

### **3. Financial Survival: Funding Graduate Study**

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Many graduate students get university funding for all or at least part of their graduate education. The support, however, rarely comes from one source. You actively need to research and apply for a wide range of funding sources, from research, travel, and dissertation writing awards to various jobs on university campus and beyond. In addition to providing key sources of financial support and other resources (such as computers), research and teaching assistantships, travel grants, and doctoral fellowships build morale and confidence, enhance your curriculum vitae (CV), and lend prestige to your profile. You can use these awards as building blocks towards securing additional grants or contracts that will provide you with the funding necessary to complete your program. Here, we orient you to the different sources of funding to help you get off to the best financial start possible.

In an ideal world, a candidate could secure funding for every year of the MA and PhD and for a few years of post-doctoral studies. However, you should be realistic about your chances for this level of financial security. In reality, there is a limited pool of funds and a great deal of competition for most jobs and awards. Tuition fees are lower in Québec, but Anglo-Canadian universities tend to have more internal funds for graduate students than francophone universities do there. Putting together a good funding package takes time and energy; fortunately, many departments and universities hold regular funding workshops and some universities have official “grants crafters” to help you put together an attractive application.

You will need to consider not only fellowships and department-sponsored employment but also jobs outside the department and university. Your search should start early, before you enter a program, and it should be wide-ranging. Consult your university research and employment officer, graduate director, PhD supervisor, and other students who have won awards and secured jobs.

There may also be certain targeted funds available to BIPOC students, though this is more common in the United States than in Canada. In 2019, however,

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the Social Sciences and Humanities Research Council of Canada introduced Indigenous Talent Measures to encourage self-identified Indigenous doctoral applicants to have their application for funding considered outside their institution's designated allotment. First Nations, Inuit and Metis students can also apply for a variety of scholarships through the graduate student offices, the Federal Government, their Metis local, or First Nation.

If you are a student with a disability, you may have access to specific resources. To learn of these funding sources, check with Graduate Student Offices and/or Graduate Student Associations.

And, if at some point you find yourself in dire financial straits, there is nothing wrong with going to your supervisor or graduate director and simply saying, "I'm broke ... is there any work I can do?"

### **Working for Pay as a Graduate Student**

This section discusses employment possibilities on campus and their ramifications for your career prospects. It is mainly aimed at domestic students. International students face very high fees; if you are a "visa" student, contact the International Students Office at your university for information about positions open to you. As an international student, you will encounter specific employment restrictions, but also special job opportunities; certain campus jobs may be set aside for you, such as summer teaching assistantships.

Your department may offer you part-time academic employment. This is often the most common way universities fund their graduate students. The job titles will differ from research assistant, to teaching assistant, to sessional instructor, but all can fit the category of graduate student employment. The offer may come as an inducement to enter a graduate program or when you accept admission into the program or in your second or third year. All the work that you do as a graduate student for a professor or a faculty-headed research team or a department should be paid, have a stipulated number of hours per week, and a predetermined work schedule set out at the beginning of the semester. Many universities also have graduate student employee unions that stipulate

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your work conditions (as of 2019, there were 25 such unions in Canada). Some scholarships also limit the number of work hours you can undertake. You will need to discuss your duties with the primary person for whom you are expected to work. When you know the particulars, you can decide whether you want the job. Always get the job offer and its requirements in writing. If applicable, be sure that the duties and pay scale conform to those laid out by your union. Keep track of your hours and communicate with your supervisor if you are reaching your weekly and/or semesters' limit.

Keep in mind that even though you may have been promised a certain amount of funding in the form of a graduate assistantship, most departments require that you apply for particular positions (bearing in mind that you still might not be able to be a teaching assistant in the course you want or feel most qualified for). Keep careful track of deadlines for applications and renewals. Apply early. Your supervisor should have up-to-date knowledge of your progress and may be able to point you in the direction of applicable employment opportunities. How graduate funding is awarded depends on the size of your department and its resources, and whether or not it must respect a union contract. Most graduate student employees in most universities in Canada are now covered by unions, usually the Canadian Union of Public Employees (CUPE).

### *Research Assistantships*

Research assistantships help to build valuable skills and can allow for more flexible work schedules than teaching assistantships. As a research assistant, you may work for one professor or a faculty-headed research team; if you are in a francophone Québec university, the research team may enjoy links with a team based in a Belgian or French university. You may undertake one or more of the following tasks: gathering statistical data, helping to edit a manuscript, arranging an archival collection, creating a website, drawing up the index to a book, photocopying published articles or primary documents, conducting or transcribing oral history interviews, or mounting a museum display. At some universities, you may have a choice between a teaching and research assistantship. When possible, pursue a research assistantship at least once in your years as a graduate student to develop your research skills. Students

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interested in a career in public history will particularly benefit from such jobs.

When you are hired in a university as a research assistant, you are most likely being paid out of funds awarded to a faculty member or a group of faculty members. In other words, the faculty are investing their own research dollars in training you. Be professional and honour the agreed upon number of hours and work schedule. Do not assume that you can take care of the assigned tasks in far less time than the contract outlines, or do them at the last minute, as you will invariably fail to do so and disappoint your faculty/employer. If your situation changes throughout the term and you are unable to fulfil the initial agreement, communicate this to the professor who hired you. Remember that this is a professional arrangement and that you may need to ask this faculty member for a reference letter. You do not want to develop a reputation as an unreliable research assistant.

If you are not offered funding or need supplementary work, you can look for research work from Faculty outside your department, historians working for government or museums, think tanks, and other organizations may have work. Ask around, and let your supervisor and other faculty members know you're looking for work. Outside universities, the role of "Research Assistant" may include skills beyond primary research and secondary source analysis. Government departments, for example, will also value your ability to write succinctly, technological know-how, language skills or social media savvy. As a graduate student in history, you're building a foundation in research and writing, but to find employment you'll need to hone multiple skills.

In the last two decades contract work on Indigenous land claims and reparation processes has become a common source of employment outside universities. This work can offer a meaningful opportunity to use historical research to right past injustices against Indigenous people and communities. You should know that advocacy work for some organizations might complicate future testimony you offer in these processes. Neutrality tends to be idealized in the selection of legal researchers and expert witnesses.

Be aware of any limits your department or Tri-Council funding parties put on

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outside work. Some scholarships come with the condition that the recipient does not work and/or limits their number of work hours outside their funded graduate project.

### *Teaching Assistantships*

As well as providing essential help to faculty, teaching assistantships are designed to provide you with teaching skills. Like an apprenticeship, a “TA-ship” affords you an opportunity to learn under professional guidance how to be a university teacher. You can sometimes gain experience in courses outside your particular field. And it is sometimes a good idea to TA for several different courses, but it is also less work to TA for the same course a number of times. This may be a useful strategy, if it is available to you, so that you can focus on your research and writing.

There are at least two types of TA work: marking student assignments and leading small group discussions, or tutorials, within a larger class. A teaching assistantship will usually involve both sets of tasks. By contrast, a marker-grader has the more limited role of grading student assignments. TA-ships that combine tutorial-based teaching and marking are more numerous in English Canada, though both anglophone and francophone universities rely fairly heavily on marker-graders.

When you work as a TA in a course directed by a faculty member, that course instructor is in charge of your professional conduct in the course. Therefore, the instructor will likely stipulate the assignments for your students (for instance, weekly tutorial readings and essay topics) in whole or in part. The instructor will often come to one of your tutorials to observe you and may also evaluate your abilities as a marker. Ideally, your instructor will provide you with tips for leading discussion and a rubric for evaluating written work. But you still might be asked to explain to the instructor why you’ve assigned a particular grade for a paper and the instructor may ultimately revise the mark. Sometimes your students will appeal a grade over your head to the instructor. This is all normal. Treat it as a learning opportunity. The course director may not only track your responsibilities, but also ask you for input on essay topics and exam

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questions, and consult with you about ways of improving the course. Ideally, this should be a collegial relationship despite the power imbalance involved. Additionally, teaching assistants are evaluated by both undergraduates and instructors; while this may seem intimidating at first, try to remember that you are an apprentice—their judgments can help you learn.

At most Canadian universities, TA-ships are covered by union contracts with established formulas that stipulate the amount of time required to prepare for a one-hour tutorial, or to mark a paper of a particular length, a final exam, and so on. In most unionized settings, a mid-term meeting is required between the TA and the instructor where they review the TA's workload and determine whether both sides are satisfied with the contractual relationship. Sometimes disputes arise between TAs and course instructors, particularly with regard to job expectations and contract terms. If you find yourself in this situation, start by approaching the person for whom you are working directly. If you do not feel comfortable doing so, or if you have done so to no avail, find out who your union steward is and bring your concerns to that person. You can also approach the graduate director.

Whether or not these formal meetings actually take place, be sure that the course instructor is aware of the hours you have worked and tasks you have completed. It is crucial that you and the faculty member agree in advance about your duties as a TA, and that your progress in carrying them out is monitored throughout the term. Be professional, but also don't allow yourself to be overworked; the terms of your contract have to be honoured by both sides.

Success as a TA can be extremely valuable when you are looking for a full-time teaching position. Hiring committees look for evidence of pedagogical skills in candidates. It is very much in your interest to do well and to have faculty observers witness your triumphs in the classroom. Whether in the form of letters of recommendation or departmental reports, faculty comments supported by student evaluations will carry weight in your applications for other jobs. It's helpful to have your performance evaluated by a number of means. Your students' course evaluations can sometimes be problematic, especially for women and BIPOC who are frequently subjected to a different

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standard. Universities know that, so it's best to have peer and faculty evaluations in your file as well. Either way, be sure to take the position of teaching assistant seriously!

You do not, however, need to TA in every year of your graduate career. Keep your eyes on the prize and get your dissertation done! While TA-ing is rewarding work and helps pay the bills, it is also demanding and time-consuming. Of course, certain teaching weeks will be more demanding than others, and teaching a course for the second time is easier than teaching it for the first time. But do not make the mistake of spending most of your work week on a part-time job that pays on the basis of 10 or 15 hours per week. Consult the guidelines of your contract. If your union contract's formula for marking an 8-10 page paper is 20 minutes, then follow it. You will learn how to be efficient (that's part of the training). TA-ing is meant to help subsidize your graduate education and some graduate students embrace it with great skill and enthusiasm. But always be careful not to lose sight of your own work.

### Application Processes

#### *Course Directorships: Teaching Your Own Course*

Some graduate students have the opportunity to teach their own courses by planning, lecturing, and marking themselves. Some departments may invite senior PhD students to teach a course in their specific field. Sometimes students at certain universities compete for the opportunity to teach a course they have proposed and designed. In other cases, a department will post the job openings, advertising to applicants both within and outside the university. Certain departments make it a rule not to hire their own students to teach courses, so you will need to find out your department's policy on this issue. If part-time instructors at your university are unionized, they may enjoy seniority rights over advertised courses. In some departments, PhD students can prepare themselves for teaching by designing a course as part of their comprehensive exams. In addition, sessional teaching positions are available off-campus as well, at CEGEPs in Québec, community colleges, other universities, and so on. For many of us, the joys of teaching are a reminder of why we entered graduate

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school in the first place.

There are many advantages to teaching your own course. Designing and teaching a course allows you to develop important academic skills. It indicates a mastery of the subject matter being taught, and shows your capacity for planning and managing an important project. If you are planning to pursue an academic career, it is a good idea to teach one of your own courses during your graduate years in order to determine whether you even enjoy teaching.

However, it is not necessary to teach many courses in order to demonstrate your ability as a university instructor, and many PhDs are hired without such experience. Tenure-track hiring committees want some indication that you can teach undergraduates—that you will be able to design course outlines, write informative lectures, and generally perform well before students—but few look for a long list of course directorships as proof of this. Excellent TA evaluations, along with a first-rate job talk or lecture, will also be taken into serious consideration. Remember that course directorships can be very time consuming and delay progress on your thesis, so make an informed decision when balancing such opportunities against the need to complete your PhD.

Of course, some students spend a lot of time teaching courses, sometimes for years, less out of a desire for the experience than for reasons of financial survival. A strong teaching record as a graduate student may help you on the sessional circuit: departments hiring on short-term (but also insecure) contracts often prefer seasoned teachers over candidates with a promising research profile. Unfortunately, universities have chosen over the past few decades to rely more heavily on less costly short-term contracts to fill out their courses: sessionals make up roughly a quarter of the teaching staff in most Canadian universities but teach anywhere from 30 to 40 percent of all courses.<sup>1</sup> For economic reasons, new graduate students who are pulled into the cycle of full-time sessional teaching can progressively diminish their ability to pursue the research and publication path needed for tenure-track jobs. Prioritize what matters to your future.

### *Fellowships and Grants*

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<sup>1</sup> [Maira Macdonald, "Sessionals, up close," \*University Affairs\*, January 9, 2013.](#)



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Departments are not the only sources of fellowship funding for graduate studies, so you will have to look beyond your own program for sources of support. Your department and your university's school of graduate studies can provide information about different sources of external funding. In some cases, external fellowships or grants can be used to supplement departmental assistantships. Within your university, there may be open competition grants for which all graduate students can apply—for example, dissertation writing awards cover tuition fees and other costs so the successful students can devote themselves full-time to completing their thesis. Some departments have funds flagged for specific fields of study, such as Canadian military or women's history or the history of certain immigrant groups. Many departments award short-term travel grants to first-rate research proposals that finance a student's trip to a specific archives or locale. Again, these are more common in English Canada than at francophone universities in Québec.

Canadian federal and provincial governments and publicly-funded academic organizations offer a variety of awards, including the Social Sciences and Humanities Research Council of Canada (SSHRC) and provincial ones such as Québec's Fonds de recherche du Québec—société et culture (FRQSC) and the Ontario Graduate Scholarship (OGS). Their deadlines are in October and November, however, which is well before most deadlines for graduate school applications itself. Consult academic organizations that offer student research and/or travel scholarships—for example, the Canadian Studies Association, and CRIAW (Canadian Research Institute for the Advancement of Women). Various private sources, such as community groups, religious organizations, and unions, can also be tapped. These awards range from thousands of dollars for several years to one-time-only grants of a few hundred dollars. They may be awarded by individuals, families, social organizations, or volunteer groups—for example, the Imperial Order Daughters of the Empire (IODE), Chinese Railway Workers' Organization, Canadian Federation of University Women, and professional and business groups.

Many fellowships are set aside for graduate students. History students can also apply for more general or multidisciplinary grants aimed at humanities and

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social science scholars. For example, the Department of Canadian Heritage provides funds for the study of immigrant and ethnic subjects. In addition, many archives and libraries in the US and Europe offer travel grants or research funding for graduate students. The competition for these awards is stiff, but they are certainly within your reach.

An important goal of funding is to reduce financial risk to the granting agency. Conscious of how little money there is to distribute, they put great weight on the reliability of references and proof of productivity. It may seem unfair, but a student who has already received one major award is more likely to receive other ones because they are perceived as “successful.” But there are always exceptions. A well-written application for a strong project can win a fellowship based on merit alone.

Many students are mystified by the process of how awards are granted. In many cases, professors from various universities sit on selection committees. In some cases, the committee members represent a variety of disciplines and do not know or are uninterested in the debates, jargon, and styles familiar to historians. Rather, they are looking for important projects with wider appeal. In such competitions, the onus is on you to present your project with a non-specialist audience in mind, to make your proposal accessible to non-historians, and to argue for the wider value, significance, or relevance of your work.

In certain competitions, you may need to demonstrate the applicability of your work beyond the academy. This may be particularly so with government-funded grants, such as certain SSHRC awards and the Trudeau Scholarship or with grants linked to publicly-funded research centres. While it may be easier for social scientists to argue that their research has valuable social policy implications, historians cannot—and should not—shy away from the challenge. After all, don't most historians think their research, whether on ancient Greece, Medieval Europe, or Cold War Canada, matters in some way to how we understand current social and political issues? Think creatively and contemporarily about your project.

The seeming unpredictability of funding awards might cause disappointed

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students to consider the awarding of grants something of a lottery. They may see students with lower grades or fewer publications receive awards, or they may receive an award one year but be rejected for the same one the next year. Do not get discouraged by what sometimes seems to be a random, even biased, process. Committees change; topics go in and out of fashion; the pool of applicants changes in size and quality; letters of recommendation vary from year to year. Be sure to keep applying for as many awards as possible. Ultimately, however, stay focused on finishing your dissertation, and don't let the award system affect your intellectual self-confidence.

### *The Application Process*

Given the enormous difference that a fellowship award can make to your studies, you should be prepared to devote considerable time to the preparation of your applications. (Even if you're unsuccessful, the process of articulating your project in a condensed format is invaluable.) Funding agencies adhere to strict deadlines for applications, so start early. You need time to prepare a good project proposal and get feedback on it. And your referees, moreover, will need ample notification of the deadlines.

You also need to be organized. Create a different file folder—both virtual and real—for each funding application. Save all relevant email correspondence in the appropriate folder. Keep various drafts of your proposal as well; you never know what you might need to revisit or re-use at another date. But make sure your most recent draft is clearly flagged. Follow the instructions for specific awards carefully, providing all the necessary information. Complete the forms neatly and precisely. Stay within the recommended length. Remember that fellowship committees often have to read hundreds of applications.

Of course, graduate students compete against each other for grants, but writing funding applications can be a shared endeavour. Guarding your application from your peers will not serve you well in the end. If you have won an award, offer to share your successful proposal with other students. Many departments keep samples of successful applications to help others write strong applications. When drawing up your research proposal, don't hesitate to ask people for

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feedback. Ask well-informed faculty (and faculty who themselves have a successful track-record in grant writing) to look over the whole application, which might include a budget and career statement as well as the description of the proposed research project. Professors and advanced students familiar with your specific field can make useful suggestions. So, too, can faculty outside your specialization; indeed, they might be better at identifying mystifying jargon or confusing shorthand. Some of your professors may even have served on grant adjudication committees. If your university has an official grants crafter (check your university's office of research), make an appointment with this person well in advance of the deadline. Be open to feedback and incorporate it accordingly. If you ask enough people, you may of course end up getting somewhat contradictory advice. The people who are perhaps most useful are those who have most recently sat on grant adjudication committees.

In applying for funding always remember to emphasize your strengths. This is best done by a clear statement of research and career plans. If your career shows unusual gaps, such as a period of withdrawal for family responsibilities or a paucity of research due to illness or heavy teaching responsibilities, explain the reason briefly, and in a straightforward manner. There's no need to apologize for the stuff of life.

Choose people to write letters of recommendation who will strengthen your application. It is always wise to ask faculty who are well known in the field. If you are working on a topic that requires a variety of skills, try to get referees who can testify to many of your attributes. If your career has been limited to a particular locale or to a teaching-oriented institution, you may try to include a recommendation from someone in a nationally-recognized department if that person is reasonably familiar with your scholarship. If you are a senior student nearing completion of your thesis, it is useful to get letters of recommendation from scholars outside your home institution; it is a sign that your work is already being well received. But weigh your options: a very positive and carefully crafted letter from a faculty member in your program who knows you well can carry more weight with a jury than a vague letter from a "star" at another university.

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The application may request supporting materials, such as a writing sample or budget. In the first case, send a polished piece of work but avoid submitting a very long paper. If you have a choice, add an abstract indicating which sections indicate the heart of your work. If a budget is required, you will need to justify it, so be realistic when estimating your needs. Don't pad your budget. The rationale is as important as the total amount of money requested, so briefly explain your reasoning in constructing the budget. Since funding agencies differ on requirements for supporting materials, seek the advice of someone who is well-informed about a particular agency. Above all, you want to show them that your topic is do-able and that you will make their investment worthwhile.

### *The Project Statement*

Your statement of research should be tailored for each individual funding application. Most subjects have many dimensions, and it is entirely appropriate to emphasize the geographical or subject area in which each funding body is particularly interested. For example, if you want to write your PhD thesis on the history of poverty in twentieth-century Canada and the United States, you should stress to the Fulbright Scholarship committee how your cross-border approach will enhance understanding of the ways “the poor” have been treated in the United States and Canada. For a SSHRC application, you might emphasize how your project will contribute to the rich literature on poverty, welfare state provisions, and anti-poverty activism in Canada, while at the same time internationalizing this scholarship. In a Trudeau Foundation application, where social justice issues matter, you might stress how studying histories of poverty and social and economic marginalization can help scholars and policymakers better understand and deal with current crises. You cannot, of course, claim to do all of these things unless you really intend to do so. The main purpose of the project statement is to show how your research is original, how it adds to existing scholarship, explores new methods, or makes new information available. The process of applying for fellowships should lead you to discover the richness of your own subject and to think systematically about how to bring this richness out. Learning how to package your research in different ways is a skill that will serve you well when you come to applying for future jobs.

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Naturally, your project description will vary depending on what stage you are at in your graduate career. For instance, whether you are finishing your Master's and applying for PhD funding or if you're in the fifth year of your doctoral program will make a difference as to how detailed your proposal will be. In any case, combine general research questions (or a working hypothesis or *problématique*) with a brief description of the relevant scholarly literature and a concrete agenda for how you intend to proceed with your research. Note the archival collections, periodicals, newspapers, or novels you plan to examine. If you are doing an oral history project, let the selection committee know you have clear ideas about how to contact the informants you hope to interview and that you are following the protocols of your university's ethics guidelines for research involving human subjects. You do not need to know all the answers to your questions, or what is in the records you describe; you do need to present a viable research agenda.

### *Re-applying*

If you don't win a fellowship the first time you apply, don't get discouraged or give up! Indeed, some departments will require that you apply for external funding is often a condition of receiving financial support from the department. Many chance circumstances enter into funding decisions and you could succeed the next time. Upon request, some agencies will provide feedback on your application. If you think that your project or qualifications were not judged fairly by a particular agency, write and ask them about it. With some agencies, such as SSHRC, you can apply under the *Freedom of Information Act* to see your file if you are concerned about whether or not your application was treated justly. You can also ask about grievance procedures, although your chances of success may be quite low.

### **Other Options**

In addition to external funding, university research and teaching assistantships, and course directorships, jobs are available for graduate students outside of

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teaching and research at the university. Your university may offer history-related jobs in the archives, library, or in university offices, including graduate student associations or unions. Similar jobs might be had off-campus. You can check out teaching possibilities in continuing education programs or long-distance programs run by local community colleges. All such employment will provide you with experience and skills that may strengthen your eventual candidacy for a permanent position. One can make a strong case in a cover letter for a tenure-track job for how a seemingly unrelated workplace experience makes you a strong candidate for a particular job posting. If you are applying for a job as a professional public historian, employment experience outside the university setting as a graduate student will be of real benefit. On the other hand, they may have less bearing on your eligibility for academic positions because hiring committees tend to focus on research and university teaching experience.

Finally, there is the option of waged work completely unrelated to your career plans. Many students find themselves “between scholarships” at some point during their graduate years and need to pursue just about any kind of job simply to make ends meet. If this is your situation, do not despair. It is not a sign of less commitment. It shows that you are dedicated enough to your graduate studies to pursue what may be unrelated work in the short term in order to meet your long-term goal of a Master’s or doctorate degree. Again, a case might later be made for how working outside the academy helped you develop skills that will serve you well in a university teaching position. But remember that even jobs that are not especially demanding intellectually may still tire you out; do not assume that you can write your thesis in the evenings after putting in day-long shifts at an office, restaurant, or store. Blocking time for thesis work around your work schedule is a good strategy. Planning for both study and work will help you to maintain your academic goals while paying the bills. Ultimately, finishing your degree is what matters.