



FHSD CoGS Funding Allocation – 2024/25

Background:

As with previous years, the College of Graduate Studies (CoGS) has allocated funding for graduate students through the UBC Okanagan Graduate Research Scholarship (OGRS) award.

OGRS funding is for full-time, thesis-based, PhD and Masters students. As stipulated by Senate, PhD students must be funded to a minimum level (\$24k/year), and Senate will likely introduce minimum funding for Masters students in the coming years. In anticipation of this, FHSD recommends PIs to adopt a \$17.5k minimum for Masters students. These minimums can be made up from a range of sources (e.g., any combination of external or internal scholarships/awards, research assistantship, teaching assistantship, or other academically-related work).

This coming year (2024/25) the Faculty of Health and Social Development (FHSD) has been awarded **\$520,000 for OGRS**, and it is up to FHSD how we allocate these funds. As in previous years, funds are allocated to students via Principal Investigators (PIs) within FHSD; allocations are split between eligible PI's. Each PI decides how to distribute their portion of the OGRS between the Masters and PhD students working in their lab. PI's are expected to use OGRS allocations to address potential funding inequities in their lab, address lab-specific EDI priorities, and strategically recruit students with otherwise limited funding opportunities.

FHSD Process for Allocation of OGRS:

Stage 1 (before June annually): Confirm PI numbers and eligibility/supervisory status across FHSD research faculty

Stage 2 (June annually): Researchers informed of their OGRS allocation for the upcoming academic year

Stage 3 (before August annually): Researchers inform FHSD administration how they wish to allocate their OGRS allocation between their eligible graduate research students

Stage 4 (before September annually): FHSD inform CoGS regarding allocation and funds are disbursed to students in three equal installments: September, January and April. PIs may request funds be paid out in one or two installments (or three installments of differing size).

Student eligibility:

FHSD Students are eligible for OGRS funding if they are 1) in good standing ("Satisfactory" or "Improvement Required" on their most recent annual report), 2) are within 24 months (Masters)/60 months (PhD) of the start of their degree, and 3) are registered full-time in a thesis-based program, as of the Fall term that year.



PI/Lab eligibility:

To receive an allocation of OGRS funding from FHSD, a PI must be the primary supervisor of at least one eligible graduate student enrolled in an FHSD graduate program (Masters of Science in Nursing, Masters of Social Work, Masters of Science in Health & Exercise Sciences, PhD in Nursing, PhD in Kinesiology, MA/PhD in IGS Individualized). PIs entering reduced workload, or end-of-appointment agreements, are required to discuss their research group's unique needs with the Dean as part of their individual agreement. This discussion will need to occur prior to May, should cover continuity of supervision (as per CoGS policy 9.2), and will inform decisions regarding their individual OGRS allocation.

Pooling of Resources Across Labs:

The FHSD OGRS allocation policy prioritizes flexibility to enable PIs to build their labs and programs strategically. PIs may allocate their funding to students outside of their lab if they wish, as long as the student is registered in a graduate program at UBCO and has a primary supervisor with an appointment in FHSD. Examples include: a PI who serves as committee member or co-supervisor for a student in another lab could allocate OGRS to that student; a group of collaborator PIs could pool their OGRS funding to allocate larger sums to one or more students, etc.

Accrual of OGRS funds:

We recognize that it may benefit some PIs to accrue funds in order to effectively develop their labs. As such, as long as a PI is supervising at least one eligible graduate student, they can accrue all/a portion of their OGRS funds for up to two years. Beyond two years, any funds not used will be disbursed between other eligible PIs.

Faculty involved with other units:

1) PI's that supervise students in IGS Themes:

Graduate students registered in IGS Themes may receive OGRS funding through IGS (this does not include individualized IGS students). To ensure fair access to OGRS funds for students and PIs across FHSD, the value of the OGRS funding a student receives from IGS will be subtracted from the FHSD allocation to that PI (i.e., the sum of OGRS allocations per lab in FHSD equals the allocation from FHSD plus the allocation from IGS). These subtracted funds will then be reallocated across all eligible PIs within FHSD.



For PI's who do not supervise IGS students:

$$\text{Total OGRS} = (\text{Base amount})^1 + (\text{IGS Reallocation})^2 + (\text{any carryforward from previous 2 years})$$

For PI's who supervise IGS students:

$$\text{Total OGRS} = (\text{IGS-Adjusted amount})^3 + (\text{IGS Reallocation})^2 + (\text{any carryforward from previous 2 years})$$

2) PI's with joint faculty appointments:

PI's who have a joint faculty appointment between FHSD and another UBC faculty *and* who supervise eligible graduate students registered in an FHSD graduate program, receive a pro-rated OGRS allocation (a pro-rated Base amount, plus a pro-rated IGS Reallocation) based on the proportion of their appointment in FHSD. PI's who have a joint faculty appointment between FHSD and another UBC faculty *and* who supervise eligible graduate students registered in an FHSD graduate program *and* who supervise eligible graduate students registered in an IGS Theme receive a pro-rated OGRS allocation (a pro-rated IGS-Adjusted amount, plus a pro-rated IGS Reallocation) based on the proportion of their appointment in FHSD.

For PIs with joint faculty appointments, who do not supervise IGS Theme students:

$$\text{Total OGRS} = (\text{Base amount})^1(\% \text{ appointment with FHSD}) + (\text{IGS Reallocation amount})^2(\% \text{ appointment with FHSD}) + \text{any carryforward from previous 2 years}$$

For PIs with joint faculty appointments, who supervise IGS Theme students:

$$\text{Total OGRS} = (\text{IGS-Adjusted amount})^3(\% \text{ appointment with FHSD}) + (\text{IGS reallocation amount})^2(\% \text{ appointment with FHSD}) + \text{any carryforward from previous 2 years}$$

¹ Base PI Amount = (Total amount from CoGS)/(Number of eligible PI's in FHSD)

² IGS reallocation = (SUM_{OGRS} paid to students from IGS across all of FHSD) / (Number of eligible PI's)

³ IGS-adjusted PI amount = (Base OGRS amount) – (OGRS paid to students from IGS)