

OP4700 AWARDING OF SCHOLARSHIPS AND BURSARIES

Records documenting the awarding of scholarships and bursaries to students at the University.

Includes the application, deliberations, and awarding of student scholarships and bursaries and the issuing of specific tax forms (T4A) for the awards.

Also includes administration of entrance and in-course awards.

Not used for government student loans. See OP4810.

Not used for the student Line of Credit program. See OP4820.

Not used for the development of terms of reference for scholarships and bursaries.

Example documents: Applications, sample budgets, committee notes and decisions, first year and upper year scholarships and bursaries, entrance awards, the Queen's General Bursary, correspondence etc.

Correspondence includes paper, email and other electronic communication.

OPR - University Registrar

(Unless otherwise assigned, see below)

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
-----	----------------	--------------	-------------	--------------	---------------

10	Senate Scholarships and Student Aid Committee - Chair	AY + 5	0	DP/AR	YES
----	--	--------	---	-------	-----

OPR - Chair of Committee and University Secretariat

Records documenting the establishment and awarding of undergraduate and graduate fellowships, scholarships, medals, prizes, bursaries, loans and other forms of student aid.

Disposition Plans: At the end of the academic year, the approved minutes, final agendas, and all other records are to be transferred by the Chair (as joint Officer of Primary Responsibility for the committee records) to the University Secretariat. The records are then held by the Secretariat for the rest of the active and semi-active periods; at the end of the retention period (five years) records are transferred by Secretariat staff to Archives

GLOSSARY

FY = Fiscal Year (May 1 to April 30)

AY = Academic Year (September 1 to August 31)

CY = Calendar Year (January 1 to December 31)

ET = Event Trigger

OPR = Office of Primary Responsibility

DP = Special Disposition Plan

AR = Transfer to Archives

D = Destroy / Delete

PIB = Personal Information Bank

OP4700 was approved on 08/01/2007.

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
11	Senate Scholarships and Student Aid Committees - Members' Participation Files OPR - Chair of Committee and University Secretariat <i>Records consist of mostly of duplicate agendas, minutes and other documentation of the deliberations of the Committee; however files may also contain record material.</i> <i>ET Definition: Members complete their term.</i> <i>Disposition Plans: Members of the committee to transfer all record to the University Secretariat and destroy all duplicate material at (or before) the end of their term.</i> <i>Duplicate material consists of copies of agendas, minutes and other documentation kept for convenience and only needed for participation in the deliberations of the Committee. However, members participation may result in some record consisting of original material (including all documented notes in any media or format) created as a result of their own individual activity as part of the work of the committee.</i>	ET + 0	0	DP/D	YES
30	Renewable Scholarships and Bursaries Files (Successful Applicants) <i>ET Definition: Student graduates, or three academic years have passed with no activity since last registration date.</i>	ET + 0	2	D	PIB
31	Non-Renewable Scholarships and Bursaries Files (Successful Applicants) <i>ET Definition: Student graduates, or three academic years have passed with no activity since last registration date.</i>	ET + 0	2	D	PIB
32	Scholarships and Bursaries Files (Unsuccessful Applicants) <i>ET Definition: Application declined.</i>	ET + 0	2	D	PIB

GLOSSARY

FY = Fiscal Year (May 1 to April 30) DP = Special Disposition Plan
 AY = Academic Year (September 1 to August 31) AR = Transfer to Archives
 CY = Calendar Year (January 1 to December 31) D = Destroy / Delete
 ET = Event Trigger PIB = Personal Information Bank
 OPR = Office of Primary Responsibility