

I am pleased to make public the report produced by McMaster's Task Force on Graduate Funding. The efforts made by the Master's and PhD students, associate deans and senior university leaders on the Task Force to conduct a thorough and evidence-based examination of this complex topic are commendable.

Graduate funding is a challenge for the higher-education sector and for graduate students. The rising costs that continue to impact all Canadian society have exacerbated the need to better understand sources of graduate funding, as well as the role of students, the university and government.

The report's findings also make it clear that the level of support universities are able to provide graduate students is related to the financial supports available in the institution.

Early in their work, Task Force members presented immediate opportunities to support graduate students, which were ratified by Graduate Council and by the university's Senate at the end of the 2023 Spring Term. These actions included an increase to the minimum stipend for all full-time/in-time PhD students at McMaster, policy changes to remove limits to on-campus employment and a commitment to continually update and publicly share aggregated data on graduate student funding.

These initial actions and the subsequent report are the result of a comprehensive consultation process undertaken by the Task Force that underscored members' commitment to including as many voices as possible in the process.

I'm thankful to the students, faculty, staff and everyone else who attended the 19 round table meetings, the town hall on campus or used the online form to submit their thoughts. Their contributions led to the five themes identified in the report, which the Task Force used to focus their recommendations.

I look forward to reviewing the recommendations with other university leaders to advance graduate student success.

Once again, I extend my gratitude to all members of the Task Force and to everyone in our McMaster community who shared their thoughts and feedback throughout this process.

Together, we will continue to uphold McMaster's tradition of excellence in graduate education and providing the wraparound supports graduate students need to succeed.

Sincerely,



Susan Tighe
Provost and Vice-President (Academic)

Task Force on Graduate Funding Report

March 2024

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INTRODUCTION

Graduate students are at the heart of McMaster's mission to discover, communicate and preserve knowledge. They play a multifaceted role in our institution as learners, researchers, teaching assistants (TAs), research assistants (RAs), and as future leaders. Graduate students also fuel the university's commitment to creativity, innovation, and excellence, strengthening McMaster's global reputation. Graduate funding provided by the institution recognizes the important contributions graduate students make to our university and to society.

In recent years, graduate funding has become a challenge for both the Canadian higher-education sector and for graduate students. In response, McMaster's Provost and Vice-President (Academic) called for the creation of a task force in February 2023 to make recommendations to better support graduate students in the current context. The need to address the financial pressures impacting the sector was also acknowledged by the Ontario government, which convened an expert panel in March 2023 to provide advice and recommendations to ensure the financial stability of the education sector and a focus on providing the best student experience possible. The [Blue-Ribbon Panel on Financial Sustainability in the Postsecondary Education Sector report](#) was released on Nov. 15, 2023. On Feb. 26, 2024, the provincial government responded to the report by announcing that it will provide nearly \$1.3 billion in funding to Ontario's 50 colleges and universities over the next three years. The funding is about half of the total amount recommended by the Blue-Ribbon Panel.

INITIAL IMPACT OF McMASTER'S TASK FORCE

During the course of the Task Force, it became clear to members that immediate opportunities to support graduate students were available. Informed by the Task Force's work, several new supports for graduate students were undertaken by the School of Graduate Studies (SGS) with the support of McMaster's six Faculties and subsequently ratified by Graduate Council and by the university's Senate at the end of the 2023 Spring Term – nearly halfway through the Task Force's mandate.

On June 7, 2023, the Vice-Provost and Dean of Graduate Studies, who served as the Task Force's chair, announced that starting on Sept. 1, 2023, all full-time/in-time PhD students at McMaster would see their minimum stipend rise to \$17,500 plus tuition, up from \$13,500 plus tuition. The change has benefited 7 per cent of PhD students. Other immediate actions were also announced:

- Policy changes to remove limits should students desire more on-campus employment.
- Increasing efforts to make students aware of emergency bursary funds for non-tuition issues.
- A review of offer letters to improve access to external information sources to help students make informed decisions considering the offered funding package.
- Commitment to develop a formal process and forum to communicate and discuss issues around graduate funding.

- Commitment to continually update and publicly share aggregated data on graduate student funding.

POST-SECONDARY SECTOR

Across Canada, and particularly in Ontario, the financial sustainability of universities faces multiple challenges that cannot be ignored in any discussion around graduate funding. Federal and provincial scholarships for graduate students have been frozen for more than 20 years.

Provincial grant funding to universities has been frozen since 2017 and domestic tuition was cut by 10 per cent in 2019 and subsequently frozen. Tuition and government grants are not sufficient to cover the costs of graduate education for all graduate students. Within the sciences and engineering, the cost of supporting graduate students falls heavily to faculty supervisors, whose support is also greatly impacted by both the federal and provincial research funding environment.

In the midst of this uncertain financial time, McMaster has nonetheless taken actions to gather feedback, discuss, and to collaboratively seek creative solutions around graduate funding. In February 2023, McMaster's Graduate Council endorsed the Provost's call to form the Task Force on Graduate Funding. The group, which was chaired by the Vice-Provost and Dean of Graduate Studies, included six students, six Faculty Associate Deans and the Deputy Provost. The full list of members was posted online to the newly created [Task Force on Graduate Funding website](#) and can also be found below:

Task Force Membership

- Chair: Steve Hranilovic, Vice-Provost and Dean of Graduate Studies
- Steven Hanna, Vice-Dean & Associate Dean Graduate Studies, Faculty of Health Sciences
- Martin Horn, Associate Dean Graduate Studies and Research, Faculty of Humanities
- Manish Verma, Associate Dean, Graduate Studies, Faculty of Business
- Bhagwati Gupta/Bruce Newbold, Associate Dean Graduate Studies, Faculty of Science
- Melanie Heath, Associate Dean, Graduate Studies, Faculty of Social Sciences
- Michael Thompson, Associate Dean, Graduate Studies, Faculty of Engineering
- Matheus Grasselli, Deputy Provost
- Alisha Anand (M.Sc. Candidate), Graduate Council Student Representative, Faculty of Health Sciences
- Natasha Malik (PhD Candidate), Graduate Council Student Representative, Faculty of Humanities
- Shamik Pushkar (PhD Candidate), Graduate Council Student Representative, Faculty of Business
- Xiaobing Li (PhD Candidate), Graduate Council Student Representative, Faculty of Science
- Joseph Antwi-Boasiako (PhD Candidate), Graduate Council Student Representative, Faculty of Social Sciences

- Hassan Abdulhussain (PhD Candidate), Graduate Council Student Representative, Faculty of Engineering

With support from

- Nancy McKenzie, Associate Director, Academic Projects and Reviews, Office of the Provost
- Fernando Carneiro, Communications Manager, Office of the Provost

The Task Force began its work by undertaking an analysis of the academic year 2021/22 graduate funding data to understand the sources and amounts of financial support provided to full-time, graduate students in research-based programs. A summary of the [aggregate data on graduate funding was published online](#) and these data formed the foundation for the extensive consultations that followed with McMaster's campus community.

The data showed that full-time/in-time PhD students across most Faculties had a median funding package in the range of \$22,000 to \$23,000 net of tuition. The exception was the Faculty of Business where the median is about \$27,000. Only 3 per cent of in-time PhD students received near the minimum funding level net of tuition of between \$13,500 and \$15,500 in 2021-22. As noted earlier, this minimum stipend was raised for all full-time/in-time PhD students starting in the Fall 2023 term. This action stands as one of the first outcomes of the Task Force's work.

CROSS-CAMPUS CONSULTATIONS

Nineteen round table meetings were held with more than 90 individuals with representation from the Graduate Students Association (GSA), graduate students (Masters; PhD; domestic and international), faculty and staff, deans and associate deans, McMaster University Faculty Association (MUFA), CUPE Local 3906, which represents TAs and RAs in lieu, as well as members from the broader university community. The Task Force also solicited and collected feedback through an online feedback form. Between February to October 2023, 47 individuals submitted online feedback. Of those, 25 were graduate students, 15 were faculty members and 7 were staff. Together, they represented all six Faculties and other university areas.

To ensure broad-based consultation and to engage the widest audience possible, a [town hall on graduate funding](#) was also held on campus on June 7, 2023. It was attended by about 140 graduate students, faculty and staff. Members of the Task Force on Graduate Funding were on stage to receive comments and answer questions from the audience. This led to an open discussion involving graduate students, staff and faculty involved in graduate education. The 1.5-hour event was extended by more than 20 minutes to ensure everyone who wanted to ask a question or contribute a comment had the opportunity to do so.

Five overarching themes emerged from the round tables, online feedback and town hall: (1) Financial Struggles; (2) Clarity on Funding Packages; (3) International Student Barriers; (4) Graduate Funding Adjustments Following Major Scholarships; and (5) Four-Year Funding

Model for PhD Students. This report addresses each of the five themes and provides recommendations herein.

THEMES AND RECOMMENDATIONS

1. Financial Struggles

Context

McMaster's institutional contributions toward graduate scholarship are provided in part through the SGS Scholarship Fund. The institutional budget allocates funds to SGS, which are then disbursed to departments and programs according to a formula based on enrollment. However, based on the 2021/22 data, in practice the SGS Scholarship Fund contributed no more than 25 per cent of the total support provided to graduate students in any Faculty.

The other sources of graduate support vary considerably between Faculties and can even vary between programs in a Faculty. For example, employment guarantees for many graduate students as TAs or RAs in lieu, constituted at least 35 per cent of support in Business and Science and is particularly important in Social Science (43 per cent) and Humanities (47 per cent). In contrast, contributions from research grants secured by supervisors (from government and industry sources) are particularly important in Health Sciences (35 per cent) and Engineering (50 per cent). Success in external competitive scholarships (primarily federal) is an important source of funding, however, these scholarships are merit-based and limited in scope and are thus distributed unequally.

Recommendations

1. Remove limitations on the number of hours that students can work for pay both inside and outside the university. [Implemented as of Sept. 1, 2023]
2. More clearly articulate that the financial supports provided to graduate students, which includes scholarships and bursaries, are only one component of a student's finances and are not intended to cover all living expenses.
3. Support efforts of graduate students to seek out affordable housing (in addition to recently increasing the number of housing units through the new *Graduate Student Residence*). This would be achieved by:
 - a. Exploring opportunities for housing bursaries targeted to students who are most disadvantaged.
 - b. Working with McMaster's Off-Campus Housing office to help identify housing options (raise awareness/help promote their services to graduate students).
4. Explore the introduction of an alternate funding payment schedules to create more predictability and account for the variability in support over different terms in an academic year.

2. Clarity on Funding Packages

Context

Graduate students rely on information provided by the university to make important decisions. Throughout the roundtable discussions and the town hall meetings, Task Force members heard that the way funding information is shared with graduate students varies across McMaster's six Faculties. Concerns shared included unclear procedural details, uncertainty over how funds are allocated, confusion over scholarship adjustment practices, and descriptions and limitations of the various awards and bursaries available.

Recommendations

1. Share aggregated data on graduate funding annually with the McMaster community. This would make McMaster one of a few Ontario institutions to provide this level of transparency to existing and prospective students
2. Form a Subcommittee on Graduate Funding within Graduate Council, to oversee the analysis of funding data and generate a publicly available annual report. The committee would provide recommendations annually to Graduate Council and the six Faculties on matters related to graduate funding.
3. Introduce regular reviews of letters of offer to ensure that the funding information provided not only continues to be accurate and complete but is also understandable and accessible by students.
4. Increase awareness of descriptions of all awards and scholarships available to students, including eligibility and number of awards. The process of how scholarships and bursaries are adjudicated should be made transparent by each Faculty and SGS.
5. Inform graduate students of the array of sources from which funding is provided in each Faculty recognizing that these sources may differ substantially between Faculties.

3. International Student Barriers

Context

International graduate students face unique financial barriers. These barriers include paying for the University Health Insurance Plan (UHIP), which is mandatory for registered international and exchange students while they study in Canada; limited access to major scholarships; a study permit maximum 20 hours per week of off-campus employment; and a lack of credit history, which impacts their ability to secure loans and housing.

Other financial issues brought up by international students may be applied equally to domestic students, particularly those coming to McMaster from outside the region or province. Those include a lack of familiarity with living costs in Hamilton, a lack of a social network to help navigate local housing, transit, and public services, and a lack of job-hunting skills appropriate to the local economy to secure employment to pay for living costs.

Task Force members also recognize the university's ongoing efforts to support international students. McMaster contributes significant financial resources to ensure that all international PhD students pay tuition fees equivalent to those of domestic students and in some Faculties, international research-based Master's students are provided scholarship support.

Recommendations

1. Provide a resource with links for up-to-date local information on housing (both on and off campus), transit, medical, social, and government matters targeted to international students.
2. Ensure international students are aware of scholarships, bursaries, and other resources to which they are eligible.
3. Develop opportunities through SGS and partner units to improve career readiness skills as well as advertise on- and off-campus employment opportunities for international students.
4. Offer workshops to help international students understand the rules on employment associated with their study permits.
5. Enlist support from University Advancement to seek out additional opportunities for scholarships that can be targeted to international graduate students.

4. Graduate Funding Adjustments Following Major External Scholarships

Context

The practice of adjusting the funding received by graduates who receive major external scholarships was raised often during consultations with the McMaster campus community. Graduate funding adjustment reduces the value of the scholarship provided to graduate students from McMaster when a student wins a major external scholarship. This practice is applied widely in the higher-education sector with funds that are reclaimed typically reallocated to support other graduate students and research activities. Graduate students who are recipients of major external awards expressed a desire to realize a greater personal financial benefit upon securing an external scholarship.

At McMaster, there is no uniform graduate funding adjustment policy. In keeping with the decentralized nature of the university's organizational structure, the six Faculties, departments and programs establish their own practices on funding adjustment. Though some Faculties have overarching funding adjustment frameworks in place, such frameworks are absent or in development in other Faculties. The consequence is a patchwork of approaches that vary from program to program.

Recommendations

1. Ensure that graduate students who win major external scholarships are better off financially after winning such an award, regardless of the funding adjustment practice in effect.
2. Ensure there are strong incentives for graduate students to apply consistently to major external scholarships.
3. Communicate clearly to graduate students the funding adjustment practices that are in place in advance of being asked to prepare scholarship applications.
4. Develop uniform policies on funding adjustments for each Faculty and communicate them to their graduate students.

5. Four-Year Funding Model for PhD Students

Context

Canada's doctoral graduates are essential contributors to Canadian society, bringing cutting-edge knowledge and skills to many sectors. In the past decade, serious conversations have taken place about the need to reconsider the structure of the PhD to preserve and strengthen its core values. One element of this conversation is time-to-completion.

Financial support for doctoral studies will normally be provided for the first four years of full-time enrolment. However, across many disciplines, the average time to completion is above four years, which is also true for most universities across Canada. An important concern that was raised was the cause of the increase in time-to-completion beyond four years. Essential to this conversation is how to streamline PhD requirements while maintaining the highest quality and educational excellence of obtaining a PhD from McMaster.

PhD programs at McMaster exhibit significant variation in their requirements, both across different Faculties and even within departments of the same Faculty, leading to varying program durations. For some Faculties, the dissertation is predominantly a "[sandwich](#)" thesis, composed of at least three publishable journal papers, with a general introduction and general discussion. For other Faculties, the dissertation is predominantly in the standard style. These variations in programs have an impact on time to completion that needs to be thoughtfully addressed.

The Task Force encourages Faculties and programs across the university to consider ways to improve the time to completion for doctoral students. An example of such an initiative is the Faculty of Humanities, which received funding from the Provost's Strategic Alignment Fund on the topic of "[Shortening the PhD](#)" to study possibilities for streamlining the PhD time to completion in the Humanities. This includes structural changes, such as consideration of curricular changes, changing the culture to support streamlining the PhD, and rethinking what constitutes the dissertation.

Recommendations

1. Review McMaster's PhD programs, examining curricular requirements to completion times, graduation rates, time to completion and employment prospects for its doctoral graduates, and compare these to other universities when possible.
2. Investigate disciplinary cultural expectations around scholarly work, publication and thesis format as there are some disciplines that may encourage projects in excess of four years in length.
3. Explore ways to enhance the time management and writing skills of PhD students through targeted activities such as workshops and dissertation-writing bootcamps delivered by SGS and partners in the Faculties, aiming to support timely program completion.
4. Encourage programs to think of creative ways to support timely completion. An example would be integrating field research placements, community-engaged projects, internships, and fellowships that provide experience and financial support as fulfilling partial requirements for the PhD degree.
5. Enlist Graduate Council and all Faculty Graduate Curriculum and Policy Committees to evaluate proposals for new program requirements in the context of completion times.

Conclusions

The Task Force is thankful to all members of the McMaster community who provided feedback, participated in the round table sessions and attended the town hall. The themes and recommendations in this report will provide a valuable opportunity for McMaster to critically reflect on the challenges and opportunities facing graduate students today.

With annual reporting of aggregated financial data, greater clarity on funding packages, enhanced supports for international students, clearer guidelines to funding adjustments after major external scholarships, and an analysis of the four-year PhD model, we are hopeful that graduate students will be better positioned for success and to continue our tradition of excellence in graduate education at McMaster University.