

Graduate Student Funding

Objective

The objective of streamlining the Graduate Student Funding Process is to allow Research Administrators to manage the facilitation of the Graduate Student Funding process and initiate conversations with faculty members. This streamlined approach aims to centralize communication and coordination, ensuring efficient dissemination of relevant information, timely meeting of deadlines, and maximizing funding opportunities for eligible graduate students.

Noteworthy Updates

1. Faculty and Research Administrators will collaborate each March to develop an annual support plan for Graduate Student Researchers, replacing the annual survey previously conducted by the Director of Student Affairs.
 2. Faculty members are expected to adhere to this annual plan without deviation.
 3. [Exception requests](#) will need to be submitted in writing at least 60 days prior to the effective date of the requested change. Any exceptions are subject to approval by the Director of Finance or Vice Chair of Graduate Education and Department Chair.
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Procedure

1. March 1st of each year, Student Affairs will send a list of Graduate Student Researchers (including name, emp ID, advisor name) to the Director of Finance.
2. The Director of Finance will incorporate the list of students into the [annual Graduate Student Funding spreadsheet](#) and distribute it to the Research Administrators by March 15th of each year.
3. Research Administrators will prepare projection reports and meet with Faculty to discuss the upcoming fiscal year plans and how they would support their Graduate Students. The Research Administrators will use the [annual Graduate Student Funding spreadsheet](#) to record the annual plan decided by the Faculty. This will be completed by April 30th of each year.
4. On April 30th, the Director of Finance will lock the sheet for edits and send it to Student Affairs for processing of position updates.
5. Research Administrators will update the position funding in UCPATH prior to applicable deadlines.
6. Each quarter, when the Research Administrator submits the financial projection report to the faculty (July 31, Oct 31st, Jan 31st), the Research Administrator will ask the faculty if they would like to add any new Graduate Student Researchers to their research lab. Updates will be sent to the Director of Finance, who will update the

[annual Graduate Student Funding spreadsheet](#) (and insert a comment to notify the Grad Support/TA funding coordinator and the Director of Student Affairs).

Exception Requests

FINANCIAL EXCEPTION REQUESTS- Research Administrators will promptly inform their faculty if they feel that they can not adhere to the annual plan due to financial reasons (i.e. position changes, not funding changes).

- i. Once a new plan has been devised, faculty will submit their exception requests and financial reports to the Director of Finance, at least 60 days prior to the effective date of the requested change.
- ii. The Director of Finance will review the request to determine if the request needs to be routed to the Vice Chair of Graduate Education.
 1. If the change involves transitioning a TA to a GSR position, the request may be approved by the Director of Finance.
 - a. If approved by the Director of Finance will notify the Faculty and Research Administrator, after consultation with the Director of Student Affairs.
 2. If the change involves the GSR transitioning to a TA position, the Director of Finance will route the request to the Vice Chair of Graduate Education who will review the request with the Director of Student Affairs to determine the impact to the department and feasibility of the request.
 - a. The Vice Chair of Graduate Education will provide recommendations to the Department Chair, who has final decision making authority.
 - b. Decisions will be communicated by the Vice Chair of Graduate Education to the Faculty member and the Director of Finance.
- iii. If approved, the Director of Finance will update the [annual Graduate Student Funding spreadsheet](#) with the approved changes and notify all administrative parties of the change.
- iv. Student Affairs will update the position via UCPath. Position funding will be entered into UCpath.
 1. If change involves moving GSR to a TA, Student Affairs will also be responsible for updating the position funding.
 2. If change involves moving TA to a GSR, the Research Administrator will be responsible for updating the position funding and updating their financial projection reports.

NON- FINANCIAL EXCEPTION REQUESTS- Faculty will immediately inform the Vice Chair of Graduate Education if they would like to deviate from the annual plan due to non- financial reasons, at least 60 days prior to the effective date of the requested change.

- v. The Vice Chair of Graduate Education will work with the Director of Student Affairs to determine the impact to the department and feasibility of the request.

- vi. The Vice Chair of Graduate Education will then provide recommendations to the Department Chair, who has final decision making authority.
- vii. Decisions will be communicated by the Vice Chair of Graduate Education to the Faculty member and the Director of Finance. .
- viii. If approved, the Director of Finance will update the [annual Graduate Student Funding spreadsheet](#) with the approved changes and notify all administrative parties of the change.
- ix. Student Affairs will update the position via UCPATH.
 - 1. If change involves moving GSR to a TA, Student Affairs will also be responsible for updating the position funding.
 - 2. If change involves moving TA to a GSR, the Research Administrator will be responsible for updating the position funding and updating their financial projection reports.