Faculty of Information
2020 – 2021 PhD Funding Package – Base Package Information Sheet

Based on eligibility, the Faculty of Information at the University of Toronto provides eligible PhD students with a base funding package for years 1 - 4 of the PhD Program. Tuition and Fees may be covered for a 5th year when good academic standing is maintained and eligibility requirements are met.

**Application to external awards for which you are eligible is required for funding eligibility.** Many fellowships will increase your funding and the process of writing such an application serves to prepare you for future grant writing.

**Funding for doctoral students who hold major external awards:** within years 1-5 of the funded cohort, will be structured as follows:

<table>
<thead>
<tr>
<th>Component</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Award* (SSHRC/OGS/Other)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$15,000 &amp; Higher depending on award received</td>
</tr>
<tr>
<td>Excellence Award**</td>
<td>$5000</td>
<td>$5000</td>
<td>$5000</td>
<td>$5000</td>
<td>$0.00</td>
</tr>
<tr>
<td>Tuition &amp; Fees (based on current annual rate but will be adjusted to actual rate in given year)</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90 if in good academic standing</td>
</tr>
</tbody>
</table>

*Please see Appendix B for further details relating to award applications.

** Please see Appendix C for further details relating to Excellence Awards.

**PhD Funding Package for individuals who have not been successful in their external award application but do meet all eligibility requirements** will receive the minimum guaranteed PhD Funding Package made up of the following components:

<table>
<thead>
<tr>
<th>Component</th>
<th>Year 1</th>
<th>Year 2</th>
<th>Year 3</th>
<th>Year 4</th>
<th>Year 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Faculty Scholarship</td>
<td>$10,700</td>
<td>$10,700</td>
<td>$10,700</td>
<td>$10,700</td>
<td>n/a</td>
</tr>
<tr>
<td>Teaching /Research Assistantships**</td>
<td>$6,800</td>
<td>$6,800</td>
<td>$6,800</td>
<td>$6,800</td>
<td>n/a</td>
</tr>
<tr>
<td>Tuition &amp; Fees (based on current annual rate but will be adjusted to actual rate in given year)</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90</td>
<td>$7850.90 if in good academic standing</td>
</tr>
</tbody>
</table>

*See Appendix A for full eligibility requirements
** See Appendix E for more details on Teaching Assistantships. Teaching Assistantships are allocated based on availability and in accordance with the CUPE 3902 Unit 1 Collective Agreement. The maximum amount of TA income to be counted by the Faculty toward the base funding package is $6,800, including 4% vacation pay. If Teaching Assistantships are not available other arrangements for funding will be arranged and may include a Fellowship or Research Assistantship, see Appendix G for more details.

**Disclosure**
- Financial support comes from various sources and may change from year to year throughout the course of a program
- Tuition amounts and Funding Policies are subject to change

We recommend that you familiarize yourself with the complete Funding Terms and Conditions, policies and other information provided in the appendices. Appendices A through G provide additional information of each component of the funding package. Appendix G provides specific information regarding the timing and breakdown of funding disbursements.

**PhD Relocation Travel Allowance**

This program has been developed to assist incoming first year Faculty of Information doctoral students, upon acceptance of their offer, with relocation travel costs associated with moving to a new city. One time only funding may be awarded to a maximum of $3,000.00 per doctoral student. Factors such as the distance of the move will determine the amount of funding per individual.

**Qualification Criteria:** Based on eligibility, this travel allowance will be awarded to successful applicants who need to re-locate to Toronto from outside the greater Toronto area. If awarded, funding will be issued based on expense reimbursements of actual costs, original receipts will need to be submitted. Qualifying candidates will be considered upon receipt of their acceptance of offer into the Faculty of Information PhD Program. See the 2020-2021 PhD Travel Relocation Policy & Application for details and to apply.
Appendix A – Funding Eligibility, Terms and Conditions

The funding package is available to Faculty of Information PhD students in the funded cohort who continually meet the following eligibility requirements:

- Registering and maintaining your status as a full-time PhD student (students who are not registered for the full academic year – e.g. on approved leave – will have their funding revised to reflect their enrolment status). The funding package is not available to those enrolled in the flex-time program;
- Are in good academic standing (if your academic progress is in question, the unit will inform you before your funding is affected);
- Are in years 1 – 4 of the PhD program. Determination of year of study is defined by the University of Toronto record which reflects any officially documented leaves of absence. If good academic standing is maintained Year 5 students are eligible to receive funding to cover tuition and fees only.
- Do not work full time (full time: ≥ 35 hours per week, or defined as full time);
- Do not receive ≥ $30,000 income per year;
- Individuals who do work full time and do receive income of greater than $30,000 per year will be eligible for tuition and fees only according to the schedules listed above;
- Have applied to all applicable external awards and major scholarships (e.g., SSHRC, OGS, MITACS, NSERC). NOTE: Funding packages change based on being a successful recipient of external awards. Many fellowships will increase your funding and the process of writing such an application serves to prepare you for future grant writing. To understand the impact this has on your funding package please refer to the charts found on page 2 of this letter. For more details on external awards please refer to Appendix B.
- Are, apart from approved absence, geographically available to visit the campus regularly. Remote Teaching Assistantships are not provided by the Faculty of Information;
- Apply to Teaching Assistant job postings. If no TA applications are submitted students will not be eligible to receive this portion of the funding package. Job postings are found on the central University website: http://unit1.hrandedequity.utoronto.ca/ as well as the Faculty of Information website, and are posted on the 6th floor CUPE bulletin board and are emailed to the PhD mailing list.
- Accept offered TA subsequent appointments as governed by the CUPE3902 Collective Agreement. Participation in Teaching and Research Assistantships is optional but failure to participate will void this aspect of the funding package.

Appendix B – Major External Awards

To receive any portion of the PhD Funding package you are required to apply for and accept any external awards for which you are eligible.

- For students in the funded cohort (Years 1 - 4) who receive an external, competitively-reviewed award valued at or over $15,000 per annum (e.g.: OGS, SSHRC, MITACS,
NSERC, NSF), that award will stand in lieu of the Base Funding portion of the University’s Funding Commitment package.

- Students with these awards are exempt from the Funding Commitment package requirements that they serve as teaching or research assistants.
- The Faculty of Information will continue to meet either domestic or international tuition fees* (as appropriate for the student), and in recognition of their success, the Faculty will award them an Academic Excellence Award for each year that they hold the external award, and remain in years 1 - 4 of the funded cohort.
- These students continue to be eligible to work as teaching or research assistants if they wish to supplement their funds, and if the Faculty has available TA positions. Awards under $15,000 have no impact on the Graduate commitment package from the University. This policy will be reviewed annually, but not varied retroactively.
- This policy ensures that internal funding is distributed as equitably as possible for all of our graduate students. If an award is accepted during the term of 2020 - 2021 academic year, this funding letter will be revised to include the award amount. You are also required to disclose any external awards that are paid directly to you (e.g. Awards that do not run through Acorn of U of T payroll).

Appendix C – Excellence Awards

- Excellence Awards are issued to individuals in years 1 - 4 who meet funding package eligibility requirements and are successful recipients of external awards (see Appendix B).
- Excellence awards are paid out in 3 equal installments, September, January and April through ACORN.
- Recipients of external awards are not eligible to receive the Base Funding module of the funding package which includes the Faculty Scholarship and the Guaranteed Income as laid out in Appendix D.

Appendix D – Base Funding (offered when no major external awards are received):
Base Funding is available within years 1 – 4 to qualifying students who applied for but were not successful in achieving an external award. The Faculty of Information Base Funding is made up of 2 different Components:

- **Faculty Scholarship** (previously referred to as a Living Allowance). Payments will be paid through ACORN in three equal installments September, January and April.
- **Guaranteed T4 Income, primarily through Teaching Assistantships** which will be paid out through the University Payroll system. Teaching Assistantships are allocated based on availability and in accordance with the CUPE 3902 Unit 1 Collective Agreement. The maximum amount of TA income to be counted by the Faculty toward the base funding package is $6,800, including 4% vacation pay. If Teaching Assistantships are not available other arrangements for funding will be arranged and may include a Fellowship or Research Assistantship. Payment is paid in equal installments throughout the term of
the assistantship. See Appendix E and F for more details on Teaching and Research Assistantships.

Appendix E – Teaching Assistantships

- **TA Income**
  - An important component of graduate student education is the opportunity to develop skills as a Teaching Assistant (TA) in preparation for an academic or professional career.
  - A teaching assistantship (TA) forms part of the funding package for students who do not hold a major award. If you do not hold a major award, you agree to apply for and accept TA positions (or forfeit that portion of the funding).
  - To help us better understand where and how much our students are working, you agree to disclose if you have TA positions across multiple departments and campuses.
  - Teaching Assistant contracts will be issued to students by the hiring unit(s).
  - Teaching Assistant work is paid out at the current hourly rate specified in accordance with the CUPE 3902 Unit 1 Collective Agreement, and are paid in equal monthly installments throughout the duration of the term of the position(s).
  - In accordance with the “no-offset” clause in the CUPE 3902 Unit 1 collective agreement, TA wages counted towards the funding package have been frozen at the hourly wage of your first PhD contract. This ensures that other sources of funding are not reduced as a result of any negotiated increase in TA wages.

- **CUPE**
  - All Teaching Assistant positions are subject to the CUPE 3902 Unit 1 Collective Agreement
  - The PhD Funding letter may be used in support of an application(s) to funds from CUPE 3901 Unit 1.
  - Once a student in the funded cohort becomes a bargaining unit employee future appointments will be offered in conjunction with CUPE Subsequent Appointment requirements

Appendix F – Research Assistantships / Stipends

These positions offer great opportunities to work closely with faculty and provide an opportunity to engage in hands-on research and academic work experience.

- Research Assistantships (RAships): are primarily offered when not enough TAships are available to satisfy PhD funding Requirements,
- These positions are offered at the sole discretion of the Faculty and there is no provision for specific requests.
## Appendix G – Schedule of Payments

<table>
<thead>
<tr>
<th>Funding Type</th>
<th>1st Installment</th>
<th>2nd Installment</th>
<th>3rd Installment</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellence Award</td>
<td>September</td>
<td>January</td>
<td>April</td>
</tr>
<tr>
<td>Faculty Scholarship (Base Funding Portion)</td>
<td>September</td>
<td>January</td>
<td>April</td>
</tr>
<tr>
<td>Tuition &amp; Fees</td>
<td>September</td>
<td>January</td>
<td>N/A</td>
</tr>
<tr>
<td>OGS Awards</td>
<td>September</td>
<td>January</td>
<td>N/A</td>
</tr>
<tr>
<td>Teaching Assistantships</td>
<td>Paid out in 4 equal installment of term worked</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Research Assistantships</td>
<td>Varies depending on Funding Source and term of work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SSHRC and other external awards</td>
<td>Please refer to award record details for payment schedules</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

April 15, 2020