



49

th Semi-Annual National General Meeting
e Assemblée générale nationale semestrielle

May 25 to 28, 2006 • Ottawa • du 25 au 28 mai 2006

AGENDA

Budget Committee

May 2006 National General Meeting

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.

The National Executive is recommending that National Treasurer David Hare and Ontario Representative Ken Marciniec be ratified as co-chairs for the Committee.

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 2005-2006 Budget and Year-to-date Statements

The Committee will review the 2005-2006 budget and the comparative year-to-date statement of revenue and expenditures.

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DAY TWO

3. REVISION OF THE 2006-2007 BUDGET

a. Presentation of Draft Budget

The first draft of the 2006-2007 budget, as prepared by the National Executive, will be presented.

b. Consideration of Amendments

The Committee will consider amendments to the proposed 2006-2007 budget.

4. OTHER BUSINESS

a. Proposal to Repeal Standing Resolution Standing Resolution #29

Housekeeping
The amount of new Travel CUTS' shares to be purchased annually is now determined automatically by the Unanimous Shareholder Agreement between the Federation and the new minority shareholder in CUTS, effectively rendering Standing Resolution #29 obsolete. The National Executive is proposing that Standing Resolution #29 be repealed.

b. Proposal to Amend Standing Resolution #32

Standing Resolution #32 lists the Saskatchewan Component fee as \$.50 per semester; however, all member locals in the province, with the exception of Local 90, are now collecting \$1.00 per semester. Therefore, it is recommended that Standing Resolution #32 be amended accordingly.

c. Other

5. ADJOURNMENT



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AGENDA

Campaigns and Government Relations Forum

May 2006 National General Meeting

DAY ONE

1. PREPARATION FOR FORUM DELIBERATIONS

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

2. REVIEW OF THE FEDERAL ELECTION CAMPAIGN

Federal and provincial elections serve as "windows of opportunity" through which the Federation can focus attention on student issues and, hopefully, extract commitments from future governments. The Committee will review the Federation's election campaign to assess its effectiveness.

DAY TWO

3. DEVELOPMENT OF THE NATIONAL CAMPAIGNS PLAN

a. Presentation of Draft 2006-2007 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.

b. Revision of Draft 2006-2007 Campaign Strategy

The Committee will revise the draft of the 2006-2007 campaigns strategy for submission to the closing plenary.

4. MOTIONS REFERRED FROM OPENING PLENARY

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

a. Proposal for Campaign for Tenancy Rights

2006/05:N02 MOTION

Local 8/

Whereas most provinces exclude housing provided by educational institutions from acts governing tenant-landlord relationships in rental properties; and

Whereas the rights of a tenant should be extended to those living in student housing; and

Whereas students' tenancy rights are often violated and these students have little recourse; therefore

Be it resolved that a letter be sent to the provincial governments in those provinces in which the housing provided by educational institutions is not governed by tenant-landlord legislation

calling on those govts to amend legislation to protect rights of students

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Be it further resolved that the member locals be encouraged to lobby provincial governments to include housing provided by educational institutions in legislation governing tenant-landlord relationships; and

Be it further resolved that provincial components be encouraged to lobby provincial governments to include housing provided by educational institutions in legislation governing tenant-landlord relationships.

b. Proposal for Campaign Regarding University and College Rankings

2006/05:N03 MOTION

Local 8/

Whereas Maclean's magazine publishes an annual ranking of Canadian universities; and

Whereas these rankings often favour universities that have raised tuition fees and increased private funding; and

Whereas some universities have established administrative working groups to examine changes the university can make in order to rank higher on the Maclean's list; and

Whereas these changes are often superficial and have come at the expense of students' interests; therefore

~~Be it resolved that Maclean's magazine be urged to discontinue its annual ranking of universities; and~~

Be it further resolved that member locals be encouraged to reject participation in the annual Maclean's survey of universities and other similar surveys; and

Be it further resolved that member locals be encouraged to submit motions to senates and governing bodies calling on them to reject participation in the annual Maclean's survey of universities and other similar surveys.

c. Proposal for Campaign for Tuition Fee Freeze

2006/05:N15 MOTION

Local 24/

Whereas after years of tuition fee hikes, Ontario students finally won a fully funded two-year tuition fee freeze in October 2003; and

Whereas students in Ontario have benefited from this freeze for the last two academic years; and

Whereas Ontario students have been in a struggle with the Liberal government to have tuition fees frozen for the 2006-2007 academic year; and

Whereas the government of Ontario announced a tuition fee framework that allows institutions to increase tuition fees between 4 and 8 percent and, in some programmes, as much as 20 percent; and

Whereas a number of universities have opted to increase student fees by the full 8 percent; and

Whereas this increase is the highest over-all increase that Ontario students have been subjected to in over a decade, far exceeding the devastating cuts and tuition fee increases of the Mike Harris years in the mid-1990s; and

Whereas Ontario already has the second-highest fees in Canada; therefore

Be it resolved that member locals be encouraged to write letters to Ontario Premier Dalton McGuinty condemning the government's decision to increase tuition fees, and calling for an immediate tuition fee freeze; and

Be it further resolved that a copy of the letter be sent to the Ontario component office.

d. Proposal to Seek Statistics for "No Means No" Campaign

2006/05:N17 MOTION

Whereas the Federation's "No Means No" campaign, launched in 1992, is one of Canada's most popular and longstanding anti-date rape campaigns; and

to BRET local members used books

CAMPAIGNS & GOVERNMENT RELATIONS FORUM AGENDA – PAGE 5

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Whereas these atrocities are unacceptable, and there is the need for further international involvement to achieve an end to the crisis and to holding those accountable who are involved in these crimes; and

Whereas a newly formed student organisation, Canadian Students for Darfur (CSFDarfur), (formerly the Vancouver-Darfur committee of Simon Fraser University and endorsed by the Canadian Federation of Students at its May 2005 national general meeting) is seeking to:

- increase public awareness throughout Canada about the ongoing crisis in Darfur;
- fundraise to assist aid agencies working to help the victims of the tragedy in Darfur; and
- urge the Canadian government to become further involved in helping to resolve the Darfur crisis; and

Whereas all aid agencies working in Darfur have recognised the urgent need for humanitarian assistance from private sources in addition to that pledged by national governments (especially in light of the many natural disasters that have occurred in the past year leading to donor fatigue, which have in turn pushed issues like Darfur to the back burner); and

Whereas Canadian Students for Darfur has set up a fund where donations can be made; and

Whereas the Canadian Students for Darfur fund aims to raise \$1 million in one year, and was launched on October 5th, 2005 at Simon Fraser University by Senator and former Lieutenant-General Roméo Dallaire; and

Whereas the fundraising strategy and campaign called "A Dollar a Student for Darfur" seeks to collect \$1 from each student and subsequently each person in Canada until the target is reached; and

Whereas Canadian Students for Darfur and its fund-drive have been endorsed by former Lieutenant-General Roméo Dallaire, Senator Mobina Jaffer, Federal NDP Leader Jack Layton, MP David Kilgour, MP Peter Julian, MP Bill Siksay, Simon Fraser University President Dr. Michael Stevenson, musician Warren Flandez, the African Heritage Society of BC, the Teaching Support Staff Union of Simon Fraser University, the Simon Fraser Public Interest Research Group, the Simon Fraser Student Society, the students unions of Vancouver Community College; and

Whereas Canadian Students for Darfur currently has chapters and or contacts in the following institutions: Langara College; Simon Fraser University; Kwantlen University-College: Langley Campus; University College of the Cariboo; Kwantlen University-College: Newton Campus; University of British Columbia-Okanagan; McGill University; and, Douglas College; and

Whereas Canadian Students for Darfur is currently working to establish more chapters and striving to work with all student unions and labour organisations, as well as city and municipal councils across Canada; and

Whereas Canadian Students for Darfur has hosted events with speakers from various aid and human rights agencies; and

Whereas Canadian Students for Darfur works closely and collaboratively with Students Taking Action Now: Darfur-Canada (STAND) as well as aid agencies working to help the victims of the Darfur conflict including Oxfam Canada, Doctors without Borders (MSF), War Child and Canadian Red Cross; and

Whereas an advisory committee will be set up to disburse funds collected for Darfur, with membership to be drawn from Canadian Students for Darfur, STAND Canada, Canadian Federation of Students, academics, civil society and NGOs to ensure credibility and fairness in the handling and allocation of funds; and

Whereas Canadian Students for Darfur has undertaken many advocacy initiatives including exhibitions, talks, presentations, and a vigil; and

Whereas Canadian Students for Darfur has also launched a postcard campaign addressed to the Prime Minister Paul Martin, calling on his government to maintain its involvement in the resolution of the humanitarian crisis in Darfur; and

Whereas Canadian Students for Darfur has developed promotional material to help create awareness, including brown bracelets, t-shirts, pins and magnets urging action in Darfur; and

Whereas Canadian Students for Darfur has launched an online "Petition to World Leaders" campaign, targeting world leaders with the power to pressure the government of Sudan and the rebel groups to sit down and find a political solution to the crisis in Darfur; therefore

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Be it resolved that the Canadian Students for Darfur national fundraising drive "A Dollar a Student for Darfur" (aimed at raising 1 million dollars to help the victims of the Darfur crisis) be endorsed; and

Be it further resolved that the national fundraising drive be promoted; and

Be it further resolved that member locals be encouraged to endorse, support and collect money for the "A Dollar a Student for Darfur" campaign; and

Be it further resolved that coalition partners and sister organisations be encouraged to endorse and support the national fundraising campaign; and

Be it further resolved that a letter be written to Prime Minister Paul Martin, calling on him to publicly recognise the genocide underway in Darfur and seek to increase the number of African Union troops in Darfur as well as a stronger mandate through the United Nations for the protection of civilians by the African Union; and

Be it further resolved that \$4,000 or an equivalent in-kind donation be contributed toward the production of awareness and promotional material aimed at enhancing the work of Canadian Students for Darfur such as petitions, postcards, posters, brochures, wristbands, newsletters, or magnets; and

Be it further resolved that member locals be encouraged to help secure the endorsement and support of their university or college governing boards, senates or equivalents, and education councils for the "A Dollar a Student for Darfur" campaign; and

Be it further resolved that member locals without chapters or contact persons be encouraged to initiate chapters and/or encourage students on their campuses to start chapters or become contacts of Canadian Students for Darfur.

2006/05:N20 MOTION

Local 1/Local 24

Whereas for more than a decade campuses across the country have been targeted by major beverage corporations such as Coca-Cola and PepsiCo to sign long-term exclusivity contracts, exchanging cash for exclusive access to sell their beverages to the campus community; and

Whereas these contracts are typically negotiated in confidence with the administration and/or student governments and with little meaningful debate and involvement of the students, staff and faculty; and

Whereas two of the principal corporations pursuing exclusivity contracts, Coca-Cola and PepsiCo, have been involved in well-documented human rights abuses, an environmentally damaging manufacturing process, poor labour management practices and the production of products that contribute to poor health and the rise of obesity amongst young people; and

Whereas these corporations increasingly are shifting their profit centre to focus on bottled water, sports drinks and juice products, since these products can be marketed through exclusivity contracts, are exorbitantly priced and poorly regulated, while the water for these products comes from public water sources (direct from municipal tap water systems in the case of Coca-Cola and Pepsi products) and is extracted in such quantity that it depletes local water aquifers; and

Whereas these exclusivity contracts have become a specious form of revenue for student unions and university administrations in a context of post-secondary education under-funding; and

Whereas exclusivity contracts contribute to the commercialisation of public spaces; and

Whereas it is time for students' unions to show leadership on this issue and advocate for change; therefore

Be it resolved that member locals be encouraged to work with groups such as the Polaris Institute and the "Stop Killer Coke" campaign that are helping to raise awareness of the public policy threats associated with the bottled water/beverage industry;

Be it further resolved that member locals be encouraged to challenge the renewal and negotiation of exclusivity contracts on campuses and to seek the termination of existing exclusivity agreements;

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Be it further resolved that member locals be encouraged to work with allied groups to develop alternative beverage agreements on campuses that encourage campus/community partnerships and that are in keeping with ethical purchasing policies; and

Be it further resolved that member locals be encouraged to strengthen lobby efforts to pressure provincial/federal/territorial governments to increase post-secondary education funding.

g. Proposal for Campaign for Representation on University and College Governing Boards

2006/05:N21 MOTION

Local 23/Local 75

Be it resolved that member locals be encouraged to lobby provincial governments and university and college administrations to allow international students to seek election to all university and college governing bodies.

5. OTHER BUSINESS

6. ADJOURNMENT

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 2008.

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

As a result of the Foundation's politicised research project and failure 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 continue to undertake research on the detrimental effects of student debt on access to public post-secondary education, as well as on the economic and social consequences of indebting post-secondary graduates. The Federation will release a comprehensive paper that articulates a vision for administering and financing a national system of needs-based grants.

Government Relations: The Federation

will lobby federal decision-makers to implement a national system of needs-based grants. The Federation will also lobby for the immediate wind down of the Millennium Scholarship Foundation and for the expansion of the federal low-income grant.

National Awareness and Media: The Federation will develop a centrally coordinated communications strategy that calls public attention to the impact of high tuition fees on access to post-secondary education. The Federation will continue to publicise the biased nature of the Millennium Scholarship Foundation's research and communications efforts. Member locals will be provided with template news releases, and sample opinion articles for submission to campus and local newspapers.

Membership Mobilisation: Member locals will be encouraged to participate in a nationally coordinated and provincially focused Day of Action to be held in February 2007, calling for increased government funding, reduced tuition fees and a national system of needs based grants.

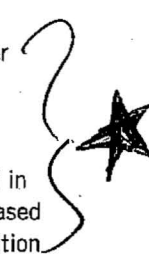
In preparation for the Day of Action, the Federation will prepare and assist member locals with the implementation of a comprehensive membership awareness strategy. The strategy will include the development of materials for distribution on campuses. Member locals will be encouraged to distribute materials at various events including welcome weeks and public forums.

Coalition Work: The Federation will continue to build widespread awareness and support among like-minded organisations about the need for a comprehensive national system of needs-based grants.

Campaign Goal

The Federation seeks the termination of the Millennium Scholarship Foundation and the establishment of a national system of grants.

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Income Contingent Repayment

Campaign Goal

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

Background

In 1955, the U.S. economist Milton Friedman devised Income Contingent Student Loan Repayment schemes (ICR) as a way of reducing 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 and Liberal Party of Canada leadership candidate 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 post-secondary education.

The Conservative Party of Canada has long-supported Income Contingent Repayment schemes for the Canada Student Loan Program (CSLP). However, during the 2006 federal election campaign, the Conservatives reversed their position in support of ICR at the urging of the Federation. In a letter to the Federation, a party representative confirmed that, if elected, "the Conservative Party of Canada will not introduce a system of Income Contingent Repayment Loans."

Under an ICR scheme, graduates with lower earnings repay their loans over a longer period of time, while high-income graduates can pay off their loans more quickly, avoiding most compound interest payments. This means that the more one earns after

graduation, the less one pays for one's education. Where ICR models have been implemented in other countries, tuition fees have risen dramatically. In fact, ICR schemes facilitate fee hikes and hasten government under-funding of education. Most models also replace loan plans that are interest-free during the period of study (such as the CSLP) 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 the federal government to expressly exclude ICR schemes from the CSLP. The Federation will also campaign to ensure that ICR schemes are not introduced in provincial budgets or in harmonisation agreements.

National Awareness and Media: The Federation will continue to raise awareness among the membership and the public about the dangers of ICR schemes through the distribution of its ICR fact sheet and other research documents to member locals, coalition partners, the media and government officials.

Membership Mobilisation: Member locals will be encouraged to submit articles to campus and local newspapers about the problems associated with Income Contingent Repayment schemes. Templates for opinion articles and editorials will be circulated to member locals.

Federal Funding

Background

For more than two decades, the Federation has called for the establishment of national 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, modeled on the principles of the Canada Health Act, be implemented. A Ministry, a dedicated transfer payment, and corresponding legislation will provide the federal government with a coherent and enforceable national vision for post-secondary education and research.

Since the introduction of the Canada Health and Social Transfer in 1996, accountability and transparency for federal post-secondary education transfers have diminished. The situation did not improve with the creation of the Canada Social Transfer in 2004. In fact, there are currently no federal standards to guide provincial post-secondary education spending.

During the 2006 federal election campaign, Stephen Harper's Conservatives promised to create a dedicated transfer payment for post-secondary education. In February 2006, a summit on post-secondary education and research organised by Canada's premiers called for the reinvestment of the \$4.9 billion that has been cut from annual federal transfers to the provinces since 1993.

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 work with the Canadian Association of University Teachers to lobby for federal-provincial negotiations on a Post-Secondary Education Act. The goal of these negotiations will be the establishment of a dedicated post-secondary education transfer payment and corresponding legislation outlining national principles. Special emphasis will be placed on seeking support from provincial governments for national standards in exchange for increased federal funding.

National Awareness and Media: The Federation will implement a communications strategy drawing public attention to the impact of federal under-funding on the accessibility and quality of Canada's universities and colleges. The strategy will focus attention on Prime Minister Stephen Harper's promise to create a dedicated transfer payment for post-secondary education.

Membership Mobilisation: A template letter to Members of Parliament calling for the creation of a dedicated transfer and corresponding legislation, outlining national standards for tuition fee reductions will be provided to member locals. Member locals will also be encouraged to participate in a nationally coordinated and provincially focused Day of Action to be held in February 2007.

Campaign Goal

The Federation will continue to seek the establishment of:

- the restoration of federal funding for post-secondary education to 1993 levels (adjusted for population growth and inflation);
- a dedicated federal cash transfer payment for post-secondary education;
- a federal Ministry of Post-Secondary Education and Research; and
- a Post-Secondary Education Act that establishes guidelines for quality and accessibility in post-secondary education and research that includes recognition of the needs of Québécois and First Nations students.

Reduce Tuition Fees

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.

Background

The Federation has widespread public support for freezing and reducing tuition fees. Polling consistently shows that a strong majority of Canadians oppose tuition fee increases.

The Federation's efforts have resulted in ongoing tuition fee freezes in Saskatchewan, Manitoba, Québec and Newfoundland and Labrador. The challenge for the Federation is to maintain the momentum towards lower tuition fees in provinces where freezes and reductions have already occurred and to create pressure in other provinces to reverse recent increases.

Implementation

Research: The Federation will assemble a research document describing the negative impacts of financial barriers. Information will be collected describing different systems of post-secondary education in countries where no tuition fees exist. In particular, the Federation will rebut the research disseminated by proponents of higher tuition fees such as former Ontario Premier Bob Rae, the Millennium Scholarship Foundation, the Educational Policy Institute, and others.

Government Relations: The Federation will continue to lobby for the

restoration of federal transfer payments for post-secondary education in meetings with federal officials. The positive benefits of coupling federal reinvestment with legislation that calls for the reduction of tuition fees will be articulated to federal and provincial governments. Finally, the Federation will advocate for the elimination of differential fees for international students.

National Awareness and Media:

The Federation will develop and implement a communications plan that illustrates the need for a national strategy for tuition fee reductions. The Federation will also continue to expose the regional and provincial disparities in accessibility across the country.

Membership Mobilisation:

The Federation will encourage member locals to continue to campaign for tuition fee reductions for both Canadian and international students. Member locals will be encouraged to build towards participation in a provincially focussed National Day of Action.

Coalition Work: Member locals will be encouraged to solicit support for the Day of Action and tuition fee reductions through the continued development of local coalitions.

Stop the GATS

Background

Federal funding cuts over the past twenty years have starved post-secondary institutions, paving the way to increased commercialisation. Private involvement in public education manifests itself as corporate funding for university capital projects, corporate interference in course curricula and research projects and, increasingly, business-model governance of universities and colleges. For example, many campus services are being out-sourced to private corporations with a greater interest in turning a profit than supporting the campus community and workers' rights.

The federal government has implemented an aggressive commercialisation agenda for university research. In order to qualify for most new federal university research funding, matching private sponsorship or demonstrated commercial potential are required. Such requirements severely inhibit a university's abilities to perform research in the public interest.

Public post-secondary education is also under pressure from the creeping privatisation inherent in trade liberalisation. International free trade agreements like the General

Agreement on Trade in Services have one purpose: to expose public services to market forces. As a public service, post-secondary education is vulnerable to privatisation under certain trade clauses.

Implementation

Government Relations: The Federation will continue to lobby the federal government for increased public funding for the national granting councils that is free of requirements for matched funding from the private sector.

The Federation will also lobby the federal government to refrain from negotiating education and other public services into the GATS.

National Awareness and Media:

The Federation will publicise the dangers of privatisation and commercialisation in public post-secondary education. When cases of corporate interference or academic misconduct arise, the Federation will support, where feasible, cases with national significance.

Membership Mobilisation: Member locals are encouraged to continue to gather information about examples of privatisation and commercialisation on campus.

Member locals are also encouraged to promote an environment where researchers who feel their academic work is compromised by private interests can speak out without fear of retribution.

Campaign Goal

The Federation seeks to stop the encroachment of privatisation in post-secondary education and to stop trade negotiations on post-secondary education and other public services.

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AGENDA

Organisational and Services Development Committee

May 2006 National General Meeting

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.

The National Executive is recommending that BC Representative Scott Payne and Québec Representative Brent Farrington be ratified as co-chairs for the Committee.

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 and Services Development Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3 d) *Organisational and Services Development Committee* states that:

The Organisational and Services 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. Communication Services

Handbook Service

This year, 58 students' unions in ten provinces will participate in the project. Over 310,000 handbooks will be produced. The Committee will discuss the progress of the project and ideas for the future.

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Website Service

The goal of the Students' Union Website Service, similar to that of the common handbook, is to produce a better quality service that meets the needs of students at an affordable price so that all member locals, regardless of their size, can improve communications with their members. The Committee will discuss the service.

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 websites. The kit contains information about Federation campaigns, research and services, as well as image-ready graphics. The 2006-2007 Communications Kit will be distributed to member locals shortly after the May 2006 national general meeting.

The Committee will review the Kit and discuss possible improvements for the 2007-2008 year.

b. Discount Programme

ISIC/Studentsaver

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 preparations and developments for the 2006-2007 discount programme.

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.

On-Line Tax Filing Arrangement

Earlier this year (February 15-April 30), the Federation again offered through its website free income tax filing with Ufile, an on-line tax filing service. The Federation is in discussions with Ufile about extending the offer to future tax filing years. The Committee will discuss the service.

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. Student Work Abroad Programme (SWAP)

The Federation has been running the Student Work Abroad Programme for more than 20 years. Following a brief orientation to the service, the Committee will discuss developments with and ideas for the service.

e. 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.

g. Other

Time permitting, the Committee will discuss possible ideas for other services and programmes to be offered through the Federation.

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DAY TWO

3. MOTIONS REFERRED FROM OPENING PLENARY

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

2006/05:N11 MOTION Local 79/

Whereas the Canadian Federation of Students is composed of a large number of locals that use paper ballots for elections and referenda; and

Whereas the use of paper ballots is costly and bears a detrimental impact on the environment; therefore

Be it resolved that a secure and confidential online voting system be developed for use by member locals in students' union elections and referenda.

recommended defeat (large 3 dis.)

2006/05:N12 MOTION Local 79/

Whereas student organisations around the country are shifting away from mail-in ballots to cost-effective and environment-friendly online voting systems; therefore

Be it resolved that Bylaw 1.4.f.i be amended to read:

Voting shall be conducted at voting stations or, subject to the agreement between the prospective member association and the Federation, at a general meeting of the prospective member association or by a mail-out ballot, or by a secure and confidential online voting system or any voting system that has been used by the prospective member association for at least two years prior to the vote to federate.

Be it further resolved Bylaw 1.6.c.i be amended to read:

Voting will be conducted at voting stations or, subject to the agreement of the Federation, at a general meeting of the member local association or by a mailout ballot, or by a secure and confidential online voting system or any voting system that has been used by the member local association for at least two years prior to the vote on defederating.

2006/05:N13 MOTION Local 79/

Whereas the Bylaws pertaining to the Vote on Defederating are unclear and, in some items, ambiguous; and

Whereas the procedure for federating and defederating should be clear; and

Whereas member locals should have the right to leave the Federation if they wish to do so, in a straightforward and democratic procedure; therefore

Be it resolved that Bylaw 1.6 be amended as follows:

Vote on Defederating

The individual members of the Federation belonging to a member local association may vote on whether to defederate, subject to the following rules and procedures:

Petition

- A petition calling for a referendum should be signed by no less than ten percent (10%) of the individual members of the association and sent to the National Executive of the Federation
- The petition should read:

"We, the undersigned, members of [name of local association], Local [local number] of the Canadian Federation of Students (CFS) call for a referendum for defederation from the Canadian Federation of Students, to be carried out during the [academic term] term of [year], in accordance with the Canadian Federation of Students' Bylaw 1.3.a.iii.

recommended defeat (large and dis.)

*• changes notice from 6 months to 4 months (dis. and large)
• remittance of outstanding fees from 6 to 4 weeks (against)*

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b. Notice

- i. No vote on de-federating may be held between:
 - April 15 and September 15; and
 - December 15 and January 15.
- ii. Notice of a vote on defederating must be delivered by registered mail to the head office of the Federation not less than four (4) months prior to the vote. The notice shall be signed by the President of the local association or the Vice-President External.
- iii. Notice of the vote must include the exact dates and times of voting.
- iv. In the case of a withdrawal referendum incorporating a mail-out component, the exact date of the referendum shall be the date the ballots are mailed to the individual members;
- v. Failure to adhere to the notice provisions in Articles b.i. b.ii. and b.iii. shall invalidate the results of the vote.

c. Campaigning

- i. There shall be no less than two (2) weeks of campaigning immediately preceding the voting during which time classes are in session.
- ii. Only individual members and representatives of the member local association, representatives of the Federation and representatives of other Federation member local associations shall be permitted to participate in the campaign.

d. Voting

- i. Voting will be conducted at voting stations or, subject to the agreement of the Federation, at a general meeting of the member local association or by a mailout ballot.
- ii. There shall be no less than sixteen (16) hours of polling over no less than two (2) days, except in the case of voting being conducted at a general meeting.
- iii. In the event that polling is conducted at a general meeting, representatives of the Federation and Federation member local associations shall be extended full speaking rights in the meeting.

e. Quorum

Quorum for the vote shall be that of the member local association's or five percent (5%) of the individual members of the local association, whichever is higher.

f. Administering the Campaign and Voting

- i. Within 3 weeks of the receipt of notice, a committee composed of two (2) members appointed by the Federation and two (2) members appointed by the member local shall be formed.
- ii. The committee shall be responsible for:
 - ii.a. deciding the manner of voting, be that by referendum, general meeting or mailout ballot.
 - ii.b. deciding the number and location of polling stations;
 - ii.c. approving all materials to be distributed during the campaign;
 - ii.d. deciding the ballot question;
 - ii.e. overseeing the voting;
 - ii.f. counting ballots;
 - ii.g. adjudicating all appeals; and
 - ii.h. establishing all other rules and regulations for the vote.

g. Appeals

Any appeals of the referendum results or rulings by the Referendum Oversight Committee shall be adjudicated by an Appeals Committee composed of one (1) member appointed by the member association and one (1) member appointed by the Federation, who were not members of the Referendum Oversight Committee.

h. Advance Remittance of Outstanding Membership Fees

In addition to Articles a. to f., in order for a de-federation referendum to proceed, a member local association must remit all outstanding Federation fees not less than four (4) weeks prior to the date of referendum.

i. Minimum Period Between De-Federation Votes

In addition to Articles a. to h, in order for a de-federation referendum to take place, a member local

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association may not have held a de-federation referendum within the previous twenty-four (24) months.

This clause may be waived, by a two-thirds majority vote of the National Executive, if the procedures of the de-federation referendum are questionable in the extreme.

j. Minimum Period Between Federation and De-Federation Votes

In addition to Articles a. to i, in order for a de-federation referendum to proceed, a member local association may not have held a referendum to join the Federation within the previous twenty-four (24) months. This clause may be waived, by a two-thirds majority vote of the National Executive.

2006/05:N16 MOTION TO AMEND BYLAWS

Whereas from time to time the National Executive must consider issues that are particularly time sensitive or urgent; and

Whereas it is detrimental to the work of the organisation for the National Executive to postpone consideration of such issues until a National Executive meeting; and

Whereas many similar organisations allow for meetings of their boards of directors to be convened by telephone or video conferencing to consider issues that require an immediate response; and

Whereas Bylaw V is currently silent on the process for convening a National Executive meeting by teleconference; therefore

Be it resolved that Bylaw V, Section 12, Calling of National Executive Meetings, be amended to include the following:

d. Emergency National Executive Meetings

The National Executive shall have the authority to convene a National Executive meeting by teleconference.

- i. teleconference meetings of the Executive may be formally called upon written request by the National Chairperson, National Deputy Chairperson and/or National Treasurer; and
- ii. notice of such meeting must be sent orally or in writing to each member of the National Executive not less than three (3) days prior to the start of the meeting.

Be it further resolved that the remaining clauses be renumbered accordingly.

4. DISCUSSION OF MEMBERSHIP DEVELOPMENT STRATEGY

5. OTHER BUSINESS

6. ADJOURNMENT



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e Assemblée générale nationale semestrielle

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AGENDA

Policy Review and Development Committee

May 2006 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:

- ratify as the committee chairperson(s) the National Executive member(s) appointed to the committee; or
- 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 Policy Review and Development Committee as established in the Federation's Standing Resolutions. Standing Resolution 1, Section 3 c) *Policy Review and Development Committee* states that:

"The Policy Review and Development 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 Federation Organiser Joel Duff.

3. MOTIONS REFERRED FROM OPENING PLENARY

The following motions will likely be referred to the Policy Review and Development Committee by the opening plenary:

2006/05:N01 MOTION TO AMEND POLICY

Local 8/

Whereas Federation policy currently states that student loans are not a solution to the problem of restricted access to post-secondary education; and

Whereas, as long as the Canada Student Loans Program exists, it should be a tool to improve access to post-secondary education; and

Whereas the Canada Student Loans Program currently evaluates an applicant's level of need based on a comparison of expenses and income; and

Whereas the Canada Student Loans Program fails to take into account an applicant's family income or class background when assessing need, despite the importance of this factor in determining access to post-secondary education; therefore

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Be it resolved that the clause following, "The Federation supports" in the Student Financial Assistance be amended to include the following:

The equal consideration of both need and income background in student loan assessments, in order to improve accessibility of post-secondary education.

2006/05:N05 MOTION TO ADOPT POLICY

Local 54/

Whereas the Canadian Federation of Students is a policy board that can pass resolutions regarding Human Rights; and

Whereas Iran was one of the signatories who unanimously adopted the Universal Declaration of Human Rights in 1948; and;

Whereas Article 26 of the Declaration states that:

Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages. Elementary education shall be compulsory. Technical and professional education shall be made generally available and higher education shall be equally accessible to all based on merit; and

Whereas Iran ratified the International Covenant on Economic, Social, and Cultural Rights on the 3 January 1976, and

Whereas Article 13 of the Covenant states that:

Higher education shall be made equally accessible to all, on the basis of capacity, by every appropriate means, and in particular by the progressive introduction of free education; and

Whereas Article 18 of the Covenant states that:

Everyone shall have the right to freedom of thought, conscience, and religion. This right shall include freedom to have or to adopt a religion or belief of his choice, and freedom, either individually or in community with others and in public or private, to manifest his religion or belief in worship, observance, practice and teaching; and

Whereas the Islamic Republic of Iran has systematically sought to deprive its largest religious minority, the Bahá'í community, of the right to a full education since 1979; and

Whereas the Supreme Revolutionary Cultural Council of Iran has stated that its dealings with the Bahá'ís must be in such a way that their progress and development are blocked; and

Whereas this has manifested itself in the form of denial of post secondary education to the Bahá'ís based solely on their faith; and

Whereas this is in direct violation of the aforementioned Declaration and Covenant; and

Whereas the United Nations Commission on Human Rights has passed more than 20 resolutions expressing concerns about reports of human rights violations in Iran, and each has made specific mention of the situation of the Bahá'í community there; and

Whereas the Senate at the University of Winnipeg on February 6, 2006 passed a resolution expressing their concern over the denial of higher education to Iranian Bahá'ís by communicating this concern to international human rights organizations and Iranian authorities; and

Whereas the student union of Trent University also passed a resolution relating to the denial of education to the Bahá'ís in Iran; and

Whereas Le Monde newspaper in France published an article written by twelve professors, including two Nobel Prize winners, expressing their concern on the issue; and

Whereas the students and faculty at the University of Guelph understand and value the importance of education for all people, and members of its administration, faculty and student body have written and expressed their concern; and

Whereas, recently, a letter by the Chairman of the Command Headquarters of the Armed Forces in Iran to a number of governmental agencies has been brought to the attention of the Special Rapporteur of the United Nations; and

Whereas, in the letter, the Supreme Leader, Ayatollah Khamenei, instructed the Command Headquarters to identify persons who adhere to the Bahá'í faith and monitor their activities; and



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Whereas the letter goes on to request the recipients to, in a highly confidential manner, collect any and all information about members of the Bahá'í faith; and

Whereas the Special Rapporteur on Freedom of Religion and Belief of the United Nations issued a statement of concern as to the information she has received concerning the treatment of members of the Bahá'í community in Iran. This statement is dated March 20th 2006; therefore

Be it resolved that the following policy be adopted:

The Federation condemns the systematic persecution of the Bahá'ís in Iran and supports the efforts of the members of the Bahá'í community in their struggle for the right to education.

2006/05:N06

MOTION TO AMEND POLICY

Local 54/

Whereas International students are currently not allowed to work off campus; and

Whereas international students pay significantly more in tuition fees; and

Whereas international students are excluded from being able to receive government subsidies for things like childcare; and

Whereas international student tuition fees are deregulated in Canada making international students a target for cash-strapped universities; and

Whereas their tuition fees increased by four percent last year at the University of Guelph (due to a budget deficit) when domestic tuition fees remained frozen; and

Whereas international student tuition fees are being raised again for September 2006 (incoming international tuition fees at the University of Guelph are set to increase by \$4000 per year for regular degree programs and \$5000 for specialised programs); therefore

Be it resolved that the international students' policy be amended to include the following:

Member locals are encouraged to:

- adopt employment equity clauses for international students applying for student union jobs;
- lobby their administrations to freeze international student tuition fees; and
- lobby the government to allow international students work opportunities off campus.

2006/05:N07

MOTION TO ADOPT POLICY

Local 54/

Whereas municipal elections occur at roughly the same time in all provinces; and

Whereas city councils deal with many issues relevant to post-secondary students especially pertaining to city by-laws, housing and public transportation; and

Whereas in addressing student issues such as tuition fees, it is important to build coalitions with and gain support from all levels of government; therefore

Be it resolved that the following policy be adopted under the heading Municipal Elections:

Member locals are encouraged to:

- lobby their administrations for on-campus polling stations during municipal elections;
- record and make public where mayoral and city council candidates stand on student issues; and
- hold on-campus all candidates forums before municipal elections take place.

Template campaign material will be provided to all member locals, which will advertise such things as information on candidates, polling booth locations and voting day for municipal elections, as well as a fact sheet on the benefits on engaging in local politics and references to where information can be found.

2006/05:N08

MOTION TO ADOPT POLICY

Local 19/

Be it resolved that the following issues policy on "Child Care" be adopted:

Preamble

To enable individuals with children to pursue post-secondary education, child care must be publicly-funded and administered, universal, accessible, comprehensive, of high-quality, and non-profit.

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Not-for-profit child care centres are more likely to have better quality, higher paid staff, better child/staff ratios, more inclusive programme offerings, and are more accessible to low-income families than private, for-profit child care services.

The delivery of child care on a public, not-for-profit basis in Canada protects child care from being negotiated in trade agreements, such as the North American Free Trade Agreement (NAFTA) and the General Agreement on Trade in Services (GATS), which would allow for large commercial chains to deliver child care in Canada. In Australia, where child care is primarily offered by for-profit chains, stakeholder profits have taken priority over quality of services.

Child care is a necessity to achieve equality for women, who are disproportionately affected by child care in Canada. Public child care enables women to choose to study or work.

Policy

The Federation supports a national child care program that is:

- Publicly funded and publicly administered;
- Universal in that it provides child care services for all children in Canada aged 0-12;
- Accessible in that child care services are provided without discrimination based on income, disability, geographical location, or other criteria;
- Comprehensive so that a range of child care services are offered, including both full and part-time child care services, and support services for caregivers taking care of children at home;
- High quality through licensed programs and well-paid, well-trained staff; and,
- Not-for-profit to ensure that child care is delivered for public not private interest.

2006/05:N09 MOTION TO ADOPT POLICY

Local 19/

Be it resolved that the following policy on "Whistleblower" protection be adopted:

Preamble

As post-secondary institutions intensify their research agenda and increasingly rely on private donors to fund research projects and infrastructure, corporate interests can influence the direction and reported results of research. Researchers and post-secondary institution administrations are increasingly under pressure to comply with private sponsor demands to sacrifice research integrity and therefore academic freedom. Government funding policy at the federal and provincial levels is also placing significant pressure on researchers to produce research with profit potential in return for funding and recognition.

Many individuals in Canada have made efforts in good faith to expose research misconduct in public institutions despite putting themselves at risk. These individuals are often referred to as "whistleblowers" and, in some cases, have been subject to retaliation. Whistleblowers are individuals who report or attempt to report, in good faith, violations to research integrity. Such violations can include data falsification or fabrication, data suppression, and plagiarism.

Students in particular are afforded little protection from retaliation because they often lack the protection normally afforded through such mechanisms as collective agreements and university policies relating to academic integrity.

Retaliation can mean any adverse action taken against a whistleblower and can include, but is not limited to, threats or action to: withhold data, suspend, expel, terminate employment, initiate deportation or otherwise threaten visa status, harass, refuse to fulfill supervisory duties, pursue defamation litigation, compromise academic standing, publicly defame, or otherwise subject to discrimination.

While Canadian post-secondary institutions that receive public funds for research are required to comply with the federal research granting councils' policy on research integrity, these ethical guidelines do not include procedures for protecting those who expose breaches to research integrity.

In contrast, the United States of America's Federal Office of Research Integrity includes a Whistleblower's Bill of Rights that states, "Institutions have a duty not to tolerate or engage in retaliation against good-faith whistleblowers", and Whistleblower Protection Policy that outlines procedures for responding to retaliation against good-faith whistleblowers.

The lack of explicit protection for whistleblowers in Canada undermines efforts to ensure scientific integrity in public research.

Policy

The Federation supports the implementation of federal whistleblower protection policy that requires public post-secondary institutions to:

recognize and address
unique needs of
parents and children with
disabilities.

Public child care enables
to focus on study or work.
and children with disabilities.

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- recognise the integral role of whistleblowers in upholding the highest standards of research excellence;
- encourage all students, faculty, staff, and volunteers to bring forth good-faith reports of actual or suspected research misconduct;
- protect students, faculty, staff, and volunteers from interference or retaliation for reporting in good faith actual or suspected research misconduct;
- censure the use of kick-backs or influence of one's position in order to interfere in an individual's efforts to expose research misconduct;
- censure the use of retaliation against an individual's efforts to expose research misconduct;
- clearly outline procedures for disclosing good-faith allegations of research misconduct;
- evaluate fully and objectively all allegations of research misconduct that are brought forward in good faith by whistleblowers;
- respond to all allegations brought forward in good faith by whistleblowers in a timely, yet thorough, manner;
- follow procedures in a manner that is not tainted by conflict of interest, such as influence from a private donor; and
- refrain, and prohibit their researchers, from entering into research contracts that include secrecy or non-disclosure clauses which would disallow researchers from defending the public interest.

2006/05:N10 MOTION TO AMEND POLICY

Local 19/

Be it resolved that the policy entitled "Privatisation" be amended to read:

Preamble

Privatisation threatens access to post-secondary education and the integrity of colleges and universities as public institutions. Privatisation on campus can take the form of increasing tuition fees, partnerships with the private sector for product sales and the services provision, a cost-recovery approach to campus services, the transfer of institutional facilities and services to private ownership or management, and the opening of fully private accredited post-secondary education institutions.

Privatisation is the result of a growing reliance by post-secondary programs and institutions on revenue from private, instead of public, sources. Higher tuition fees are the most common effect of privatisation and such fees represent a significant barrier to access for low and middle-income students. In addition to high fees, an increasingly prevalent example of privatisation is the reliance of public-private partnerships for funding new buildings, departments, and facilities. Such funding regimes serve to starve certain programmes within the post-secondary education system and exacerbate inequities between institutions and programmes.

The encroaching privatisation of universities and colleges is also manifest in the increased outsourcing of institutional and student-run services, such as food services and administrative services, by large corporate chains. Such agreements frequently give the company exclusive rights to the campus that often compete directly with, or prohibit the existence of, services and operations run by students unions. Privatised services on campus prioritise profit by maintaining low wages, limiting consumer choice, avoiding ethical purchasing policies, and promoting consumption – all of which can undermine both quality and affordability.

In exchange for generous donations, corporations can receive direct or indirect influence over the governance and management of post-secondary institutions. Direct influence can come in the form of input into course content or research focus, ownership over research results and outcomes, and representation on departmental, faculty, and institutional governing bodies. As private fundraising increasingly becomes a permanent institutional objective, institutional governing boards have taken on an increasingly corporate character. This trend is visible in the increasing number of corporate appointees selected, over local community representatives, for their fundraising potential. Indirect influence is a byproduct of a greater institutional reliance on private financing and can lead to informal and invisible control, as institutional priorities and policies are modified to fit the interests of corporate sponsors. Both forms of influence undermine the autonomy of institutional governing bodies and threaten to distort the mandate of public post-secondary institutions through the incorporation of business values into the policies and operations of public colleges and universities.

The establishment of fully-private for-profit institutions threatens to undermine the entire public system of post-secondary education. The existence of a parallel and competing private education system siphons resources from the public system, offers sub-standard education, and endangers sovereign policy-making under international trade liberalisation agreements.

Policy

The Federation supports publicly funded and administered education.

The Federation is therefore opposed to any and all forms of privatised education, including but not limited to:

- the removal of public funding from universities and colleges;

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- the trend toward the deregulation of tuition and user fees for education;
- privatisation of existing public educational programs and institutions;
- the opening of accredited private post-secondary institutions,
- the replacement of public funds for research with private funds and the resulting loss of public accountability;
- the transfer of institutional facilities and services to private ownership and/or management;
- the outsourcing of college and university services to private for-profit companies; and
- corporate representation on the governing bodies of post-secondary institutions.

2006/05:N14 MOTION TO REPEAL AND REPLACE POLICY

Continuing Education Students' Association of Ryerson/

Be it resolved that the "International Students' Issues" policy be repealed and replaced with the following:

Preamble

The participation of international students in Canadian colleges and universities:

- fosters the international exchange and development of knowledge;
- promotes cultural diversity and understanding within Canada's colleges and universities, and the communities in which they are located;
- enriches the educational experience of international students and of Canadian students and academic staff; and
- facilitates international cooperation and development.

Federal and provincial governments, granting councils, universities and colleges, employers participating in co-operative educational programs, police authorities, and other organisations or persons involved in the education of international students should not discriminate against international students on any grounds including race, creed, colour, ancestry, citizenship, ethnic or national origin, political or religious affiliation, belief or practice, sex, sexual orientation, disability, marital status, family relationship and responsibility, personal or social lifestyle or behaviour, or age. Colleges and universities in particular should not discriminate in the admission of, or the provision of services to, international students.

Policy

The Federation supports the:

- rights of international students, as described in policy of the Federation;
- establishment and continuance of campus international student clubs, societies, and organisations (first adopted in 1987);
- establishment and continuance of campus international student services and centres; and
- entrenchment of international student representation within local students' unions (first adopted SAGM 1991).

The Federation opposes:

- any and all differential tuition, ancillary, and administrative fees for international students (first adopted in 1976);
- quotas placed on international student enrollment (first adopted AGM 1987);
- provincial health care charges for international students;
- the use of 900 series Social Insurance Numbers and other mechanisms that identify workers based on their citizenship status (first adopted SAGM 1987);
- the expulsion of international students from Canada because of unexpected financial difficulties or unanticipated cost increases (first adopted SAGM 1990); and
- discrimination against international students by federal and provincial governments, colleges, universities, granting councils, employers participating in co-operative education programs, police authorities, and other organisations or persons involved in the education of international students.

The Federation supports the establishment of public policy that ensures that:

- there are no differential fees applied to international students;
- the Government of Canada engage in formal co-operation to establish and implement policy and programs for international students at all post-secondary institutions;
- international students are eligible for access to sufficient student financial assistance and special emergency funds in order to ensure they are able to access and maintain studies at Canadian colleges and universities irrespective of their family income background;
- international student access to colleges and universities in Canada should be based on the merit of candidates, where the criteria and judgment of merit are determined by students and academic staff;

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- the Governments of Canada provide appropriate financial assistance to ensure that students admitted to public colleges and universities in Canada from the forty poorest countries in the world (as determined by the United Nations) are not denied access to a college or university in Ontario for financial reasons;
- international students are free to work in Canada during the period of their studies, on the same basis as domestic students; (first adopted AGM 1973)
- restrictions of the federal granting councils on the employment of international graduate students should be abolished;
- international students are able to obtain visas, at the time of their enrolment, lasting for the duration of their studies in Canada (first adopted SAGM 1990); and
- international students receive coverage under the provincial Health Insurance Plans that is equivalent to that of domestic students.

The Federation supports the establishment of institutional policies that ensure that:

- there are no differential fees applied to international students;
- international student access to colleges and universities in Canada should be based on the merit of candidates, where the criteria and judgment of merit are determined by students and academic staff;
- the purposes of recruiting international students are those outlined in the Preamble, not financial gain;
- the employment of specialised, trained staff and the provision of support services, commensurate with the number and diversity of students recruited, to meet the special needs of international students and to comply with the legal duty to provide services free from discrimination;
- academic staff are provided with resources and professional development opportunities to facilitate teaching, supervision, evaluation methods, etc. that accommodate the special needs of international students (first adopted AGM 1991); and
- all reasonable assistance is provided to international students in their interactions with municipal, police, immigration, and other authorities and take all reasonable measures to ensure that such authorities do not discriminate against international students.

4. OTHER BUSINESS

5. ADJOURNMENT



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AGENDA

Provincial Component Meetings

May 2006 National General Meeting

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;
- Organisational and Services Development Committee; and
- Policy Review and Development Committee.

3. REVIEW OF MOTIONS FOR CONSIDERATION

The Component will review the motions that were submitted with notice for consideration at the May 2006 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



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AGENDA

National Aboriginal Caucus

May 2006 National General Meeting

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 18.2.

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 2006 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;
- Organisational and Services Development Committee; and
- Policy Review and 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.

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9. REVIEW OF CAUCUS CAMPAIGNS

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

10. OTHER BUSINESS

11. ADJOURNMENT



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AGENDA

National Graduate Caucus

May 2006 National General Meeting

SESSION 1 – Friday, May 26, 2006

1. ROLL CALL OF MEMBER LOCAL ASSOCIATIONS

- Local 3 University of British Columbia Students' Union-Okanagan
- Local 23 Simon Fraser Student Society
- Local 89 University of Victoria Graduate Students' Society
- Local 21 University of Calgary Graduate Students' Association
- Local 9 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 Student Union
- Local 39 McMaster University Graduate Students' Association
- 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
- Local 85 Saint Paul University Students' Association
- Local 19 University of Toronto Graduate Students' Union
Trent Graduate Student Association*
- Local 47 University of Western Ontario Society of Graduate Students
- Local 56 Wilfrid Laurier University Graduate Students' Association
- Local 48 University of Windsor Graduate Student 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 67 University of New Brunswick Graduate Students' Association
- Local 70 University of Prince Edward Island Graduate Student Association
- Local 95 Cape Breton University Students' Union
Dalhousie Association of Graduate Students*
- Local 34 Mount Saint Vincent University Students' Union
- Local 100 Memorial University of Newfoundland Graduate Students' Union

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

49th Semi-Annual National General Meeting of the Canadian Federation of Students
Thursday, May 25 to Sunday, May 28, 2006

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;
- Organisational and Services Development Committee; and
- Policy Review and 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.

SESSION 2 – Friday, May 26, 2006

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 DISCUSSION

The meeting will discuss campaigns and government relations activities:

- commercialisation of research
- campaign to maintain/restore post-residency fees
- campaign for whistleblower protection legislation
- copyright
- other

9. REVIEW OF CAUCUS FINANCES

10. CONSIDERATION OF MOTION SERVED TO THE NATIONAL GRADUATE CAUCUS

2006/05:NGC-01

MOTION

Local 79/Local 94

Whereas the NGC executive members would like to see meaningful participation from member locals;

Be it resolved that all member locals be consulted in the preparation of caucus meeting agendas and the choice of topics to be discussed;

Be it further resolved that meeting documents including reports, draft minutes, discussion documents and budget updates be circulated to all member locals at the latest three weeks prior to each caucus meeting.

11. UPDATE FROM PLENARY SUB-COMMITTEES

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

SESSION 3 – Sunday, May 28, 2006

12. CAUCUS ELECTION

At this time, elections will be held for the Graduate Students' Representative on the National Executive.

13. REVIEW OF FEDERAL BUDGET

14. UPDATE FROM PLENARY SUB-COMMITTEES

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

15. ROUNDTABLE DISCUSSION

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

16. ADJOURNMENT

MINUTES

National Graduate Caucus of the Canadian Federation of Students
Friday, March 3 to Sunday, March 5, 2006 • Winnipeg, Manitoba

CALL TO ORDER – Saturday, March 4, 2006

9:36 National Graduate Caucus Chairperson Eric Newstadt called the meeting to order.

1. ATTENDANCE ROLL CALL

Local 3	University of British Columbia Students' Union-Okanagan	Absent
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 9	University of Regina Students' Union	Absent
Local 101	University of Saskatchewan Graduate Students' Association	Present
Local 96	University of Manitoba Graduate Students' Association	Present
Local 102	Brock University Graduate Students' Association	Absent
Local 78	Carleton University Graduate Students' Association	Present
Local 62	University of Guelph Graduate Students' Association	Present
Local 32	Lakehead University Student Union	Absent
Local 39	McMaster University Graduate Students' Association	Absent
Local 94	University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s	Present
Local 27	Queen's University Society of Graduate and Professional Students	Present
Local 24	Ryerson Students' Union	Present
Local 85	Saint Paul University Students' Association	Absent
Local 19	University of Toronto Graduate Students' Union Trent Graduate Student Association*	Present Absent
Local 47	University of Western Ontario Society of Graduate Students	Present
Local 56	Wilfrid Laurier University Graduate Students' Association	Absent
Local 48	University of Windsor Graduate Student Society	Absent
Local 84	York University Graduate Students' Association	Present
Local 83	Concordia University Graduate Students' Association	Present
Local 79	Post-Graduate Students' Society of McGill University	Present
Local 67	University of New Brunswick Graduate Students' Association	Present
Local 70	University of Prince Edward Island Graduate Student Association	Absent
Local 95	Cape Breton University Students' Union	Absent
	Dalhousie Association of Graduate Students*	Absent
Local 34	Mount Saint Vincent University Students' Union	Absent
Local 100	Memorial University of Newfoundland Graduate Students' Union	Present

* Prospective member

National Graduate Caucus Chairperson Eric Newstadt declared that quorum had been achieved.

2. ANNOUNCEMENT OF PROXIES

Newstadt said that no locals had designated a proxy for the meeting.

3. WELCOMING REMARKS AND INTRODUCTIONS

Newstadt provided welcoming remarks.

Delegates introduced themselves.

PAGE 2—MINUTES

National Graduate Caucus of the Canadian Federation of Students
Friday, March 3 to Sunday, March 5, 2006

4. REVIEW OF ROBERT'S RULES OF ORDER

A brief overview of Robert's Rules of Order was provided.

5. ADOPTION OF THE AGENDA

2006/03:01 MOTION

Local 47/Local 94

Be it resolved that the agenda for the March 2006 meeting of the National Graduate Caucus be adopted.

CARRIED

6. ADOPTION OF THE MINUTES

2006/03:02 MOTION

Local 27/Local 94

Be it resolved that the minutes of the November 2005 meeting of the National Graduate Caucus be adopted.

CARRIED

7. PREPARATIONS FOR ELECTIONS

a. Introduction of Electoral Officer

Newstadt said that the Executive was recommending that Campaigns and Government Relations Coordinator Ian Boyko serve as the Electoral Officer.

2006/03:03 MOTION

Local 27/Local 78

Be it resolved that Ian Boyko be ratified as the Electoral Officer for elections for the March 2006 National Graduate Caucus meeting.

CARRIED

b. Overview of Election Schedule and Procedures

Boyko explained that elections be held for the position of Caucus Chairperson and Caucus Deputy Chairperson for the 2006-2007 term. He said that the terms commenced in May 2006 at the conclusion of the national general meeting. He said that information about the positions could be found in Standing Resolution 19.

Boyko provided a brief overview of the electoral process and the time frame surrounding the election process.

8. PRESENTATION OF EXECUTIVE REPORT

Members of the Caucus Executive highlighted sections of the report.

Newstadt provided an update on the Caucus' whistleblowers campaign. He said that the Executive had undertaken research into whistleblower legislation in various countries including the United Kingdom, Australia, and the United States.

National Deputy Chairperson Angela Regnier provided an update on Chris Radziminski's academic freedom case. She said that the Federation has been corresponding with the Natural Sciences and Engineering Research Council (NSERC), requesting that it urge the University of Toronto to undertake a proper investigation of Radziminski's allegations. She said that the

Federation had also been corresponding with the journals. She noted that one of the journals had agreed to issue a retraction.

Regnier said the Federation had supported Radzinski's efforts to expose misconduct on a recent experiment on drinking water in Wiarton, Ontario. She said that the published results from the tests contradicted results Radzinski had obtained through Freedom of Information requests. She said that the Federation had recently presented on Radzinski's case to the Academic Freedom and Tenure Committee of the Canadian Association of University Teachers. She said that the Association was supportive of the Federation's efforts.

Caucus Deputy Chairperson Meghan Gallant provided an update on Ian Mauro's academic freedom case. She explained that Mauro was a graduate student at the University of Manitoba, who had received funding from the Social Sciences and Humanities Research Council (SSHRC) to undertake a farmer-focused risk analysis of genetically modified crops and produce a documentary film. She said that the University's bylaws entitled it to partial copyright ownership of the documentary and had subsequently prevented the film's release by imposing unreasonable legal conditions and citing concern about potential litigation from Monsanto. She said that Monsanto had recently relocated its Canadian headquarters to the University of Manitoba. She said that Local 96 had actively supported Mauro's position and had organised a public panel of the researchers and the administration. She said that, under such public pressure, the University finally consented to release the film. She said that the Caucus had made efforts to publicise Mauro's case and had provided resources to help facilitate the national release in the film.

Regnier provided an overview of the Federation's work with the National Council on Ethics in Human Research and the proposal for the creation of an accreditation system that would ensure institutions met a series of standards in order to conduct research involving human subjects.

Graduate Students' National Executive Representative Phil Robinson said that Caucus representatives had attended the University of Alberta Summit on Research and Teaching in August 2005. He said that the Federation's presentation at the Summit outlined the risks involved with intensification of the commercialisation of research. He said that the presentation had been met with some hostility by administrators but faculty and staff expressed support for the Federation's position.

Newstadt said that Caucus representatives had attended the Discovery 2006 conference entitled "Bridging the Commercialisation to Innovation Gap". He said that the conference focused on integrating connections between university research and the marketplace. He said that the conference was advocating for profit-driven, rather than curiosity-driven research. He said that participants showed little concern about the negative effects of the commercialisation of research.

Robinson provided an update on the campaign for the restoration and maintenance of post-residency fees. He said that many universities had moved from post-residency fees to full tuition fees during the 1990s, which had resulted in significant increases in the cost of graduate degrees and hindering access to graduate studies. He said that the new president of Carleton University had shown interest in revisiting the issue and that, as a result, the reinstatement of post-residency fees for Local 78 members seemed plausible.

Robinson said that Statistics Canada's annual report on tuition fees in September had indicated that students in BC and Alberta had experienced the highest increases in tuition fees over the past decade. He said that the National Graduate Caucus had been lobbying Statistics Canada for increased research on graduate students. He said that Statistics Canada had finally begun collecting some information on graduate students and debt. He said that there had been some methodological flaws with the Survey of Earned Doctorates which had led to some misleading results.

Robinson said that the Canada Student Loan Program Interest Relief provision had expired after 340 weeks of study. He said that for some graduate students, Ph.D. students in particular, this

PAGE 4—MINUTES

National Graduate Caucus of the Canadian Federation of Students
Friday, March 3 to Sunday, March 5, 2006

provision meant that their loan went into repayment while they were still studying. He said that the Caucus had secured a commitment from the Program to reviewing the criteria for in-study interest relief.

Regnier said that the Federation had been working with coalition partners to prepare for anticipated amendments to the Copyright Act. She said that, even though draft legislation that had been introduced in the last parliament died on the order paper, it was very likely that amendments would be introduced under the new federal government. She said that the Federation's goal was for amendments to the Act to provide fair and balanced access to digital materials for the general public, not just to create minimal exceptions for educational institutions.

Robinson provided an update on the Caucus' activities with the National Library of Canada – Theses Canada which had been the in-house methods of digitising theses in order to discontinue its agreement with UMI ProQuest, a private company currently providing the service on a for-profit basis.

Gallant reported that the granting councils had received funding increases in the 2005 federal budget, but noted that funding had once again unevenly distributed, with Social Sciences and Humanities Research Council (SSHRC) receiving considerably less than NSERC and the Canadian Institutes for Health Research (CIHR).

Robinson said that Canadian Consortium for Research, of which the Federation is a member, had submitted a brief to the House of Commons Standing Committee on Finance recommending the creation of a dedicated transfer payment for post-secondary education, increased and equitable distribution of funds to the federal granting councils, and increased funding for government science research.

Robinson said that Caucus representatives, as part of the Canadian Consortium for Research (CCR) lobby meetings, had met with then acting President of NSERC, Nigel Lloyd. He said that Consortium representatives highlighted sections of its 2005 brief to the Standing Committee on Finance. He said that NSERC was focused on securing additional federal funding and encouraging increased collaboration with industry.

Regnier said that a Caucus representative, along with other CCR representatives, had also met with Assistant Deputy Minister of Industry Canada David Fransen. She said that the equitability of funds distributed to the federal granting councils had been discussed. She said that Fransen and his staff had explained that increased support for the social sciences and humanities did not fall under Industry Canada's current agenda.

Newstadt provided some background on the Canadian Association for Graduate Studies (CAGS) and the Caucus' effort to democratise student representation on the CAGS executive committee. He said that the Executive had been working closely with the current graduate student representative from la Conseil National des Cycles Supérieures to ensure that new bylaw amendments were more democratic than the current model.

Newstadt said that the Social Sciences and Humanities Research Council had recently contracted Sciencemetric to undertake consultations on SSHRC's transformation. He said that the Caucus had been contacted for a consultation. He said that Sciencemetric tended to be more familiar with the natural sciences than the social sciences and humanities.

Newstadt said that Caucus representatives and local representatives had participated in the National Dialogue on Higher Education held by the Canadian Federation for the Humanities and the Social Sciences (CFHSS) in November 2005. He said that several participants had expressed concern that the meeting was more of a monologue and that there was a significant focus on the commercialisation of research. He said that there were some board members of the CFHSS who had also expressed concern regarding the structure and content of the event.

Gallant reported that Federation representatives and local representatives had attended the Canadian Coalition of Graduate Employee Unions conference in August 2005. She said that the

Federation had presented on the importance of graduate student unions and graduate employee unions working together.

Regnier said that an increased number of students had been coming forward regarding issues of academic freedom as a result of the whistleblower campaign. She said that member locals should extend any possible support to members before referring them to the national office. She said that the Federation had been working towards the development of whistleblower protection legislation, and could provide support to member locals, who in turn, were in the best position to support individual graduate students.

Robinson detailed the work between the Caucus and the CNCS with respect to the Canadian Association of Graduate Studies. He noted that the recent federal election has slowed work on a joint research project with CNCS but efforts continued.

Robinson said that in February 2006, graduate students at the University of New Brunswick had voted overwhelmingly in favour of rejoining the Federation.

Local 27 delegate Jennifer Stacey thanked the Executive on the thorough report and commended the Executive on the breadth of work undertaken during the reporting period.

Local 94 delegate Shoshanah Jacobs said that a motion had been presented at the CAGS general meeting to review the executive committee membership that was supported by the Dean of Graduate Studies at Local 94 and that he seemed to have aspirations of moving higher up within the CAGS structure.

Local 27 delegate Simon Kiss asked if Carleton University had a minimum funding package for graduate students. He said that he was concerned that implementation of post-residency fees would come at the expense of guaranteed funding packages at the university.

Robinson said that Local 78 did not have a guaranteed funding package. He said that a four-year guaranteed funding package would not address the needs of students with six to seven year completion times.

Local 19 delegate Gina Trubiani said that University of Toronto graduate students had one year of guaranteed funding as well as post-residency fees. She said that post-residency fees had been phased out when guaranteed funding had been established.

Local 78 delegate Liam Lynch asked about the size of the CAGS executive.

Newstadt responded that there were eight executive members.

Local 79 delegate Mehdi El Ouali asked about research on the breakdown of graduate student tuition fees in Canada.

Robinson said that Statistics Canada only collected information about the minimum and maximum graduate student tuition fees from each university and no information about program of study was collected.

2006/03:04

MOTION

Local 78/Local 94

Be it resolved that the report of the Executive of the National Graduate Caucus be accepted.

CARRIED

2006/03:05

MOTION

Local 100/Local 23

Be it resolved that the meeting recess until 9:00 a.m. on Sunday, March 5, 2006.

CARRIED

10:52 the meeting recessed.

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National Graduate Caucus of the Canadian Federation of Students
Friday, March 3 to Sunday, March 5, 2006

CALL BACK TO ORDER—Saturday, March 5, 2006

09:45 National Graduate Caucus Chairperson Eric Newstadt called the meeting to order. Attendance was as follows:

9. ATTENDANCE ROLL CALL

Local 3	University of British Columbia Students' Union-Okanagan	Absent
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 9	University of Regina Students' Union	Absent
Local 101	University of Saskatchewan Graduate Students' Association	Present
Local 96	University of Manitoba Graduate Students' Association	Present
Local 102	Brock University Graduate Students' Association	Absent
Local 78	Carleton University Graduate Students' Association	Present
Local 62	University of Guelph Graduate Students' Association	Present
Local 32	Lakehead University Student Union	Absent
Local 39	McMaster University Graduate Students' Association	Absent
Local 94	University of Ottawa Graduate Students' Association des étudiant-e-s diplômé-e-s	Present
Local 27	Queen's University Society of Graduate and Professional Students	Present
Local 24	Ryerson Students' Union	Present
Local 85	Saint Paul University Students' Association	Absent
Local 19	University of Toronto Graduate Students' Union	Present
	Trent Graduate Student Association*	Absent
Local 47	University of Western Ontario Society of Graduate Students	Present
Local 56	Wilfrid Laurier University Graduate Students' Association	Absent
Local 48	University of Windsor Graduate Student Society	Absent
Local 84	York University Graduate Students' Association	Present
Local 83	Concordia University Graduate Students' Association	Present
Local 79	Post-Graduate Students' Society of McGill University	Present
Local 67	University of New Brunswick Graduate Students' Association	Present
Local 70	University of Prince Edward Island Graduate Student Association	Absent
Local 95	Cape Breton University Students' Union	Absent
	Dalhousie Association of Graduate Students*	Absent
Local 34	Mount Saint Vincent University Students' Union	Absent
Local 100	Memorial University of Newfoundland Graduate Students' Union	Present

* Prospective member

Newstadt declared that quorum had been achieved.

10. ELECTIONS FORUM

Boyko reported that he had received one nomination for each of the positions of Chair and Deputy Chair of the National Graduate Caucus. He announced that Eric Newstadt had been nominated for the position of Chair and Graham Cox had been nominated for the position of Deputy Chair. Each candidate presented a brief statement on their interest in running for the positions.

Ballotting was conducted.

Boyko announced that Newstadt had been elected Chair of the National Graduate Caucus and Cox had been elected Deputy Chair of the National Graduate Caucus.

2006/03:06

MOTION

Local 84/Local 19

Be it resolved that Eric Newstadt (Local 84) be ratified as the Chairperson of the National Graduate Caucus for the 2006-2007 term.

CARRIED

2006/03:07

MOTION

Local 78/Local 27

Be it resolved that Graham Cox (Local 67) be ratified as the National Graduate Caucus Deputy Chairperson for the 2006/2007 term.

CARRIED

2006/03:08

MOTION

Local 24/Local 23

Be it resolved that the ballots be destroyed.

CARRIED

11. PRESENTATION ON FEDERATION SERVICES

a. National Student Health Network

Greener provided an overview of the Federation's National Student Health Network.

b. Website Service

Boyko provided an overview of the Federation's Website Service.

c. Common Handbook Project

Regnier provided an overview of the common handbook project.

d. Other services

Regnier provided an overview of the Studentsaver Discount programme and Ufile.ca.

12. DISCUSSION OF 2006 FEDERAL ELECTION

Boyko provided an overview of the Federation's campaign activities related to the 2006 Federal Election campaign. He said that the Federation had secured a commitment from the Conservative Party not to implement Income Contingent Student Loan Repayment Schemes. He said that it appeared that the Conservatives would focus on increasing the tax exemption on scholarship from \$3,000 to \$10,000.

Local 94 delegate Jacobs said that she was concerned that the Federation had not include the Bloq Québécois in its election report card.

Boyko said that the Bloq was a provincially focused party and the report card had analysed the federal parties.

Graduate Students' National Executive Representative Phil Robinson said that he was concerned by indications from the Conservatives that SSHRC funding might be cut.

13. REVIEW OF CAUCUS FINANCES

a. Update on Expenditures

Robinson and Gallant provided an overview of the Caucus budget. Robinson noted that Local 67 referendum expenses and the Caucus annual general meeting had not yet been

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National Graduate Caucus of the Canadian Federation of Students
Friday, March 3 to Sunday, March 5, 2006

included in year-to-date actuals. He said that holding the meeting in Winnipeg had resulted in increased costs for the general meeting.

Local 94 delegate Shoshanah Jacobs asked if the remainder of the research funds would be spent by the end of the year.

Robinson said that there had been a delay by the Conseil National des Cycles Supérieures on the joint research project on graduate funding were funds had been committed.

Robinson said that initiatives to direct spending came from the membership and that because there were more materials produced in-house, there were considerable savings for the Caucus throughout the year.

Boyko said that many of the Federation's lobbying effort had only minimal costs.

Regnier explained that that many of the expenses related to graduate students were assumed within the Federations' general budget and not the Caucus budget, such as costs and resources for Federation services provided to Caucus member locals.

Boyko said that staff and national executive salaries allocated to research and government relations activities of the Caucus were also assumed in the Federation's general budget.

Local 21 delegate Kathleen Rhodes asked when actuals would be available and what numbers had been utilised to establish the 2005-2006 budget. She said that expenses to date were 75 percent of budgeted values, which is the same position the Caucus had been in one year earlier at the same point in the fiscal year.

Robinson said that there were a number of expenses were still anticipated and that the Caucus allocation would likely be depleted.

Local 94 delegate Jacobs said that it would have been useful to review the budget in advance of the meeting. She suggested that surplus funds be used to send delegates to the Canadian Association for Graduate Studies meeting.

Newstadt said that many member locals received funds from their graduate deans to attend the CAGS meeting. He said that the Caucus budget had been circulated at the November 2005 meeting.

Robinson said that the Caucus would be considerably over budget if resources utilised for work such as support for the Radziminski case, which was part of a broader Caucus campaign, were included.

Newstadt said that more funds spent on contracting a law student to draft a submission on the *Copyright Act* amendments, as well as research underway with CNCS on adequate funding levels for the granting councils had not yet been incorporated into the research line in the budget.

Rhodes said that it would be useful to compare to-date expenses to those at the same time last year.

Jacobs asked whether a document could be provided with the budget, delineating how surplus funds would be allocated and describing expenditures related to ongoing projects.

Robinson said that the reason the budget had been circulated late in the meeting was to ensure that the most accurate representation of the actuals had been incorporated.

Newstadt said that efforts would be made to provide a description of costs that were incurred on behalf of the Caucus but not attributed to it.

14. COMMUNICATIONS

a. Update on the Status of the Caucus Website

Robinson said that the website had been updated during summer 2005 and requested member locals submit suggestions for improvements.

b. Review and Revision of Caucus Electronic Mailing List

Robinson explained that the listserv provided locals opportunity to share issues and ideas with other members. He strongly encouraged representatives to use it regularly.

15. OTHER BUSINESS

2006/03:09

MOTION

Local 79/Local 94

Whereas the NGC executive members would like to see meaningful participation from member locals;

Be it resolved that all member locals be consulted in the preparation of caucus meeting agendas and the choice of topics to be discussed; and

Be it further resolved that meeting documents including reports, draft minutes, discussion documents and budget updates be circulated to all member locals at the latest three weeks prior to each caucus meeting.

Local 79 delegate El Ouali said that, by circulating materials in advance, delegates would have more input into the discussions at Caucus meetings.

Delegates discussed the merits of having documents circulated in advance of meetings while acknowledging that they were often either unavailable or inaccurate in advance of the meeting.

Robinson said that the agenda and the campaigns had not significantly changed since the November meeting. He was also encouraged delegates to communicate regularly with the Executive members between meetings and to proactively use the website to offer input and suggestions to the Executive members.

Local 27 delegate Stacey said that, while she appreciated the sentiment of the motion, she was concerned about the feasibility of circulating meeting materials so far in advance.

2006/03:10

MOTION TO POSTPONE

Local 84/Local 27

Be it resolved that Motion 2006/03:10 be postponed to the May 2006 national general meeting.

CARRIED

NOTED ABSTENTIONS

Local 79

Local 94

2006/03:09

POSTPONED

18. ADJOURNMENT

2006/03:11

MOTION

Local 67/Local 96

Be it resolved that the meeting be adjourned.

CARRIED

19:14 the meeting adjourned.

Across Canada

Working Together

au Canada
on travaille ensemble



The voice of **graduate students** in Canada

La voix des étudiantes et étudiants des 2^e et 3^e cycles du Canada

National Graduate Caucus
of the Canadian Federation of Students

2005-2006

annual report

2005-2006

rapport annuel

Caucus national des 2^e et 3^e cycles
de la Fédération canadienne des étudiantes et étudiants

Letter to the Members

Throughout the coming year, graduate students will face both new and recurring challenges. From the current climate of "innovation" and commercialisation, to the restructuring of graduate programmes, to the need for democratic reform and graduate student representation in organisations like the Canadian Association for Graduate Studies, and to the uncertainties of a minority federal government—all of the challenges we face require that graduate students work together and alongside undergraduate and college students across the country.

This meeting will provide opportunities to discuss and strategise on key issues facing graduate students, as well as to share experiences and best-practices. The meeting has been structured such that delegates will have an opportunity to hear from knowledgeable speakers on issues for which the Caucus has developed campaigns. There will also be opportunities for delegates to discuss issues as a group and to pursue more informal dialogue at social events.

Ian Mauro, a PhD student at the University of Manitoba, will share his experiences in his fight to release his publicly-funded research results. Graham H. Cox, from the Federation's newest member local, the University of New Brunswick Graduate Student Association (Local 67), will provide an overview of the current trends in open access to scholarly journals. These speakers were assembled to help inform campaigns discussions and future initiatives of the Caucus.

There is a great deal of work for us to do this weekend. As federal and provincial governments continue to embark on commercialisation initiatives in our public institutions, the need to work towards mechanisms to ensure research integrity and academic freedom—such as whistleblower protection—become ever more important. The inequitable distribution of research funds through federal programs such as the Canada Research Chairs program and the granting councils pose challenges to fair and balanced funding for all the disciplines. The *Copyright Act* is still in need of revisions to respond to digital technology. It is critical that new legislation promotes fair and balanced access to copyrighted works and promotes open access to public materials that will inform a vibrant knowledge community in Canada. Differential tuition fees for certain international students and the elimination of post-residency fees at many universities are an impingement on equitable access to graduate education in Canada.

As graduate students' unions are generally smaller than our undergraduate students' union counterparts, we face particular challenges in providing the resources and continuous infrastructure to support our local members. Through the economies of scale, the Federation is able to provide numerous services that directly benefit our students' unions and our members. This weekend, we will discuss the implementation of Federation services, such as services offered by the National Student Health Network, U-File.ca, the handbook project, and the students' union website project.

In this context, we look forward to productive and energetic discussions as we work together to further our vision for graduate students in Canada.

In solidarity,

The National Graduate Caucus Executive

March 3, 2006

Introduction

The National Graduate Caucus of the Canadian Federation of Students 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. The primary objective of the Caucus is to promote the interests of graduate students nationally while working within the larger student movement to improve the quality of and access to public post-secondary education.

All member locals of the Federation with graduate student members comprise the Caucus. Both students' unions that have only graduate student members, as well as those students' unions that include both graduate and undergraduate students, are represented in the Caucus. The issues facing graduate students in Canada are both unique from, and intertwined with, those of college and undergraduate students. 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 Eric Newstadt, Deputy Chairperson Meghan Gallant, and National Executive Representative Phil Robinson

Campaigns and Government Relations

Commercialisation of Research

Whistleblowers Campaign

As research institutions have become more reliant on private sector money, private corporations have come to influence both the direction and the reported results of research. Researchers who have been unwilling to tailor their work to the needs of private sponsors have become the targets of academic censorship and, in some cases, reprisals and public smear campaigns. Students are particularly vulnerable when trying to uphold research integrity because they lack the protection of mechanisms like collective agreements.

The National Graduate Caucus' Whistleblower campaign recognises those researchers who "blow the whistle" in defense of the public interest. The campaign calls for the implementation of federal whistleblower legislation. The Caucus maintains a website www.cfs-fcee.ca/whistleblowers that includes background information on the issues of public/private partnerships in university research and academic freedom. The Federation's Whistleblower fact sheet has recently been updated to highlight recent academic freedom cases.

Whistleblower Legislation

The National Graduate Caucus undertook a comparative analysis of whistleblower legislation in three Organisation for Economic Cooperation and Development (OECD) countries: Britain, Australia, and the United States. This analysis should aid the Caucus' lobbying efforts to protect Canadian researchers from retribution when exposing research misconduct in the university setting.

The analysis concluded that Canadian whistleblower legislation should outline policy and procedures in five areas: Internal

reporting/disclosure; External reporting/disclosure; Anonymity; Protection from reprisal; and, Reporting of information/findings. The international models that were examined differed in the extent to which their focus was on disclosure, the degree to which whistleblowers were protected and legislation encouraged litigation, and the level of authority held by centralised governmental agencies. Although presently only in draft form, the analysis proposes guidelines for Canadian legislation that emphasises disclosure policies that will help to minimise civil litigation and maximise the rights and protections available to the whistleblower. It also stresses respecting the autonomy of universities without over-empowering the administration in the dispute resolution process.

The Case of Christopher Radziminski

As a result of work on the Whistleblowers campaign, the Federation was approached by a former graduate student from the University of Toronto, Christopher Radziminski, seeking support in exposing several cases of research misconduct by his supervisors. Radziminski, who received public funds from the Natural Sciences and Engineering Research Council (NSERC) for his master's work, alleges that his supervisors plagiarised his research in two journal articles without his knowledge or consent and manipulated research results. Radziminski is also interested in exposing research misconduct on a related drinking water experiment in Warton, Ontario. Having received threats of a defamation suit from the University after attempting to contact the journals, Radziminski is interested in pursuing legislation to protect whistleblowers in Canada.

In January 2005, the Federation retained legal counsel to support Radziminski against the University and the journals' publishers. During this time, the Federation has been corresponding with the University of Toronto to outline the shortcomings in the manner in

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which they have responded to Radziminski's formal complaints. Despite numerous requests by the Federation for the University to undertake a formal investigation of the process, the University has refused to do so. However, in October 2005, the University of Toronto initiated an investigation at the request of one of the accused professors. This investigation did not follow the framework to investigate complaints of research misconduct set out by the University and hastily dismissed Radziminski's allegations.

The Federation has also been corresponding with NSERC to request that they investigate the University of Toronto's process for investigating complaints of research misconduct. To-date, despite its obligation to review complaints of research misconduct on projects for which they have provided funding, NSERC has dismissed Radziminski's complaints as a "purely private matter", adding that NSERC has "no mandate to protect whistleblowers". The Federation has responded to NSERC stating that the lack of explicit protection for whistleblowers is a negligent omission from its ethical framework. As a result, the Federation has called for revisions to the granting council guidelines such that they explicitly include protection for whistleblowers who expose cases of research misconduct.

On March 23, 2006, the Federation will meet with Dr. Suzanne Fortier, the new president of NSERC, to outline both our concerns about the lack of whistleblower protection, specifically in the *Tri-Council Policy Statement: Integrity in Research and Scholarship*, and the manner in which NSERC has handled the Radziminski case.

In January 2006, the Federation secured an agreement from the *Water Research* journal to retract one of the articles in question. The details of the retraction proposed by the editor of *Water Research* and accepted by Radziminski, include details of the reason for retracting the article and a two-year "blacklisting" of the accused from publishing

in the journal.

The Federation continues to seek a retraction on Radziminski's behalf of the article published in *Applied & Environmental Microbiology*.

Research Misconduct in Wiarton, Ontario

In addition to pursuing the allegations of research misconduct arising from Radziminski's master's thesis, Radziminski is also working to expose the false dissemination of research results on an experiment testing chlorine dioxide as an alternate disinfectant on the town of Wiarton's water distribution system. Despite numerous complaints by Wiarton residents regarding the odour and smell of the water, research results portrayed the experiment as a novel success, explicitly stating there were no complaints from residents. Health Canada is currently using these manipulated results to update their drinking water quality guidelines. In October 2005, Radziminski submitted a report to Health Canada in order to expose discrepancies in the reporting, providing evidence acquired through Freedom of Information requests. In addition, the Federation has requested that NSERC undertake an investigation of the Wiarton experiment based on significant discrepancies between the academic reporting and evidence obtained through Freedom of Information requests.

The Winter 2006 edition of *Standpoints* includes an article on the alleged research misconduct in the Wiarton experiment. The newsletter has been circulated to concerned citizens in Wiarton who have provided positive feedback for the Federation's efforts in exposing the case.

Canadian Association of University Teachers – Academic Freedom and Tenure Committee

The Federation was invited to speak to the Canadian Association of University

Teachers' (CAUT) Academic Freedom and Tenure Committee regarding the case of Christopher Radziminski. On March 3, 2006, the Federation presented to the Committee on the efforts by the Federation to-date in supporting Radziminski's case. The Federation solicited support from the Committee on the Federation's efforts to lobby for Whistleblower protection legislation in Canada through the granting councils. Possible avenues in which the CAUT may support the Federation's efforts to expose alleged research misconduct on a drinking water experiment in Warton were also discussed.

The Case of Ian Mauro

In June 2005, the Federation was contacted by Ian Mauro, a PhD student at the University of Manitoba, for support in his academic freedom case. In 2001, Mauro and his academic supervisor received funding from the Social Sciences and Humanities Research Council (SSHRC) for a farmer-focused risk analysis of genetically modified crops and for the production of a documentary, *Seeds of Change* from these results. As a result of a shared copyright clause in the supervisor's collective agreement, the University was able to prevent the screening of the documentary for four years by placing unreasonable conditions on the screening of the film and citing concern about potential litigation from Monsanto, a multinational biotechnology company. Although the project was publicly funded, University negotiations to relocate the Canadian headquarters of Monsanto to the University's research park appear to have played a role in suppressing the release of the documentary.

The two researchers were advised to break off negotiations with the University and have been receiving legal support and advocacy through the Canadian Association of University Teachers. They have been broadening their coalition to seek assistance in publicising the case and the dangers of creeping privatisation on university

campuses. In fall 2005, media across the country became interested in the story. On October 25, Local 96-University of Manitoba Graduate Students' Association organised a panel of researchers, the University president, and the president of the University's research park to debate the concerns surrounding the suppression of the research findings. Under pressure, the University administration conceded to allow the researchers to screen the documentary.

The Federation has been supporting the two researchers in arranging for screenings of the film across Canada. On November 18, the screening of the documentary was premiered in Ottawa. The Federation endorsed the national event and provided in-kind support to publicise it.

National Council on Ethics in Human Research

Given the increasing prevalence of concerns over research misconduct related to commercialisation, there is an elevated awareness about ethical research guidelines among many research policy-makers. On June 21 and 22, 2005, a National Graduate Caucus representative attended a workshop hosted by the National Council on Ethics in Human Research (NCEHR) on the development of an accreditation system for Human Research Protection Programs. NCEHR is a national council that currently provides educational workshops on research ethics to university and other research institution ethics boards. The NCEHR's proposed accreditation system would require institutions that perform research involving human subjects to comply with a series of standards in order to be accredited to perform such investigations.

Participants debated the pros and cons of moving towards an accreditation model for universities. Some attendees felt that it was unnecessary while other attendees asserted that accreditation would improve protection for human subjects involved in research. The Federation's representatives asked how

accreditation would improve the position of university researchers—particularly students—who expose misconduct on research involving human subjects. The Federation also questioned whether such an accreditation process would improve the monitoring of institutions' own ethical research guidelines. Although several participants were supportive of concerns raised about the ability to protect those who expose university non-compliance with ethical guidelines, representatives of both NCEHR and the tri-councils were dismissive of the importance of including these issues in accreditation standards.

The draft final report of the Task Force was circulated to conference participants and stakeholders on January 27, 2006. The report concluded that an accreditation process ought to be implemented in Canada to come in line with ethical standardisation mechanisms in other countries, such as the United States of America. This accreditation entity ought to be a separately incorporated body affiliated with NCEHR. While this body is likely a positive step towards regulating research involving human subjects, the Caucus will continue to work with NCEHR and the new accrediting body to seek mechanisms to protect whistleblowers from retaliation when exposing irregularities in research practices at accredited institutions.

University of Alberta Summit on Research and Teaching

From August 3 to 5, the University of Alberta hosted a conference called "Canadian Summit on the Integration of Teaching and Research". The objectives of the conference were to initiate dialogue with university administrators, faculty, and students on the importance of integrating teaching and research, to bring together "champions" from universities in Canada to share best practices, and to provide a forum for experts to outline a vision for integrating research into teaching. The conference focused on the benefits of incorporating research into teaching activities,

particularly in undergraduate programs. Many of the participants argued that research was integral to the teaching experience while offering little analysis of the risks of the research agenda as presented in the federal government's innovation strategy.

The Federation presented a paper titled "The Politics of Corporate Partnerships: The Price of Doing Business". The presentation cautioned participants that, although there was no question that research was integral to the learning process, there are risks to academic freedom and research integrity resulting from the intensification of the commercialisation of research in public universities. The Federation outlined evidence and academic analysis to suggest that teaching quality, emphasis on basic research, and support for the social sciences and humanities would likely be compromised when a research agenda focuses on commercial gain. Some university administrators responded with hostility to the suggestion that caution was required when incorporating an encroaching commercial research agenda into all university activities. However, several faculty and university staff privately expressed support for the Federation's position.

Discovery 2006 Conference

Discovery 2006, "Bridging the Commercialisation to Innovation Gap", was the third installment of what has become an annual conference organised by the Ontario Centres for Excellence (OCE). The OCE are, "among the few publicly funded institutions that systematically integrate and manage connections from university to marketplace to ensure the successful application of innovative science and technology to profitable new businesses." The Board of the OCE brings together investors, representatives from Canada's largest corporations, government representatives, and a host of academics from Ontario's universities. As one would expect, the OCE are vocal proponents of commercialisation,

and are not at all interested in exploring the pitfalls of such arrangements.

Among the seminars attended by Caucus representatives—which included seminars titled, “Winning Partnerships: Leveraging Academic Research for Profit” and “A Warriors Diary: The Commercialisation Handbook”—there was little evidence that any kind of critical analysis was undertaken. In fact, the following suggestions were frequently offered: professors should avoid early publication and/or public discussion of research results and should wait to examine the possibility of commercialisation with industry partners and other interested corporate bodies; and, all students should receive mandatory training in intellectual property rights and patent law. With about 100 supportive attendees at each seminar, there was little room for Caucus representatives to offer alternative proposals. Efforts to conduct critical discussions outside of seminars were simply dismissed.

The “discovery series” and the OCE are prime examples of the extent to which the pace of the commercialisation of research has picked up and is being supported by both federal and provincial governments.

Tuition Fees

The Campaign for the Restoration/ Maintenance of Post-Residency Fees

‘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.

The campaign for the restoration and maintenance of post-residency fee systems was adopted by the Caucus in February 2004. In September 2004, a fact sheet on post-residency fees was developed and circulated to members. A revised and updated version of the fact sheet was developed and circulated in the fall of 2005.

Central to the campaign is a pledge form that has been developed for students to sign and deliver to the university’s governing body. The pledge includes a commitment that, as alumni, the signatory will withhold donations to their university unless post-residency fees are restored (in cases where they have been eliminated) or unless post-residency fees are maintained (in cases where they have not yet been eliminated). By targeting alumni donations, the campaign signals to universities that there will be a cost if they are to charge graduate students full tuition fees for the duration of their program. The pledge also calls on university boards of governors to actively lobby for reduced tuition fees and increased provincial and federal funding. Customised pledge forms have been developed for all locals that have requested them.

To-date, pledge forms have been designed for the following locals: Local 19-University of Toronto Graduate Students’ Union, Local 24-Ryerson 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.

Local 78 initiated the campaign to reinstate post-residency fees in fall of 2004. Throughout the past year, over 1,000

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graduate students have signed the pledge. Recent developments at the university indicate promising movements towards the reinstatement of post-residency fees for graduate students. In fall 2005, David Atkinson, the President of Carleton University, announced that the University would review the re-establishment of a post-residency fee system as part of a larger restructuring of graduate funding models and an anticipated increase in graduate enrollment. To facilitate this restructuring, three committees with graduate student representation were formed. Local 78 lobbied these committees, as well as departmental chairs of graduate programmes and faculty, and emphasised the benefits of reinstating post-residency fees. These lobby efforts focused on the benefits post-residency fees would have on retention, time-to-completion rates, and the University's ability to recruit graduate students. The allure of these benefits, in conjunction with the widespread support amongst graduate and undergraduate students and faculty, as well as the financial and public relations threat posed by the pledge, led all three committees to recommend the reinstatement of post-residency fees to the senior administration. While this is clearly promising, it remains to be seen whether the senior administration and the Board of Governors will concede to the reinstatement. The President has indicated that he does not fully support a 'one size fits all' reinstatement, and Vice-President Finance and Administration has remarked that the reinstatement of post-residency fees will hamper the University's ability to hire additional faculty. Local 78 plans to continue to mobilise and educate members and lobby senior administration on the benefits of reinstating post-residency fees for Carleton graduate students.

Graduate Student Tuition Fees and Debt

Between 2004 and 2005, tuition fees for graduate and professional programmes

rose 4.6% for domestic students and 8.5% for international students according to Statistics Canada. Since 2000, fees for graduate programs have increased 40%, while fees for many professional programs have increased on average by almost 70%. Canadian graduate students in Alberta and British Columbia have seen the most drastic increases, averaging 95.3% and 104.3%, respectively.

While Statistics Canada calculates that the average Canadian graduate student will pay \$5,699 in tuition fees based on an eight-month academic year. In reality, the vast majority of graduate students are required to pay tuition fees twelve months a year, bringing the actual total closer to \$8,546. International graduate students pay, on average, roughly three times as much as Canadian graduate students.

In July 2005, Statistics Canada also released the Survey of Earned Doctorates: A Profile of Doctoral Recipients. This study revealed that roughly one in two graduate students is forced to rely on loans to finance their studies.

While research on tuition fees for graduate programmes and graduate student debt is welcomed, there are a number of significant problems with the existing methods and results. For example, the current tuition fee survey does not differentiate between graduate programmes, but rather calculates averages based on the highest and lowest tuition fees paid at a given university. In addition, the tuition fee survey does not acknowledge that graduate students generally pay tuition fees year-round. Problems are also evident in the Survey of Earned Doctorates, such as the inclusion of international students in debt calculations and 'brain drain' figures.

The Caucus executive has prepared a letter to Statistics Canada requesting an opportunity to review their methodology and offer constructive feedback on ways it can be improved. Two media releases addressing

graduate debt and tuition fee levels were also prepared and distributed by the Caucus executive over the past year.

In-study Interest Relief

As previously reported, student loan interest payment relief for students still enrolled is limited to between five and ten years, depending on the type of loan and the level of academic study. These limits can place graduate students and other students in protracted studies at risk of being forced into repayment before studies are completed. Further, the limits to in-study interest relief are not clearly conveyed in Canada Student Loan Program (CSLP) promotional materials. These issues have been raised at meetings with officials from the CSLP, and the Federation has secured a commitment to review the scope of the problem. The Director General of the CSLP has recently retired, but the issue will be raised again with his successor.

Renewal of the Copyright Act

Background

The federal *Copyright Act* has been undergoing review, in part, to respond to digital technology. The review of the Act is largely a consequence of digital technology and the availability of copyrighted works on the Internet.

Through the Canadian Recording Industry Association (CRIA), large movie and music labels have participated in an aggressive campaign to protect their profit interests by lobbying for increased restrictions and surveillance of Internet activities. As part of its campaign to win new restrictive measures to curb access to the Internet, CRIA has particularly targeted students as culprits of unlawful file-sharing. In response, the Federation has been opposing revisions to the *Act* that overly favour the interests of the recording industry. Rather, the Federation argues that the Internet offers new

opportunities to share public knowledge and thus any revisions to copyright legislation need to ensure reasonable public access to the Internet.

Campaign For a Fair and Balanced Copyright Act

At the February 2005 annual general meeting, the Caucus adopted a campaign to ensure new copyright legislation is fair and balanced and does not infringe upon the right of researchers, scholars and students to have access to and share digital information. The Caucus developed a postcard, template letter for members of Parliament, and a factsheet to inform members and politicians on the concerns related to amendments to the *Copyright Act*. In June, 20,000 postcards that highlighted student concerns about copyright revisions were produced. The postcards were sent to member locals for distribution during orientation and other local activities. Many member locals distributed the postcards to members who have signed and sent them to the Prime Minister.

Bill C-60 *An Act to Amend the Copyright Act*

On June 24, Bill C-60, *An Act to Amend the Copyright Act*, was tabled. While the bill demonstrated significant improvements from previous recommendations, it remained skewed in favour of the recording and software industry: little protection was secured in the bill to have access to educational materials. Instead of expanding the fair dealing clause, thereby clarifying exceptions for educational institutions, the bill included restrictive provisions for digital inter-library loans and technology-enhanced learning.

Thus, while the recording and software industry publicly praised the bill, various members in the educational community and a number of public interest groups called on Parliament to defeat it. However, the 38th Parliament did not have the opportunity to vote on the bill and, on November 28, 2005,

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Bill C-60 died on the order paper with the fall of Parliament.

Copyright Forum

As part of its campaign activities, the Federation participates in the Copyright Forum, a network of national organisations concerned about educational issues with respect to copyright law. Members include the Canadian Association of University Teachers, the Association of Universities and Colleges in Canada, the Canadian Libraries Association, the Canadian Teachers' Federation, and the Canadian Association of Research Libraries. The Forum has met regularly since June 20 when Bill C-60 was tabled in order to share updates on campaign and government relations activities and to share analysis on the details of the bill.

On June 10, 2005, a Federation representative attended the Copyright Forum meeting. Attendees discussed what was likely to be contained in the upcoming bill and strategised about how best to respond. After having reflected on the implications of amendments to copyright legislation enacted in 1996, Forum members concluded that at that time, the educational community had not acted quickly or firmly enough in demanding balance for users. It was agreed that in responding to Bill C-60, member organisations must be significantly more critical in their response to ensure that education and research are protected.

On October 17, 2005, the Forum met to discuss the process by which stakeholders would be able to contribute to the deliberations on Bill C-60. Several members of the Forum, including the Federation, announced that they would be submitting a brief to the legislative committee. There are diverging approaches among members of the forum on how the Bill should address the needs of the educational community—either through specific exceptions for educational institutions qualified in the Act or through the expansion of the rights for users already articulated in the current “fair dealing”

clause. Members expressed concern that such differences could weaken the messaging of the educational community, and that the commercial interests of the recording industry were superseding the arguments calling for the protection of the public interest. The Forum resolved that it would promote a common message of supporting the needs of the educational community while still allowing for technical differences in individual briefs and hearings.

On February 21, 2006, the Forum hosted a special meeting to discuss opportunities in the educational community to come together on approaches to educational exceptions in future legislation. Since it is expected that the newly formed government will table new legislation to revise the *Copyright Act*, representatives of the community have been preparing to come forward with the most unified demands possible that meet the needs of the educational community. Participants of the meeting productively debated the merits of expanding the rights of educational users among various clauses in the *Act*. University administrators (Association of Universities and Colleges in Canada) and education ministers (Council of Ministers of Education, Canada) continue to argue for narrow restrictions to protect the liability of university administrators while the Federation, librarians, faculty, and advocates for the public argue that broader clarifications ought to be made through the current fair dealing clause.

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, whose mandate is 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 have previously expressed concerns that a private company, ProQuest, provides access to these theses and dissertations on a for-profit basis, so an arrangement has been made to direct 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 has developed 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 took 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 theses processing remained the same for the first year at \$53.00. However, during the second year, the price has

increased to \$55.00. This increase will be passed on to universities, some of which explicitly charge graduate students a fee for digitisation.

Library and Archives Canada has indicated that it will continue to seek additional funding from within the federal government to subsidise improved service, including funds to decrease the time period before theses are available on the electronic theses portal.

The Caucus is a member of 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. Regrettably, the Committee has not met over the last year.

The 9th International Symposium on Electronic Theses and Dissertations is scheduled for June 7-10, 2006 at Laval University in Québec City. Entitled "Unlocking Scholarly Access: ETDs, Institutional Repositories and Creators", the Symposium will be organised around five sub-themes: open access, open source, intellectual property, institutional repositories and electronic theses and dissertations, and technical and normative issues.

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.

2005 Federal Budget

The 2005 budget increased the federal granting councils' budgets by \$75 million per year for the next five years. The increase was unevenly distributed: \$32 million for the Natural Sciences and Engineering Research

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Council (NSERC); \$32 million for the Canadian Institutes for Health Research; and only \$11 million for the Social Sciences and Humanities Research Council (SSHRC).

According to the Canadian Federation of Humanities and Social Sciences, both NSERC and SSHRC experienced cuts to their base budgets in 2004 due to an internal resource re-allocation within Industry Canada. Thus, the 2005 federal budget only represents a real increase of \$7.4 million (4.4%) for SSHRC and \$21.8-million (3.3%) for NSERC.

The federal budget provided an additional \$15-million for the indirect costs of research program introduced in 2003. The program's budget will increase from \$245-million to \$260-million in 2005-2006. Cuts during the 1990s greatly reduced individual institutions' ability to properly support the infrastructure costs associated with conducting research. These costs, such as research support staff and electricity, are a direct result of work undertaken on projects funded by the federal granting councils.

Unfortunately, there is no evidence to suggest that the relief provided by this program has reduced the "need" for higher tuition fees as a source of revenue, as some university presidents suggested before the program was introduced. Consequently, more federal money for the indirect costs of research does not serve as a substitute for increased transfer payments to the provinces for post-secondary education.

The Natural Sciences and Engineering Research Council

On October 7, 2005, the Canadian Consortium for Research, including the Federation, met with Acting President Dr. Nigel Lloyd and other senior bureaucrats from the Natural Sciences and Engineering Research Council (NSERC). At the meeting, Dr. Lloyd indicated that NSERC would be pursuing three primary foci in attempting to secure increased government funding: international research and student mobility;

the development of highly qualified people, including the development of business and leadership skills within the sciences and engineering; and, strategic new initiatives such as quantum computing, nanotechnology, clean manufacturing, platform technologies, and health-related research. In discussing each of these items, representatives from NSERC stressed the need to further the development of industry-university relationships. Despite expressed opposition, NSERC representatives insisted that students want more industry-university partnerships. Given this, as well as NSERC's 2005 publication, *Research Means Business*, there is a need for member locals to actively counter the commercialisation agenda that is increasingly gaining prominence within NSERC.

Social Sciences and Humanities Research Council Transformation

The Social Sciences and Humanities Research Council (SSHRC) has begun efforts to outline and frame its efforts to continue its transformation process which was initiated in 2003. To this end, SSHRC has hired an independent consultant, Sciencemetric, to consult stakeholders about the ongoing transformation process. In January 2006, Sciencemetric contacted the Caucus to participate in a meeting and a telephone interview. The approach did not leave much room for challenging the assumptions of the process. For example, discussants were asked to identify the importance of public-private partnerships in research without discussing their inherent problems. Notably, Sciencemetric is staffed by scientists much more familiar with the conduct of research in the natural sciences than in the social sciences and humanities.

Meeting with Industry Canada Assistant Deputy Minister David Fransen

On November 30, 2005, the Federation attended a meeting with Assistant Deputy Minister David Fransen of Industry Canada. The purpose of the meeting was to present highlights from the Canadian Consortium for Research's submission to the House of Commons Standing Committee on Finance. The meeting discussed the need for equitable distribution of funds to the granting councils. Fransen, as well as other aides present at the meeting, indicated disinterest in increasing support for the social sciences and humanities as such disciplines did not contribute to the goals set out by Industry Canada. Members of the Consortium also raised concern with increasing pressure from Industry Canada to commercialise research in the absence of appropriate protection for whistleblowers in Canada.

National Dialogue on Higher Education

The Canadian Federation for the Humanities and the Social Sciences (CFHSS) is an umbrella organisation for scholarly societies. On an annual basis the CFHSS organises a congress that showcases social sciences and humanities research currently conducted in Canada. Although the primary role of the

CFHSS is to organise this scholarly meeting, it has also taken on an advocacy role in Ottawa from time to time. As part of this work, the CFHSS recently organised a "National Dialogue On Higher Education" – a day-long symposium dedicated to topics in higher education.

The Dialogue brought together educators, administrators, students, and senior policy makers (provincial and federal), for what was billed as a series of "discussions" about the direction of post-secondary education. Presenters included mainly government officials and representatives of the media, such as Jeffrey Simpson (Globe & Mail) and Anne Dowsett Johnson (Maclean's). The Federation was represented by several delegates including National Graduate Caucus Chairperson Eric Newstadt. Federation Researcher Michael Conlon also spoke on a panel about student financial aid.

After the conference, concerns were raised by both students and other conference participants about the lack of diversity in the presenters. Students and faculty representatives were only invited to participate after pressuring conference organisers, and the majority of speakers were government representatives who rarely ventured beyond the status quo of public policy, let alone towards discussions about greater government funding for post-secondary education.

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 November 18, a Caucus representative met with Paul Jones, CAUT researcher, to review the first draft of a legal opinion on intellectual property rights. It was agreed that there was a need to gather more research for a second draft.

Canadian Consortium for Research

The Consortium brings together over 600,000 researchers, students and practitioners from fifteen national organisations.

In September 2005, the Consortium presented a brief to the House of Commons Standing Committee on Finance. The brief included three recommendations to the federal government. The first recommendation was for the establishment of a dedicated federal-provincial transfer payment that would increase the funding for the core operating costs of post-secondary educational institutions. The second recommendation was for increased funding for the federal research granting agencies. This recommendation emphasised the need to ensure that academic excellence is the primary criterion for allocating research funds and warned against the risks of greater private sector involvement in publicly funded research projects. The third recommendation was for a re-investment in the federal government's

research infrastructure.

Following the presentation of the Consortium's brief, roughly a dozen meetings were organised with federal bureaucrats to discuss the brief and emphasise its recommendations. The Consortium met with representatives from the Department of Finance, Industry Canada, Human Resources and Skills Development, the National Research Council, the three federal granting councils, the Canadian Foundation for Innovation, the National Science Advisor to the Prime Minister's Office, and the Association of Universities and Colleges Canada.

In the coming months, the Consortium will be publicising an open letter to parliamentarians that emphasises the need for the federal government to act on the recommendations contained in the 2005 brief to the House of Commons Standing Committee on Finance.

Canadian Coalition of Graduate Employee Unions

Federation representatives attended the first meeting of the Canadian Coalition of Graduate Employee Unions (CCGEU), held in Vancouver on August 11 to 13, 2005. The CCGEU brought together representatives of unionised and non-unionised teaching and research assistants across Canada. Delegates unanimously resolved to include tuition fee protection in their next round of collective bargaining, and work towards the progressive elimination of tuition fees; to call on university presidents and graduate deans to recognise the right of student employees to choose whether or not to unionise free from the interference of university administrations; and to call on the Canadian Labour Congress to present a legal challenge to Alberta's Bill C-43, which makes it illegal for graduate employees to organise.

The Caucus facilitated a workshop on

student and worker union solidarity, focusing on ways in which students' and workers' unions can enhance their political strength by working in solidarity.

Conseil national des cycles supérieurs (CNCS)

The CNCS is the graduate and post-graduate student wing of la Fédération étudiante universitaire du Québec (FEUQ), which currently represents 17 member associations and about 145,000 students in Québec. The CNCS is an important coalition partner interested in addressing many of the same concerns raised by the Caucus, particularly those related to graduate program restructuring, and student representation at the Canadian Association for Graduate Studies (CAGS). Presently the President of CNCS, Philippe-Olivier Giroux, holds the single seat available to graduate students on the CAGS executive. Ongoing communication with the CNCS executive has been frequent and productive. The Caucus executive is currently working with CNCS to outline an agenda for the 2006 CAGS conference and to co-sponsor a research project that will examine the performance of the federal granting councils.

Canadian Association for Graduate Studies

The Canadian Association for Graduate Studies (CAGS) is a non-profit organisation whose mandate is to promote graduate studies in Canada. Membership in the 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 member of CAGS since membership was extended beyond graduate schools, and has sat on the CAGS executive committee since 1998, though only once every three years via an ad hoc rotational arrangement that was decreed by the deans.

Although the Caucus has found some common ground upon which to work with the CAGS, the executive committee has been unwilling to allow for critical debate of commercialisation, has been opposed to recognising the right of students to choose to organise, and has consistently failed to incorporate the democratic decision-making of graduate students.

Leading up to the 2005 CAGS annual general meeting and conference, the Caucus voiced concerns about the structure of both the upcoming conference/annual general meeting (which did not include any student panelists) and of the CAGS executive (on which only a single seat is open to students). These concerns were ignored by the CAGS executive, and the conference workshops were unbalanced and favoured policies that would aggressively commercialise Canadian universities and make graduate studies increasingly inaccessible and unaffordable. Question and answer periods were cut short by the conference organisers such that students were prevented from asking questions or making points contrary to the panelists' opinions. By the end of the conference, several graduate deans, including the newly elected president of the Canadian Federation for the Social Sciences and Humanities, expressed reservations about the organisation of the conference and the CAGS executives' decision to ignore the democratically expressed will of graduate students.

The Caucus executive and a representative of Local 101-University of Saskatchewan Graduate Students' Association distributed a leaflet describing the systemic disenfranchisement of graduate students within CAGS through the democratically deficient currently used to determine graduate student representation on the CAGS executive. The leaflets were generally well-received by the CAGS membership and often generated healthy dialogue and exchange.

Nonetheless, at the closing plenary the CAGS president ruled that only one student from

each national graduate student organisation would be allowed to speak during the AGM. Students' objection to this ruling was overturned by the deans. One dean, Jonathan Driver from Simon Fraser University, did note the need for the CAGS executive to explore a resolution to the present situation, as continued tension was increasingly unproductive. Driver subsequently submitted a proposal to the CAGS membership calling

for concerned members to commit to a series of consultations and mediations. The newly-appointed student representative to the CAGS executive has recently contacted the Caucus executive, and some movement on the issue is expected in May 2006 when the CAGS executive has scheduled a weekend long meeting to exclusively discuss the issues raised by graduate students about the structure and performance of CAGS.

Services

Web Site Service

In October 2004, the National Executive identified the design and hosting of local websites as a service widely used by member locals that could be provided at a higher quality and lower cost by the Federation. The goal of the Students' Union Website Service, similar to that of the common handbook, is to produce better quality services that meet the needs of students at an affordable price so that all member locals, regardless of their size, can improve communications with their members. This service should prove especially useful for National Graduate Caucus member students' unions since they typically have minimal resources for web site maintenance.

A content management system for local websites has been developed and a dedicated web/email server has been leased. A variety of website templates for member locals to choose from have been developed. Along with having the first and only student-run, non-profit hosting service, the Federation is also now a bulk domain name reseller, allowing students' unions to register and renew their .ca, .com, .net, and .org domain names.

The Students' Union Website Service permits a member local to simply visit the Service's website (www.cfsadmin.org), choose a template and hosting package that best suits the students' union's needs, sign up and activate a new website. Another benefit of hosting websites with the Students' Union Website Service is free and instant access to all of the latest service developments. Currently, an online tool for managing the collection and maintenance of members' email addresses is in the design phase. This tool will allow members to sign up on a students' union's web site, indicate an interest in a particular part of the students' unions' work (i.e. events, campaign, services, first-year programming) and be added to

the relevant list to receive email "blasts".

More importantly, this tool will manage the requests of those who choose to join or leave the lists and provide feedback to the member local students' union about how the information it shares with its membership is being received.

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. Five more graduate students' unions have adopted customised Homes4Students websites over the past year, bringing the total number of graduate locals using the service to eight. These include Local 19-University of Toronto Graduate Students' Union, Local 23-Simon Fraser Student Society, Local 32-Lakehead University Student Union, Local 34-Mount Saint Vincent University Students' Union, Local 70-University of Prince Edward Island Graduate Students Association, Local 78-Carleton University Graduate Students' Association,

National Graduate Caucus - Services

Local 94-University of Ottawa Graduate Students' Association des étudiant(e)s diplômé(e)s de l'Université d'Ottawa, and Local 101-University of Saskatchewan Graduate Students' Association.

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. For the 2005-2006 academic year 53 students' unions, 51 member locals and two non-member unions in ten provinces participated in the project. In addition, a generic handbook for graduate students which included a section on the research and campaigns of the National Graduate Caucus was 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. Twenty-two Caucus members are participating in the 2006-2007 handbook project:

Local 3-University of British Columbia Students' Union-Okanagan, Local 7-Student Union of NSCAD University, Local 19-University of Toronto Graduate Students' Union, Local 21-University of Calgary Graduate Students' Association, Local 23-Simon Fraser Student Society, Local 24-Ryerson Students' Union, 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 61-Malaspina Students' Union, Local 70-University of Prince Edward Island Graduate Student Association, Local 78-Carleton University Graduate Students' Association, Local 83-Concordia University Graduate Students' Association, Local 84-York University Graduate Students' Association, Local 85-Saint Paul University 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- Cape Breton University Students' Union, Local 96-University of Manitoba Graduate Students' Association, 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 utilising the collective purchasing power of many member locals, graduate students' unions, which are smaller than their undergraduate counterparts, have derived significant cost savings through the Network.

Currently, sixteen of the 27 Federation members participating in the Network are member locals of the National Graduate Caucus:

Local 7-Student Union of the Nova Scotia College of Art and Design, 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 85-Saint Paul University Students' Association-Association étudiante de l'Université Saint-Paul, 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-Cape Breton University Students' Union, Local 100-Graduate Students' Union of the Memorial University of Newfoundland,

Local 102-Brock University Graduate Students' Association, Local 103 University of Manitoba Students' Union, and Trent 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.



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th Semi-Annual National General Meeting
e Assemblée générale nationale semestrielle

May 25 to 28, 2006 • Ottawa • du 25 au 28 mai 2006

AGENDA

Caucuses: Colleges and Institutes, Large Institutes, and Small Universities
May 2006 National General Meeting

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;
- Organisational and Services Development Committee; and
- Policy Review and 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



49

th Semi-Annual National General Meeting
e Assemblée générale nationale semestrielle

May 25 to 28, 2006 • Ottawa • du 25 au 28 mai 2006

Students w/ Disabilities

AGENDA

Constituency Groups

May 2006 National General Meeting

1. INTRODUCTIONS and OVERVIEW OF CONSTITUENCY GROUP MEETINGS

- Roundtable Introductions
- Review of the Constituency Group Agenda
- 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; Michelle, YKB, Michelle
- Organisational and Services Development Committee; and Jeremy
- Policy Review and Development Committee. Jewell, Dave

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

Membership Advisory

2006 May

CFS FCEE
Canadian Federation of Students
Fédération canadienne des étudiants (cfs)

www.cfs-fcee.ca

CUPE 1281

2006-2007 Federal Budget

Introduction

The Conservative government's first federal budget introduces a number of initiatives to restructure the role of the federal government vis-à-vis the provinces, to provide social benefits through the tax system, and to signal that it is prepared to reduce the size and scope of the federal government.

The tax cuts and debt reduction payments in the 2006 budget exceed social program investment by a two-to-one margin over the next two years. Furthermore, the government has announced its intention to cut over one billion dollars from operating departments in the coming year, reinforcing the truism that "tax cuts aren't free".

The budget contained more tax cuts than most pundits were predicting. A total of more than \$20 billion was spent on cutting taxes, including eliminating capital taxes on corporations and reducing the Goods and Services Tax. Yet most Canadians will not see the lion's share of the tax "relief" proposed by Finance Minister Jim Flaherty. An individual earning \$30,000 per year will pay approximately \$300 less in tax, whereas individuals earning over \$100,000 will pocket up to \$1,987.

A detailed overview of what has been proposed by social justice groups, including the Federation, for a socially-responsible and fiscally-prudent federal budget is available in the Canadian Centre for Policy Alternatives' 2006 Alternative Federal Budget at www.policyalternatives.ca.

Rethinking Federal-Provincial Relations

The associated budget document titled "Restoring Fiscal Balance in Canada" outlines the division of powers in the federation as defined by the Constitution. Under the overarching theme of "Accountability", the government argues that federal and provincial roles should be better defined, as overlapping jurisdictions results in confusion.

In a move to rebalance federal-provincial relations, the new government suggests that previous ones have been too intrusive in areas of provincial responsibility (e.g. social programs, education) and did not focus enough spending in areas of core federal jurisdiction (e.g. defence, security, immigration).

Over the next year, the federal government will be reshaping its role in post-secondary education vis-à-vis the provinces:

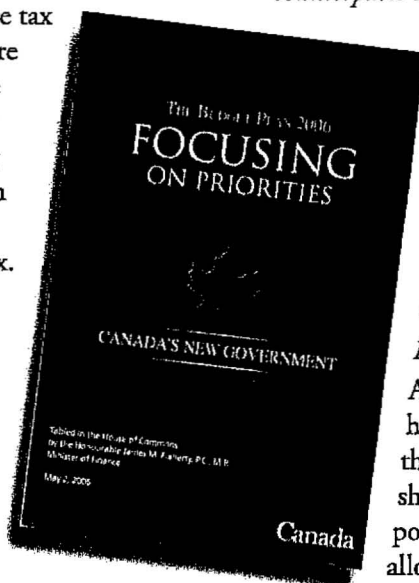
"In relation to post-secondary education and training, the Minister of Human Resources and Social Development will also undertake consultations with her provincial and territorial counterparts with a view to identifying appropriate roles and responsibilities for each order of government in support of post-secondary education and training. These consultations will serve as the basis for the development, within the next year, of proposals by the Government for long-term federal support for these priorities."

Already this consultative note has led some pundits to suggest that the federal government should decentralise its role in post-secondary education and allow the provinces to experiment with such regressive initiatives as

Income Contingent Student Loan Repayment Schemes. It is very likely that, given the overall tone of this budget, the federal government will be reluctant to institute any kind of national standards to improve access to post-secondary education.

Federal Transfer Payments and Core Funding

Despite massive federal surpluses over the past few years and another surplus this year, Budget 2006 does not increase core funding for post-secondary education. Although it is difficult to calculate precisely the amount cut from transfers for post-secondary education during the past decade, estimates by provincial Premiers peg the annual shortfall at \$4.9



billion. These cuts created a climate in which tuition fees more than doubled in all provinces except Québec. As a direct result, accessibility to universities and colleges has been severely compromised and quality declined.

Leading up to the 2006 federal budget, the government was forecasting a surplus of \$17.4 billion in 2005–06 and \$17.8 billion for 2006–07. However, tax cuts reduced the anticipated surpluses to \$5 billion and \$600 million respectively, and the Conservatives have committed to using the leftover surplus for national debt reduction.

Thus, more money will be allocated to paying down the national debt—which is already one of the lowest in the world—rather than to restoring funding to post-secondary education. The Conservatives also failed to create a dedicated transfer payment for post-secondary education, breaking their promise from the 2006 federal election.

C-48: Liberal/NDP 2005 Budget Amendment

In the previous federal parliament, the New Democrats brokered a deal with the governing Liberals to amend the 2005 federal budget to add \$1.5 billion for post-secondary education.

Although the Conservatives' 2006 budget claims to uphold that commitment, a closer look reveals a betrayal of the spirit of Bill C-48. Whereas the Liberal/NDP deal reads as follows: "for supporting training programs and enhancing access to post-secondary education, to benefit, among others, Aboriginal Canadians, an amount not exceeding \$1.5 billion"; the Conservative budget allocates only one billion dollars to a fund to "enhance universities' and colleges' infrastructure and equipment...as well as related institutional services."

In this light, the budget removes the heart of C-48: affordability. This is not to say that years of federal funding cuts have not had a negative impact on the physical condition of Canada's universities and colleges; however, pitting equality of access against deferred maintenance is callous policy making. It also may be part of a larger move to focus the federal role in post-secondary education toward research and development, leaving issues of access to the provincial governments. Furthermore, money will

only flow under the auspices of Bill C-48 in the event of a federal surplus of at least \$3 billion.

The staggering level of tax cuts in the 2006 federal budget leaves very little room for unforeseen changes in the economy. According to the *Globe and Mail*, even a one percent rise in interest rates could put the federal government into a deficit position because of the massive reduction in government revenue due to the 2006 tax cuts.

Taxation

The 2006 budget instituted over two dozen tax cuts that, in the end, will do very little to benefit post-secondary students. The government will forfeit resources that could have easily been directed toward universities and colleges to reduce tuition fees.

The Conservative Party's 2006 federal election platform was thin on policy ideas for student financial assistance. Only minor tax changes were proposed, and students were promised nothing in the way of up-front assistance. In that vein, the 2006 federal budget lives up to its minimal expectations.

The federal budget eliminates the taxation of scholarships/bursaries/grants. Grants were taxable over \$500 until 2000, when the Federation exposed the inadequacy of the Millennium Scholarships, at which point the federal government moved to exempt \$3,000 (the average Millennium Scholarship amount). The elimination of the tax on scholarships is not necessarily as forward-looking as it seems, because the average grant is still less than \$3,000. Therefore, the tax only applies to graduate student research grants and very exceptional need and/or merit grant recipients.

In the case of graduate students receiving Canada Graduate Scholarships (the most generous federal research grants for students), the elimination of the tax on research grants will save Master's students \$1,500 and most PhD students more than \$4,000. However, the majority of graduate students do not qualify for federal research grants. Thus, although a substantial portion of the grant will be recovered by grant recipients, federal policy still ignores the financial need of most graduate students. To make matters worse, the Conservative government has

refused to implement the 50% increase in the number of Canada Graduate Scholarships that was announced in the November 2005 Economic and Fiscal Update by the previous government.

Stephen Harper's first budget also introduces a non-refundable income tax credit of \$65 per month for full-time students (\$20 for part-time students) to defray the cost of textbooks. This tax credit will be available to all students, or transferable to parents, regardless of financial need. The net benefit for a student enrolled full-time for eight months is expected to be a mere \$80, less than the cost of one textbook per academic year. However, most students do not earn enough to pay income tax, and will derive no benefit whatsoever from non-refundable tax credits.

Although the Liberals practically invented tax credits as a form of student financial aid while in government, Liberal Human Resources Critic Geoff Regan said in a news release before the federal budget: "tax credits and exemptions aren't the right approach to student assistance because they don't help lower and middle income students with tuition costs up front". He added that loan increases for middle-income students will "likely be eaten up by tuition hikes".

The Federation welcomes the revised approach taken by the critic for the official opposition, and will work with all opposition parties to propose alternatives to the insufficient measures proposed in Budget 2006.

The Goods and Services Tax Cut

The Conservatives promised to cut the GST in the federal election campaign and this budget begins that process. The budget reduces the rate of the GST to six percent from seven percent effective July

1, 2006. In 2006-07, the cost of the GST cut will be \$3.5 billion and \$5.2 billion in 2007-08.

University Research

The 2006 federal budget has been characterised as a "bad news budget" by the university research community. With the exception of university presidents, university research organisations,

including the Canadian Consortium for Research and the Canadian Association of University Teachers, harshly criticised the budget.

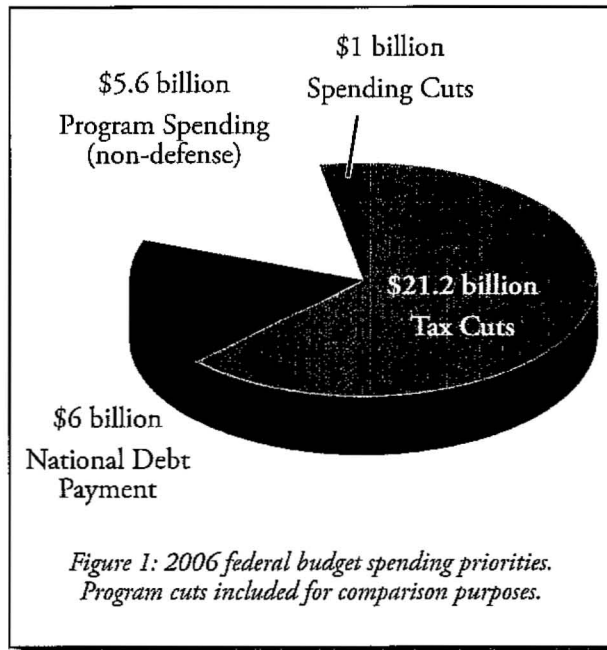
The federal budget increases the base budgets of the research granting councils—NSERC and SSHRC—by only two percent. With inflation, this constitutes a cut to federally-sponsored research.

The federal budget expands the annual funding for the indirect

costs of research for the fourth year in a row. The program will grow by more than fifteen percent in 2006 to \$300 million annually. Regrettably, university presidents have not found a way to use this funding to the advantage of their institutions to relieve the upward pressure on tuition fees.

Of the \$100 million being directed toward the federal research agencies, the Social Sciences and Humanities Research Council received only \$6 million. By contrast, \$60 million is allocated to the Canadian Foundation for Innovation and the Indirect Cost of Research Program.

Perhaps most noteworthy under the research section of the federal budget is the pledge to conduct a "value for money" review of the granting council's activities. This review also must be considered in the context of the latest report from the Expert Panel of the Commercialisation of University Research, which argues for new research commercialisation



initiatives such as the creation of a commercialisation advisory body, student fellowship programs oriented to commercialisation, and the development of a "commercialisation superfund". As members of the official opposition, Conservative MPs regularly belittled many university research projects, often based only on a project's title. The Federation will work closely with its coalition partners to ensure that the government's response to this report does not serve to attack basic research.

Canada Student Loans Program

No fundamental changes to the Canada Student Loans Program were included in the federal budget.

A minor change was made to the Canada Student Loans Program needs-assessment by lowering the "expected parental contributions". As a result, it is easier for students from some middle-income households to qualify for a CSL. This is a positive change, especially since it might make the difference for some students who could not otherwise raise the money to participate in post-secondary education.

Unlike increasing loan maximums, this change will not, for the most part, drive the most indebted students deeper into debt.

Conclusion

This budget clearly signals that the Conservatives want to take a different approach to governing, one that withdraws the federal government from areas of joint responsibility with the provinces. In fact, the tax cuts introduced in the 2006 federal budget are so extensive that there is a danger that the Conservative government will cut back program spending in the future, beyond the \$1 billion already announced, in order to maintain the tax cuts. Public remarks by the Prime Minister and Finance Minister emphasize that Canadians are supposedly "over taxed", but they have rarely, if ever, shown the same zeal for improving access to post-secondary education. Such a fixation on cutting taxes at all costs may be an ominous sign of things to come for students.

Canadian Federation of Students' submission to the

2006 Pre-budget Consultations

April 19, 2006

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Introduction

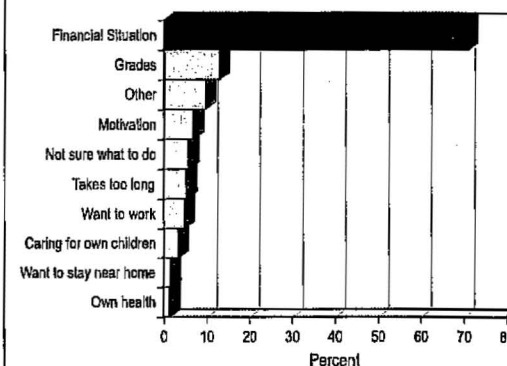
Canada's Post-Secondary Education System is Characterised by Financial Barriers to Access

The crisis in accessibility in Canada's universities and colleges is driven by the cost of a post-secondary education. The defining difference between those who have access to post-secondary education and those who are forced to languish in low-paying, low-skill work is financial resources. Despite the elementary nature of this observation, there is real resistance among university and college administrators and government policymakers to accept this reality. Over 400,000 students in Canada are forced to borrow to finance their education every year. Average student debt for a four-year program is now nearly \$25,000. However, that number will rise rapidly with the increase in loan limits introduced in the 2004 federal budget. The decision taken to substantially increase the amount that students can borrow will ensure that students from low- and middle-income households start their working lives saddled with debt. It is critical to note that the rapid increase in student debt has occurred in conjunction with the elimination of grants programs in most provinces. Québec is the only remaining province with a comprehensive system of needs-based grants.

Although policymakers often look at student debt as the deferred cost of a post-secondary education, there is good reason to believe that it is a primary factor in determining access to post-secondary education at the front end. While it is true that students do not start repaying a loan until they cease full-time study, students are increasingly weighing their post-graduation debt burden when deciding whether to pursue higher education. We also know from the Youth in Transition Study (YITS) that

among those who list a barrier to post-secondary education, over 70% list finances as the primary barrier (see Figure 1). In addition to addressing the reality of debt aversion, it is imperative that the federal government examine the real cost of student debt. A \$25,000 student debt is actually a debt of almost \$34,000 when accounting for interest payments over the amortization period (see Table 1). This number is also based on interest rates near an all-time low.

Figure 1: Identified Barriers to Post-Secondary Education for Secondary School Graduates



Source: Youth In Transition Survey 2002 (Statistics Canada)

It is important to note that the financial return of a post-secondary education over a lifetime has been greatly exaggerated by those who seek to justify higher tuition fees. Those who use a narrow economic equation to argue for higher fees imply that those who have a university or college credential automatically earn a six-figure salary. Although it is certainly true that those with post-secondary education earn more than those with just a high school diploma, the return on post-secondary education has actually remained relatively constant since the 1990s. Contrary to those who argue that education

is simply an investment like any other, a post-secondary education is not the ticket to the highest income bracket, but rather the necessary pathway to a modest income.¹ In *Knowledge Matters*, Human Resources and Skills Development Canada estimates that over 75% of new jobs will require at least 2 years of post-secondary education by 2007. The average wage of those with such a credential is just over \$30,000 per year compared to just over \$25,000 for high-school graduates, hardly the kind of income that would justify \$6,000 in tuition fees and \$25,000 of student debt.²

Table 1: Canada Student Loan Repayment by Principal and Repayment Period

Principal	Repayment Period	Monthly Payment	Interest Paid	Total Cost of Education
\$20,000	10 years	\$232.22	\$7,865.87	\$27,865.87
\$20,000	15 years	\$179.77	\$12,357.22	\$32,357.22
\$20,000	20 years	\$155.06	\$17,214.29	\$37,214.29
\$25,000	10 years	\$290.27	\$9,832.61	\$34,832.61
\$25,000	15 years	\$224.71	\$15,446.87	\$40,446.87
\$25,000	20 years	\$193.82	\$21,519.28	\$46,519.28
\$32,000	10 years	\$371.55	\$12,585.50	\$44,585.50
\$32,000	15 years	\$287.63	\$19,771.83	\$51,771.83
\$32,000	20 years	\$248.10	\$27,541.74	\$59,541.74

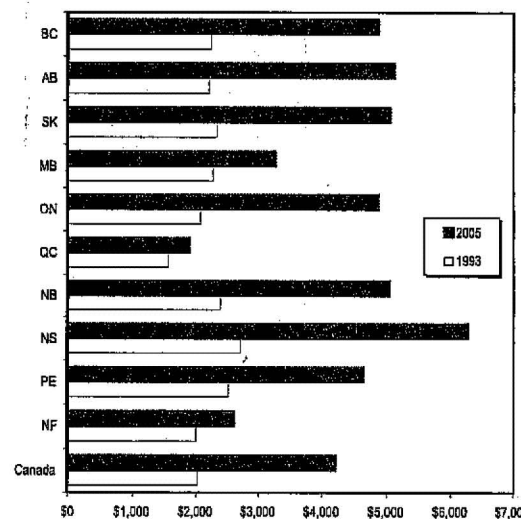
Note: As the repayment period is extended, the cost of education for low-income earners increases

Recent socio-economic data also starkly demonstrates that student debt is, by definition, the most regressive way of financing a post-secondary education. Those who enter the system with the least are forced to borrow the most. Students from low-income households are the least likely to have a ready source of funds to pay tuition fees up-front. Thus, those who are from low-income homes bear the brunt of fee hikes and borrow tens of thousands of dollars to finance an undergraduate degree. A recent Canadian Association of University Teachers (CAUT) report documented this trend by noting that, as a percentage of disposable income, those in the bottom fourth of income earners devote nearly twice as much to education costs as those in the top fourth.³ This disparity is confirmed by Statistics Canada's Post-Secondary Education Participa-

tion Study (PEPS), which determined that those from families in the top income quartile are twice as likely to attend university as those in the bottom quartile.

This evidence becomes more worrisome when it is viewed in the context of recent data on the growing gap between the rich and the poor in Canada. Statistics Canada's 2001 census report showed that the income of those in the bottom quintile remained stagnant through most of the 1990s while families in the top one-tenth of income earners made substantial gains. These findings are corroborated by other census data that found that, on average, those under the age of thirty are earning substantially less than they did in 1980.⁴ This statistic is troublesome on several levels: first, it means a decline in disposable income for those facing tuition fees that increased by 130% in the 1990s. Second, for those lucky enough to attend college or university this income data shows that they are likely to experience difficulty paying back mortgage-size student loans. Thus, Canada has the most indebted generation in its history facing a real decline in their income.

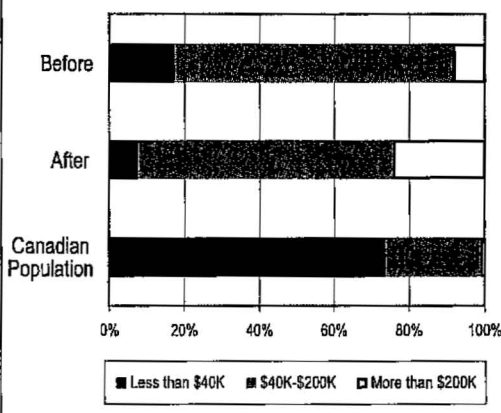
Figure 2: Undergraduate Arts Tuition Fees, 1993 & 2005



The greatest factor driving higher student debt is tuition fees. Tuition fees are the largest cost students face as students. Tuition fees have more than doubled since 1993, making the average for tuition fees

for an arts and sciences undergraduate degree over \$4,000 per year (see Figure 2). Fees at that level will entrench the access gap outlined by the PEPS study, but there is also evidence to suggest that current fee levels are pushing students out of the system. A study undertaken by leading U.S. researchers demonstrates that for every \$1,000 increase in tuition fees, there is a 19% drop in persistence rates for low-income students.⁵ A similar study conducted by economist Thomas Kane in California noted that for every \$1,000 dollar in fee hikes there would be a commensurate decline in enrolment of 14.9%. According to Kane, the decline in enrolment comes "almost exclusively from minority and low-income students."⁶

Figure 3: Income Distribution of UWO Medical Students Before and After Tuition Fee Deregulation



In the Canadian context, a 1999 study found a direct link between tuition fee hikes and depressed enrolment amongst students from low-income families. The Department of Epidemiology and Biostatistics at the University of Western Ontario undertook a study on the accessibility of Western's medical school in the years immediately following the deregulation of tuition fees in Ontario.⁷ This study was conducted over a four-year period to determine the effect of steep fee increases on the attributes of new students. The study examined 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. In the first year examined, 17.3% of students

in medical school came from homes where their family income was under \$40,000. That year, students were paying the regulated tuition fees of approximately \$4,000. By the fourth year of the study, when tuition fees had risen to over \$10,000, only 7.7% of students were from this low-income group (see Figure 3). Thus, immediately after exorbitant tuition fee increases, there was a 50% decline in the participation of low-income students.

Student Financial Assistance: A Path to Access vs. Lifelong Debt

Any discussion of tuition fees must end with an assessment of student financial assistance. What follows is an outline of the current policy context that will assist the committee in its task of modernising student financial assistance. The national and international data demonstrates unequivocally that the level of tuition fees and the model of student assistance are the determining factors in who has the opportunity to participate in post-secondary education. In addition to the research on the up-front cost of a post-secondary education, there is overwhelming evidence to suggest that grants (not loans) are the best way to promote access. In the largest study of its kind, British researchers followed low-income students through the post-secondary system and determined that the availability of grants was the primary factor in determining whether low-income students could finish their degree.⁸

A similar study in the United States, entitled *Empty Promises*, also argues that access to grants was the determining factor on whether or not low- or middle-income students would enter the system and persist until graduation.⁹ In another UK study, researcher Stephen Machin tracked the decline in the participation rates of low-income students after the UK government abolished grants for living expenses. In the final year of the program, 13% of those in UK universities were from the lowest income strata. Six years after the grant was scrapped, only 7% came from the poorest British families.¹⁰

By increasing loan limits in the 2004 budget, the federal government made clear its opinion that loans are the preferable policy model for coping with the exploding cost of post-secondary educa-

tion. Unfortunately, this approach will exacerbate the social inequities in access outlined above. As we documented at the beginning of this section, the pressing and simple solution to this problem is a concerted federal and provincial effort to reduce tuition fees. Simply put, there will be very little political or financial incentive for provincial governments to reduce tuition fees until the federal government re-asserts its role in funding post-secondary education. A sustainable approach to federal funding is outlined later in this brief.

The grants program for low-income students introduced in the 2004 federal budget is a somewhat modest recognition by the federal government of the necessity to increase spending on grants. However, at the current level of financing, the program is unlikely to be much more than a first step since a grant's value is relative to the cost it is intended to mitigate. Without restoring funding to the provinces for post-secondary education, tuition fees will rapidly erode the value of federal grants.

As fees continue to rise, the Canada Student Loan Program (CSLP) is under increasing pressure. One of the inevitable effects of deregulated tuition fees is that students studying professional programs are now far more likely to borrow (and very often borrow at maximum levels) under the CSLP. With tuition fees of \$18,000 for law school at the University of Toronto and \$16,000 for Dentistry at the University of Saskatchewan, and \$11,000 for animation arts at Sheridan College, most modest- and middle-income students now rely on mortgage-sized student loans to fund their education. With professional programs charging fees at this level and average arts and science undergraduate fees approaching a national average of \$5000, it is no surprise that the CSLP is under increasing pressure to meet the evolving needs of students studying in a variety of programs and entering or re-entering post-secondary education at different times in their adult life. For example, according to the Association of Community Colleges Canada (ACCC), the average age of a college student is 26. Therefore, those entering college are likely to have family obligations

and prior debt and are not likely to be well-served by a loans-based system.

The financial pressure created by high fees has also led to some policy discussion about how Canada Student Loans are distributed and who benefits from the program. Since its inception, the CSLP has been a needs-based system of student financial assistance. Financial need is calculated by subtracting existing financial resources (savings and anticipated earnings from summer and part-time employment) from overall educational and living costs. The Government of Canada pays the interest accruing on Canada Student Loans during the full-time study period. Under this system, the interest subsidy largely flows to those students coming from a low-income household, but high fees have increasingly meant that borrowers from middle-income backgrounds are receiving a greater share of the interest subsidy. This development has resulted in calls for a revamped program of student financial assistance, one that focuses on those from the very lowest income homes and leaves those from modest-income families to fend for themselves.

The idea of excluding all but the most disadvantaged was proposed by former Ontario Premier Bob Rae in his 2004 review of post-secondary education in Ontario. In other words, Rae recommends a system in which a sliver of students from very low-income homes get substantial grants, while everyone else is left to rely on debt to finance their education.

The implications of such a proposal are stark: under Rae's plan, a family of three earning \$36,000 a year would receive no non-repayable student financial assistance. Such a proposal would simply compound the debt of thousands of students and increase the number of students who are forced to take out loans. Rae also muses about the elimination of all interest subsidies, which would reduce the cost to government of future loan administration. For the family of three living on \$36,000, Rae's solution is ostensibly a private system of for-profit lending.

Low-income students and those communities underrepresented in university and college should be at the centre of any student assistance model. However, the emerging trend that Canada's financial

aid system must address one of either high-need or low-income must be rejected. Tuition fees are the primary cause of the rising costs faced by students and higher tuition fees are forcing more students to rely on financial assistance every year. It is preposterous to suggest that the best policy solution is to increase the cost of borrowing for all but those from the very poorest families. The federal government has a responsibility to ensure affordability for all of those unable to pay the up-front cost of a post-secondary education, but as long as tuition fees are allowed to continue to rise, the sustainability of any effective student financial assistance program is tenuous at best.

High tuition fees compromise access, overtax the CSLP, and create an artificial distinction between high need and low-income students. Virtually all of these problems can be traced back to reduced government funding. This situation is remedied by implementing a long-term vision that includes tuition fee reductions and a broad system of grants.

RECOMMENDATION #1—*Increase the value of the low-income grant from 50 percent of tuition fees to 100 percent of tuition fees, while eliminating the \$3,000 ceiling.*

Learning Bond

The federal government announced that \$325 million will be spent each year attempting to address what it perceives as a motivational problem amongst low-income families to save for their children's post-secondary education. The notion that poverty and lack of savings for post-secondary education are the result of insufficient RESP advertising—rather than the reality of other more immediate expenses (i.e. food, shelter)—is dubious at best. As with the public relations machine behind the Millennium Scholarships, the creators of the Learning Bond have placed a premium on optics over sound public policy. Gimmicky approaches like the Learning Bond will do nothing to erase the reality of generational poverty, housing shortages and massive rent inflation, and the myriad of real challenges that inhibit the participation of low-income families in post-secondary education. Until the federal government makes real commitment

to addresses these issues, policies like the Learning Bond will seem cynical.

Families with incomes below \$35,000 who bear children after 2003 will receive \$500 towards the establishment of a Registered Education Savings Plan (RESP) and \$100 each subsequent year the family remains "low-income". By the federal government's own estimates, the maximum benefit of the Learning Bond/RESP program will be approximately \$3,000 in 2004 dollars. In other words, the most a low-income family can hope for from a Learning Bond is 75 % of one year of tuition fees. Moreover, the "savings" in a Learning Bond may reduce a family's eligibility for other needs-based assistance.

The Canadian Federation of Students convened a meeting in March 2004 with the National Anti-Poverty Organization, the National Organization of Immigrant and Visible Minority Women of Canada, the Canadian Council on Social Development, and Low-Income Families Together to discuss the implications of the Learning Bond. Participant organisations were unanimous in their opposition to the proposal to increase federal spending on flawed savings programs.

Millennium Scholarship Foundation

The Millennium Scholarship Foundation (MSF) was created in 1998 as part of the "education budget". Then Finance Minister Paul Martin promised in his budget speech that the MSF would reduce the debt of students with the highest need by \$12,000. Unfortunately, very little of the money set aside to reduce student debt has even made its way to students. Most provinces have simply ignored the non-binding "gentleman's agreements" signed with the Foundation. In British Columbia, Saskatchewan, Ontario, Prince Edward Island, and Nova Scotia students are seeing little or no net benefit. In other provinces, a small portion of the money is going to reduce student debt.

Regrettably, little time or energy has been put into pushing the recalcitrant provincial governments to use Foundation funds to reduce student debt. These five provincial governments, with the blessing of the Foundation, have simply reneged on

their agreements to invest Foundation funds into student financial assistance.

In addition to gaping operational failures, there are also mounting concerns about the Foundation's lack of transparency. The Foundation has a \$10 million research budget but it has consistently refused to release any detailed information about how it disperses funding for research projects. This is particularly disconcerting given that the Foundation is awarding lucrative "no bid" contracts to former employees.

In addition, the Foundation's research project is heavily biased toward researchers who favour higher tuition fees and student debt. Therefore, only those who support the Foundation's ideological positions can compete for research funding or speaking slots at Foundation conferences. Despite receiving over \$2.5 billion in taxpayer funds, the Foundation operates like a private corporation—accountable to nobody but a largely hand picked and pliant board. The structure of the Foundation, then, allows it to bypass the most elementary standards of transparency and accountability in its day-to-day functioning.

The Canadian Federation of Students is not alone in its concern about the fiscal and operational accountability of the Millennium Scholarship Foundation. In testimony before the Standing Committee on Public Accounts, Auditor General Sheila Fraser (February 12, 2003) and Professor Peter Aucoin of Dalhousie University (October 8, 2003) both criticized the fact that Foundations are unaccountable to parliament despite their vast expenditures of tax dollars. The Auditor General was particularly perturbed that the finances and operations of the MSF are essentially the business of its private board.

The MSF is a failed experiment in contracting out student financial assistance. Unfortunately, it has been low-income students and their families that have suffered the consequences of this cynical exercise. In light of this record of abject failure and the pressing need for a modern system of student financial assistance, the Canadian Federation of Students is calling upon the federal government to collapse the Foundation and redirect its budget to

expanding a needs-based grant administered by the Canada Student Loan Program.

RECOMMENDATION #2—*The federal government should scrap the Millennium Scholarship Foundation and the Registered Education Savings Plan and use the funds to implement a national system of needs-based grants.*

Credit Checks

In 1998, the federal government introduced credit checks for all Canada Student Loans Program applicants over the age of 21. A student loan can be denied to an individual who, in the three years preceding application for a student loan, has missed at least three monthly payments on each of three separate loans or debts worth \$1,000 or more. The ostensible reason for the introduction of this regulation was to screen out habitual credit abusers. However, virtually any family in Canada that falls upon hard economic times could fail the current credit check. In most cases, failing the Canada Student Loans Program's credit screening is not due to a moral failing or fraudulent intent, but rather a matter of financial desperation. These are the Canadians that the federal government has made a specific commitment to help in the past. Therefore, it is punitive and counter intuitive to disqualify those who are the most in need of post-secondary education or training from receiving student financial assistance. The federal government has failed to distinguish between those in legitimate financial hardship and those committing fraud. In its effort to protect the fiscal integrity of the system, the government has, in effect, punished people for being poor.

RECOMMENDATION #3—*The federal government should remove the credit history assessment for Canada Student Loans Program eligibility.*

Debt Reduction in Repayment

The Canadian Federation of Students is calling on the federal government to honour a commitment made to students in the 1998 budget. That budget committed to a Debt Reduction in Repayment program (DRR) supposed to help over 12,000 students per year. Touted as a method of reducing unmanageable debt after graduation, the stringent

eligibility criteria has ensured that less than 500 students per year benefited from the program in its first four years.

In 2004, the Department of Finance finally acknowledged this problem and changed the eligibility requirements for DRR to bring them in line with the Interest Relief program. Unfortunately, many of those who should have legitimately qualified for Debt Reduction in the past five years will have defaulted on their loans, and be rendered ineligible for DRR under the revised criteria. In addition, despite Paul Martin's promise to assist 12,000 borrowers per year, there is no provision to make the current criteria retroactive. Given it took over five years to implement the program as promised, it is only fair that those who applied and were denied under the old criteria should be allowed to re-apply for those years under the new rules.

RECOMMENDATION #4—*The federal government should allow previous applicants who were denied DRR between 1999 and 2004 to reapply and be assessed retroactively using the new criteria.*

Bankruptcy and Insolvency Act

The provisions of the Bankruptcy and Insolvency Act were designed to offer hope to those unable to cope with debt. Under the Act, an individual must appear before a judge and present evidence under oath that their financial situation makes it impossible for them to meet their obligations. However, a ten-year prohibition introduced in the 1998 "education budget" deprived students of their rights under the law. The effects of the 1998 changes to the Bankruptcy and Insolvency Act (BIA) have been destructive and widespread. The law ensures that those unable to afford massive student loan payments are harassed by collection agents for up to ten years. This arbitrary and punitive change is widely criticized by legal and bankruptcy professionals.

In the spring of 2003, Industry Canada and the Senate set out to examine all aspects of the BIA, including the ten-year prohibition on student loan bankruptcy. In both cases, it was eventually recommended that students be entitled to a hardship hearing within one year of graduation and that the

general prohibition be lowered from ten years to five years.

In June 2005, the federal government finally responded to these mounting concerns with the introduction of a proposed change to the Bankruptcy and Insolvency Act. The bill proposes a reduction in the prohibition from ten to seven years. Although a belated acknowledgement of the misery caused by the law, reducing the prohibition from ten to seven years is a cosmetic change to a patently unfair bill.

RECOMMENDATION #5—*The federal government should repeal the ten-year prohibition on bankruptcy for Canada Student Loan holders.*

Federal Transfers for Post-Secondary Education

Current Transfers Arrangement is Broken

There is a growing consensus in the post-secondary education community that current transfer payment mechanisms are inadequate to achieve federal funding goals. This section is a blueprint for how increased funding through a separate transfer payment for post-secondary education is a necessary step towards improving the accessibility and quality of Canadian universities and colleges.

The Federal Government in Retreat

To the detriment of access to post-secondary education, the federal government has quietly retreated from its historical role as the key figure in post-secondary education financing.

In the name of federal deficit reduction, billions were cut from post-secondary education and training during the 1990s. Provinces struggled with the increased burden and passed those costs on to students and their families. In today's dollars, federal cash contributions for post-secondary education are now 50 percent lower than in 1982.¹¹

As a direct result, tuition fees at Canada's universities more than doubled in less than a decade. Thus, while claiming to eliminate Canada's budgetary deficit, that amount has been shuffled off the national books and onto the backs of students in the form of increased student debt. The devastating re-

sults on access and student debt were reviewed in detail in the previous section.

Towards a Post-Secondary Education Transfer

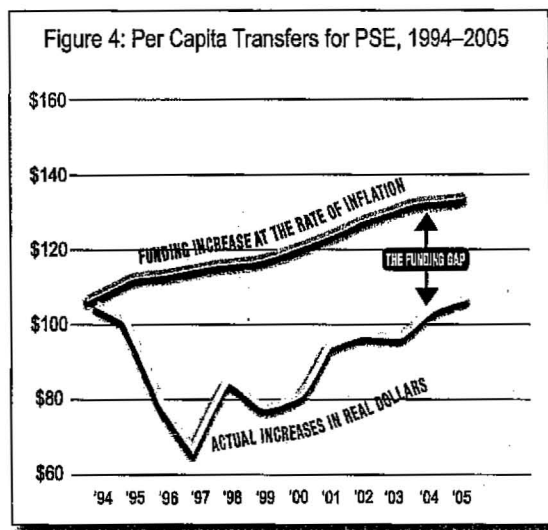
Recent federal surpluses have not been used to restore the funding cut from post-secondary education in the 1990s. The federal government has made minor adjustments in areas of undisputed federal jurisdiction (ie. income tax), but has failed to make any effort to engage provincial governments in negotiations to improve the quality and accessibility of Canadian universities and colleges.

The federal government has a clear constitutional role in the core funding of universities and colleges. The Prime Minister has responded to the call of the Canadian Federation of Students for a post-secondary education transfer, but the conditions and commitments placed on such a transfer will determine its viability. Not only must there be a distinct payment to the provinces for public universities and colleges, but mutually agreed upon conditions must be established in order to avoid provincial misallocation of federal post-secondary education funding.

The Canadian Federation of Students and the Canadian Association of University Teachers (CAUT) both recommend the adoption of legislation or other binding forms of agreement that would establish conditions for federal post-secondary education transfers. These conditions must commit the provinces to upholding principles similar to those of the Canada Health Act: public administration, accessibility, comprehensiveness, democratic governance, and academic freedom. In return for upholding these principles, provincial governments would receive increased and predictable funding from the federal government.

One of the first steps to creating the conditions for a collaborative strategy with provincial governments is for the federal government to commit to restoring cash transfers to 1993 levels in real dollars (see Figure 4). That represents an immediate investment of \$1.2 billion per year. In the medium term, the federal government should return spending levels for post-secondary education to 0.5% of gross

domestic product, which will require an additional \$2.8 billion.



Provincial premiers have recently made unmistakable signals that they are interested in exploring further collaboration with the federal government to improve the affordability and quality of post-secondary education. The federal government must use this historic opportunity to reach a new agreement on transfers for post-secondary education.

2005 Budget Amendment

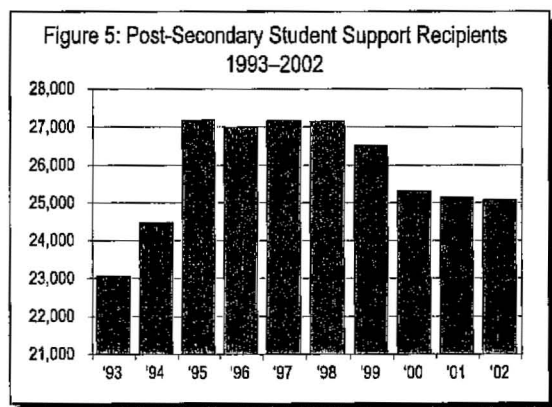
The majority of Canadian students are currently protected by a tuition fee freeze. Most provinces have taken steps to curb tuition fee increases, a move that signals that governments of all political stripes are taking action to address the financial barriers posed by tuition fees. This is precisely the policy shift in the provinces that the federal government must support and encourage with fiscal commitments.

The 2005 federal budget amendment is an important piece of legislation because it furthers the policy goal of reducing tuition fees. It also re-establishes the federal government's legitimate role in financing access to post-secondary education. Finally, the budget amendment's goal of reducing tuition fees should jump-start negotiations with the provinces on the issue of a new transfer for post-secondary education.

RECOMMENDATION #6—*The federal government should, in cooperation with the provinces, create a post-secondary education cash transfer payment for the purpose of reducing tuition fees and improving quality at universities and colleges. The transfer should be guided by the principles set out in a Post-Secondary Education Act.*

Aboriginal Education

The Assembly of First Nations estimates that nearly 10,000 First Nations students are unable to get funding through the Post Secondary Student Support Program (PSSSP) each year. Figure 5 illustrates the shrinking number of recipients of the PSSSP. Although many provinces have frozen tuition fees, post-secondary education remains beyond the financial reach for thousands of Aboriginal students. Reduced funding and rising tuition fees are key factors in the stagnation of Aboriginal enrolment in post-secondary education since the mid-1990s.



According to the 2005 Alternative Federal Budget¹²:

The budget for the PSSSP program needs to be increased to allow more Aboriginal students to obtain post-secondary education, and status-based restrictions to the program must be eliminated. Funding for the PSSSP program should be indexed to the growth in the Aboriginal youth population.

The concerns of Canada's Aboriginal leaders were echoed in the 2004 Report of the Auditor General. The Auditor General's office concluded that the PSSSP's allocation does not ensure equitable access, in part because Indian and Northern Affairs does not collect enough data on enrolment to measure the program's effectiveness.

The situation of Aboriginal students in Canada is unsatisfactory and getting worse. The federal government must move swiftly to offer greater non-repayable financial assistance in conjunction with other treaty obligations.

RECOMMENDATION #7—*The federal government should meet its treaty obligations by fulfilling the post-secondary education funding needs identified by the Assembly of First Nations, the Metis National Council, and the Inuit Tapiriit Kanatami.*

Post-Secondary Education Tax Credits

Since the mid-1990s, the federal government has increasingly looked to tax expenditures as a substitute for directly allocated student financial assistance. 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 in real dollars and more than the total amount the federal government will spend on upfront grants this year.¹³

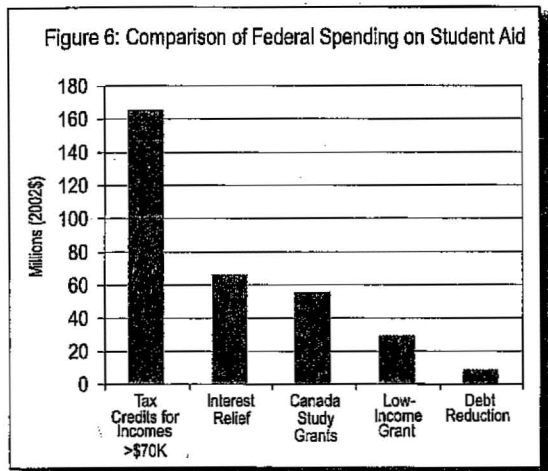
Despite their large price tag, federal tax expenditures do virtually nothing to either improve access to post-secondary education or relieve student debt. Moreover, since everyone who participates in post-secondary education qualifies for tax credits regardless of financial need, the federal government is diverting vast sums of public funding where they are not necessarily required.

This massive public expenditure, if offered as upfront grants, could deliver significant financial assistance to students with the greatest financial need. For example, if every Canada Student Loan recipient received a \$3,000 grant, the cost would be approximately \$1.13 billion per year. 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%.

Helping Those Who Need Help the Least?

The Department of Finance estimates that transferred amounts account for almost half the total value of education and tuition fee tax credits

claimed.¹⁴ In total, individuals with incomes over \$70,000 claimed more than \$164 million in federal education and tuition fee tax credits for the 2002 taxation 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 (see Figure 6).



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.

RECOMMENDATION #8—*The federal government should cancel the education and tuition fee tax credit and apply the savings directly to a new national system of needs-based grants.*

Conclusion

This document has demonstrated that the high upfront costs of post-secondary education dissuade tens of thousands of young people from applying for university and college, and force thousands more to drop out because they can no longer afford to attend. This situation continues to worsen, despite the millions of dollars spent each year by the federal government on a patchwork of ineffective student aid programs.

The Canadian Federation of Students supports the Prime Minister's plan to separate a portion of the Canada Social Transfer for post-secondary education. Such a move would improve transparency and accountability in the federal-provincial relationship governing the core funding of Canadian universities and colleges. However, a post-secondary education transfer must have the explicit goals of reducing tuition fees and improving the quality of the learning environment. The agreed upon conditions for provincial spending must be accompanied by conditions for predictable and escalating funding by the federal government, because without specific and binding conditions on the cash transfer, the entire project will be pointless.

Endnotes

1. The following statement from *Knowledge Matters* reflects the federal government's acknowledgment of the problem and a theoretical commitment to address it: "While overall post-secondary education participation rates have risen steadily until recently, a significant gap in participation in university is evident between lower, middle and higher income Canadians...Action is needed to address factors such as debt aversion, lack of information or the 'sticker shock' effect of high and rising educational costs that may discourage less advantaged Canadians from pursuing post-secondary education".

2. For a more detailed overview of the "return" on a post-secondary education see Statistics Canada's *Relative Wage Patterns Among the Highly Educated in a Knowledge Based Economy*, September 2004. Also see the Statistics Canada 2001 Census for the most detailed overview of average earning relative to education level.

3. See "University and College Affordability: How and why have fees increased?" *Education Review*. Canadian Association of University Teachers.

4. For further documentation of this trend, see Armine Yalnizyan's *Canada's Great Divide: The Politics of the Rich and the Poor in the 1990s*. In addition, Andrew Jackson's *Falling Behind* specifically addresses the stagnant wages of working youth in Canada.

5. This study also reveals a strong correlation between financial barriers and persistence (re-enrolment) rates for poor and working class students in the United States. The researchers concluded "... the high-tuition, high loan approach ... to higher education finance does not seem to be working". See "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).

6. Thomas 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. The key portion of Kane's findings suggests that this drop comes "almost exclusively

from Latino, African American, and low income students". See "College-Going and Inequality: A literature review", paper for the Russell Sage Foundation, June 2001, and *The Price of Admission: Rethinking How Americans Pay for College* (November 1999) University of California Press.

7. Report of the 1999 Survey of Medical Students. University of Western Ontario Department of Epidemiology and Biostatistics, May 1999.

8. *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.

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" (p. 12).

9. *Empty Promises: The Myth of College Access in America*. United States Advisory Committee on Student Financial Assistance, June 2002.

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”.

10. “Unto them that hath ...”, Stephen Machin, *Centrepiece Magazine*, Winter 2003, Centre for Economic Performance, London School of Economics.

11. “The Growing Funding Gap”. *Education Review*, August 2005, Canadian Association of University Teachers.

12. *Alternative Federal Budget 2005: It’s time*. Canadian Centre for Policy Alternatives.

13. *The Canada Student Loan Program Actuarial Report* (2004) and Canada Revenue Agency preliminary figures.

14. Department of Finance Canada *Tax Expenditures and Evaluations 2001*.

Post-Secondary Education Issues Research Digest

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Compiled by the Canadian Federation of Students

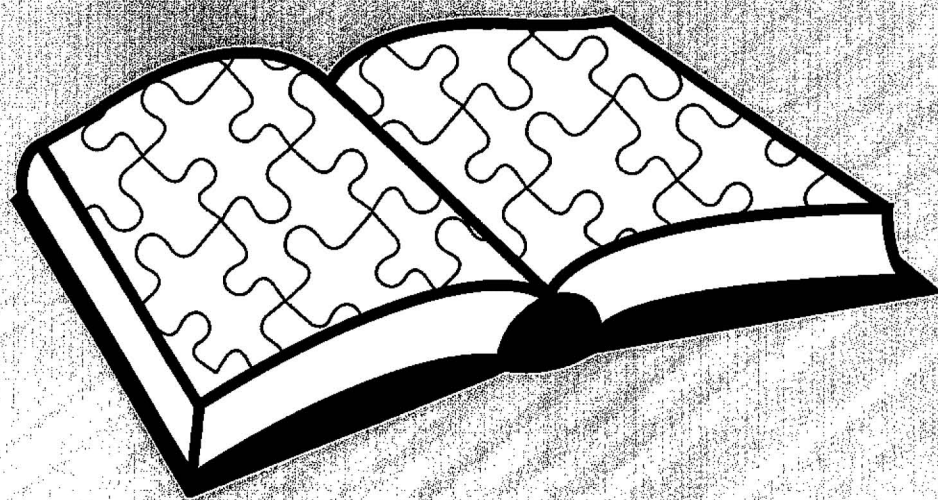


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1. Financial Barriers to Access: Canada

a. Access Denied: The affordability of post-secondary education in Canada.

Canadian Association of University Teachers (CAUT), September 2002.

www.caut.ca

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

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

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. However, the 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

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. Does it Pay to go Back to School?

Statistics Canada, Perspectives on Labour and Income (March 2006)

This study examines the benefits of adult retraining. Adult students are defined as persons who had worked for at least one year without being enrolled in studies prior to returning to school.

The report suggests that people who return to school as adults are more likely to enrol at non-university institutions. Close to 90 percent of post-secondary certificates obtained by adult students were from community colleges, trade, or vocational schools. People who participated in adult education and obtained a post-secondary certificate generally reported higher subsequent income than people who did not retrain, even after taking factors such as initial wages, occupation, and firm size into account.

Although younger workers who left work to seek post-secondary certification reported greater increases in their post-training income rates, taking those same factors into account, older workers gained a discernable increase in wages following post-secondary retraining. It was noted that the benefits to older workers of retraining were heavily concentrated among those workers who returned to their previous employer, whereas younger adults benefited more from changing employers following their retraining.

f. 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

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.

g. *Financing Canada's Universities & Colleges: How Ottawa and the provinces can fix the funding gap.*

Canadian Association of University Teachers, *Education Review*, Volume 7, Number 5, August 2005.

www.caut.ca

This short quantitative research piece by the CAUT traces the decline of federal funding over the past fifteen years, and concludes that federal contributions to the provinces for post-secondary education are approximately \$4 billion short of levels seen in the late 1970s. The CAUT prescribes a dedicated transfer payment for post-secondary education to be governed by a Post-Secondary Education Act.

h. *Funding Postsecondary Education in Ontario: Beyond the Path of Least Resistance.*

Hugh MacKenzie, December, 2004.

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.

i. *The Impact of Tuition Fees on University Access: Evidence from a large-scale price deregulation in professional programs.*

Marc Frenette, Statistics Canada, September 2005.

The most recent Statistics Canada study of access examines the effect of deregulated fees in professional programs. Not surprisingly the study confirms earlier studies that document a decline in access for middle- and low-income families. The study measures access on the basis of those who come from one of three homes: those in which neither parent has post-secondary education qualification, those with one parent with a degree or diploma, and those from a home in which one parent has a professional or graduate degree. There is some controversy as to whether this measure presents a complete picture of socioeconomic status. Prior studies relied on income data rather than education and no compelling rationale is given for using education instead of income.

Prior to the deregulation of tuition fees, students from high-income homes were over-represented in programs such as law, dentistry and medicine. However, the deregulation of fees has intensified the socio-economic stratification in these programs. The gap widened the most in Ontario, where fees have gone up by over 500% in some programs. For example, prior to the deregulation of tuition fees, those from home in which the parent had a bachelor's degree were only slightly less likely to enroll than someone from a home in which one parent had a professional or graduate degree. After the deregulation of fees in Ontario, those from a home with a professional or graduate degree were more than four times more likely to enroll. Provinces in which there were only moderate fee hikes or fee freezes had the most representative participation rates. Such findings go a long way toward undermining the case of those that argue that fee hikes have no effect on accessibility.

One of the study's more interesting findings is that access remained relatively steady for those from low-income homes despite large fees hikes. Though those from low-income homes are dramatically underrepresented in professional programs, the fact participation rates did not decline in the face of massive fee hikes is likely a result of scant student financial aid packages under which the very poorest students paid no fees. In most programs this accounts for fewer than 50 students. A second and more disturbing finding is that the participation rates of students from middle-income families plummeted. It is clear that those students who do not meet the very narrow definition of low-income used in most programs (those from homes of under \$22,000 annual income) are being shut out of professional programs.

j. *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.

k. *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

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.

l. *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

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.

m. 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

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.

n. Is post-secondary Access More Equitable in Canada or the United States.

Statistics Canada, March 2005.

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.

o. 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.

p. 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).

q. Survey by the National Opinion Coalition (Vector Research Inc.)

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.

r. The Tuition Trap.

Hugh MacKenzie.

www.ocufa.on.ca

In *The Tuition Trap*, Hugh Mackenzie builds on his earlier paper prepared for the Rae Review, *The Path of Least Resistance*. In *The Tuition Trap*, Mackenzie looks at the socio-economic composition of Ontario families relative to their participation rates in college and university. What he found was that, as portion of taxes paid through the progressive tax system, no income group carries a greater share of the burden. This finding is critical because it points to another factual error in the argument that post-secondary funding is a net transfer of wealth from the poor to the wealthy. Although there are disparities in participation rates between low- and high-income Canadians, Mackenzie demonstrates empirically that it is false to claim that low-income families do not share in the benefit of a publicly funded system of post-secondary education. In doing so, he undercuts one of the primary arguments made by high tuition fee advocates like Bob Rae.

Mackenzie also mounts a decisive critique of a recent study from a conservative US think tank, the Educational Policy Institute. EPI's study claims that the primary obstacle facing low-income Canadians is a lack of information about the benefits of post-secondary education. EPI's Alex Usher makes this

claim on the basis that low-income families tend to overestimate the cost of post-secondary education and underestimate the benefits. Mackenzie points out that the poll, originally done in 2002, was not designed to test the financial literacy of prospective students and their families, as Usher claims. Usher also misreads the study's own findings, according to MacKenzie. Based on the results, Ipsos Reid concluded the following: "No demographic variations in opinion are apparent for this issue [the price and benefit of post-secondary education]." Yet Usher's entire argument is based on a supposedly sharp difference in knowledge between high-and low-income Canadians. Mackenzie succinctly captures the quality of Usher's work when he concludes "There are significant technical problems with every step of this argument....The complacent conclusion does not follow from its carefully selected fact base."

s. *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

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.

t. *Who Gets Student Loans?*

Statistics Canada, *Perspectives on Labour and Income* (March 2006)

Focusing on people 18-24 years old, this study addresses several aspects of the Canada Student Loans Program (CSLP), including: how well student loans are targeted to low-income youth; the extent to which the amount of the loan provided reflects the individual student's level of financial need; and the consequences of taking parental income into account for students who are assessed as independent from their parents (not requiring a parental contribution). Québec, Nunavut, and the Northwest Territories were excluded from the analysis because they do not participate in the Program.

The report finds that 52 percent of full-time post-secondary students aged 18-24 whose parents earned less than \$40,000 received a loan from the CSLP in 2000. By comparison, only 14 percent of students whose parents earned more than \$80,000 received a public loan. More women students received CSLP loans than did their male counterparts (34 percent versus 29 percent). Women students who had a higher full-time post-secondary participation rate (38 percent versus 30 percent), and also students whose families immigrated to Canada after 1980 had a much higher CSLP take-up rate than students whose families have resided in the country longer (45 percent versus 31 percent), a difference largely attributed to income inequality: 58 percent of students from families that recently immigrated to

Canada having a parental income of less than \$40,000, compared to 29% of all other students whose parental income was below \$40,000.

The study confirms that students from lower-income households have lower post-secondary participation rates. The enrolment rate for the highest family income bracket in 2000 was almost twice that of the lowest income bracket (51 percent versus 29 percent). A tremendous difference was also revealed in post-secondary participation rates among young people who live with their parents and those identified as independent (46 percent versus 17 percent).

2. Financial Barriers to Access: International Evidence

a. *America's Untapped Resource: Low Income Students in Higher Education.*

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 Ellynn 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.^d "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

and,

The Price of Admission: Rethinking How Americans Pay for College

Both written by Thomas Kane, University of California Press (November 1999).

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

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

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.*

The Lumina Foundation for Education, 2004.

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

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.

The 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

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

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.

Equal Justice Works, the Partnership for Public Service, and the National Association for Law Placement, November 2002

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. Paying Back, Not Giving Back (April 2006)

New Hampshire Public Interest Research Group

In 2005 Baum and Schwartz wrote *How much debt is too much? Defining benchmarks for manageable student debt*, that proposed that "borrowers with pre-tax incomes less than half the median . . . should not be expected to make loan payments."

Drawing from this definition, the NHPIRG reveals that many graduates who enter certain public sector careers, including teaching and social work, have unmanageable student debt.

The median pre-tax income level they cite is \$37, 543 for full-time U.S. workers in 2004. Income above that threshold is "discretionary," and Baum and Schwartz argue that graduates should not have to spend more than twenty percent of their pre-tax discretionary income on loan repayment.

The New Hampshire Public Interest Research Group judges New Hampshire graduates to be the most indebted in the U.S., with 54 percent of new teachers who graduated from a public university and 67 percent of private university graduates starting their career with unmanageable debt. Nationally, 23 percent of public and 38 percent of private university graduates start their careers as teachers with unmanageable debt.

These findings give weight to the concern that student debt will increasingly affect graduates' ability to pursue certain careers and the cautions that rising debt levels may result in diminished capacity to recruit graduates to work in the public sector. The report also calls into question the notion that high tuition fees are justified because post-secondary education is a personal investment with guaranteed, long-term benefits.

p. 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.

q. 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."

r. 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.

s. 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.

t. 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.

u. Student Workers in High School and Beyond: The Effects of Part-Time Employment on Participation in Education, Training, and Work

Margaret Vickers, Stephen Lamb, and John Hinkley, Longitudinal Surveys of Australian Youth (2003)

This report examines the effects of part-time student employment on participation and attrition in school and post-secondary education, and on the post-school activities of Australian youth.

The report highlights the recent growth in employment rates during study. The authors indicate that there is an inverse relationship between in-class requirements and drop out rates in university. On average, the more hours a student spent per week in classes, laboratories, and practical training, the less likely that student was to abandon his or her studies. The authors argue that participation in part-time work reduces the amount of time spent in the classroom, increasing the likelihood of dropping out.

Overall, the students in this study who worked long hours while in school were much more likely to drop out than those who did not work at all. For Australian university students who worked an average of 20 to 29 hours per week, the likelihood of dropping out was approximately 160 percent greater for those students who were not employed. For students who worked over 30 hours per week on average, drop out rates were 200 percent greater than for those who were not employed.

v. 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.

w. *Unequal Opportunity: Disparities in college access among the 50 states.*

The Lumina Foundation for Education. January 2002.

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.

x. *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.

y. *Unto them that hath. . .*

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

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.

z. *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.

aa. 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

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

This study demonstrates that education tax credits introduced in American state of Georgia lead 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.

www.businessweek.com/bwdaily/dnflash/oct2000/nf20001027_396

c. The Impact of Federal Tax Credits for Higher Education Expenses.

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

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

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

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

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

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

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/en/issues/trade/gats-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 Pearson 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

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?

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

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.

Public Opinion Polling Data on Post-Secondary Education Issues

Compiled by the Canadian Federation of Students



Polling conducted by Vector Research + Development Inc. for the Canadian Opinion Coalition. Selected results are taken from polls conducted between May 2004 and January 2006. Some totals may not add up to 100 due to rounding or "don't know"/"depends" responses. This presentation of data was conducted by the Canadian Federation of Students. For information about different data stratification and margin of error, please contact the Canadian Federation of Students' national office at (613) 232-7394.

Canada's Top Priorities

The following were labelled a "top priority" for government:



Fixing shortage of health professionals



Making college, university tuition fees affordable



Making child care affordable



Implementing the Kyoto Accord



Raising student achievement scores

Getting into University

What worries Canadians more?

Grades not good enough

Taking on too much debt

13%

65%

Total Population

26%

61%

Students

17%

57%

\$70,000+ annual household income

14%

72%

18–29 year-olds

10%

68%

<\$40,000 annual household income

Canadians Are More Worried Than Five Years Ago

☐ "Are you worried that you or someone in your family will have to take on too much debt to afford university?"



Total Population



<\$40,000 annual household income



Visible minorities



18-29 year-olds



\$70,000+ annual household income

Priced out of University

"Have you or someone in your family decided not to attend a professional program at university because of cost?"



Total Population



Women



Men



18-24 year-olds



\$70,000+ annual household income

Ontario's Tuition Fee Freeze

"Do you favour or oppose extending the tuition fee freeze
for another two years?"

(Ontario only)

In favour

82%

Total Population

85%

Progressive Conservative voters

82%

NDP voters

81%

Liberal voters

86%

\$70,000+ annual household income

Perception of the Government's Effort

"How well do you think the federal government is doing on the issue of making colleges and universities more affordable?"

"Very well" / "Well"

19%



West

20%



Ontario

40%



Québec

26%



Atlantic

25%



Canada

51%



66%



66%



75%



69%



"Not so well" / "Poorly"

National Standards and Federal Funding

"Should the government set standards provinces must meet to receive funds for colleges and universities?"

