

# Checklist for Drafting Offers of Funding for Graduate Studies

This checklist is intended to assist Graduate Coordinators [often known as Associate Chairs (Graduate Studies)] when drafting letters containing offers of funding for a new doctoral or master's student. There is no uniform approach to funding offers. **However, these offers are binding and care should be taken to be clear and provide sufficient details (see below).**

An additional, formal "letter of appointment" may have to be issued upon acceptance and arrival. The "Collective Agreement between the Graduate Students' Association and the University of Alberta Board of Governors Governing the Academic Employment of Graduate Students" (also known as the AEGS Collective Agreement) will contain terms that govern Graduate Research and Teaching Assistantships (GRA and GTA). Advice on interpreting and applying the AEGS Collective Agreement can be obtained from Susan Buchsdruecker, Faculty and Staff Relations ([Susan.Buchsdruecker@ualberta.ca](mailto:Susan.Buchsdruecker@ualberta.ca)).

## GENERAL

- If departmental resources are fluid or uncertain, is the offer of funding to the student clearly made "subject to" available resources?
- Is there a clear statement as to the amount of funding being offered?
- If funding is not guaranteed after the first year, but efforts will be made to secure funds, is the wording in the letter transparent enough that the student will not make an assumption that the funding will probably be continued?
- Is there a clear statement that the funding offer is for a specific period of time (i.e. one year only, two years, etc.), subject to the student's fulfillment of certain conditions "as outlined in this letter"?

## CLARITY REGARDING PAYMENT

- Will the funding be paid to the student as a one-time payment or in installments?
- Will the funding be applicable for a calendar year (i.e. Sept to Aug) or an academic year (Sept to Apr)?
- Does the letter clearly articulate whether the funding offered is to cover both a stipend and payment of tuition fees?
- Will there be deductions other than tuition fees from the amount of funding being offered? (e.g. statutory deductions)
- Have you specified whether the student must maintain full-time registration?
- Have you stated that the student must maintain a certain level of academic standing? Does it state whether those are department-specific or the ones defined in the Calendar as "satisfactory standing" and "superior standing"? Are they aligned with the AEGS Collective Agreement?
- Alternatively, have you specified that the student must achieve a certain cumulative grade point average (GPA)?

## CHANGES IN STATUS

- Does the letter address what happens to the funding if the student's status changes from a Study Permit to a Permanent Resident (i.e. a consequential reduction in tuition based on differential fees)?
- Does the letter address what happens to the funding if the student's status changes from Masters to PhD student?
- If there is a requirement for full-time registration, have you considered what you will do if the student requires a leave (Medical, Maternity/parental or Compassionate)? (Note that for graduate assistantships, the AEGS Collective Agreement contains a provision on leaves).
- Does the letter address what happens to the funding if the student elects to defer admission?

## STIPENDS

- Does the letter state clearly what work is expected of the student to receive the funding offered?
- If relevant, does the letter indicate that the funding will be in the form of a graduate assistantship governed by the AEGS Collective Agreement.? Have you referred to the current version of the AEGS agreement?

## OTHER SOURCES OF FUNDING

- Does the letter impose an obligation on the student to report the receipt of other funding?
- Is the funding subject to a reduction if funding is received from external sources (such as an external scholarship or from foreign government sponsorship)?
- Does the letter state that the student will be expected in subsequent years to apply for external scholarships for which the student is eligible?
- Have you considered providing an incentive for a student to apply for external scholarships? (e.g. a top-up in the amount of \$X if an external scholarship is secured [over a certain amount])

## WRITING STYLE

- Is the letter written in a clear, transparent and accessible style?
- If the letter directs the reader to an internet address, have you confirmed that the link is still active?
- Have you made limited reference to documents and policies found on the internet so as to ensure that the crucial terms are found in the letter?