



K'ómoks **First Nation**

## **Continued Education and Student Financial Aid Bursary Policy**

This policy sets out guidelines for the application, selection, and funding disbursement process for the K'ómoks First Nation (KFN) Continued Education and Student Financial Aid Bursaries.

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# **K'ómoks First Nation Policy Continued Education and Student Financial Aid Bursaries**

## **1.0 Purpose**

This policy sets out guidelines for the application, selection, and funding disbursement process for the K'ómoks First Nation (KFN) Continued Education and Student Financial Aid Bursaries.

## **1.1 Term**

The term of the bursary initiative is from August 2024 to August 2030 (five consecutive years).

## **1.2 Five-Year Pilot Study**

The bursaries are a new support for the education and capacity building of K'ómoks Members. This policy builds in an initial five-year annual review process so data from the bursary applications may be assessed to inform the creation of a bursary program/initiative for consideration in 2031.

## **2.0 Scope**

This policy applies to K'ómoks Members, KFN's Education and Finance Departments, Trustees of the Education Capacity Trust, and the Education and Capacity Development Committee.

## **3.0 Definitions**

**"Academic Year"** - means the school year (September to September).

**"Continuing Education and Training"** – Continuing education and training, also known as continuing studies, are courses and programs that help people enhance their skills and knowledge to achieve personal or professional goals. Continuing education can help people stay current in their industry and maintain their professional competence.

**"Continuing Student"**- means a student who was funded or enrolled in post-secondary education in the previous year and is returning to their studies. A student may be granted academic leave for one year max from studies with prior approval and still be considered a continuing student.

**"Council"** – means the elected Chief and Council of the KFN.

**"Director of Finance"** – means the Director of Finance employed by the KFN.

**"Education and Capacity Development Coordinator"** – means the Education and Capacity Development Coordinator employed by the KFN

**"IBA"** – means the Impact Benefit Agreement made between KFN and B.C. Hydro.

**“IBA Monies”**- means the payment made pursuant to the IBA, to be paid into a trust to be established by KFN for the purposes of training, education, and capacity building for KFN and its Members.

**“K’ómoks Member”** - means a member of KFN as defined in the K’ómoks Constitution or equivalent enactment. In the event the K’ómoks Constitution or equivalent enactment is not in effect, then "K’ómoks Member" means a member of the K’ómoks First Nation as defined and provided for in the *Indian Act* (Canada) R.S.C. 1985, c.1-5.

**“K’ómoks First Nation Training Education and Capacity Building Trust” (“trust”)** - means the trust created to hold the IBA Monies and such other assets, property, rights, and benefits as may be hereafter transferred to or acquired for the use and benefit of KFN, including all K’ómoks Members.\

**“K’ómoks First Nation Finance Department”** – means the department that oversees all financial transactions for KFN.

**“Status Card”** – means the identification document issued by the Canadian government to individuals recognized as registered members of a First Nation under the Indian Act.

**“Student Financial Aid”** – means financial assistance provided to students to help cover a wide range of costs for students facing unexpected financial hardships. This aid includes emergency funds that can address a broad range of expenses beyond tuition and fees. These expenses may include housing, food, transportation, healthcare, technology, childcare, textbooks, and other essential costs that could otherwise hinder a student’s ability to continue their education during challenging times. This comprehensive approach ensures that students can focus on their studies without being derailed by unforeseen financial needs.

**“Trustees”** means collectively those persons appointed to act as a Trustee pursuant to the IBA, and from time to time thereafter appointed or substituted therefor; and "Trustee" means any one of the Trustees.

## **4.0 Roles and Responsibilities**

### **4.1 Elected Chief and Council**

- a. Council is responsible for approving this policy including any future amendments and for ensuring it is effectively implemented for the benefit of all K’ómoks Members.
- b. Council plays a role in a dispute/complaint resolution process as outlined in Section 10 of this policy.

### **4.2 Education and Capacity Development Coordinator**

The Education and Capacity Development Coordinator has the following roles and responsibilities:

- a. Implementation of this policy.
- b. Educating K’ómoks Members about the pilot bursary program, including the provision of informational materials on the website and related social and print media.
- c. Facilitating meetings of the Trustees as required for approval and implementation of the bursary program and this policy.

- a. Providing an annual budget and distribution request to the Trustees as per the KFN Training, Education, and Capacity Building Trust.
- b. Facilitating screening of bursary applications, including meetings regarding approval on bursary awards, and payment to the successful applicants.
- c. Responding to complaints by applicants and if unresolved, setting up a dispute resolution meeting as outlined in Section 10 of this policy.
- d. Reviewing bursary applications annually for data on trends, issues, and student needs for a five-year period and to compile the data into a report as a tool to inform future bursary policy development.

#### **4.3 Role of Trustees**

Trustees are responsible for:

- a. Approving the annual academic year budget for the Student Financial Aid and Continued Education Bursaries by endorsing the amounts to be transferred from the Trust to KFN's general bank account.
- b. Meeting with the Education and Capacity Development Coordinator on policy and procedures as may be required and to ensure the Education and Capacity Development Coordinator is aware of the Trust guidelines for any future program development.
- c. Providing recommendations to the Education and Capacity Development Coordinator on the implementation of this policy.

#### **4.4 Role of the Education and Capacity Development Committee**

The Education and Capacity Development Committee has the following responsibilities:

- a. Committee members select successful applications using selection criteria described in this policy if there are more applicants than bursaries available.
- b. Committee members assist the Education and Capacity Development Coordinator by providing guidance on the implementation of the policy including the finalization of it after a 5-year review.
- c. Establish and review selection criteria.

## 5.0 Available Funding for the Continued Education & Financial Aid Bursary Awards

### 5.1 Funds Available under the *Continued Education Bursary*:

	December 1	April 1	August 1	Total For Year
Sept 2024- '25	\$4,000	4,000	\$4,000	\$12,000
Sept 2025- '26	\$4,000	\$4,000	\$4,000	\$12,000
Sept 2026- '27	\$4,000	\$4,000	\$4,000	\$12,000
Sept 2027- '28	\$4,000	\$4,000	\$4,000	\$12,000
Sept 2028- '29	\$4,000	\$4,000	\$4,000	\$12,000
				<b>TOTAL</b>
				5 YEAR PILOT PERIOD:
				<b>\$60,000</b>

### 5.2 Application Period for Continued Education Bursary

The application period is for two weeks prior to the start of each intake date: December 1, April 1, and August 1.

### 5.3 Eligible Award Amounts Per K'ómoks Member Applicant

- a. Applicants may apply for a MAXIMUM of \$1,000.00 per application.
- b. Applicants are limited to receiving Continued Education Bursary funds **once** per academic year and to a maximize of four (4) times per program.
- c. Applicants can apply to both the Continued Education and Student Financial Aid Bursaries in the same academic year and may be awarded both pending budget and meeting selection criteria.

#### 5.4 Available funds under the *Student Financial Aid Bursary*

	December 1	April 1	August 1	Total For Year
Sept 2024- '25	\$1,000	\$1,000	\$1,000	\$3,000
Sept 2025- '26	\$1,000	\$1,000	\$1,000	\$3,000
Sept 2026 - '27	\$1,000	\$1,000	\$1,000	\$3,000
Sept 2027- '28	\$1,000	\$1,000	\$1,000	\$3,000
Sept 2028 - '29	\$1,000	\$1,000	\$1,000	\$3,000
				<b>TOTAL</b> 5 YEAR PILOT PERIOD: <b>\$15,000</b>

#### 5.5 Application Period – Student Financial Aid

The Student Financial Aid Bursary differs from the Continued Education Bursary; – it is available to K'ómoks Members year-round as funding permits.

#### 5.6 Eligible Award Amounts Per K'ómoks Member Applicant

- a. Applicants may apply for a MAXIMUM of \$250.00 per application.
- b. Applicants are limited to receiving Student Financial Aid Bursary funds **once** per academic year and up to four (4) times per program
- c. Applicants can apply to both the Continued Education and Student Financial Aid Bursaries in the same academic year and may be awarded both pending budget and meeting selection criteria.

#### 5.7 Unused Funds

Under both the Continued Education and Student Financial Aid Bursaries, any funds unused in each period will roll over into the next period

## **6.0 Application Process**

**6.1** Eligible applicants are those who meet **ALL** the following criteria:

- a. Are K'ómoks Members.
- b. Are enrolled at an accredited institution or association or can provide proof of intent (followed by proof of registration).
- c. Have not exceeded the maximum number of bursary allowances per academic year (once per academic year for Continued Education and once per academic year for the Student Financial Aid).
- d. Have not exceeded the maximum bursary allowances of 4 Continued Education and 4 Student Financial Aid Bursaries per program. .

## **6.2 General Application Submission**

Applicants must use the prescribed Bursary Application Forms (see Appendix 1).

Applications must be complete and signed upon submission. In addition, for both the Continued Education and Student Financial Aid Bursaries, the following must be included:

- a. Proof of being a K'ómoks Member (photocopy of a valid Status Card – front and back).
- b. Acceptance letter at a recognized accredited institution or association, or proof of intent.
- c. Letter from employer (if applicable to verify apprenticeship).
- d. For trades, confirmation from an institution that the student must attend training outside their normal residence during their apprenticeship training.

## **6.3 Eligible Fields of Study**

All fields of study are eligible to be considered under both the Continued Education and Student Financial Aid Bursaries. What is required is proof of enrollment or proof of intent, followed by proof of registration to meet eligibility requirements.

## **6.4 Eligible Costs for Student Financial Aid Bursaries**

Eligible costs under the bursary include, but are not limited to:

- a. Fees related to death or injury of an applicant or their relations
- b. Essential travel costs
- c. Public transportation costs
- d. Housing security
- e. Food security
- f. Childcare
- g. Incurred costs of dependents
- h. Physio and/or related therapy costs (if not otherwise covered by Non-Insured Health Benefits)
- i. Doctors' notes
- j. Utilities and other bills
- k. Medical costs (if not otherwise covered by Non-Insured Health Benefits)
- l. Dental costs (if not otherwise covered by Non-Insured Health Benefits)
- m. Optical costs (if not otherwise covered by Non-Insured Health Benefits)
- n. Supplement or special dietary costs related to medical conditions

- o. One time repair costs
- p. Unexpected veterinary costs for a therapy or assistance pet

## **6.5 Eligible Costs for Continued Education Bursaries**

Eligible costs for the Continued Education bursaries include, but are not limited to:

- a. Mandatory or demonstrated valuable professional conferences and symposiums
- b. Workshops
- c. Travel fees related to professional development or educational opportunities
- d. Professional Fees
- e. Professional Development
- f. Mandatory school fees not otherwise covered by other funding sources
- g. Micro credentials (short-duration, competency-based learning opportunities, that align with labour market or community needs and can be assessed/recognized for employment or further learning opportunities)
- h. Certifications
- i. Certification renewal
- j. Apprenticeship dues or related program fees
- k. Webinars
- l. Online courses
- m. Independent study or research fees
- n. Equipment or tools to conduct/further professional work
- o. Volunteer opportunities and related fees
- p. Professional license renewal
- q. Learning a second language; fees/associated expense
- r. Mental health and learning assessments

## **7.0 Selection Process**

The Education and Capacity Development Coordinator receives all bursary applications and screens applicants for eligibility as outlined in section 6.1 and 6.2 within this policy. If there are more eligible applicants than bursaries available, the Education and Capacity Development Committee will determine successful applicants based on the following criteria:

- a. For the Student Financial Aid bursary, awards are based on 'date received'. Funds will be distributed by demand year-round until the budgeted amount for the year is spent.
- b. Demonstrated financial need through transparency of monthly expenses vs income.
- c. Dollar amount request.
- d. Total financial need.
- e. The ability of the applicant to communicate, verbally or in writing, the need for requested funds.

### **7.1 Selection Criteria**

When funding is limited, applicants for Continued Education and Student Aid bursaries must not only meet the minimum eligibility criteria, but they will also be ranked to determine who receives funding that year. In general, KFN gives priority to those who have not had a chance to be funded in the past. Priority will be given to applicants in the following order:



- a. Continuing students who remain in good standing with their institution.
- b. High school graduates continuing into a post-secondary program within two years of their graduation.
- c. New students not previously funded by the Continued Education or Student Aid bursaries.
- d. Returning students: those who withdrew from their program of study and who are returning to the same program of study.
- e. All other applicants.

## **8.0 Financial Administration and Payment of Bursary Awards**

For every academic year, the Education and Capacity Coordinator will prepare a Distribution Request for Continued Education and Student Financial Aid Bursary awards for consideration by the Trustees at a meeting convened for this purpose. The request will be:

- a. A budget to actual database from the previous year.
- b. The total amount requested for each bursary for the academic year.
- c. A description of the purpose for the requested funds and how it meets the objectives of the Trust.
- d. A budget, including details as to when funds will be required and whether funding will be required beyond the present academic year.
- e. Whether there are funds available in the Trust to cover the Distribution Request.

### **8.1 Trustee Outcomes**

Trustees may decline the Distribution Request; ask for further information, confirm that the Distribution Request is approved for funding and that there are sufficient funds available to make the requested distribution.

Decisions of the Trustees are by majority approval. Upon approval, the Trustees will provide a Record of Decision for use by KFN's Finance Department to transfer the trust monies approved to KFN's general bank account.

A Record of Decision is the written outcome of the Trustee's consideration, dated and signed by each Trustee who approved the Request for Distribution at the duly convened meeting.

### **9.0 Payment Distribution**

Student Financial Aid awards are available year-round as funding permits. The Continued Education Bursary is available three times per year: December 1, April 1, and August 1.

If there are more eligible applicants than bursary funds available, the Education and Capacity Development Committee will select successful applicants based on the criteria in section 7.0 and 7.1 of this policy. The selections will be recorded and signed off by the Education and Capacity Development Committee. The Education and Capacity Development Coordinator will provide this document to the Finance Department as authorization to pay the successful KFN applicants.

In the event there is no competition and therefore no selection process, the Education and Capacity Development Committee will sign off on a direct award to the applicant(s) effected for processing through the Finance Department.

### **9.1 Processing of Payment**

The Finance Department will work with the Education and Capacity Coordinator to process bursary funds for the successful applicants within fifteen (15) days. Payment will be made via cheque or direct deposit. Direct deposit may be an option to remove barriers to timely receipt of the award.

### **9.2 Deviations from the Application**

If an applicant does not commence with a certificate/diploma or trades program, or fails to complete a program due to lack of effort after receiving a bursary, the Education and Capacity Development Committee will look at this on a case-by-case basis to determine if funds must be repaid; if the debt is forgiven, and/or if the applicant is barred from future applications.

### **10.0 Dispute/Complaint Resolution**

- a. K'ómoks Members initiate a complaint resolution process by bringing their concerns and complaints regarding decisions and actions taken under the bursary initiative to the Education and Capacity Development Coordinator for review and resolution.
- b. If the K'ómoks Member is dissatisfied with the outcome of a meeting with the Education and Capacity Development Coordinator, they may put concerns in writing and request a meeting with Council.
- c. Written complaints are acknowledged in writing by an administrative staff/assistant within ten (10) business days.
- d. Following the acknowledgement letter, the complaint is addressed by Council within six (6) weeks after gathering information from relevant staff. If the process requires more time the complainant will be informed in writing.
- e. Decision(s) of Council on the outcomes of the action(s) taken under the bursary initiative are final.

### **11.0 Annual Review**

The bursary initiative is reviewed by the Education and Capacity Development Coordinator, with feedback from the Education and Capacity Development Committee, on an annual basis to gather data for future developments of the initiative.