuition Fee Freezes and Reductions:

#### Protecting Students

Although much of the blame for Canada's regression to a primarily user pay system lies with the federal government, there is disparity amongst provinces with regard to tuition fee policy. Without the implementation of national legislation to guarantee equality of access, the situation is likely going to worsen. Fortunately, students in many provinces have won protection from tuition fee increases:

#### Saskatchewan

A fully-funded one-year tuition fee freeze was announced in the 2005 budget, six years after a promise was made during the 1999 provincial election.

#### Manitoba

Tuition fees in Manitoba have been frozen for five years since a 10% user fee reduction in 2000. Unfortunately, the passivity of the Manitoba government has allowed universities to circumvent the freeze by increasing ancillary fees by as much as \$400.

#### Ontario

A two-year tuition fee freeze was implemented in Ontario in 2004. The new Liberal government increased core funding to institutions to offset the cost of the freeze. Despite the freeze, Ontario students still pay some of the highest tuition fees in the country, second only to students in the province of Nova Scotia. Disgraced former Premier Bob Rae released a report calling for tuition fees of at least \$6,000 and income-contingent student loan repayment schemes (ICR).

#### Québec

For residents of Québec, the province has the lowest university tuition fees in the country, and college is free. User fees in Québec have been frozen for 15 of the last 20 years.

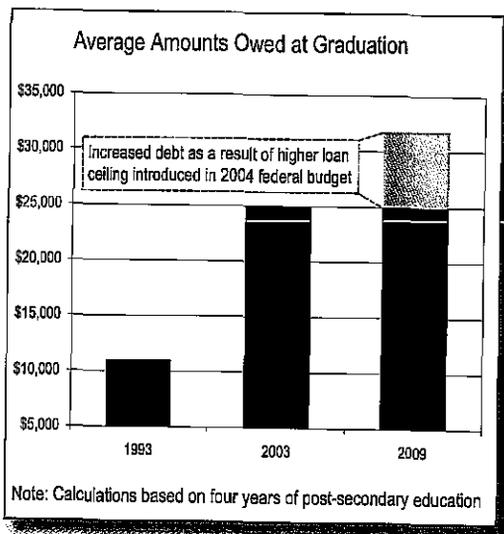
## Newfoundland and Labrador

Tuition fees have been frozen or reduced in Newfoundland and Labrador for the past six years. Premier Danny Williams has pledged to maintain the freeze until at least 2008.

## Student Loans = Student Debt

The federal government's strategy for reducing debt is deeply flawed. The Millennium Scholarship Foundation has been an abject failure, leaving Canada as one of only two nations in the industrialised world without a national system of needs-based grants. The loans-based approach to student financial assistance fails to ensure equality of access and leads to crushing student debt for tens of thousands of young Canadians.

Research clearly demonstrates that the cost of post-secondary education and increasing debt levels are significant factors in the decision students make about whether or not to continue their studies beyond high school. Even more significant is the finding that students from lower income households are much more likely to be affected by financial issues when deciding to pursue or not pursue their education beyond high school.



## Study Now, Pay Forever: Income Contingent Repayment Schemes

Income contingent repayment (ICR) schemes were designed with one purpose in mind: to facilitate a system of individual user fees in which the students pay the full cost of post-secondary

education. ICR schemes go by many names, but they are first and foremost a regressive funding model that facilitate the reduction of government support for post-secondary education.

Often referred to as "flexible repayment", ICR extends repayment over a longer period of time. Compound interest payments ensure that students earning less after graduation will pay several times more for their education than students with higher incomes, who would pay equivalent loans back faster. Furthermore, the gender gap in wages will profoundly disadvantage women.

Canadian students vigorously opposed ICRs when they were proposed by the federal government in 1994, and consequently they were never implemented.

## Millennium Scholarships

Despite the fact that the Millennium Foundation was endowed with \$2.5 billion over ten years, Millennium Scholarships have proven to be ineffective at providing widespread relief to students.

More of a public relations exercise for the federal government than a student grants program, the Foundation lacks the ability to ensure that all of the provinces distribute its scholarships. Provinces like Ontario and Nova Scotia have refused to cooperate, and as a result, students in those provinces are seeing little or no benefit from the program.

## A Grants Program for Canada

The only way to adequately begin to address the student debt crisis is for the federal government to introduce a national system of needs-based grants. For years, the Canadian Federation of Students has been proposing a system of needs-based grants that would be national in scope, and available to any student in financial need.

Reallocating the Millennium Foundation's endowment, as well as other ineffective federal programs, such as the Canada Education Savings Grants, would fund a grants program. If administered as a non repayable portion of the Canada Student Loan, the federal government could use its existing infrastructure to save on costs, as well as avoid federal-provincial wrangling. Such a program would improve access to post-secondary education, especially for students from low- and middle-income backgrounds.

**"Students made it impossible for me not to freeze tuition."**

Brian Tobin, then Premier of Newfoundland and Labrador

**"The research clearly demonstrates that... students from lower income households are much more likely to be affected by financial issues when deciding to pursue or not pursue their education beyond high school."**

Maritime Provinces Higher Education Commission, 1997

**"Tuition fees are the primary source of rising student needs."**

2003 Actuarial Report of the Canada Student Loans Program

# Millennium Scholarship Foundation

## Background

Announced in the 1998 "education" budget, the Millennium Scholarship Foundation was a belated acknowledgement by the federal government of the student debt crisis in Canada. In the face of average debt levels of \$25,000, the Millennium Scholarship Foundation was to be the centrepiece of the federal government's student debt reduction strategy. At the time of its introduction, Finance Minister Paul Martin declared in the House of Commons that the Foundation would reduce the debt of those in the greatest need by \$12,000. However, nearly seven years after its implementation the Foundation has proven to be a futile public relations exercise and a colossal disappointment for students in need of the grants they were promised.

## The Record

In theory, the Foundation's mandate is to disburse \$250 million annually in student financial assistance. The federal government chose to have the Foundation dispense the funds through an annual allotment to the provinces based on population size. Without any advanced consensus from the provinces about implementation, the hasty and ill-conceived structure of the Foundation made most provinces resentful participants.

## Provincial Misuse

Provinces were asked to sign a non-binding agreement to not reduce their contributions to student financial assistance. In places where Foundation dollars overlapped ("displaced") provincial dollars, the provincial savings were supposed to be re-invested into financial aid, but the record of re-investment has been minimal at best.

The Nova Scotia government simply ignored the agreement, consciously re-directing funds intended for students into other government revenues. Four years passed before the Foundation decided to enforce the agreement, and the resulting back-ended program will do nothing to improve access to post-secondary education in Nova Scotia.

In Ontario, where approximately 40% of the Foundation funds are transferred, the provincial government has directed

less than 15% of displaced savings back into student financial assistance.

In Saskatchewan, the provincial government has not re-invested the money back into student financial assistance. Despite the signed agreement to invest in reducing student debt, the Saskatchewan government has informed the MSF that it used Foundation funds to keep tuition fee increases moderate. However, since the inception of the MSF, fees have risen in Saskatchewan by 69%. MSF officials consider these hikes in line with what was agreed to with the province. So, the high need student who Paul Martin promised in 1998 would see her debt reduced by \$12,000, actually graduated in 2004 with her debt increased by over \$1500. Senior MSF officials are adamant that the program is working perfectly well in Saskatchewan and that the MSF was never really designed to actually reduce student debt.

An external review of the Foundation conducted in 2003 also concluded that the Foundation's impact on student debt was minimal. Sadly, the Foundation continues to deny that the misuse of the endowment has diminished its effectiveness.

## The Public Relations Smokescreen

From the very beginning, the Foundation functioned as a partisan public relations vehicle for the federal government. In its first year of implementation the Foundation sent students letters telling them they had won scholarships. In fact, students had "won" nothing; in most cases, the scholarships replaced loan remission. Recipients were simply getting a portion of their student financial assistance from another source. To further the federal government's own partisan goals, the Foundation included sample news releases with the letters and encouraged students to celebrate their "winnings" by sharing the news with the local community.

## The Research Smokescreen

Despite (or perhaps because of) the fact that it has been unable to address the issue of student debt, the Millennium Scholarship Foundation has embarked on a campaign to downplay the crisis of student debt. The Foundation has taken on a prominent role as a partisan think tank

## “Millennium Fund Gets Failing Grade”

Ottawa Citizen headline, August 31, 2001

**“The direct impact of the CMSF on access therefore likely ranges from limited and indirect to non-existent.”**

*Evaluation of the Foundation's Performance, Institute of Intergovernmental Relations, May 30, 2003*

in debates about post-secondary education policy. In briefings to government committees, federal bureaucrats, and university and college presidents, Foundation officials have argued that higher student debt and higher tuition fees will not affect accessibility. In other words, a supposedly arms-length, non-partisan, publicly funded foundation has evolved into an apologist for the federal government's record on post-secondary education.

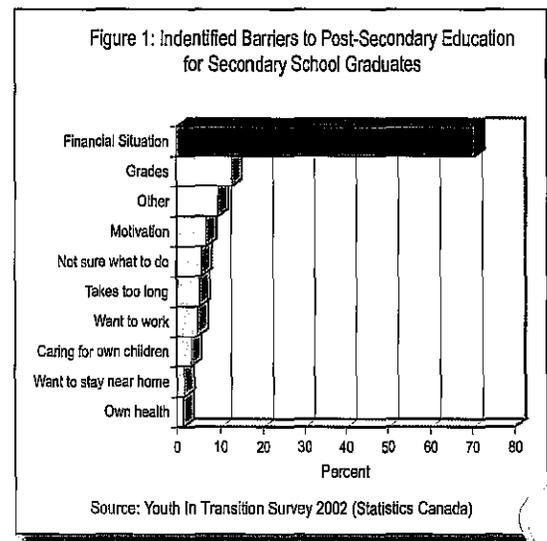
The Foundation's efforts to downplay the student debt crisis rely on a misreading of the data. For example, using research involving interviews with young Canadians who did not go to college or university, the Foundation wilfully ignored the fact that direct financial barriers were the most commonly reported reason for non-attendance. Instead, the Foundation chose to emphasise the other barriers cited by non-attendees to challenge the generally accepted importance of financial barriers. At a recent research conference MSF research staff claimed that finances were only the third most important barrier for poor students behind lack of information and poor grades.

When the data is more closely examined, it is even more clear that the Foundation's presentation of the results is misleading. Many of the so-called “non-financial barriers” cited by non-attendees are often indirectly related to insufficient personal resources. In this light, the number of people who “chose” not to attend university or college due to financial barriers is much higher. As this study relied on data collected in 1991 and 1995, its results also fail to take into account the effects of the enormous increases in tuition fees across Canada since the mid-nineties.

### A Credible Reading of Existing Data

Foundation officials have publicly claimed that higher tuition fees have little or no effect on access to post-secondary education, and that money is not the primary factor in determining who goes on to higher education. However, most reliable evidence points to the contrary. For example, Statistics Canada has consistently reported that high-income Canadians are twice as likely to attend university as low-income Canadians.

This conclusion is further supported by Statistics Canada's Youth in Transition Survey. The Survey found that financial obstacles were a barrier for over 70% of the 18 to 20 year old high school graduates who cited barriers to their participation in higher education (see Figure 1). This Statistics Canada survey is another example of research that the Foundation has reported upon without concluding that high costs of post-secondary education are a deterrent to students from low-income backgrounds.



### Conclusion

The Millennium Scholarship Foundation's primary role has been to perpetuate the appearance that the federal government has been active in tackling student debt. This effort has been bolstered by the Foundation's so-called “research project”. The approach of the Foundation can be summed up in the words of the former research officer: student debt levels are irrelevant “because it doesn't matter how much debt a student has, what matters is their ability to pay it back”.

In response to the failure of the Foundation at delivering grants and its more recent campaign to deny the effects of student debt, the Canadian Federation of Students has called for the Foundation to be dismantled and the savings used to fund a national system of needs-based grants.

# 2005-2006 Federal Budget

## Introduction

### "Delivering on Commitments"?

Leading up to the 2005 federal budget, economists were forecasting a \$45-billion federal surplus over the next three years. That amount is approximately ten times what was cut from federal spending on post-secondary education during the 1990s. Despite this fiscal strength, the 2005 federal budget allocated no new money for transfers to the provinces for post-secondary education.

The absence of increased support for post-secondary education is also baffling in light of Paul Martin's election promises. On June 4, 2004, during a nationally-televised federal election forum, Martin promised that he would divide the Canada Social Transfer to create a separate transfer for post-secondary education of "seven to eight billion dollars." There was not even a hint in the 2005 federal budget that there is any intention of meeting the dedicated transfer promise. This, from a budget titled "Delivering on Commitments".

### Overall Impact

Far from the free-spending reputation that this budget has already earned in the mainstream media ("Martin Turns On Taps" *National Post* headline), the 2005 federal budget is more about appearances than solving societal ills. In the words of Canadian Centre for Policy Alternatives economist Ellen Russell, "The social reinvestment in this federal budget is a mile wide and an inch deep."<sup>1</sup> Further, Russell points out that the 2005 federal budget's program spending will eventually reach 11.9% of Gross Domestic Product, less than the norm during the past 25 years. For a

detailed overview of what social justice groups propose for a socially-responsible and fiscally-prudent federal budget, download the Canadian Centre for Policy Alternatives' 2005 Alternative Federal Budget at [www.policyalternatives.ca](http://www.policyalternatives.ca).

## Student Financial Aid

### Until Death Do You Part

The 2005 federal budget extends eligibility for loan forgiveness to Canada Student Loan borrowers who die. The budget also extends eligibility for loan forgiveness to Canada Student Loan borrowers who acquire a permanent disability. In total, this new measure will cost the federal government only \$3 million a year.

Both measures are already in place for government student loans obtained before 1995 ("Guaranteed Loans"). Post-1995 student borrowers who became permanently disabled during the repayment period were ineligible for loan forgiveness unless the disability occurred during the first six months of repayment.

### Addressing Access

In the 2004 federal budget, the federal government explicitly acknowledged the importance of grants by creating a new first-year grant to provide assistance for students from disadvantaged backgrounds. The move is a good "down-payment" on a grants program but, as currently designed, is inadequate to make a meaningful impact on access for low-income students<sup>2</sup>. The value of the grant is limited: 50% of tuition fees up to a limit of \$3,000, costing the federal government only \$30-million per year<sup>3</sup>. Tuition fee increases eat away at the real value of the grant and in programs where tuition fees are higher than \$6,000, the maximum grant will cover less than 50% of tuition fees.



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# Post-Secondary Education Issues Research Digest

Volume 5, Number 1

Compiled by the Canadian Federation of Students

*Let's be clear about the effect of unsustainable cost and the resulting debts on individual students. Wherever tuition goes down, enrolment goes up. And where does the increase in students come from? From those with less money. In other words, the lower the fees, the more egalitarian the society. The lower the fees, the more we are able to release the genius of the citizenry as a whole. And that genius, that collective unconscious is the key to a successful democracy.*

John Ralston Saul

## Introduction

The January 2002 National Executive meeting resolved that a compendium of research be compiled and distributed to the membership. An initial research digest was produced in the winter of 2002 in order to provide member locals with a guide to important national and relevant international research. This digest updates the original with summaries of relevant research. As in the original digest, the emphasis in this guide is on the Federation's core message of access to post-secondary education.

- Section One:* Canadian research on financial obstacles to access
- Section Two:* International research on financial obstacles to access
- Section Three:* The real impact of personal savings schemes
- Section Four:* The growth of economic inequality in Canada
- Section Five:* Research on the potential impacts of international trade agreements on post-secondary education
- Section Six:* Social and economic benefits of post-secondary education
- Section Seven:* Commercialisation of Research



### 1. Financial Barriers to Access: Canada

- a. *Access Denied: The affordability of post-secondary education in Canada.* Canadian Association of University Teachers (CAUT), September 2002.  
[www.caut.ca/english/publications/review/200209\\_access.asp](http://www.caut.ca/english/publications/review/200209_access.asp)

*Access Denied* shows that post-secondary education is less affordable today than at any time in the last sixty years. The report examines changes in tuition fees from 1857 to 2002. When fees are adjusted for inflation, undergraduate university students today are paying more than at any other time in the past century, and six times what a student was charged in 1914.

The study measures how affordable university education is today compared with previous periods by plotting the number of hours of work (at an average carpenter's wage) it would take to pay for one year of tuition fees. By this account, it takes more hours of work to pay for tuition fees today than at any time since 1940.

According to the report, the decline in the affordability of professional programs since 1990 has been particularly steep. Law school tuition fees could be paid with 100 hours of manufacturing work in 1990, but today a total of 265 hours of work is needed. In 1990, one year of tuition fees in a dentistry program would have required 124 hours of work, compared to 512 hours today. For medical school, fees were equal to 118 hours of manufacturing work in 1990, and 425 hours in 2002.

- b. *At a Crossroads: First Results for the 18 to 20-Year-old Cohort of the Youth in Transition Survey* Human Resources Development Canada and Statistics Canada, January 2002  
[www.statcan.ca/english/IPS/Data/81-591-XIE.htm](http://www.statcan.ca/english/IPS/Data/81-591-XIE.htm)

This analysis of data from the Youth in Transition Survey (YITS) reveals that financial barriers are overwhelmingly the most common barriers to access for young people in Canada. Over 70 percent of high school graduates who had not gone on to post-secondary education because of barriers listed their financial situation as a primary obstacle. A similar percentage of respondents who had dropped out of a post-secondary program (71.4 percent) cited financial barriers as a primary reason for not continuing with their education.

The survey clearly demonstrates that money is the key factor determining access to post-secondary education, and contradicts claims by the Millennium Scholarship Foundation (MSF) that so called "non-financial" barriers are more important. MSF has attempted to misrepresent and downplay the results of the YITS in their own research reports.

- c. *Class of 2000: Profile of post-secondary graduates and student debt.* Statistics Canada, April 2004  
[www.statcan.ca/english/IPS/Data/81-595-MIE2004016.htm](http://www.statcan.ca/english/IPS/Data/81-595-MIE2004016.htm)

The results presented in *Class of 2000* paint a worrying picture about the rapid growth of student debt in Canada during the late 1990s. For university graduates, student debt grew by an average of 30 percent between 1995 and 2000. The average debt for degree holders was \$19,500<sup>1</sup>. However, the

1. This figure collapses data from graduates of three- and four-year degree programs. The commonly cited student debt of \$25,000 represents a federal government estimate of student debt for those completing four-year degrees.

study reports that for graduates who owe to both private and public sources, average debt is a stunning \$32,200. Almost one in three indebted graduates carried more than \$25,000 worth of loans in 2000.

The study also documented the burden of high student debt for a growing number of graduates. Almost one in four bachelor graduates reported difficulty in repaying their student loan, up from one in five graduates only five years earlier.

*Class of 2000* reported on data gathered from the National Graduates Survey (NGS). Released every five years, the NGS studies graduates of degree and diploma programs who were not enrolled in further studies, including graduates of professional programs. In addition to data on student debt, the study also provides useful information on the demographic characteristics of graduates in 2000.

- d. *Distance to School and University Participation*. Statistics Canada, June 2002.  
[www.statcan.ca/Daily/English/020624/d020624b.htm](http://www.statcan.ca/Daily/English/020624/d020624b.htm)

This study reveals that family income and distance to a university have a substantial affect on participation rates. The report shows that, outside commuting distance, students from high-income families were almost six times more likely to participate in university between 1995 and 1999 than were young people from lower-income backgrounds. According to the study, only three percent of students from low-income families living beyond commuting distance participated in university.

The existence of such a gap suggests that high education-related expenses and inadequate student financial aid have pushed university education beyond the reach of low and moderate-income people who need to relocate from outlying areas in order to attend university. Overall, one in five Canadians lived beyond commuting distance from a university in 1996. That figure rises to 52 percent for residents of Saskatchewan and to 42 percent for Newfoundland and Labrador residents.

- e. *Effects of rising tuition fees on medical school class composition and financial outlook*. Canadian Medical Association Journal, 166 (8), April 16, 2002.  
[www.cmaj.ca/cgi/content/full/166/8/1023](http://www.cmaj.ca/cgi/content/full/166/8/1023)

This study examines the family income background of students at Ontario medical schools between 1997 and 2000 and found that as tuition fees increased in Ontario, the proportion of students from families with incomes less than \$40,000 decreased from 17.3 percent to 7.7 percent.

The study concludes that the large increases in tuition fees implemented by medical schools in Ontario are associated with changes in the medical student population. At Ontario medical schools, there are now fewer students from lower-income families and more students expecting to graduate with large debts. In this research, Ontario medical students also report that financial considerations have an increasing influence on their specialty choice and practice location.

- f. *Funding Postsecondary Education in Ontario: Beyond the Path of Least Resistance*. Hugh MacKenzie, December, 2004. [www.reviewrae.ca](http://www.reviewrae.ca)

This study examines the socioeconomic demographic of those claiming the tuition fee tax credit, which is a non-refundable 16 percent credit against income tax. The credit can be used on total tuition and ancillary fees paid in one year. Though the credit can be used by either the student, or the students' parents or grandparents, the tuition fee credit is an effective means by which to track who pays tuition fees relative to household income. MacKenzie also examines the rate of tax people pay under the current (relatively) progressive system of taxation.

This original research refutes the idea that publicly funded post-secondary education is subsidy to the rich, paid for by the poor. Unlike those who argue for higher tuition fees, Mackenzie carefully examines the overall distributional effect of tuition fees by examining both ways Canadians pay for post-secondary education: through the tax system and through user fees at source. When both sources are examined, the idea that low tuition fees for students are unfair to low-income students and low-income Canadians becomes a highly suspect and unsustainable argument.

Using tuition fee tax credit data, the study found that those earning above average income claimed less in tax credits than they contributed to the tax base. MacKenzie concludes that the progressive taxation system ensures that those who come from upper-income homes already pay a substantial premium for their education and other public services, precisely because they pay higher taxes for the same service. This point is vital because it obliterates the idea that lower tuition fees are a regressive transfer to the wealthy. A healthy system of progressive taxation ensures that low fees benefit everyone equally.

- g. *Getting Ahead in Life: Does your parents' education count?* Statistics Canada Education Quarterly Review, Volume 5, No. 1, 1998.

This report documents the influence that parental education has on the likelihood that a child will attend college or university: 69 percent of those children from homes with a parent who completed a post-secondary education versus just 23 percent from homes in which they did not complete a secondary education. As Dr. Robert Allen notes in *The Education Dividend*, those who obtain a post-secondary education qualification earn, over a lifetime, 40 percent more than those without a post-secondary education. Though not surprising, this data confirms the cycle of exclusion for low-income families from post-secondary education.

- h. *The Part-Time Enrolments: where have all the students gone?* Torbin Drews and Herb O'Heron, Association of Universities and Colleges of Canada Research File, Volume 3, No. 2, May 1999  
[www.aucc.ca/publications/auccpubs/research/research\\_e.html](http://www.aucc.ca/publications/auccpubs/research/research_e.html)

This study examines declining part-time participation rates at Canadian universities during the 1990s and concludes "tuition fees...are estimated to account for approximately 60 percent of the observed drop in part-time enrolments." This conclusion is particularly interesting because it was published by the Association of Universities and Colleges of Canada (AUCC), the Canadian university presidents organisation. The AUCC and its members often attempt to deny the impact of tuition fees on access when communicating with student representatives and the media.

- i. *Participation in Post-Secondary Education and Family Income.* Statistics Canada, The Daily, December 7, 2001 (erratum published January 9, 2002)  
[www.statcan.ca/Daily/English/020109/d020109a](http://www.statcan.ca/Daily/English/020109/d020109a)  
[www.statcan.ca:80/Daily/English/011207/d011207c.htm](http://www.statcan.ca:80/Daily/English/011207/d011207c.htm)

This study assesses post-secondary participation rates by income between 1993 and 1998. The findings of the study are unequivocal: young adults from high-income families are more than twice as likely to attend university as those from low-income families. Only 18.8 percent of 18-21 year olds from families in the lowest income quartile attended university between 1993 and 1998, whereas 38.7 percent of those from the highest income quartile attended university during the same time period.

- j. *Paying the Price: The case for lowering tuition fees in Canada.* Canadian Association of University Teachers, Education Review, Volume 7, Number 1, February 2005. [www.caut.ca](http://www.caut.ca)

In this study, the Canadian Association of University Teachers traces the rising share of post-secondary institutions' operating budgets comprised by tuition fees. The study notes that in 1980 public funding accounted for 84 percent of operating budgets, but by 2003 it had dropped 58 percent of university budgets. Not surprisingly, the share of tuition fees as a portion of operating budgets went from 13 percent in 1980 to 34 percent in 2003. In addition, the study clearly demonstrates that the rise in fees is tied directly to a sharp decline in base operating grants to colleges and universities.

This study offers much needed context for the specious claim that "low" tuition fees and current tuition fee freezes are to blame for declining quality and capacity at Canadian universities.

- k. *Is post-secondary Access More Equitable in Canada or the United States.* Statistics Canada, March 2005. [www.statcan.ca](http://www.statcan.ca)

This recent Statistics Canada study examines the differences in access and cost of post-secondary education between Canada and the United States. Currently in Canada, those in the top quarter of income are twice as likely to attend university as those in the bottom quarter. In the United States, those in the top quarter of income are four times more likely to pursue university education. The study adds to recent findings that in the United States those in the top quarter of income are six times more likely to obtain a university degree.

Most importantly, the study concluded that the higher cost of education in the United States is one of the key reasons for the disparity, citing the fact that the cost of "publicly funded universities is 31 percent higher in the United States". The study also suggests that the proliferation of higher fee, private universities in the United States is a key reason for the higher gap in attendance between the rich and the poor. This point is of particular interest in the debate over the deregulation of tuition fees. Many larger universities in Canada such as the University of Toronto, Queen's University, and the University of British Columbia have shown keen interest in the idea of "ivy league" tuition fees as a means of creating a more elitist system.

- l. *Report of the 1999 Survey of Medical Students.* University of Western Ontario Department of Epidemiology and Biostatistics, May 1999.

This study was conducted over a four-year period to determine the effect of deregulated tuition fees on accessibility. The study examines participation rates by socio-economic status and documented a dramatic decline in participation rates from low-income families by the fourth and final year of the study. 17.3 percent of students in medical school came from homes where family income was under \$40,000. During that first year students were paying the regulated tuition fees of approximately \$4000. By the fourth year of the study, when tuition fees had risen to over \$10,000, only 7.7 percent of students hailed from homes of family income of less than \$40,000. As a result of deregulated tuition fees, there was a 50 percent decline in the participation of low-income students.

This study is particularly important because it undermines the notion, parroted by most university presidents across the country, that high tuition fees will not exclude low-income students because 30 percent of tuition fee increases are allocated to increased student financial assistance. As this data makes clear, it is simply false to say that increases to student financial assistance will address the problem of accessibility when tuition fees rise.

m. *Student Loans: Borrowing and Burden*

Ross Finnie, *Education Quarterly Review*, Vol.8, No. 4, 2002

This study examines incidence of debt, level of debt, repayment of debt and burden of debt based on data from the 1982, 1986, 1990 and 1995 National Graduate Surveys. The report's author often downplays the significance of growing debt levels, but some of the data presented in the study contradicts such an interpretation. Data tables used in this study show that the average student loan debt burden for female undergraduates tripled between 1982 and 1995.

Debt-to-earnings is calculated in this study by dividing the median average debt at graduation by the average annual rate of pay listed by respondents in their first National Graduate Surveys interview. Essentially, the study is looking at student debt as a percentage of annual rate of pay. The higher the ratio, the greater the debt burden it represents. Figures used in this study show that the debt-to-earnings ratio increased from 0.14 in 1982 to 0.38 in 1995 for male undergraduate students, and from 0.17 to 0.51 for female undergraduate students during the same time period. In other words, the average student debt for a female undergraduate in 1982 was equal to 17 percent of her first year of earnings after graduation. By 1995, average debt for a similar student had risen to 51 percent of her yearly earnings. To put this in perspective, a study done in the United States found that the average debt to earnings ratio for people who were forced to declare bankruptcy was 0.71 (or 71 percent of annual income).

n. *Survey by the National Opinion Coalition (Vector Research Inc.), October, 2001*

In an opinion poll conducted in October of 2001, Vector Research polled Canadians about the reasons why they did not pursue a post-secondary education. The poll confirmed that financial constraints were the key criteria that excluded low income Canadians and reported that 46 percent of low-income Canadians said lack of money was the sole reason for not attending. For those from families of income over \$100,000 lack money was reported by only 15 percent of respondents as a reason for not attending college or university. The poll was conducted with a sample of 1500 and is accurate within three percent age points 19 times out of 20.

o. *University and College Affordability: How and why have fees increased?*

Canadian Association of University Teachers, *Education Review*, Volume 3, Number 2, May 2001.

[www.caut.ca/english/publications/review/200105\\_tuition.asp](http://www.caut.ca/english/publications/review/200105_tuition.asp)

This study offers a comprehensive overview of the impact funding cuts and higher tuition fees have had on low-income families. The study charts a 25 percent decline in provincial and federal funding for post-secondary education between 1991 and 1998. During that same period tuition fees rose by over 125 percent and the average student debt increased from \$8,000 in 1990 to \$25,000 in 1998.

Most important the study quantifies the argument that "the impact of higher fees [is] most discernible in terms of exacerbating inequalities in access". Between 1991 and 1998 the real income and buying power of Canadians with the lowest 20 percent of after-tax income declined. Additionally, in 1991 families in this category would have to set aside 14 percent of their household income to pay tuition fees. By 1998 that amount had increased to 23 percent, an increase of over 60 percent coupled with a decline in buying power. This data is also confirmed by Statistics Canada's *Education Quarterly Review* in 1997 that reports that median family income in the 1990s had declined by five percent and the average employment income of those between 21 and 24 had fallen by 21 percent.

This data clearly demonstrates that tuition fee increases adversely affect low-income families and explain why it is preposterous to suggest that massive tuition fee hikes will not undermine access for low and modest income families.

## 2. Financial Barriers to Access: International Evidence

- a. *America's Untapped Resource: Low Income Students in Higher Education*. Written by Richard D. Kahlenberg, Century Foundation Press, 2004

This book by, Richard D. Kahlenberg, examines the social and economic cost of excluding low-income students from college and university. His study found that while "race sensitive" admissions in the United States had marginally increased the participation rate of underrepresented minorities, low-income participation rates remained stagnant or decreased. They also found that affirmative action programs had done little to increase the participation rates of minority students from low-income backgrounds. The most alarming statistic from the study is the fact that, "economically disadvantaged student are 25 times less likely to be found on elite college campuses than economically advantaged students". This is but one statistic among many in Kahlenberg's book that undermines the view that high tuition fees do not deter low-income students.

- b. *The Burden of Borrowing: A report on the rising rates of student loan debt*. King, Tracey and Ellyne Bannon Wahington: State PIRG's Higher Education Project, 2002.

Thirty-nine percent of student loan recipients graduate with unmanageable debt, defined as debt repayments that exceed 8 percent of monthly income. In comparison, 55 percent of African-American and 58 percent of Hispanic student borrowers graduate with unmanageable debt burden.<sup>d</sup>

*Comparison of the Influence of Debtload on the Persistence of Students at Public and Private Colleges*. Cofer, James and Patricia Somers *Journal of Student Financial Aid* 30.2 (2000).

Medium and high debt levels reduce the probability of persistence between 4 and 7 percent for students at private colleges. Tuition fee levels and the number of grants exert more influence on persistence at public colleges than do debt levels.

- c. *College-Going and Inequality: A literature review*. Paper for the Russell Sage Foundation, June 2001. <[https://secure1.sc.netnation.com/~russells/programs/proj\\_reviews/si/revkane01.pdf](https://secure1.sc.netnation.com/~russells/programs/proj_reviews/si/revkane01.pdf)>, and *The Price of Admission: Rethinking How Americans Pay for College* (November 1999) University of California Press). Both written by Thomas Kane.

Kane, an economist at the University of California at Los Angeles, examines price sensitivity for tuition fee hikes in the public college system in California. Based on a statewide survey Kane found that for every \$1,000 tuition fee hike there would be a drop of 14.9 percent in enrolment. The key portion of Kane's findings suggests that this drop comes "almost exclusively from Latino, African American, and low-income students."

- d. *The Effects of Tuition Prices and Financial Aid on Enrolment in Higher Education: California and the nation.* Donald E. Heller, 2001. [www.edfund.org/pdfs/I-57.pdf](http://www.edfund.org/pdfs/I-57.pdf).

In his study, Heller argues that “for every ten percent increase in fees we would see an enrolment decrease of 1.34 percent.” Heller’s study examines community colleges that, in California, serve primarily low-income residents.

- e. *Empty Promises: The Myth of College Access in America.* United States Advisory Committee on Student Financial Assistance, June 2002  
[www.ed.gov/offices/AC/ACSFA/emptypromises.pdf](http://www.ed.gov/offices/AC/ACSFA/emptypromises.pdf)

This report was written by the independent committee appointed by the United States Congress to assess student financial assistance. It concludes that financial barriers are the main obstacles preventing low and moderate income Americans from having access to post-secondary education. The report predicts growing losses of college qualified high school graduates and wider income-related gaps in participation and degree completion unless need-based grant aid is increased significantly.

*Empty Promises* has direct relevance to the Canadian debates, as it explicitly contradicts the idea being put forward that addressing “non-financial” barriers is more important to improving access than reducing financial barriers to participation. The report challenges the effectiveness of the types of “early intervention” programs advocated by the Millennium Scholarship Foundation (such as mentoring and academic preparation programs) as policy options for improving access. The US Advisory Committee is clear that “early intervention” programs are only useful if accompanied by large increases to non-repayable student aid. In the Committee’s words:

“The primary cause of today’s college access and persistence problem is the excessive level of unmet financial need and associated work and loan burden for low and moderate income high school graduates ... [to] make progress in the long term, early intervention must include an access to college guarantee for low and moderate-income families.”

- f. *Expanding College Access: The Impact of State Finance Strategies.* A report by the Lumina Foundation for Education, 2004.  
[www.luminafoundation.org/research/access.html](http://www.luminafoundation.org/research/access.html)

Researchers at the *Indiana Education Policy Centre at Indiana University* offer a state-by-state analysis of financial aid policy. The study measures various strategies of student financial assistance. After examining databases in 50 states researchers concluded, “needs-based grants had a stronger influence than any other financial variable in the model (11)”. That is to say that the largest factor influencing access for low-income students was non-repayable student financial assistance. The researchers note the remarkably consistent results across states. Further, the researchers note a particularly strong negative effect in states in which fees are high and grants are either minimal or not available at all. This data contributes to a growing mountain of research that draws a direct link between grants, lower fees, and access.

In addition, the study notes a link between low tuition fees and a comprehensive system of grants and high school completion. Though one of the few studies of its kind, this study points to a startling link between massive tuition fee hikes, high student debt and high school completion rates. Put more bluntly, high fees and high debt deter and demoralize low-income students long before they enter college or university.

- g. *Graduate and Professional Degree Attainment Among 1992-93 College Graduates.* Price, Derek V. Ms. 2001. Lumina Foundation for Education.

Undergraduates who borrow reduced their odds of obtaining a graduate or professional degree within four years by 9 percent.

- h. *Generation Debt: The New Economics of Being Young.* Brendan I. Koerner. "The Ambition Tax: Why America's young are being crushed by debt—and why no one seems to care." March 2004.

[www.villagevoice.com/issues/0411/fkoerner.php](http://www.villagevoice.com/issues/0411/fkoerner.php)>

This Village Voice story outlines the effect of high debt on low-income families. It makes the case that high student debt ensures that low-income students forced to borrow for an education are penalized for holding the same ambitions as upper income students who generally graduate with little or no debt. The article also makes the important case that high student debt serves to erase many of the ameliorative effect of post-secondary education. Students are forced to borrow so much that they effectively remain in the low-income bracket despite their post-secondary education credentials. The article also outlines the long-term economic effects of student debt. The article ends with a series of testimonials from students in debt. The testimonials are particularly powerful because they put a human face on student debt. It is precisely this face missing in the attitude held by those, like the Millennium Scholarship Foundation, who argue for higher debt and higher tuition fees.

- i. *Higher Education, Increasingly Important for All Americans, is Unaffordable for Many.* Lumina Foundation for Education. Illuminations. Indianapolis: Lumina Foundation for Education, 2002.

Student loans paid for 95 percent of the increased charges to students at four-year public colleges between 1991 and 1995. In the following four years, loans covered 62 percent of these increases. (Jerry S. Davis)

- j. *Life After Debt: Results of the National Student Loan Survey.* Baum, Sandy and Diane Saunders Braintree, MA: Nellie Mae, 1998.

In 1997, 70 percent of Black, Hispanic, and Asian/Pacific Islander borrowers who did not complete a degree reported that loans prevented them from staying in school. African-Americans with greatest levels of debt burden disproportionately report that student loan debt changed their career plans or prevented them from attending graduate school.

In 1997, lower-income students who received Pell Grants were more likely than other undergraduate borrowers to have debt exceeding \$20,000. The average percentage of monthly income that goes toward student loan payments was 12 percent, which is 2 to 4 percent higher than the maximum acceptable debt burden according to the U.S. Department of Education and the student loan industry. Debt burdens are especially high for students who make lower than average salaries (like art and music majors).

- k. *Measuring Up 2002*. National Centre for Public Policy and Higher Education (United States), October 2002

[measuringup.highereducation.org/2002/pdf/MeasUp2002.pdf](http://measuringup.highereducation.org/2002/pdf/MeasUp2002.pdf)

This report finds that improved academic preparation in the United States has not, on its own, improved access. Though many states have made substantial strides in preparing students for college-level education, there have not been widespread gains in the proportion of Americans going to college. The report also finds that overall college opportunity in America is at a standstill, and remains unevenly and unfairly distributed.

This report is important because it challenges the Millennium Scholarship Foundation's emphasis on "academic preparation" and "non-financial barriers" as the primary barriers to access. To quote the authors of *Measuring Up 2002*: "As a nation, we are doing better in preparing our young people for college than we are doing in assuring that they have opportunities to enrol in and complete programs of education and training beyond high school."

*Measuring Up* is produced every second year by the National Centre for Public Policy and Higher Education, a widely respected US non-profit, non-partisan post-secondary education policy institute.

- l. *Measuring the Effect of in Study Employment*

[www.employment-studies.co.uk](http://www.employment-studies.co.uk)

Undertaken by the Institute for Employment Studies-UK, this report found that working compromised students' grades. Not surprisingly, the study found that low-income students had nearly 50 percent higher debt upon graduation and worked more hours. 58 percent of those who worked regularly gained a first or second class standing (roughly equivalent to an honours degree in the upper band, and regular honours degree), while 71 percent of those who did not work gained a first or second-class standing.

The data is based on a tracking study of 1,500 students between 1998 and 2003. The study is one of the few longitudinal studies that track the effect of in-study employment and academic results. Although it is known that Canadian students work on average more than 20 hours per week, very little data is available on the effect of paid work on academic performance.

- m. *Money Matters: The Impact of Race/Ethnicity and Gender on How Students Pay for College*. King, Jacqueline E. Washington: American Council on Education, 1999.

Almost eight out of ten African-Americans who earn a bachelor's degree borrow, and the average amount of student loan debt they accrue is \$13,000. The average loan debt for African-Americans who complete an associate degree program is \$6,500. Among Hispanic students who graduate with a bachelor's degree, almost 70 percent have debt averaging \$11,500. For comparison, just over half of White bachelor's degree recipients borrowed while in college, and their average indebtedness is \$12,300.

- n. *Paper Chase to Money Chase, Law School Debt Diverts road to Public Service*. A study by Equal Justice Works, the Partnership for Public Service, and the National Association for Law Placement, November 2002

[www.equaljusticeworks.org/choose/lrapsurvey.php](http://www.equaljusticeworks.org/choose/lrapsurvey.php)

This study examines the effect of high tuition fees and high student debt on the career choice pursued by law graduates in the United States. The study makes a direct link between high debt and aversion to lower paying public service legal careers. The study substantiates this disturbing trend by analysing employment statistics as well as qualitative interviews with graduates. The qualitative research

demonstrates very clearly that those from low-income backgrounds who may have wanted to serve their own communities are rarely able to do so because they are most likely to be carrying crippling debt. The study effectively highlights the dual effect of this trend by pointing out that racially and economically marginalised communities are less likely to have community role models because of high fees and debt and that the community is robbed of a potential resource offered by legal professionals willing to work in low income neighbourhoods.

- o. *Rising Public College Tuition and College Entry: How well do public subsidies promote access to college?* Thomas J. Kane, National Bureau of Economic Research Working Paper No. 5164, July 1995

In this comprehensive appraisal of statistical evidence on the price sensitivity of American youth to tuition fees, UCLA professor Thomas Kane finds that high tuition fees are clearly a barrier to access for lower-income youth. Some of Dr. Kane's findings include:

- states with high public tuition fee levels have lower college entry rates;
- the gap in enrolment between high and low-income youth is wider in high tuition fee states; and,
- within-state tuition fee hikes lead to lower enrolment rates and wider gaps between high and low-income youth.

- p. *Social Class and College Costs: Examining the Financial Nexus Between College Choice and Persistence.* Michael B. Paulsen and Edward P. St. John, *The Journal Of Higher Education*, Vol. 73, No. 2, (March/April 2002).

This study reveals a strong correlation between financial barriers and persistence (re-enrolment) rates for poor and working class students in the United States. Using data collected in the United States National Postsecondary Study Aid Survey, researchers found that every \$1000 increment in tuition fees reduced the probability of poor and working class students re-enrolling in college or university the following year by 16 percent and 19 percent, respectively. The researchers concluded, "... the high-tuition, high loan approach ... to higher education finance does not seem to be working."

- q. *The Student Aid Game: Meeting Need and Rewarding Talent in Higher Education.* McPherson, Michael and Morton Owen Schapiro. City: Publisher: 1998.

The higher net costs of college restrict the options for low-income students who are increasingly attending community colleges. These higher net costs are partly a function of the declining percentage of tuition covered by federal financial aid grants: between 1986 and 1993 the percentage declined from 68 percent to 42 percent.

- r. *Student Money Matters 2002: A report on the finances and spending habits of school leavers, students and graduates.* NatWest (National Westminster Bank), United Kingdom, August 2002

This survey, conducted by British banking company NatWest, finds that half of British Sixth Form students (equivalent of Canadian high school graduates) not going to university blame tuition fees and the prospect of high debt as their main reasons for not attending. 50 percent of eligible students in 2002 have at least considered not going to university because of tuition fees. In total, the survey finds that almost one fifth of qualified UK sixth form graduates are not going on to higher education due to a lack of money.

This study is significant because it shows the detrimental effect of tuition fees on access. Prior to 1998, university was free in the United Kingdom and a national system of grants assured that academically qualified students were generally able to attend university regardless of financial circumstances.

- s. *Student Loans and Social Inequality*. Price, Derek V. Ms. 2002. Lumina Foundation for Education.

Among a national sample of 1992-93 baccalaureate degree recipients, low-income students from families with incomes of less than 1.85 times the poverty rate had a six times greater risk than higher-income students of having educational debt burden exceed the 8 percent maximum threshold (8 percent of monthly income after taxes). Students from families with incomes between 1.85 times the poverty rate and 3.4 times the poverty rate had a 3.6 times greater risk of having debt burden exceed the 8 percent threshold.

- t. *The Student Loan Scheme: Inequities and emerging issues*. New Zealand University Students' Association, Wellington, 2002.

This assessment of the impact of Income Contingent Repayment (ICR) student loans on students in New Zealand provides further evidence in support of the Federation's opposition to the implementation of ICR schemes in Canada. According to research compiled by the New Zealand Students Association, total student debt in New Zealand has soared to over \$5 billion since the introduction of ICR, and only one in ten students is debt free.

Women, indigenous people and students from minority groups in New Zealand have been hit particularly hard by the inequities inherent in ICR schemes. For example, a Maori woman can expect to spend an average of 24 years repaying the cost of her bachelor degree under ICR, as opposed to 13 years for a New Zealand male of European ancestry. These figures are even worse for Pacific (non-Maori Polynesian) women in New Zealand, who face a staggering estimated average loan repayment time of 33 years. Overall, a woman with a bachelor degree in New Zealand can expect to take an average of 28 years to repay her loans under ICR—almost double the 15 year average repayment time for a man.

- u. *Unequal Opportunity: Disparities in college access among the 50 states*. A Lumina Foundation for Education report. January 2002.  
[www.luminafoundation.org/research/access.html](http://www.luminafoundation.org/research/access.html)

This study focuses on the relationship between affordability and access. The study finds that "the extent to which accessibility varies among states is more often a function of whether colleges are affordable than of their admissions criteria [or academic preparation]." This finding is particularly important because it undermines the idea that academic preparation and not cost is the main determinant of access. Academic preparation is a fashionable policy trend in the United States that is based on the argument that self-help programs that boosting the grades of poor youth is the key to access. While there is nothing wrong with such programs in and of themselves, this study demonstrates that it is ludicrous to suggest that finances have little or no impact on accessibility. Further the study confirms and extends earlier findings that grants as opposed to loans, combined with low tuition fees, is the best model for increasing access for low-income families.

- v. *Understanding the College Choice of Disadvantaged Students: New Directions for Institutional Research*. Carbrera, Alberto F. and Steven M. La Nasa (2000).

Targeting grants to low-income students is likely to result in increased enrolments. For example, a \$1,000 increase in grant aid increases enrolment rates for low-income students by 9 percentage points

while a similar increase in tuition would decrease enrolment rates by 3.4 percentage points. The same increase in grant aid has a 3-percentage-point positive effect for lower-middle and middle-income students.

- w. *Unto them that bath. . .* Stephen Machin, Centrepiece Magazine, Winter 2003, Centre for Economic Performance, London School of Economics.  
*A story based on this study is available free on the Guardian newspaper website: [education.guardian.co.uk/specialreports/tuitionfees/story/0,5500,901332,00.html](http://education.guardian.co.uk/specialreports/tuitionfees/story/0,5500,901332,00.html)*

This report examines participation in higher education in the United Kingdom by social class during the 1990s and finds that the introduction of tuition fees appears to have increased the gap in university participation between high and low-income individuals. Prior to 1998, UK universities charged no tuition fees and the UK had a national system of need-based grants. In 1991-1992, while free tuition and grants were still in place, 13 percent of children from the lowest income families went to university. By the end of the decade, after the government introduced tuition fees and abolished the student grant, this figure dropped to just seven percent. At the same time, participation by children from the upper middle incomes increased from 55 percent to 72 percent.

- x. *Why Aren't More African Americans Going to College?* Carnoy, Martin. Journal of Blacks in Higher Education 6 (1994/95).

During the 1980s, federal financial aid shifted from primarily grants to primarily loans. During the same period, fewer Blacks enrolled in college. Carnoy posits that the net decline in financial aid during this period (after controlling for inflation) is in large part a function of rising college prices and affected Blacks more than Whites because a higher proportion of Blacks were from low-income families. He argues that "more high school graduates from poor minority families were competing for less financial aid in real terms," meaning the chance of receiving a grant went down by half during this period.

- y. *Widening Participation the Experience of Low-Income Students in Higher Education.* Vanessa Fitzgerald and Andrew Hannan (University of Plymouth), Arthur Baxter and Sue Hatt (University of the West of England, Bristol), May 2004.  
[www.staffs.ac.uk/schools/graduate\\_school/access/docs/Amster-paper](http://www.staffs.ac.uk/schools/graduate_school/access/docs/Amster-paper)

The study offers a comprehensive set of data on the effect of grants on persistence (re-enrolment). The study demonstrates a very clear link between the availability of non-repayable student financial assistance and the ability of low-income students to finish a degree or diploma by tracking the path of low-income students at two universities in Southwest England. In particular, the researchers examine the effect of the grant available to low-income students to cover tuition fees. After carefully examining the persistence rates at both institutions the following unequivocal conclusion was reached:

"The most interesting finding of this study arises from the data in table 4 that compares the continuation rates of students with and without bursaries. Taking all students regardless of their fee support status, bursary students had higher rates of continuation than those without awards and this was consistent overall and at both institutions." (12)

These results echo a growing body of research in the United States that grants and not loans are the key to access and persistence for low-income students.

### 3. Registered Education Savings Plans (RESP), the Canada Education Savings Grant (CESG), and Education Tax Credits

- a. *Hope for Whom? Financial Aid for the Middle Class and Its Impact on College Attendance*, Susan Dynarski, National Bureau of Economic Research Working Paper No. 7756, June 2000.  
[www.nber.org/papers/w7756](http://www.nber.org/papers/w7756)

This study demonstrates that education tax credits introduced in the American state of Georgia led to increased postsecondary participation—but only for young people from higher-income families. According to the study, post-secondary institutions use the availability of tax credits as an excuse to increase tuition fees. As a result, college and universities have become less affordable for low-income earners, who often do not earn enough money to be eligible for tax credits. Instead of improving accessibility, education tax credits actually widen the gap in college attendance between African Americans and Caucasians, and between those from low and high-income families.

- b. *How Tax Credits Push Up College Costs*, a Business Week article, is available online:  
[www.businessweek.com/bwdaily/dnflash/oct2000/nf20001027\\_396](http://www.businessweek.com/bwdaily/dnflash/oct2000/nf20001027_396)

- c. *The Impact of Federal Tax Credits for Higher Education Expenses*. Paper prepared by Dr. Bridget Terry Long for the National Bureau of Economic Research Conference College Decisions: How Students Actually Make Them and How They Could, Harvard University, August 2002  
[www.nber.org/~confer/2002/hiedc02/long.pdf](http://www.nber.org/~confer/2002/hiedc02/long.pdf)

This study by a Harvard University education economist reveals that education tax credits introduced in the United States did nothing to improve access. Accordingly, the author concludes that, “although one goal of the tax credits was to increase access to higher education, this study found no evidence of increased post-secondary enrolment among eligible students.” The study also finds that the education tax credits introduced in the U.S. appear to have provided state governments with an incentive to raise tuition fees at public institutions.

- d. *Survey of Approaches to Educational Planning*. Statistics Canada, April 2001  
[www.statcan.ca/Daily/English/010410/d010410a](http://www.statcan.ca/Daily/English/010410/d010410a)

In 1998, the federal government introduced the Canada Education Savings Grant (CESG) as a supplement to the existing Registered Education Savings Plan (RESP). The RESP was designed to provide a tax shelter as an inducement to save for a child's education. The CESG expanded the program dramatically by offering to match 20 percent of any contribution up to \$2,000. A \$2000 investment in an RESP, therefore, nets a 20 percent return.

When the program was first announced in 1998, the Federation argued that the program would disproportionately benefit those already in a position to save. In addition, the Federation argued the program would draw scarce resources away from areas where it was needed most such as tuition fee reductions or real solutions to the crisis of student debt.

The April 2001 Statistics Canada study confirms the Federation's pessimistic analysis of the RESP program. The study reports that, while 79.8 percent of those families with incomes under \$30,000 wanted to save for a child's education, only 18.7 percent were actually able to afford to do so. In families

with incomes over \$80,000, 95 percent reported a desire to save for post-secondary education and 62.6 percent actually were saving.

These data clearly show that the RESP program does little to address the plight of those Canadians least likely to attend college and university in the first place. By individualising the cost of education in the form exorbitant tuition fees, federal and provincial governments have exacerbated the inequities in participation rates between low, high and middle-income students. These Statistics Canada data clearly demonstrate that the RESP program is not a solution to this social divide.

- e. *Tax Credits as Education Policy*. Canadian Federation of Students, September 2002  
[www.cfs-fcee.ca](http://www.cfs-fcee.ca)

In this fact sheet, the federal government tax credits for post-secondary education are examined and are found to have failed to compensate for increases in tuition fees during the 1990s. Using average Ontario university tuition fees in 1988, 1995 and 2001 as a basis for comparison, researchers found that the gap between federal education tax credits and Ontario university tuition fees increased from \$1,426 in 1988 to almost \$2,900 in 2001, even after adjustments for inflation. In addition, the study reveals that high-income earners were, on average, claiming more through education tax credits than were low- and middle-income earners. The study also finds that the average amount claimed through the federal Student Loan Interest Credit was extremely low and was apparently having little impact on student debt.

- f. *Tax Preferences for Education Saving: Are RESPs effective?* Kevin Milligan, C.D. Howe Institute Commentary, No. 174 (November 2002)  
[www.cdhowe.org/english/publications/currentpubs.html](http://www.cdhowe.org/english/publications/currentpubs.html)

In this study, University of British Columbia economist Kevin Milligan shows that wealthy Canadians are far more likely to benefit from Registered Education Savings Plans (RESPs) and federally funded Canada Education Savings Grants (CESGs) than people from low-income households. In 1999, only 6.3 percent of children from households with incomes under \$30,000 were beneficiaries of RESPs, while in households with incomes of \$80,000 or higher, almost 30 percent of children had RESPs in their name. Based on this finding, Milligan argues that Canada Education Savings Grants amount to a massive federal subsidy to families that are already well equipped to pay for post-secondary education. As Milligan points out, the \$423 million the federal government spent on the CESG in 2002/03 could have provided free tuition to 21 percent of Canadian university students. The report concludes that "... CESGs give scarce public funds to the wrong households ..." and that "[t]he CESG program should be discontinued."

#### 4. General research on economic inequality in Canada

- a. *The Evolution of Wealth Inequality in Canada, 1984-1999*: Statistics Canada, February 2002  
[www.statcan.ca/english/research/11F0019MIE/11F0019MIE2002187.pdf](http://www.statcan.ca/english/research/11F0019MIE/11F0019MIE2002187.pdf)

This recent Statistics Canada study shows that wealth inequality in Canada has increased significantly between 1984 and 1999. Some of the study's findings include:

- wealth in Canada has become increasingly concentrated in the hands of the richest 20 percent of families;
- the top ten percent of families held 55.7 percent of Canada's total net worth in 1999; and,

- the top 10 percent of families saw their net worth increase by over 35 percent from 1984 to 1999, while the bottom 20 percent of families saw their net worth decline by 85 percent or more.

This growing inequality is not just relative; many people are actually poorer, after adjustments for inflation, than they were 15 years ago. Growth in wealth inequality has been associated with substantial declines in real average and median wealth for groups such as young couples with children and recent immigrants.

The median wealth of young couples aged 25 to 34 with children was \$30,800—nearly a third less than in the mid-1980s.

- b. *Minimum Wages in Canada: A Statistical Portrait with Policy Implications.* Ken Battle, Caledon Institute of Social Policy, January 2003

This study provides statistical data and analysis on the minimum wage and minimum wage workers in Canada, and includes provincial comparisons. Statistics show that after adjustments for inflation, the average minimum wage in Canada is lower today than it was in 1976, and that the minimum wage fell well below the poverty line in most Canadian jurisdictions. The study also shows that a disproportionate percentage of young workers, women and students were working for minimum wage in Canada. Around 30 percent of 17-19 year olds and 7 percent of 20-24 year olds worked for minimum wage in 2000. In total, workers aged 15-24 accounted for over 64 percent of all minimum wage workers. In the summer of 2000, 73 percent of young minimum wage workers—295,000 people in total—were full time students planning to return to school in the fall.

- c. *Rags and riches: Wealth inequality in Canada.* Steve Kerstetter, Canadian Centre for Policy Alternatives, December 2002  
[www.policyalternatives.ca](http://www.policyalternatives.ca)

Recent research and historical statistics are brought together in this study, which charts the growth of poverty and wealth inequality in Canada over the past 20 years. Statistics are broken down by age, family size, province and by numerous other variables. The study finds that much of the recent growth in wealth inequality can be traced to government cuts to social programs and also to changes in federal and provincial tax policies that favour Canada's wealthiest people.

## 5. International Trade Agreements and Post-Secondary Education

- a. *GATS Impact on Education in Canada.* Gottlieb & Pearson, October 2001.  
(Legal Opinion commissioned by the Canadian Federation of Students, the Canadian Association of University Teachers and the British Columbia Teachers Federation)  
[www.caut.ca/english/issues/tradelgats-opinion.asp](http://www.caut.ca/english/issues/tradelgats-opinion.asp)

In October 2001, the Canadian Federation of Students, in concert with our partners at the Canadian Association of University Teachers and the British Columbia Teachers Federation, sought a legal opinion from the legal firm of Gottlieb and Pearson regarding the potential impact of the General Agreement on Trade in Services (GATS) on education in Canada. Gottlieb and Pearson analyzed the portions of the GATS that Canada has agreed to, as well the meaning and strength of the clause upon which Canada is relying to protect public education. They found that the clause was not only ambiguous but that the Canadian system of post-secondary education may not satisfy the conditions for exclusion. In their analysis, Gottlieb and Pearson conclude that because "private education co-exists with public education" it will be difficult for Canada to argue that education is offered solely under government authority.

In addition, the proliferation of private education providers in Canada makes it even more difficult for Canada to argue that education is not provided on a commercial or competitive basis. Gottlieb and Pearson note that the WTO has consistently interpreted the government authority exclusion in a narrow manner and further conclude that “the GATS meaning of competition is much wider than has been articulated by Industry Canada”. In short, Gottlieb and Person conclude that the clauses provide little if any grounds to protect public education from the dictates of the GATS.

- b. *Trading It Away: How GATS Threatens UK Higher Education*. Steven Kelk and Jess Worth, People and Planet, United Kingdom, October 2002.  
[www.peopleandplanet.org/tradejustice/tradingitaway.asp](http://www.peopleandplanet.org/tradejustice/tradingitaway.asp)

*Trading it Away* is a comprehensive analysis of the potential impact that the General Agreement on Trade in Services (GATS) could have on post secondary education. The report was prepared by the British based student campaigning organisation People and Planet. Though the report focuses primarily on how the GATS will affect post-secondary education in the United Kingdom, much of the analysis and research is applicable to Canada and other countries participating in the GATS negotiations. Supported by extensive and detailed research, the authors of the report conclude that the GATS “... threatens the financial viability, quality, ideals and character of UK Higher Education.”

## 6. Economic and Social Benefits of Post-Secondary Education

- a. *Earnings of Canadians: Making a living in the new economy*. Statistics Canada, March 2003.  
[www12.statcan.ca/english/census01/products/analytic/companion/earn/contents.cfm?](http://www12.statcan.ca/english/census01/products/analytic/companion/earn/contents.cfm?)

Information collected in the 2001 census reveals that though a university education was associated with higher earnings, young graduates were not benefiting to the same extent as older people with degrees.

Overall, results from the 2001 census show that higher education is associated with higher earnings. More than 60 percent of people in the lowest earnings category did not have more than a high school education in 2000, while more than 60 percent of those in the top category had a university degree.

However, the census also indicates that it is older groups with higher education and more work experience who made the most significant earnings gains over the last decade. As this report states, “a clear generational divide has opened up in the labour market with younger groups on a lower earnings track than older, more experienced groups.” The low-income figures for younger university graduates provide a strong counter argument against attempts to justify increased student debt on the basis of “the high future earnings of graduates.”

- b. *Job Futures: World of Work*. Applied Research Branch, Human Resources Development Canada, August 2000 (publication updated in 2002)  
[jobfutures.ca/en/brochure/JobFuture.pdf](http://jobfutures.ca/en/brochure/JobFuture.pdf)

In August of 2000 the Department of Human Resources Development Canada released an empirical study outlining the future of the labour market. The study offers conclusive evidence that post-secondary education will continue to be the dividing line between those who flourish in the new economy and those left behind to struggle in underpaid, unfulfilling work. Analysts conclude that by 2004, over 70 percent of all jobs will require post-secondary education and only 5.8 percent will be available to those who do complete high school.

## 7. Commercialisation of Research

- a. *Dances with the Pharmaceutical Industry* and *Look, No Strings: Publishing industry funded research*. Canadian Medical Association Journal September 18, 2001; 165 (6) and Canadian Medical Association Journal February 19, 2002; 166 (4) respectively.

In September 2001 and February 2002, the Canadian Medical Association Journal published two studies critical of industry sponsored research. The first article, *Dances with the Pharmaceutical Industry*, tracks the disturbing link between positive results and industry sponsorship. The second study, *Look, No Strings*, focuses on the relationship between medical research and the pharmaceutical industry. The article also reviews the case of Dr. Nancy Olivieri and her hostile treatment by the Hospital for Sick Children and the University of Toronto. The article reviews the sordid roles played by pharmaceutical giant Apotex and then University of Toronto President Rob Pritchard who was at the time lobbying for Apotex.

