

CHAPTER THREE

FINANCIAL SURVIVAL: FUNDING GRADUATE STUDY

Many graduate students get university funding for all or 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 the 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 scholarship. 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 postdoctoral 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 Quebec, but Anglo-Canadian universities tend to have more internal funds for graduate students than francophone universities in Quebec. Putting together a good funding package takes time and energy, but 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. If you are a student of colour or belong to a specific racial or ethnic group, there may be certain targeted funds available to you, though this is more common in the United States than in Canada. If you are a student with a disability, you may have access to specific resources, such as library technology. 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 too; certain campus jobs may be set aside for you, such as summer teaching assistantships.

Your department may offer you part-time academic employment. The job titles will differ from research assistant, to teaching assistant, to sessional instructor, but all 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 later, 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. 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. 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 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. Keep careful track of deadlines for applications and renewals and 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 Quebec university, the research team may also enjoy links with a team based in a Belgian or French university. You may undertake one or two 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, research assistant jobs are given primarily to MA students, while teaching assistantships are reserved for PhD students. At other universities, you may have a choice between a teaching and research assistantship. If possible, pursue a research assistantship at least once in your years as a graduate student to develop your research skills. Students interested in a career in public history will particularly benefit from such jobs.

When you are hired as a research assistant you are most likely being paid out of funds awarded to a faculty member or 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 thus 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 it is a professional arrangement and that you may later need to ask this faculty member for a reference letter. You do not want to develop a reputation as an unreliable research assistant.

Usually, professors with funds to hire research assistants do not openly advertise this fact. Some faculty members may wish to support their own students, or they may approach a student in their course who has impressed them. But many are also open to the idea of hiring students who need the money. All this means that you need to make your desire for such a position known to your supervisor and other faculty members. Ask around to discover who has grant money and might be hiring.

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. You can gain experience in courses outside your particular field. It is a good idea to TA for several different courses. Obviously, it is less work to TA for the same course a number of times, and this may be the better strategy depending on where you are at in your own dissertation research or writing. If possible, make strategic choices.

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 probably 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 come to one of your tutorials to observe you and may also evaluate your abilities as a marker. You 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. Treat all of this as a learning opportunity. The course director may not only track your responsibilities, but also ask you for input on essay topics and exam 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 and 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 (check your local CUPE website) 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 kept abreast 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.

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. So be sure to take the position of teaching assistant seriously!

However, you do not 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, 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. Remember, TA-ing is meant to help subsidize your graduate education, but it should not be a substitute for focussing on your own work.

Course Directorships: Teaching Your Own Course

Some graduate students have the opportunity to teach their own courses, doing the planning, lecturing, and marking themselves. Some departments may invite senior PhD students to teach a course in their field. Senior PhD 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 even 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, community colleges, other universities, and so on. For many of us the joys of

teaching are a reminder of why we entered graduate 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 course 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 considering such opportunities.

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 may help you on the sessional circuit: departments hiring on short-term (but, alas, also insecure) contracts often prefer seasoned teachers over candidates with a promising research profile but less classroom experience.

Fellowships and Grants

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. For an excellent list of scholarships, fellowships, grants, and research travel awards for universities across Canada, head to <http://www.cha-shc.ca/gsc-ced/en/awards.htm>. Within your university, there may be open competition grants for which all graduate students can apply – for example, dissertation writing awards that 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 or communities. Many departments award short-term travel grants to first-rate research proposals that finance a student's trip to a specific archives or locale, though, again, these are more common in English Canadian than in francophone universities in Quebec.

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 Quebec's Fonds québécois de la recherche sur la société et la culture (FQRSC) and the Ontario Graduate Scholarship (OGS). 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 minor 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. Again, head to <http://www.cha-shc.ca/gsc-ced/en/awards.htm> .

Many fellowships are set aside for graduate students. History students can also apply for more general or multidisciplinary grants aimed at humanities and social science candidates. 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 he or she is perceived as "successful." Of course, there are always exceptions. A well-written application for a strong project can win a fellowship based on merit.

Many students remain 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 wide 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, say, 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 about your project.

The unpredictability of funding awards might cause disappointed students to consider the awarding of grants something of a lottery. They may see students with lower grades or fewer publications than themselves receive awards, or they may receive an award one year but be

rejected for the same one the next year on the basis of the same academic dossier. Do not get discouraged by what may seem 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 sense of self-worth.

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. Funding agencies adhere to strict deadlines for applications, so start early. Remember you need time to prepare a good project proposal. Similarly, faculty who are writing letters of reference on your behalf deserve the courtesy of having 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. It is a good idea to save the various drafts of your proposal as 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, and 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 and should 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, ask people for feedback. Ask well-informed faculty 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 well versed in your field can make useful suggestions. So, too, can faculty outside your specialized field; indeed, they might be better at identifying mystifying jargon or confusing shorthand. 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.

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. No apologies are needed!

Choose people to write letters of recommendation who will strengthen your application. It is

always wise to choose 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 all 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 the thesis, it is useful to get a few 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" from another university.

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 you can 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 similar and differing ways in which the poor have been treated and regulated 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 same time internationalizing this Canadian 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 to better understand and deal with current crises. You cannot, of course, claim to do all these things unless you really intend to. 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, one that will serve you well when you come to applying for tenure-track jobs (for more details, see chapter 7).

Naturally, your project description will vary depending on what stage you are at in your graduate

career. For instance, whether you are finishing your masters and applying for PhD funding or 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 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. But 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, and don't give up! Indeed, most departments will not let you give up since applying 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 fairly. You can also ask about grievance procedures, though your chances of success may be quite low.

Other Jobs

In addition to external funding, university research and teaching assistantships, and course directorships, jobs are available for graduate students outside of teaching and research, and even outside the university. Your university may offer history-related jobs in the archives or library or, alternatively, in university offices, including graduate student associations or unions. Similar jobs might be had off-campus. You could 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 faculty position. On the other hand, they may not have much bearing on your eligibility for academic positions, because hiring committees tend to focus on research and university teaching experience. However, 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. Furthermore, if you are applying for a job as a professional public historian, employment experience outside the university setting as a graduate student could be of benefit.

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: you are in good company. It is not a sign of a lesser commitment. On the contrary, it shows that you are dedicated enough to your graduate studies to pursue what may be unsatisfying 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 so do not assume that you can write your thesis in the evenings after putting in day-long shifts at an office, restaurant, cinema, or store. Ultimately, finishing your degree is what matters.