



# **Adult Upgrading Grant\***

## **Policy and Procedures Manual**

**2015-2016/2016-2017**

\*Formerly called the Adult Basic Education Student Assistance Program (ABESAP)

## INTRODUCTION

The Adult Upgrading Grant (AUG), formerly known as Adult Basic Education Student Assistance Program, provides financial support to learners enrolled in Developmental Programs. This grant is intended to support learners most in need with financial assistance for tuition, fees, books, unsubsidized childcare and transportation.

Each year, 18 public post-secondary institutions delivering Developmental Programs receive a funding allocation from the Ministry of Advanced Education (The Ministry) to support the AUG. These institutions then allocate funding directly to learners in accordance with defined policies and procedures.

This manual has been revised to reflect some recent policy changes and most up-to-date information. The changes relate to the expansion of eligibility, suspension of bulk book purchase, and updates to the section: Academic Progression and Re-application.

The Policy and Procedures Manual may be updated or amended by the Province, in its sole discretion when necessary to provide the most up-to-date information.

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**Overview of Roles:**

The Ministry of Advanced Education is responsible for the following:

- Allocate funding to institutions in a timely manner
- Ensure both Financial Aid Offices (FAO) and Developmental Program Administrators are made aware of allocations
- Review reports submitted by institutions
- Engage in dialogue with institutions regarding program and course eligibility
- Maintain all documentation related to the program (application form, policy manual, electronic reporting system) and ensure institutions are made aware of any changes to all AUG related documents

Post-secondary institutions are responsible for the following:

- Provide students who are enrolled in, or planning to enrol in, developmental programs information related to the AUG and the process required to submit an application
- Process AUG applications through the institution's Student Financial Aid Office
- Engage in a cross-institution decision-making process to ensure allocation of funding to students aligns with policy and institutional/provincial priorities
- Meet the Ministry's reporting requirements and allocate funding in accordance with policies and procedures described in this manual

Students are responsible for the following:

- Sign and submit an application for funding to their respective institution's Financial Aid Office
- Provide documentation requested by Financial Aid Office (i.e. Proof of Immigration status)

**SECTION 1      Immigration Status**

**POLICY**

In alignment with the Canada Student Financial Assistance Act, to be eligible for funding, an applicant must be a Canadian citizen within the meaning of the Citizenship Act or a permanent resident, or a protected person within the meaning of the Immigration and Refugee Protection Act.

**PURPOSE**

To ensure that students applying for the AUG meet provincial requirements.

**PROCEDURE**

Classification of students who are eligible for the AUG:

- 1) Canadian citizens – these students will have a SIN starting with 1, 2, 3, 4, 5, 6 or 7.
- 2) Permanent residents – these students will also have a SIN starting with 1, 2, 3, 4, 5, 6, or 7, but are also required to provide their Permanent Resident Card or Record of Landing (IMM 1000) or Confirmation of Permanent Residence (IMM 5292 or IMM 5509).
- 3) Protected Person Status – these students may receive funding while they have a SIN starting with a 9. They must provide a copy of their SIN card showing an expiry date after their study end date, as well as a “Protected Person Status Document” or a “Decision Letter” issued by the Immigration Refugee Board (IRB).

**NOTE:** Landed Immigrants with Investor Class Status NV5 are not eligible for the AUG.

The IMM 5521 is a Protected Person Status application, and must be specially requested from Immigration, Refugees and Citizenship Canada. The following URL is the link to Immigration, Refugees and Citizenship Canada: <http://www.cic.gc.ca>. Successful applicants will be issued the “Protected Person Status Document”.

**POLICY**

Students applying for the AUG must be residents of British Columbia.

**PURPOSE**

To limit funding assistance to B.C. residents.

**PROCEDURE**

Students are considered residents of British Columbia for the AUG if they fall into one of the three categories:

- a. have lived in B.C. since birth; or
- b. B.C. is the province where the student last lived for 12 continuous months, as of the study start date, not including months of full-time post-secondary study; or
- c. arrived in Canada as a permanent resident or landed immigrant, or protected person, and will attend school in B.C., and have not lived in any other province for 12 continuous months.

**Note:** Revised for clarification. Section 2C- a permanent resident, landed immigrant, and protected person who plans to attend school in B.C., and has not lived in any other province for 12 continuous months is exempt from residency requirement regardless of the initial port of entry into Canada..

**POLICY**

Eligible students must demonstrate financial need.

**PURPOSE**

This program was established to assist low income students enrolled in developmental programs (see section 11 for description of “developmental programs”).

**PROCEDURE**

Students must demonstrate financial need by completing an AUG application form. The application form must be completed in full, signed and dated. Each section of the form must be completed in full or marked as “N/A” if not applicable. The application form will be assessed by the institution’s FAO to determine the amount of the AUG awarded or declined.

Use the following chart to determine if a student is deemed a ‘dependent’ or ‘independent’ applicant.

**CHART A:**

Description	Independent vs. Dependent	Demonstration of financial need	Considerations
Applicant is 22 and over	Independent	An applicant’s income is based on line 150 of their tax return. Previous year’s AUG that contributed to the student’s income is to be deducted. If an applicant has not filed a tax return, financial need will be based on all sources of income from that previous year (apart from any AUG contributions).	Exceptions to chart B may be considered (at the discretion of the FAO) where the student and/or family income/assets were affected within the last 12 months by:  1. Layoff or loss of employment. 2. Unexpected reduction in income in the last 12 months (retirement does not qualify as an unforeseen circumstance). 3. Strike or lockout. 4. Medical illness/injury impacting employment income.
Applicant is (irrespective of age): 1. A single parent 2. Married or in a common-law relationship 3. A person with a PWD designation confirmed by the Ministry of Social Development and Social Innovation.	Independent	An applicant’s income is based on line 150 of their tax return. Previous year’s AUG that contributed to the student’s income is to be deducted. If an applicant has not filed a tax return, financial need will be based on all sources of income from that previous year (apart from any AUG contributions).  If married or in a common-law relationship, the spousal income is considered.	A detailed rationale from both the student and/or parents (where applicable) must be submitted, stating the reason(s) why the originally assessed income or parental contribution should be reduced.
Applicant is under the age of 22 and does not reside with parent (s)	Independent	An applicant’s income is based on line 150 of their tax return. Previous year’s AUG that contributed to the student’s income is to be deducted. If an applicant has not filed a tax return, financial need will be based on all sources of income from that previous year (apart from any AUG contributions).	

Applicant is under the age of 22 and resides with parent (s)	Dependent	Eligibility is based on combined parental income on line 150 of the tax return or all parental income from the previous year. Applicant is also required to provide income information (apart from any AUG contributions). In the event that the applicant's income is greater than the combined parental income, the student's income is used and the applicant is considered a family of 1.	Documentation to support these claims may be requested by the FAO
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“Family Size”: For ‘**independent**’ applicants, family size is defined as the number of persons (including the student, spouse and dependents under the age of 19, or dependents over the age of 19 with special needs) within the student’s immediate family but excluding parents, siblings, and other relatives. For students deemed ‘**dependent**’ where the combined parental income is higher than the applicant’s income, income assessment is based on the parental income and the family size is based on the student’s immediate family INCLUDING parents and all dependents of the parent (i.e. other children under age of 19). For students deemed ‘**dependent**’, whose income is higher than the combined parental income, the student’s income is used for assessment and s/he is considered a family of 1.

“Gross Family Income” is defined as the amount of yearly income (line 150 of income tax return), and the full net value of assets, income from investments (including investments and property owned inside and outside of Canada), and monetary gifts.

Chart B below indicates the gross family income level students must be under to be eligible for the AUG. If the student’s gross family income exceeds the amount shown on Chart B, the student does not qualify for the AUG.

**CHART B: Maximum Gross Family Income limits for AUG eligibility**

Family Size	Income level	Income level at 10% above threshold
1	\$ 24,144	\$26,558
2	\$ 30,059	\$33,065
3	\$ 36,955	\$40,651
4	\$ 44,866	\$49,353
5	\$ 50,887	\$55,976
6	\$ 57,392	\$63,131
7 or more	\$ 63,898	\$70,288

**Note:**

- The updated threshold table is in effect for programs starting in fall 2016.
- New Policy as of 2016- Any AUG contributions from the previous year that influenced a student’s income (line 150) shall be deducted for the purposes of determining current year AUG eligibility. FAOs’ confirmation of previous year’s AUG award is required to deduct the proper amount.
- New Policy as of 2015- An exception will be made for students whose gross family income exceeds the income threshold by up to 10%, as shown in Chart B. Students in this particular income category will only be eligible to receive up to 50% of the tuition cost (other costs are not eligible).



**SECTION 4      Income Assistance Recipients****POLICY**

It is the responsibility of the learners to ensure that receiving the AUG does not impact their income assistance eligibility.

**PURPOSE**

Learners must assume responsibility for ensuring that they adhere to policies established by agencies that are funding their living expenses.

**PROCEDURE**

Students are required to discuss this with their employment assistance worker as well as access the most up to date policies through the following URL:

[http://www.gov.bc.ca/meia/online\\_resource/verification\\_and\\_eligibility/students/](http://www.gov.bc.ca/meia/online_resource/verification_and_eligibility/students/)

In the event that an income assistance recipient applies for the AUG, any income assistance received by the learner should be counted toward his / her 'gross income'.

**SECTION 5      Students receiving full-time Canada - BC integrated student loans****POLICY**

Learners who access a full-time Canada-BC Integrated student loan should access the AUG only if they exceed 100% course load.

**PURPOSE**

The Ministry avoids disproportionately supporting learners enrolled in both developmental and post-secondary level programming.

**PROCEDURE**

Learners approved for full-time Canada-BC integrated student loans who are taking a 100% course load and wish to take further developmental courses, are eligible for the AUG for additional developmental courses (provided they meet other criteria).

Learners approved for full-time Canada-BC Integrated student loans who are enrolled in less than a 100% post-secondary course load and wish to enrol in developmental courses are not eligible for the AUG.

For example, a learner receiving a full-time Canada-BC integrated student loan who is enrolled in an 80% course load (4 courses), would not be eligible for the AUG to support an additional developmental course. It is assumed that since the learner is receiving a full-time student loan, that the difference between his / her actual tuition/books should be sufficient to cover the additional course. If this same learner was to enrol in 2 additional developmental courses (in excess of the existing 4 post-secondary courses), he / she would be eligible for the AUG for 1 of these courses as he / she would now be enrolled in what is calculated to be in excess of a 100% course load.

**POLICY**

Students who have previously received the AUG and are applying for continued AUG funding must have demonstrated successful completion and/or satisfactory progress in their previous course(s). Adult Basic Education (ABE) and English as a Second Language (ESL) students who complete, but fail, a course, may only receive one additional period of the AUG funding to support enrolment in the same course, but are only eligible for a maximum of 50% of the tuition cost (other costs are not eligible).

Adult Special Education (ASE) students may receive approval for funding to repeat a course if they have obtained an unsuccessful grade but made progress, at the discretion of the financial aid office (FAO).

**PURPOSE**

The AUG funding is limited to students who are pursuing their studies and progressing satisfactorily in their education in order to move into the workforce or pursue post-secondary training.

**PROCEDURE**

ABE and ESL students may access one additional period of the AUG funding to re-enroll in a course for which they have received the AUG in the past only if those students have completed, but failed, the course. For example, a student cannot access funding twice to enroll in English 050 if s/he did not previously successfully complete the course.

Students who stop attending course(s) without formally withdrawing, withdraw twice from course(s), and/or fail twice to demonstrate satisfactory progress in their education while funded by the AUG will no longer qualify for future AUG from the Ministry for enrolment in any courses. Please refer to Section 7 for reinstatement policy and procedures.

The FAO must confirm that previous course(s) were successfully completed before approving additional grants. However, it is understood that course registration generally occurs before previous course(s) are completed. Therefore, FAOs have the discretion to approve or conditionally approve funding for the next semester.

In cases where an Adult Special Education student obtained an unsuccessful grade or received an interim grade (i.e. student has not successfully mastered the course content but is making progress) and the instructor indicates that the student regularly attended classes, made progress on their previous attempt and requires more time to complete/pass the course, the student can be approved for further funding. Approval for further funding is at the discretion of the FAO. The FAO may request the student provide documentation from the instructor regarding attendance and progress.

**EXCEPTION: Extenuating Circumstances**

In cases where ABE, ESL and ASE students did not successfully complete previously funded course(s) and where extenuating circumstances occurred, approval for continued grant support is at the discretion of the FAO. An explanation and supporting documents must be kept with the application.

**Note:** The intention of the AUG is to provide funding to ensure students are progressing satisfactorily in their education in order to move into the workforce or pursue post-secondary training. The FAO must use discretion when considering repeat funding to students. The instructor's letter of support to the student is not, and should not be considered as the final decision. The FAO should obtain further clarification of the rationale of the instructor's recommendation. The FAO has the right to deny students the AUG despite the instructor's recommendation. Please refer to Section 8 regarding "Lifetime Maximum".

<b>SECTION 7</b>	<b>Reinstatement</b>
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**POLICY**

Students who are funded by the AUG and do not show academic progress after completing course(s) twice or are denied based on Section 6 may be reinstated for AUG funding if they successfully complete one semester (any number of courses), funded through their own resources.

**PURPOSE**

The AUG is limited to students who are earnestly pursuing their studies and progressing satisfactorily.

**PROCEDURE**

Students applying for reinstatement of the AUG must demonstrate successful completion of one semester of studies (any number of courses), funded through their own resources.

<b>SECTION 8</b>	<b>Lifetime Maximum</b>
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**POLICY**

The lifetime maximum for the AUG funding is 156 funded weeks. At the discretion of the FAO, this maximum may be extended.

**PURPOSE**

The AUG is limited to students who are upgrading or progressing satisfactorily in their education with the goal of entering into the workforce or pursuing post-secondary training.

**PROCEDURE**

A “funded” week is every full or partial week that the student has been funded by the AUG, regardless of the number of AUG eligible courses (e.g., a student funded for five 16-week courses in a semester is receiving 16 weeks of funding).

The academic records of students receiving the AUG are subject to review by the institution or the Ministry after 156 weeks of funding.

“Funded” weeks apply to periods in which students: withdraw and the funds provided during these weeks are not credited back; fail to meet expectations of the course/program (see Section 6); or do not attend courses.

If the student returns the AUG funds after withdrawing, these weeks are deducted from the “funded” weeks used.

Cases of lifetime maximum extension beyond 156 funded weeks must be reported to the Ministry by April 30<sup>th</sup> of each year outlining the circumstance or reason for the extension.

**SECTION 9 Eligible Institutions**

**POLICY**

The AUG is available to students attending BC public post-secondary institutions that have been approved to administer the AUG.

**PURPOSE**

Access to the AUG is limited to institutions that meet the requirements for administering the AUG.

**PROCEDURE**

The following institutions participate in the AUG:

British Columbia Institute of Technology	Nicola Valley Institute of Technology
Camosun College	North Island College
Capilano University	Northern Lights College
College of New Caledonia	Northwest Community College
College of the Rockies	Okanagan College
Douglas College	Selkirk College
Kwantlen Polytechnic University	Thompson Rivers University
Langara College	University of the Fraser Valley
Native Education College	Vancouver Community College
	Vancouver Island University

**POLICY**

The AUG is available to students attending developmental programs delivered through partnership agreements.

**PURPOSE**

To ensure that access to the AUG is available to students attending community-based programs.

**PROCEDURE**

Students who attend a developmental course or program (see Section 11 for description of program/course eligibility), delivered through a partnership agreement between a public post-secondary institution outlined in Section 9 and a private institution, community organization, or not-for-profit organization are eligible for the AUG if they meet the following criteria:

1. Are registered at the public post-secondary institution and issued a student ID number by that institution (see Section 9 for eligible institutions);
2. Receive developmental course/program credit at the public post-secondary institution for their participation in the course/program delivered through the affiliation agreement; and,
3. Meet all other student eligibility criteria outlined in Sections 1-8

**POLICY**

Developmental education courses/programs are eligible. These include Adult Basic Education, English as a Second Language, and Adult Special Education.

**PURPOSE**

Funding for direct educational costs is available to students with financial need.

**PROCEDURE**

FAO must ensure that AUG eligible course(s)/program(s) are non-credit courses in one of the following course/program types (please note: these descriptions are for the purposes of the AUG policy and are not intended to serve as program definitions):

1. Adult Basic Education: courses that provide courses and skills training ranging from basic, functional literacy through to provincial level and adult secondary school completion; or
2. English as a Second Language: courses that offer English language instruction at basic, intermediate or advanced levels to people whose first language is not English; or
3. Adult Special Education: courses at the adult basic education level available to individuals with permanent disabilities or combinations of learning difficulties; or

**Note:** New as of 2016 - Courses previously categorized under 'developmental other' are reclassified as Adult Basic Education and eligible for funding under the AUG.

Federal Language Instruction for Newcomers to Canada (LINC) programs, continuing education, personal interest/hobby, or 'discovery programs' are not eligible for funding under the AUG.

Institutions are required to seek approval from the Ministry, prior to commencing funding, for the inclusion of any course or program as AUG eligible. To do this, institutions are required to contact the Ministry via email (see contact information in introduction) to:

- demonstrate the rationale for the inclusion of the course/program,
- provide evidence of support from the Dean or Director of Developmental Education (or similar program coordinator) or Registrar; and,
- recognize that additional funding will not be provided for inclusion of the course/program

**SECTION 12 Allowable costs for the student**

**POLICY**

Direct educational and targeted barrier-reducing costs for students demonstrating financial need and enrolled in eligible AUG course(s) may be considered for funding.

**PURPOSE**

To provide financial assistance for direct educational and targeted barrier-reducing costs to eligible students enrolled in the AUG approved programs.

**PROCEDURE**

Allowable costs include:

- Tuition Fees
- Fees - including compulsory and other non-discretionary fees (including UPass)
- Books –textbooks and course packs
- Supplies – standard course supplies including special clothing (hard hat, steel-toed boots, lab coat), calculators, criminal record check for work placement, etc. at FAO discretion
- Transportation
- Unsubsidized childcare (the portion of licensed childcare cost not covered by a childcare subsidy from other agencies or governments)

**Note:** New Policy as of 2015

- Additional tuition support is available to students who wish to register in a course they previously completed but failed. As well, additional tuition support is available to students whose gross family income exceeds the income threshold by up to 10%, as shown in Chart B of Section 3. Up to 50% of the tuition cost will be provided under both of these new policies (other costs are not eligible).
- Bulk book purchases are suspended. The previous section, “Allowable costs for institutions-bulk book purchase” has been deleted.

**SECTION 13 Allowable costs for institutions (administration fee)**

**POLICY**

An allowance of 8% of **the allocated** AUG funds may be used to cover administrative costs associated with the AUG.

**PURPOSE**

To provide funds to assist with the administrative costs of the AUG.

**PROCEDURE**

The institution is responsible for calculating the administrative allowance on the AUG funds allocated during the program year (8% of funds expended for the current year).

Institutions are required to provide the exact administration fee expenditure at the end of each program year.

**POLICY**

Institutions will be contacted to provide budget forecasts at the start of each fiscal year. The allocated budget is intended to be fully expended in the fiscal year (April 1<sup>st</sup> – March 31<sup>st</sup>) it is received by the institution. The funding will be allocated across 3 payments.

**PURPOSE**

To allow institutions to adequately establish priorities for allocation of their AUG budget to students, and to provide opportunity for the Ministry to align funding with student demand.

**PROCEDURE**

The Ministry will contact institutions to request budget forecasts at the start of each fiscal year. The Ministry will collaborate with institutions to determine their funding level. A funding letter will be addressed to an executive member of the institution with a copy sent to the Financial Aid Office and the Dean or Director of Developmental Education.

Funding will be dispersed at intervals across the fiscal year and not in one lump sum payment. The Ministry may reallocate funding mid-year based on program demand. Prior to each funding allocation, institutions will be asked to provide a program demand/financial forecast that will influence reallocation of funding for the remainder of the fiscal year.

The policy manual will be updated to reflect any revisions to funding levels and procedures.



**SECTION 15      Program Year**

**POLICY**

The AUG program year will run from April 1 to March 31.

**PURPOSE**

To align with the government and the post-secondary system fiscal year cycle.

**PROCEDURE**

Funding will be allocated at intervals across the fiscal and it is intended to be fully expended by March 31<sup>st</sup>.

All reporting requirements for the program will follow the same fiscal cycle (see Section 16: Reporting)

**SECTION 16      Reporting Requirements – Reporting Expenditures**

**POLICY**

Institutions are required to report AUG activity via the AUG Electronic Reporting System. This requirement is outlined in the Institutional Reporting Requirements list.

**PURPOSE**

Detailed information regarding institutional allocations and expenditures will assist government in demonstrating the positive impact of the program across participating institutions, as well as ensure that institutions are reporting consistently and allocating funding in accordance with the *Policy and Procedures Manual*.

**PROCEDURE**

The AUG reporting is on the list of Institutional Reporting Requirements. The Ministry requires the institution to indicate all AUG expenditures by learner, program type, and expenditure type on an ongoing basis using the AUG Electronic Database.

Access to the site will require a BCeID. The URL will be sent directly to the FAO and instructions for reporting can be found on the site.

The Ministry recognizes that a number of institutions have existing electronic record keeping practices. This electronic reporting system is not intended to 'replace' your existing system or result in dual data entry. The Ministry recognizes that there will be institutions that will engage in a continuous entry process and others that will engage in a upload process at set intervals. In either event, the process is standardized and reporting is reviewed quarterly.

Institutions uploading information from an existing reporting system will be required to update the electronic reporting system quarterly. Reporting will be done on or by the following dates:

**July 15<sup>th</sup>, October 15<sup>th</sup>, January 15<sup>th</sup>, April 15<sup>th</sup> (including activity up to March 31<sup>st</sup>)**

Institutions that use the system for direct entry of information will not be required to upload their data as it is inputted on an ongoing basis. They are required to ensure it is up-to-date by the dates listed above.

Please see Sections 17-20 for further reporting requirements (book purchase, administration fee, courses and programs, and T4A).

The fields for reporting include:

- |                                |   |
|--------------------------------|---|
| 1. Student ID number           | 9. Tuition compensation                 |
| 2. Immigration status          | 10. Tuition compensation at 50%         |
| 3. Aboriginal status           | 11. Fees compensation (including UPass) |
| 4. Course Title                | 12. Books compensation                  |
| 5. Course Type (ABE, ESL, ASE) | 13. Transportation compensation         |
| 6. Course Code                 | 14. Childcare compensation              |
| 7. Start Date                  | 15. Other compensation                  |
| 8. End Date                    | 16. Date of award                       |

**NOTE:** The Ministry has the authority to perform random audits at any time.

<b>SECTION 17      Reporting Requirements – Reporting Eligible Programs/Courses</b>
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**POLICY**

Institutions will report all courses and programs that are deemed 'AUG eligible'.

**PURPOSE**

To ensure funding is being targeted to support learners in 'developmental programs'.

**PROCEDURE**

The institution will be responsible for reviewing and updating their course/program list by October 15 of the program year.

This will be done via the electronic reporting system (see section 16).

Please see section 11 for eligible program/course types and the process for seeking approval of adding a course to your list of eligible courses/programs.

**SECTION 18 Reporting Requirements – T4A****POLICY**

The institution is responsible for issuing T4As to students in receipt of the AUG for combined yearly award amounts totaling more than \$499 (calendar year).

**PURPOSE**

To ensure adherence to federal and provincial income tax regulations.

**PROCEDURE**

Institutions will provide written confirmation that they have issued T4As to students accordingly. Details of actual T4As should be omitted.

The letter confirming the issuance of T4As will be required by April 30<sup>th</sup> of each program year and must be uploaded to the electronic reporting system.

The letter should be addressed to the Ministry and signed by a spending authority at the institution.

**SECTION 19 Reporting Requirements –Administration Fee****POLICY**

Institutions will report the total amount of administration fee at the end of each program year.

**PURPOSE**

To ensure institutions adhere to the 8% administration fee policy.

**PROCEDURE**

Institutions are required to provide the exact administration fee expenditure at the end of each program year via the year-end expenditure report.

**POLICY**

Institutions that provide more than 156 funded weeks of the AUG to a student are required to outline the reasons for this extension.

**PURPOSE**

Maintain equitable access to funding for learners.

**PROCEDURE**

Institutions are required, by April 30<sup>th</sup> of each program year, to provide the reasons that warranted an extension to the 156 week lifetime maximum policy. This can be done via the electronic reporting system.

FAOs are to contact the Ministry to discuss individual situations prior to denying any student access to the AUG funding based on the lifetime maximum of 156 funded weeks.