

# Graduate Funding Reform & Policy



## Major Updates In Progress

**As we all know, much has changed since Fall 2019! We are working hard behind the scenes to bring this page up to date - thanks for your patience and flexibility.**

You can "watch" this page to be notified of important updates - see instructions on the [Collab Access](#) page.

Dear Colleagues,

In the Fall of 2019, we created this collaborative resource to share information about the campus's strategic efforts to reform the graduate student funding model. We are now augmenting this to encompass all major communications about this topic, organized chronologically in the table below. The FAQ resource can also still be found here.

We encourage you to visit this website regularly for information about graduate student funding reforms. As always, feel free to let us know your questions so that we might continue to update this website and the resources it contains.

Sincerely,

Elizabeth H. Simmons,

Executive Vice Chancellor

James Antony

Dean of The Graduate Division

Steve Ross

Associate Vice Chancellor for Resource Administration

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## Chronological List of Documents and Communications

For a chronological list of documents and communications, please see [Graduate Funding Reform - Documents and Communications](#). The same documents and communications are linked as pertinent in the topics and FAQ below.

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## Answers to Frequently Asked Questions

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### Minimum Support Guarantee

The original [October 14, 2019](#) memo indicated "Effective winter quarter, Doctoral and MFA students must be supported at a minimum of the equivalent of a 50% Teaching Assistantship. The minimum may be met by a combination of appointments and/or fellowships. The student's home department is responsible for monitoring their level of support. The Graduate Dean has the authority to grant limited exceptions to this policy when deemed appropriate and in the best interest of the student."

The [November 8th, 2019](#) update memo distributed to deans, department chairs, assistant deans, department business officers, and graduate coordinators, added an important clarification which reads, "However, at the suggestion of divisional partners, we are adding language to clarify the precise meaning of the first sentence so that it now reads, 'Effective winter quarter (2020), Doctoral and MFA students who were admitted with a guarantee of support must be supported at the minimum of the equivalent of a 50% Teaching Assistantship.'"

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Our department is eager to arrive at the point where every doctoral student is admitted with a promise of 50% support for 5 years. However, we are not there yet. Some of our current students were admitted with a promise of support for fewer than 5 years. Must the department retroactively change the support packages of all existing students to be 5 years at 50%?

No. The reform requires that any student whom the department has committed to support during a given quarter be supported at a minimum level of 50%.

There is no requirement to retroactively change the length of time for which a given student will be supported. Our goal is to work toward a future where every new student will be admitted with a 5-year support package.

*Added on 11/17/19, updated 8/23/21*

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**Do these reform efforts imply that a Doctoral or MFA student will be guaranteed full funding past their fifth year? And do departments now have to fully fund students who have exceeded the original funding commitment they received from their departments at the time of their admission (what we call “post-admissions support commitment students”)?**

The spirit of these reforms is that the university will work over time toward a model where all Doctoral students would be admitted with five years of guaranteed graduate financial support. As has always been the case, departments are encouraged to work with post-admissions support commitment students who remain eligible for funding to identify funding opportunities.

The university policy on graduate student support time limits has not changed.

*Revised on 11/17/19*

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## Proportional Split of Tuition & Fees

[October 14, 2019 announcement:](#)

*"Graduate students remain eligible for tuition and fee payments and other benefits according to the criteria of their appointment(s). The cost of the tuition and fee payments and other benefits will be charged proportionally across the funding sources of the student's support."*

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**Will one-off stipends be factored into proportionality? If yes, how would this work given that they can be added at any time?**

FY 2021-22: Stipends will not be included; the first phase is employment only.

Future State: The workgroup is still reviewing mechanics, including consideration of the new SIS system.

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**Does proportional split apply to all MFA and doctoral students, or only those within their guaranteed support period?**

The proportional split applies to all graduate students, regardless of degree aim or whether they are within the guaranteed support period.

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**Does proportional split apply across all employment appointments (even if they total to >50%?, e. g., through 50% TA and 25% GSR)**

Yes. In this example, TA funding source would cover 66.7% and GSR funding source would cover 33.3%.

Other employment sources of income outside of GSR/IA remission eligible positions do not incur proportional T/F.

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**Do individuals with <25% ASE appointments as their only employment based support still incur proportional fee payment? Or would their fellowship/stipend source continue to pay all fees?**

In this example, the student is not eligible for remission. The student's home department is responsible for requesting a direct fee payment via the "draft fellowship" module in FSRT.

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**What if a student has a fellowship covering full tuition & fees, and an employment appointment that qualifies for tuition remission?**

*Coming soon!*

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## What if a student works at 25% GSR and receives a 25% stipend? Will the split still be proportional?

No. In 21-22 proportional distribution of tuition & fees only applies to employment. The GSR source would pay the full tuition & fees.

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## What will we do with existing awards that weren't budgeted for tuition & fees?

Rebudget, if possible.

If not possible, you can supplement with additional funds from your department, or failing that you can request support from your department's Divisional Dean. Bridge funding from the EVC may be available on a limited basis, but must be pursued through your Divisional dean's office.

Moving forward, the budget must include tuition and fees (recommendation is to include tuition and fees proportional to a 50% TA appointment equivalent)

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## What will we do with new awards that are not budgeted for tuition & fees?

New awards, post the announcement of proportional funding (October 14, 2019) are not eligible for bridge funding for tuition and fees.

If possible, student GSR-ships can be moved to summer. Department or, by exception, divisional support can be used for the proportional award. The goal is for new awards to pay their fair share of tuition and fees.

For assistance with specific awards, please submit a ticket at [support.ucsd.edu/students](https://support.ucsd.edu/students) (see also: [Services & Support](#))

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## What will we do with existing awards that don't allow for tuition & fees?

1) Check to make sure they truly do not allow for tuition and fees. In many cases, they do, if by exception.

2) If not eligible, you can use fungible department funds to cover the shortfall.

For assistance with specific awards, please submit a ticket at [support.ucsd.edu/students](https://support.ucsd.edu/students) (see also: [Services & Support](#))

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## What will we do with new awards that don't allow for tuition & fees?

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## How does students opting out of health insurance affect the calculations?

The health insurance waiver will be credited to the fund sources that would have paid the tuition & fees (proportionally).

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## How does graduate support via Associate In (teaching a class), funded by TempFTE relate to these policies?

Tuition & fees will be charged by default to the same funding source as the gross payroll.

If Associate In is charged to a dedicated TempFTE project, the department can elect to journal resources from a TAFTE project (or not, and use TempFTE balance by default).

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## Accounting Information - Posting Tuition Remission to Financial Ledgers

Tuition remission for GSR (GSRTF) will continue post to the same PTAF/COA as the gross pay, using the pool rate and adjusted by the proportional split.

Tuition remission for Instructional Assistance (IATF) will post as follows, using actual costs and adjusted by the proportional split :

- Resident tuition & campus fees will post to the same PTAF/COA as the gross pay
- Non-resident supplemental tuition (NRST), *where applicable\*\**, will post to a single project-task provided *by the academic home department for the instructional student employee.*

For more information on running ledger reports to review this activity, visit [Ledger Posting for Tuition Remission](#)

For more information on processing tuition remission payments to the student's billing account, visit [FAQ: FSRT Entries & Proportional Split](#)

*\*\* (See "the fine print" under the section "Requesting the Balance of Fees or NRST" at the FAQ link above)*

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## Why is IATF charged differently than GSRTF?

Typically, the gross payroll for instructional assistants is funded via the [Teaching Assistant Allocation Model \(TAFTE\)](#) allocations. The model includes resources to pay for tuition remission, covering all resident tuition and campus fees in full.

Via the [Graduate Student Growth and Excellence Initiative Model \(GSGEI\)](#) allocations, the academic home department associated with eligible non-resident graduate students receives resources equivalent to 90% of the NRST paid on behalf of the student.

Given the current structure of these two models, the proportional cost of NRST associated with IA appointments will flow back to the student's home department.

We recognize that these assumptions are not true for all programs (graduate or undergraduate). We also acknowledge that policy and the funding models are subject to change, and may evolve over time as sufficient data/analysis are available. However, as the majority of students/IA assignments will fall under the "typical" scenario, we will move forward with these assumptions and revisit via ongoing process improvement and financial analysis cycles.

***Please follow the links above for the full details on model assumptions and calculations.***

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## Can our department provide more than one project/chart string for IA NRST?

**No.**

Given the constraints at this current stage, the data available for this process is limited. As additional data and infrastructure become available in the Activity Hubs, we will continue to make iterative adjustments to the business processes for the proportional split.

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## Can tuition remission be charged to a PTAF/chart string that is different than the gross payroll funding?

**No.**

For consistency with audit principles and in line with other benefits of employment, the process for posting the cost of GSRTF and resident IATF will use the same PTAF/COA as was entered for the gross payroll funding.

Additionally, given the constraints at this current phase of ESR, the data and infrastructure available for this process is limited. The process used to join and transform the data used to generate the tuition remission costs is incredibly complex. Standardizing the inputs allows for a more automated, and therefore efficient and consistent, process. As additional data and infrastructure become available in the Activity Hubs, we will continue to make iterative adjustments to the business processes for the proportional split.

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## Can cost transfers be used to move tuition remission?

**No (with few exceptions).**

Like other benefits expenditures, retroactive funding or appointment changes in UCPath will be mirrored by the process used to charge tuition remission (to put this another way, the tuition remission benefit will follow the gross payroll).

Cost transfers should not be used to avoid tuition remission posting to the payroll PTAF, unless disallowed by an extramural sponsor.

If tuition remission is unallowable on the funding source used for the gross payroll, *consult the [SPF award accountant](#) assigned to the award.*

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## How will unprocessed costs associated with SLA violations or PTAF errors be resolved?

Please see more information here: [Unprocessed Transactions Posting to Default Project](#). If you have a specific issue, please submit a ticket via [Services & Support](#).

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## Funding Models & Resource Allocations

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## Will there be fungibility across graduate funding sources (BG, TAFTE, TAHI/TAFE (if applicable), GSGEI)?

Yes, with two considerations:

- 1) graduate funding models must be used for direct graduate student support;
  - 2) GSGEI includes a minimum amount of the funding that must be allocated to faculty who have paid fees from their grants.
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## Will any reconciliation across fund sources be necessary?

You will not be required to reconcile across fund sources; of course, reconciliation in the aggregate will be necessary to quantify carry-forward/deficit (with appropriate remediation plans)

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## Will TAHI/TAFE be redistributed to Divisions/Departments?

The decentralization of TAHI/TAFE will begin in 21-22. Money will be distributed to Divisions at the rate of 1 resident tuition & fee coverage (including "fee balance") per 50% TAship.

Per the terms of the ASE contract, all ASEs employed at 25% or greater time must receive 1 TAHI/TAFE. Units will be responsible for managing their TAHI/TAFE allocation in accordance with their teaching needs. In some cases, they may need to supplement their TAHI/TAFE allocation with additional department/program funds (for instance, if employing readers, or 25% ASE appointments of any kind).

On the other hand, students employed as ASEs in multiple units simultaneously will have a portion of their TAHI/TAFE proportionally paid by each unit.

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## Are non-student tutors (who do not incur T/F) considered when allocation TAHI/TAFE to units, or is it on the basis of salary dollars alone?

TAHI/TAFE is not allocated on the basis of appointment type - it is allocated on the basis of the TAFTE allocation. If a unit employs non-student tutors, the TAHI/TAFE money that is not expended on these individuals can be used to support other individuals (for instance, those hired as readers, or those hired at less than 50% time).

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## If TAHI/TAFE will be redistributed, how is the additional work of this process on department staff being considered (which may be greater if the complexities are greater, including students opting out of health insurance)?

Anything we can share (formulas, templates, spreadsheets, diagrams) will be made public, so that we can help to streamline efforts as much as possible.

Process improvement is ongoing - for both the current state, and in the future state design considerations for SIS.

This question assumes there will be additional workload on staff. The changes will need to be in place for at least a couple of fiscal years before we can analyze the full impact - including both workload increase and efficiencies realized. If there are any material changes in the workload that merit a change in the divisional support model, they should be discussed with your Divisional Dean.

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## Will any money be added into the system to address the centralized over-spending of TAHI/TAFE?

The TAHI/TAFE budget is based on the TAFTE budget. The total TAFTE budget will not be increased\*. The TAHI/TAFE will be calculated based on the number of FTE budgeted in the TAFTE model.

The recalculation of TA load (replacing PRC) was meant to be budget neutral, which meant no change overall in FTE. Any increase to the TAFTE budget will include TA salaries and TAHI/TAFE will increase or decrease proportionally.

\*When undergraduate enrollment increases, the EVC Resource Management team will work with the Chancellor to review budgets. Undergraduate course enrollment drives TA funding - including FTE, salary, and remission benefits.

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## Will departments receive supplementary TAHI/TAFE funds if ASE remission expenditures exceed the departmental allocation?

No - the TAHI/TAFE will be calculated based on the number of FTE budgeted in the TAFTE model.

If necessary, you can supplement with department balances, or failing that you can request support from your department's Divisional Dean. Bridge funding from the EVC may be available on a limited basis, but must be pursued through your Divisional dean's office.

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**As TAHI/TAFE will be redistributed, what will the process be for using those funds? (i.e., will they be entered into the FSRT?)**

Fee payment and remission requests will be entered into the FSRT, with modifications. Please see [FAQ: FSRT Entries & Proportional Split](#) (*more information coming soon!*)

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**As TAHI/TAFE will be redistributed, how can we ensure that the "right" department gets the right amount? This is pertinent for units that hire TAs with outside home departments, or for those whose grads routinely TA for outside departments**

The TAHI/TAFE allocation will follow the TAFTE formula, since the unit that hires the TAs will be responsible for the payment of TAHI/TAFE.

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## Task Forces & Workgroups

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### Holistic Graduate Funding Task Force (Summer '21)

*coming soon!*

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### Grad Summer Support Implementation Task Force

*coming soon!*

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### Proportional Split Workgroup

*coming soon!*

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### Senate-Administration Workgroup on Graduate Funding (2018-19)

*coming soon!*

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## Graduate Funding Resource/Allocation Models

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### Block Grant (BG)

*more coming soon!*

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### Diversity Incentive (DI)

*coming soon!*

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## GSGEI (Graduate Student Growth and Excellence Initiative)

For more information, please see [EVC Resource Administration](#) > [Budget & Financial](#) > [Graduate Student Growth and Excellence Initiative Model](#)

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## MGI (Masters Growth Incentive)

For more information, please see [EVC Resource Administration](#) > [Budget & Financial](#) > [Masters Growth Incentive Program Model](#)

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## TA FTE (Teaching Assistant (FTE) Allocation Model)

For more information, please see [EVC Resource Administration](#) > [Budget & Financial](#) > [Teaching Assistant Allocation Model](#)



### Decentralization of TAHI/TAFE

Effective FY 2021-22, the Teaching Assistant Allocation Model will include resources to cover resident tuition, health insurance, and full campus fees for each 50% TA calculated by the model (ie, every 1 FTE = 2 50% TAs).

Please stay tuned for updates to the EVC resource pages above and FAQs found on this page.

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## Other

### Diversity Fellowships

*coming soon!*

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### Student-initiated Fellowships

*coming soon!*

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### Training Grants

*coming soon!*

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### Faculty-initiated Sponsored Research Grants

*coming soon!*

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### Graduate Financial Support Payments

### Employment & Tuition Remission

*coming soon!*

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### Fellowship

*coming soon!*

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# Special Exceptions & Waivers

*coming soon!*

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# Need-Based Financial Aid

*coming soon!*