



# GUIDELINES FOR THE FINANCIAL SUPPORT OF FULL-TIME GRADUATE STUDENTS

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All PhD, and many MSc, students are guaranteed a financial support package as stated in their letter of offer of admission. This package is typically a mixture of program scholarships, competitive external scholarships, TA employment income, and research scholarship provided by the supervisor.

This document is intended to clarify how McMaster's policies with respect to employment and scholarship support for graduate students may be clearly articulated in letters of offer of admission and what changes in funding support after arrival are permitted. It is especially important that the constraints on graduate support are understood given the range of research grant and contract funding sources available to FHS researchers.

## OFFER OF ADMISSION

The letter of offer of admission is a contract with the student. The nature and minimum amounts of financial support must be specified in this letter. The School of Graduate Studies requires that financial support offered to full-time PhD students must be at least \$17,500 plus tuition per year for 4 years, however many FHS graduate programs offer total funding packages beyond this required minimum. There is currently no university-mandated minimum level of financial support for MSc students, although FHS graduate programs may have internal policies that establish such an amount. A student may be provided more than the amount guaranteed in the letter of offer of admission, but never less.

## TYPES OF FINANCIAL SUPPORT

### RESEARCH SCHOLARSHIP

Research scholarship consists of a financial contribution from the supervisor which is typically generated by research grants and contracts. This source of support is guaranteed for the duration that the student is considered "in-time". Research scholarships may be provided during overtime and out-of-time status at the supervisor's discretion.

Research scholarship is *not* considered employment income. It is offered to support a student in full-time study and is not subject to taxes or other employment deductions. As such, there are no specific duties expected in exchange for such support, aside from the academic expectations set by the program, including the requirement to be available on campus on a full-time basis (or the requirement to begin studies online, as appropriate). For example, a student is provided a research scholarship to complete coursework and make reasonable progress on thesis research and other academic milestones. A student may choose to work on a non-thesis research project or other professional development activity that is mutually agreeable, but a student cannot be required to do this in exchange for a research scholarship.

No hourly pay rate, or expected number of hours of work, may be associated with research scholarship. For example, the research scholarship is not contingent on the number of hours per week spent in the laboratory or working on a project. Performance as a full-time student is evaluated in terms of reasonable progress and scholarship regarding program requirements. Examples include thesis supervisory committee reports, course grades, and the timely and effective achievement of program milestones.

### PROGRAM SCHOLARSHIPS

The program's contribution towards a student stipend typically comes from the distribution of scholarship funds allocated to the program by the School of Graduate Studies or program operating funds.

These funds are typically provided to students in the form of a Program or Departmental Scholarship. Such scholarships are provided solely to support the student in undertaking full-time study and are not considered employment income and is not subject to taxes or other employment deductions.

### EXTERNAL AWARDS

A student may win competitive financial support awards, such as Tri-Council fellowships and Ontario Graduate Scholarships. It is normally permissible for such awards to contribute to the student's total guaranteed financial support, thus reducing the amount required from other sources of scholarship funding. External awards do not impact TA commitments. Each FHS graduate program is expected to have an internal policy, based on the programs' unique structure, regarding the impact that successfully earning an external award has on the overall student stipend. Programs must publish their adjustment policy to students, normally in their program handbooks. The FHS graduate policy on the adjustment of financial support and merit-based scholarships can be found [here](#). It is a best practice for students who secure awards to realize an increase in their annual financial support and for supervisors to obtain some reduction in their research scholarship contribution, where applicable. Any offset in funding that occurs must ensure that the student is realizing at least a 20% increase in overall scholarship support than they would have received without earning the award.

In cases where the award is granted prior to admission, the letter of offer should specify how the award contributes to the total amount of financial support. The letter should also indicate that, should the student win an award after admission, the program may adjust the amount contributed from other sources.

### INTERNATIONAL STUDENTS

It is important to note that international students cannot be paid scholarship or employment income until they have arrived in Canada and opened a Canadian bank account. No TA employment is possible outside of Canada and a supported student cannot begin working until they have arrived and signed their employment forms. Students who have not arrived in Canada before the start of their program, should be advised not to commence any research, study, or employment work. That is, their time outside Canada is not part of TA employment they are owed.

### TEACHING ASSISTANTSHIP AND "RA IN LIEU" EMPLOYMENT

The terms and conditions for employing teaching assistants are governed by the collective agreement negotiated between McMaster University and CUPE 3906 Unit 1, available [here](#).

The specific terms will change as the contracts are periodically renegotiated, but a key feature is that an offer of TA employment in any particular term creates a commitment for future employment for the duration of a student's guaranteed eligibility. The maximum number of guaranteed hours is 260 hours per academic year (excluding 3 additional hours per term for training). Any hours worked in excess of 260 hours are not guaranteed in subsequent years. Full-time graduate students are eligible for TA employment for 2 years of MSc and 4 years of PhD studies, provided they maintain regular full-time graduate status and their ability to perform the work. There is no requirement for the letter of admission to include an offer of TA employment. However, once offered and accepted, the same number of hours must continue to be offered for the remainder of the period of guaranteed eligibility. The wage rate will be as outlined in the collective agreement. The employee is not guaranteed to be assigned to a particular course and may be employed as a TA across 2 or more courses during a term, subject to the employees' agreement. TA positions must include a minimum of 32 hours of work (excluding 3 hours for Health and Safety training/orientation and 5 hours for pedagogy training if required).

In many cases, TA employment may contribute to the guaranteed minimum level of financial support as outlined in the letter of offer. The pay rate (subject to applicable taxes and deductions) and minimum number of guaranteed hours should be summarized in the letter. Continued employment as a TA may be contingent on satisfactory performance in the role.

If an employee is provided TA hours in excess of the guarantee, this becomes the new guaranteed number of hours for the remainder of the eligibility period. It is important to be aware that a student may independently apply for additional TA work on campus (up to a maximum of 260 hours per academic year). If hired, those hours become part of the new guarantee and the home department may be responsible for providing those hours in future years.

The collective agreement regards McMaster University as the employer and does not differentiate between programs and departments. Therefore it is crucial that there is a clear agreement, prior to hiring, between a student's graduate program and the program employing the TA about which unit will fulfill the guarantee. This is a common issue for graduate programs in departments which do not operate a corresponding undergraduate "feeder" program.

Program leaders and administrators should be aware that if a student takes an approved leave of absence from study, this does not automatically imply a leave from employment. A student on a leave of absence from studies who wishes to continue their TA employment should be informed that if they complete the TA assignment, it will exhaust one of their guarantees. It should be noted that if the individual on leave applies for a vacant TA position (not part of the guarantee) and is awarded the position, these additional hours will become part of the guarantee in subsequent years.

A student who is promoted to PhD without completion of a Masters will receive a new letter of offer of admission. The inclusion (or exclusion) of a TA guarantee may differ from the letter of offer of admission the student received prior to commencing graduate studies.

Students who are not guaranteed TA employment in a letter of offer of admission may subsequently apply for employment as a TA, and if it is provided, those hours becomes a guarantee of future employment for the remainder of their eligibility. Additionally, Article 16.04 the Collective Agreement includes language whereby the Employer (McMaster University) agrees that **an employee's entitlement to the wages earned as part of TA employment not included in the offer letter, will not result in a reduction of, or offset against, the financial support promised by the University to a graduate student.**

Students may waive, decline, or defer (PhD students only) a portion, or the entire TA guarantee at their discretion. Students who...

- *decline* a TA position relinquish their guarantee of future TA employment.
- *waive* a TA position are requesting to waive their guarantee for that academic year only.
- *defer* a TA position are extending the guarantee period by an additional term, when they must be offered a position. This is applicable even if they are not normally eligible in the following term (e.g. overtime status).

A student who declines a guarantee is permanently forfeiting a significant fraction of their support package, and so it is expected that students will rarely choose this over a waiver. As a result, whenever an employee is considering declining rather than waiving a guarantee it is important that the implications of this choice are understood by the student, the program staff, and the employer. If a student has previously *declined* a TA guarantee, it is similarly important to clarify that student's intentions at the time the decision was made. Individuals must decline, waive, or defer in writing using the [Declination/Deferral of TA-ship Form](#).

Individuals holding TA guarantees may be offered a research assistant position in lieu of a TA ("RA in Lieu"). RAs in Lieu are employed at the same rate and the same conditions (i.e., hours) as the TA position, but will work as a research assistant instead of a teaching role. RA in Lieu positions are at the discretion of the head of the academic unit after discussing this with the employee (Article 13.02h).

The [TA Hours of Work form](#) is the contract that documents expectations of hours worked. The greater level detail included on an hours of work form, the more effective it is in the event of a dispute over the hours worked and the duties assigned. Employment supervisors should provide sufficient detail as to the breakdown of hours so that time expectations are clearly described for both the employer and employee. For example, rather than specifying a total of 70 hours allocated to grading, it is much more effective to include the expected hours for grading each assignment. The Hours of Work form applies to both TA and RA in Lieu positions.

### **OTHER EMPLOYMENT**

Students may be employed in a variety of roles across campus however the Graduate Calendar recommends that the total number of hours of employment at McMaster (in all roles) not exceed 1005 per academic year. Employment as a Research Assistant (RA) is not equivalent to an RA in Lieu of TA; the latter only applies if a student has been guaranteed a TA position and it is governed by the terms and conditions of the collective agreement between the University and CUPE Local 3906 Unit 1.

Students may be offered research assistant work but are not required to accept this work and it may not substitute for an amount of financial support guaranteed in the letter of offer. That is, it is offered as an option for students who wish to increase their income.