

GRADUATE SCHOLARSHIP COMMITTEE
Scholarships & Awards Manual

Effective May 1, 2018

FACULTY OF GRADUATE STUDIES AND RESEARCH

KILLAM CENTRE FOR ADVANCED STUDIES

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Official version

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1. Introduction

The regulations in this manual apply if you have been selected to receive an award administered by the Graduate Scholarship Committee of the University of Alberta (UAlberta). This Manual is updated each year. The regulations and dollar amounts in this Manual are effective for 2018-2019 awards and may change in subsequent years.

The information provided is based on the policies of the Graduate Scholarship Committee (GSC) and on the procedures used in the Faculty of Graduate Studies and Research (FGSR) for the management of graduate awards.

The majority of the awards administered by the University of Alberta will be governed solely by the regulations published in this Manual. However, awards from other granting agencies may have published regulations that differ from, or are in addition to, those in this Manual.

For regulations regarding specific awards administered by the Graduate Scholarship Committee, please refer to [Section 14](#).

More information can always be found at the [FGSR awards website](#).

If after reading this Manual you still have questions related to your University of Alberta graduate award, we welcome hearing from you.

Contact Awards Services:

Email: grad.awards@ualberta.ca

Local Telephone number: 780-492-9460

*Toll-free telephone number: 1-800-758-7136

Once a document has been published on the [FGSR website](#), the only official copy of that document is the online version. The material can be printed if necessary, but the printout should be considered an unofficial copy. Before using printed material in any capacity, users should always check the online system again to ensure that they have the latest version of the material.

Unless explicitly stated otherwise in the terms of reference or offer letter for your award, the following definitions and regulations will apply:

2. Definitions

Any Scholarships, Fellowships, Prizes, Medals or Awards administered by the Graduate Scholarship Committee of the University of Alberta will be referred to as "awards".

2.1 Scholarships and Fellowships

Scholarships and Fellowships are intended to support future work, and can only be awarded to students with first-class academic standing (equivalent to a grade point average of 3.5 or greater on the University of Alberta grading scale); additional selection criteria may be considered. Scholarships and Fellowships are awarded competitively.

2.2 Prizes and Medals

Prizes and medals recognize past accomplishments and are not intended to support future work.

2.3 Awards

Generally, awards are intended to support future work and are awarded competitively to students with satisfactory academic standing (equivalent to a grade point average of 3.0 or greater for awards offered to students newly admitted to a graduate degree program or a grade point average of 2.7 or greater for awards offered to students continuing in a graduate program); additional selection criteria may be considered, and may include financial need.

2.4 Graduate Scholarship Committee (GSC)

A standing committee of the Council of the Faculty of Graduate Studies and Research (FGSR), the GSC administers and adjudicates the various awards competitions, approves new awards, and develops policy for graduate awards managed by the University of Alberta. The information in this Handbook is based on policies approved by the Graduate Scholarship Committee. The GSC is chaired by the Dean of the Faculty of Graduate Studies and Research, or designate. More information on the GSC is posted on the FGSR website.

2.5 University Term

"University Terms" means the three terms in the academic year (i.e., Fall Term (September 1 to December 31); Winter Term (January 1 to April 30); and Spring/Summer Term (May 1 to August 31)).

3. Honorary Scholarships & Fellowships

You are encouraged to accept external awards offered to you, as doing so will not adversely affect your UAlberta award, unless otherwise stated in [Section 14](#). Some UAlberta graduate awards can be held in some form together with specific external awards. In some cases, the UAlberta award is then designated as being an Honorary award, and its value, if greater than the value of the external award, may be reduced by the value of the external award. See [Section 14](#) for the specifics. Honorary scholarships are noted on your transcript.

4. Eligibility

4.1 Course-based

- *Part-time*

Part-time students are not typically eligible, unless specified in the terms of reference for the award. If you are selected as the recipient of one of the limited number of department-specific awards for which part-time students are eligible, you are required to register in each term for the duration of the award.

- *Full-time*

Full-time students are required to be registered full-time in each Fall and Winter term.

4.2 Thesis-based

- *Part-time*

Part-time students are not typically eligible, unless specified in the terms of reference for the award. If you are selected as the recipient of one of the limited number of awards for which part-time students are eligible, you are required to register in each term for the duration of the award.

- *Full-time*

Full-time students are required to be registered full-time in each term of the duration of the award.*

** Students who commenced their thesis-based graduate degree program prior to Fall 2011 and were registered full-time during the Winter Term, are continuing in the same program, and plan to take up a new award in the Spring Term, will not need to register during the Spring and Summer Terms. However, you are required to register full-time in your graduate degree program for the following Fall and Winter Terms if the terms of the award require this.*

4.3 Graduate Certificate & Diploma Registrants

Students registered in Graduate Certificate and Diploma programs are not typically eligible, unless specified in the terms of reference for the award. If you are selected as the recipient of one of the limited number of awards for which Graduate Certificate and Diploma students are eligible, you are required to register in each term for the duration of the award.

4.4 Ineligible Student Categories

Qualifying students, special students, students on academic probation, visiting students and students in cost-recovery programs are not eligible to hold FGSR-administered awards, unless specified in the terms of reference for the award.

4.5 Years in Program

Unless otherwise stated in [Section 14](#) or specified in the terms of reference for the award, applicants registered in master's programs are eligible to hold awards during the first four years of their program. Applicants in doctoral programs are eligible to hold awards during the first six years of their program.

5. Payment of Tuition and Fees

Unless otherwise stated in [Section 14](#), **you** are responsible for paying your [tuition and related fees](#) directly to Financial Services. Your tuition cannot be deducted from your award stipend.

6. Concurrent Awards

- *UAlberta Awards*

You may hold any number of UAlberta awards (unless specified in the terms of the award) concurrently and at full value, except for certain combinations of awards as noted in [Section 3](#) and [Section 14](#).

- *External Awards*

The Graduate Scholarship Committee does not limit the number or total value of external awards that you may hold. However, the external agencies for these awards may have their own restrictions. You should consult the external agencies directly for their policies.

7. Employment while holding an award

7.1 You are expected to devote most of your working time to completion of your graduate degree. Before you accept employment, for example, a graduate assistantship, first discuss this action with, and receive consent from, your supervisor and department to ensure your total workload is compatible with your activities as a full-time graduate student and award holder. Graduate students who work under the [CAST agreement](#) are treated as graduate assistants for matters related to awards.

7.2 If you accept awards from any source, and the regulations for the award(s) and your department permit, you may hold a graduate (teaching or research) assistantship at any point in the duration of your award(s). Certain UAlberta awards stipulate or restrict the graduate assistantship duties you may perform. No decisions regarding assistantship appointments or their payment are made by FGSR; please contact your department or [Human Resource Services](#) with questions.

7.3 External granting agencies may restrict the number of hours of employment permitted. Consult the external agencies directly for their policies in this regard.

8. Accepting or Declining an Award

8.1 Unless you are offered an award that does not require acceptance you are required to accept the award offered to you in order to receive payments.

8.2 To accept or decline your award, complete and sign the Graduate Award Acceptance form or the Graduate Award Decline form available on the [FGSR website](#) and return it to FGSR. Please note: your letter of offer includes a deadline for acceptance/declination (30 days from the date of the letter of offer). If FGSR does not hear from you by the date stipulated in that letter, the award cannot be guaranteed beyond the deadline; it may be offered to another eligible student. Early notification of your declination of an award will permit FGSR to offer the award to another eligible student.

8.3 If you accept your award, but wish to defer the date the award begins due to a program deferral or approved leave, please notify your graduate department and our office. Your offer may be subject to expiration. These situations are dealt with on a case-by-case basis: please contact Award Services with the details of your case for specifics.

9. Award Renewals & Progress Reports

9.1 If your graduate award is [renewable](#), it is your responsibility to initiate payment for your renewal year by completing and signing the appropriate Renewal Form (e.g. Alberta Innovates GSS, Killam) available on the [FGSR website](#) Forms page or submitting the applicable Progress Report (e.g. [NSERC,SSHRC,Vanier](#)).

9.2 To be eligible for renewal of your graduate award, First Class academic standing (equivalent to a grade point average of 3.5 or greater) must be maintained, unless the terms of reference for the specific award indicate otherwise.

9.3 To ensure there is no disruption to your payments, please return the completed “Renewal Form” or “Progress Report” (available in the [forms](#) cabinet) to the FGSR at least 6 weeks before the start of your renewal year.

10. Payment of Awards

10.1 The duration and value of your award are outlined in your letter of offer.

10.2 In order to ensure timely payment, Acceptance Forms must be received in FGSR well before the payroll deadline date of the relevant semi-monthly pay period, as defined by [Payroll Operations](#), in which award payments are expected to begin (please see the Payroll Operations payment schedule for details on pay dates).

10.3 Payment of awards is processed by direct deposit to your personal bank account. You must set up direct deposit in order to receive payment. You can set up and manage your [Direct Deposit on-line](#) in [BearTracks](#). Additional information is available on the [Human Resource Services](#) website.

10.4 Award payments are made in arrears:

- Awards valued up to and including \$6,000 are paid in a one-time payment, within the time frame noted on the offer letter.
- Awards valued over \$6,000 up to and including \$11,999.99 are typically paid in two equal lump sums, usually at the beginning of each of two successive university terms, after confirmation of full-time registration (if required). Such awards may have their second instalment cancelled after the first term, if the requirements of the award are no longer met.

- Awards valued at \$12,000 and over will be paid in equal semi-monthly instalments in accordance with [Payroll Operations'](#) semi-monthly pay dates over a 12 month period. Such awards may have their remaining instalments cancelled if the requirements of the award are no longer met.
- Some awards payments may not follow the schedule outlined above for reasons which may include specific payment structure dictated by an external agency. Please check [Section 14](#) for additional regulations.

10.5 It is not possible to change the method and timing of payments. As noted in [Section 5](#), unless otherwise stated in [Section 14](#), **you** are responsible for paying your tuition and related fees directly to Financial Services. Your tuition cannot be deducted from your award stipend.

11. Income Tax

Currently, most awards income is non-taxable, though we note that the [Canada Revenue Agency](#) (CRA Individual income tax enquiries: 1-800-959-8281) regulations and Income Tax Act are subject to change at any time; please contact the CRA with questions about any income tax payable from award income.

12. Changes Affecting Your Award

It is your responsibility to notify FGSR in writing of any changes that will affect your registration, immigration, student or employment status, or affect the assessment of the international differential fee. Depending on the situation, the value of your award may be prorated or the award may be terminated.

12.1 If a change to your student status makes you ineligible to hold all or some specific portion of your award, any award funding that you are not eligible to hold will be terminated on the date the change to your program is effective. You may be required to repay all, or a portion of, the award stipend (including any tuition and fees paid on your behalf). Please familiarize yourself with the guideline of our "Forgiveness Policy" (Section 12.5). Changes affecting your award may include:

- Being placed on academic probation;
- Withdrawing from your program, being required to withdraw;
- Change in registration changes from full-time to part-time status;
- Change in program;
- Not being registered;
- Accepting another award that precludes holding concurrent awards.

12.2 If for any reason you continue to accept award funds in excess of amounts forgiven under Section 12.5 after you become ineligible for the award, or if the value of the award is prorated, you will be required to reimburse the UAlberta.

12.3 If your immigration status changes and you are no longer required to pay the international differential fee, or if you hold an award that provides payment of [tuition and fees](#), you may be required

to repay all or a portion of the tuition and fees paid on your behalf or any payments you have received for a tuition and fees component.

12.4 Prizes are awarded in recognition of past accomplishments. With the exception of the President's Doctoral Prize of Distinction (PDPD – see [Section 14.7](#)), you will not be required to return any portion of the prize monies received should your enrolment status change.

12.5 “Forgiveness Policy”: In the event of a change to your student status affecting your eligibility to hold an award, and unless otherwise stipulated by an external funding agency, FGSR will not pursue a refund of award monies paid to you, based on the following:

- For an award valued at or under \$6,000, FGSR will not pursue a refund of award monies paid to you.
- For awards valued over \$6,000 up to and including \$11,999.99, if you have been paid for a university term in which you were registered, then FGSR will not pursue a refund of award monies paid to you, but will withhold the second half of the award if you do not register for the following university term.
- For awards valued at \$12,000 and over, FGSR will terminate semi-monthly installments based on the date the status change is effective.

This policy is enforced at the sole discretion of FGSR and may change at any time, without notice.

12.6 Under certain compelling circumstances, exceptions to the rules in this Section may be approved by the Dean, FGSR (or designate). Compelling circumstances include unanticipated events unrelated to the academic program that could not have been avoided, such as medical emergencies, compassionate leave, or unique program requirements. The department should submit a written request to Award Services.

13. Program Completion and Awards

13.1 For thesis-based programs, payment of awards will be terminated:

- *For awards paid semi-monthly* - at the end of the month following the month in which FGSR receives the Thesis Approval/Program Completion form. Tri-Council Awards will be terminated due to the completion of degree requirements. FGSR will follow Tri-Council regulations and FGSR's end-of-program registration deadlines re: submission of the Thesis Approval/Program Completion form to terminate Tri-Council award payments. Visit FGSR's website for further information.
- *For awards paid in one or two installments* - the installment will be cancelled if there is no registration in the university term in which it was scheduled to be paid.

13.2 For course-based programs, payment of awards will be terminated at the end of the month following the month in which FGSR receives the Report of Completion of Course-based Master's Degree form. If you have completed all coursework and are not required to register in a Fall/Winter term in which you hold an award, you may be allowed to continue holding the award if FGSR receives a confirmation from your department that you are working on your program while not registered.

14. Additional Specific Regulations

14.1 Izaak Walton Killam Memorial Scholarship

14.1.1 The scholarship is offered to students registered full-time in a doctoral program. The award may begin either May 1st or September 1st. The award is valued at \$35,000 for 12 months and is renewable for a second 12-month period provided all renewal conditions, including first-class standing are met (refer to [Section 2.3](#)).

14.1.2 You are responsible for payment of your [tuition and fees](#). However, the scholarship will cover the International Graduate Student Differential Fee associated with full-time registration, if applicable. The differential fee, if applicable, will be paid directly to [Financial Services](#) on your behalf. If your immigration status changes and you are no longer required to pay the differential fee, any inapplicable portion of the international differential fee paid on your behalf must be returned to the University of Alberta.

14.1.3 You may hold any number of UAlberta awards concurrently with the Izaak Walton Killam Memorial Scholarship.

14.1.4 If you win an external scholarship you are required to accept the external award, and to inform FGSR of your offer. The Izaak Walton Killam Memorial Scholarship might then become Honorary ([Section 3](#) for details). The Honorary Killam Scholarship is renewable for a second year (subject to the conditions outlined in [Section 9](#)), and you must complete the [Renewal Form](#) and submit it to the Faculty of Graduate Studies and Research for a renewal to be activated. A full-value Killam Scholarship is available in the renewal year (subject to the conditions outlined in [Section 9](#)) should the external award not be available for a second year.

14.1.5 Before commencing your Killam Scholarship, you may defer it for up to a maximum of one year, but only for reasons of maternity, child rearing, illness, or health-related family responsibilities. You may not defer your award in order to take up another award, or to accept or hold employment, or to pursue studies other than those for which you received funding. You must request the deferral as soon as possible but **no later than one month after** the scheduled start date of your award. You must be on an approved leave of absence from your program to be eligible for the deferral.

14.2 University of Alberta Doctoral Recruitment Scholarship

14.2.1 The scholarship is offered to UAlberta applicants who will be registered full-time in a doctoral program after the offer of the award. The award commences in your first term of doctoral registration. The award value and duration vary. Additional program-specific conditions may also apply. A multi-year Doctoral Recruitment scholarship is subject to annual renewal (see [Section 9](#) for more information on the renewal process).

14.2.2 You are responsible for payment of your [tuition and fees](#).

14.2.3 You are strongly encouraged to apply for a scholarship from one of the [Tri-Council agencies](#) (CIHR, NSERC, or SSHRC), if eligible. The expectation is that you will also apply for all other scholarships for which you are qualified during the duration of the Doctoral Recruitment Scholarship.

14.2.4 You may hold any number of FGSR-administered UAlberta awards concurrently with a Doctoral Recruitment Scholarship.

14.2.5 If you win an external or non-FGSR administered award, you will retain your University of Alberta Doctoral Recruitment Scholarship unless prohibited by non-FGSR external funding regulations.

14.3 Andrew Stewart Memorial Graduate Prize

14.3.1 This prize is valued at \$5,000 and is available to full-time PhD students who have completed two or more years of their PhD program and are actively engaged in thesis research at the time of the award offering.

14.3.2 You may hold any number of awards concurrently with an Andrew Stewart Memorial Graduate Prize.

14.3.3 You are not required to accept this prize. It will be automatically paid to you following the offer.

14.4 University of Alberta Thesis-based Master's Recruitment Scholarship

14.4.1 The scholarship is offered to UAlberta applicants who will be registered full-time in a thesis-based master's degree program. The award commences in your first term of thesis-based master's registration. The award is valued at over \$22,000 (a stipend of \$17,000, plus [full-time program](#) and [non-instructional fees](#), and any applicable International Graduate Differential Fee). This scholarship is not renewable.

14.4.2 Any tuition or fees beyond what is stated above are your responsibility. FGSR will not cover fees for additional courses taken that are not part of your degree or courses taken during Spring/Summer terms (only thesis registration will be paid for during these terms). Tuition and fees covered by the scholarship will be paid directly to Financial Services on your behalf. If your immigration status changes and your tuition and fees are recalculated as a result of the change, or if you are no longer assessed the international differential fee, any portion of the award paid on your behalf for which you are ineligible must be returned to the UAlberta.

14.4.3 You are strongly encouraged to apply for all external scholarships for which you are eligible.

14.4.4 You may hold any number of UAlberta awards concurrently with this scholarship.

14.4.5 If you win and accept an external award, you must inform FGSR about your external award offer. Your University of Alberta Thesis-Based Master's Recruitment Scholarship may become Honorary. If your tuition and fees are covered by another award, whether external or from UAlberta, your tuition and fees will not be covered by your Master's Recruitment Scholarship.

14.5 University of Alberta Course-based Master's Recruitment Scholarship

14.5.1 The scholarship is offered to UAlberta applicants who will be registered full-time in a course-based master's degree program. The award may commence September 1st or January 1st, in the term

following the offer of admission. The award is valued at over \$22,000 (stipend of \$17,000 plus [tuition and fees](#) as outlined below). The scholarship is not renewable.

14.5.2 Tuition for required courses and fees is included with this scholarship, up to the cost for registration in the equivalent of 9 credits (18 fee index units) per term during the first Fall and Winter Terms. The International Graduate Student Differential Fee is also included, if applicable. Any fees in excess of this amount are your responsibility. Tuition and fees covered by the scholarship will be paid directly to Financial Services on your behalf. If your immigration status changes from Study Permit to Permanent Resident, and your tuition and fees are recalculated as a result of the change, or if you are no longer assessed the differential fee, any refund of the award paid on your behalf for which you are ineligible must be returned to the University of Alberta.

14.5.3 You may hold any number of UAlberta awards concurrently with this scholarship.

14.5.4 If you win and accept an external award, you must inform FGSR about your external award offer. Your University of Alberta Course-Based Master's Recruitment Scholarship may become Honorary. If your tuition and fees are covered by another award, whether external or from UAlberta, your tuition and fees will not be covered by your Master's Recruitment Scholarship.

14.6 Queen Elizabeth II Graduate Scholarships

14.6.1 These scholarships are awarded to Canadian citizens or permanent residents who will be registered full-time in Master's or Doctoral programs. The start date and duration of the award will be determined by the department.

- Master's – Applicants must be in years 1 to 4 of a master's degree program during duration of the award. The Queen Elizabeth II Master's Graduate Scholarship (QEII) is valued at up to \$10,800 for a full-value award, and up to \$5,400 for a half-value award.
- Doctoral – Applicants must be in years 1 to 6 of a doctoral degree program during the duration of the award. The Queen Elizabeth II Doctoral Graduate Scholarship (QEII) is valued at up to \$15,000 for a full-value award, and up to \$7,500 for a half-value award.

14.6.2 The full-value QEII Graduate Scholarship will be paid in two equal lump sums at the beginning of each of two successive terms, after confirmation of full-time registration for each term. The half-value QEII Graduate Scholarship will be paid as a one-time payment after confirmation of full-time registration in the relevant term (Fall or Winter). Please note that the payment schedule for this award differs from the standard schedule as outlined in Section 10. Notwithstanding the "Forgiveness Scholarships & Awards Manual 2018-2019 page 9 Policy" outlined in [Section 12.5](#), any changes to your student status affecting your eligibility to hold the award may require you to repay a portion of the scholarship.

14.6.3 You are responsible for payment of your [tuition and fees](#).

14.6.4 You may concurrently hold any number of UAlberta awards with the QEII. The QEII is not renewable, but your department may nominate you for a new award in each year during which you meet the eligibility requirements.

14.7 President's Doctoral Prize of Distinction (PDPD)

14.7.1 The prize is awarded to students registered full-time in a doctoral degree program who have won one or more of a [specific list of external doctoral-level scholarships](#). The prize is valued at \$10,000 in the first year that you hold the eligible external award. For subsequent years that you hold an eligible external award, the PDPD has a value equal to that of the Walter H Johns Graduate Fellowship (see Section [14.8](#)).

14.7.2 You cannot receive PDPD payments in those terms in which you do not receive payments from your eligible external award.

14.7.3 This prize is awarded automatically. No additional application is required.

14.7.4 You are responsible for payment of your tuition and fees, including the international differential fee, if applicable.

14.7.5 Recipients of [eligible scholarships](#) will be awarded the President's Doctoral Prize of Distinction (PDPD) upon receipt of the Graduate Award Acceptance Form of the eligible Tri-Council scholarship. You do not have to separately accept the President's Doctoral Prize of Distinction (PDPD) - it is automatically applied upon your acceptance of the eligible Tri-Council scholarship.

14.7.6 Recipients of eligible NSERC/SSHRC and Vanier awards will be paid the PDPD upon receipt of the NSERC/SSHRC/Vanier Payment Activation Form. Progress Reports are required for renewals before PDPD payments can be processed. Recipients of eligible CIHR awards and Trudeau Scholarships will be awarded the PDPD after submitting a copy of their Notification of Award to FGSR. The Notification of Award must be submitted annually, at least 6 weeks prior to the start date of the eligible external award. No separate acceptance is required for the PDPD offer.

14.7.7 As long as you are continuing to hold the eligible external doctoral-level scholarship, you can continue to receive payments beyond regular eligibility as identified in [Section 4.5](#).

14.8 Walter H Johns Graduate Fellowship

14.8.1 The fellowship is awarded to students registered full-time in a graduate degree program who hold eligible Tri-Council master's-level scholarships. The award has value of no less than full-time non-instructional fees, plus the annual program fee. Please see the [website](#) for the current value or contact Scholarship Services.

14.8.2 You cannot receive WHJ payments in those terms in which you do not receive payments from [your eligible external award](#).

14.8.3 You are responsible for payment of your [tuition and fees](#).

14.8.4 Recipients of [eligible scholarships](#) will be awarded the Walter H Johns Graduate Fellowship upon receipt of the Graduate Award Acceptance Form of the eligible Tri-Council scholarship. You do not have to separately accept the Walter H Johns Graduate Fellowship - it is automatically applied upon your acceptance of the eligible Tri-Council scholarship.

14.9 FGSR Graduate Travel Awards

For detailed regulations, please consult the [FGSR website](#). You are not required to accept this award. It will be automatically paid to you following the offer.

14.10 Departmental and Interdepartmental Awards

GPA for departmental and interdepartmental awards are calculated using a minimum of 15 credits.