

## 2019-2020 OSOTF Unilever/Lipton Graduate Fellowship

### Description

On behalf of University of Toronto's (UofT) Faculty of Medicine, the Office of Research Trainees (ORT) is pleased to administer the 2019-2020 OSOTF Graduate Fellowship to support research trainees at the University Health Network (UHN). These fellowships are awarded to graduate students, registered with UofT's Faculty of Medicine, on the basis of financial need and academic excellence who are studying within the neurosciences field at UHN.

**Deadline:** June 28<sup>th</sup>, 2019 @ 5pm

### Award Administration

The award will be paid directly to the awardee either as a cheque or direct deposit as set up in the ROSI system.

### Eligibility to Apply

OSOTF awards are allocated on the basis of academic excellence; however, financial need is the primary consideration for OSOTF awards. The award holder must be a full-time student at the UofT Faculty of Medicine for at least 14 weeks in any term during which they hold the award. Internal awards are automatically used to pay the student's outstanding fees. **Preference in funding decisions will be given to students in year 1-2 of their MSc or year 1-5 of their PhD.** Students beyond these years will be considered under exceptional circumstances (financial circumstances i.e. family emergency). The length of support from OSOTF awards is for up to one year and is not renewable, however new applications may be made for subsequent competitions.

Please review the attached **Guidelines for Applicants** to ensure you are eligible for this award.

### Application Process:

Applicants must submit the following:

- Completed application form (attached) including the following documents:
  - Short Description of Research
  - Transcripts (both official transcripts and certified true copy (stamped and signed); transcripts printed from their graduate department will be accepted)
  - Letters (2) of Recommendation (Reference Letters can be sent directly to The ORT by email or mail. See contact details below.)
  - Financial Needs Assessment Form

**Submit as ONE (1) .pdf file, electronically to: [ort.admin@uhnresearch.ca](mailto:ort.admin@uhnresearch.ca) by June 28, 2019.**

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Questions?

Contact the Office of Research Trainees (ORT)  
MaRS/PMCRT 101 College Street, Suite 13-701  
Toronto, Ontario M5G 1L5

Tel: 416-634-8775

Email: [ort.admin@uhnresearch.ca](mailto:ort.admin@uhnresearch.ca)

Website: [uhntrainees.ca](http://uhntrainees.ca)



## 2019-2020 Departmental OSOTF Awards Guidelines

### **Introduction**

The Ontario Student Opportunity Trust Fund (OSOTF) awards are a series of awards that have been developed through the Provincial Government, which set up a matching program in 1996/97. The Province provided 1/3 of the funding, matched by another 1/3 from the University and a final 1/3 from the donor. The adjudication of the awards is organized by your graduate unit or the awarding department.

The Provincial Government held 2 matching program periods resulting in establishing OSOTF and OSOTF II awards. Any donations not matched through the OSOTF II program when it ended, the Government made the match through The Ontario Trust for Student Support (OTSS) program. All three programs hold the same general criteria as outlined below.

### **Purpose**

The OSOTF Awards provide financial support for full-time registered graduate students (primarily M.Sc. and Ph.D.) in the Faculty of Medicine. Prospective and returning students are eligible to apply. These funds contribute towards the annual minimum funding commitment for doctoral-stream students.

Students in professional masters programs with significant coursework and internship/practicum/clinical placement components are not eligible for these awards.

### **Value & Duration**

Amounts available from OSOTF, OSOTF II and OTSS endowed Awards will be based on the annual income (interest earned) generated from the endowments.

The length of support for OSOTF awards is for up to one academic year and is not renewable, however, new application may be made for subsequent competitions.

### **Eligibility to Apply**

Graduate units ensure nominees meet eligibility criteria, including:

- OSOTF awards are restricted to individuals who meet all of the following criteria at the time of application:
  1. Canadian citizen, Permanent Resident of Canada or Protected Person;
  2. Resident of Ontario; and
  3. Demonstrates financial need.

**Note:** Requirements to be considered a resident of Ontario follow the guidelines established by OSAP to determine Ontario residency for OSAP and OSOTF awards.

- OSOTF awards require applicants to demonstrate financial need with an OSOTF Needs Assessment Form. Applicants may refer to the *FoM Expenses and Resources Guide for OSOTF Financial Need Assessment* for further information.



- Preference in funding decisions will be given to students in the following year of study at time of tenure of award (e.g., 2019-20 academic year):
  - **Year 1-2 of their M.Sc. or**
  - **Year 1-5 of their Ph.D.**
  - PhD students transferred from Masters have their PhD registration back-dated to the date of entry into the MSc program for calculating their year of study. E.g., a 2018-19 MSc student in year 1 transferring to PhD in 2019-20 will be considered PhD year 2 in 2019-20.
  - Students beyond these years will only be considered under exceptional circumstances. Graduate Units must have an explanation noted in their adjudication file for any students selected beyond these years.

### **Adjudication**

- Graduate units/Award Departments are responsible for adjudicating the OSOTF Awards and selecting their top students based on academic excellence, individual award's eligibility requirements, and financial need (if applicable).

### **Eligibility to Hold an OSOTF Award**

- The award holder must be a full-time student for at least 14 weeks in any session during which they hold the award at the graduate unit from which the award was applied.
- Should the student's financial and/or academic circumstances change, the Graduate Unit/Awarding Department should inform the Graduate and Life Sciences Education (GLSE) Office of any award monetary changes or cancellations.

### **Award Result Notification: Graduate Unit's Responsibility**

- Notifies all applicants of their internal adjudication results.
- Students' OSOTF Application Forms and Financial Needs Assessment Forms remain on file in the Graduate Unit/Awarding Department (GLSE does not require a copy).
- Submits Restricted Departmental Award Payment Request Form (2019-20) to GLSE to process the award.
- Notifies GLSE of any change in students' registration status.

### **Award Result Notification: GLSE Responsibility**

- Processes payments to successful students through ROSI/ACORN in sessional installment(s).

For Departmental OSOTF, OSOTFII, OTSS, PPEF Awards, please direct questions to:

Rita Seto, Business and Awards Officer

GLSE, Faculty of Medicine

Rita.seto@utoronto.ca

416.946.7616

Last Updated: May 1, 2019



**UNIVERSITY OF TORONTO**  
**FACULTY OF MEDICINE**

**APPLICATION FOR DEPARTMENTAL OSOTF AWARDS, FACULTY OF MEDICINE**  
**GRADUATE & LIFE SCIENCES EDUCATION - 2019-20**

*(Please be sure to identify all pages of your application with your name and student number)*

Name of Award(s) applied for:

Student Name (surname, first name and initial):

Student Number:

Home Mailing Address:

E-mail Address:

Phone #:

University Department :

Location of Research (University Bldg, Hospital / Research Institute name or off campus location):

Degree Program:

M.Sc. Year: at time of tenure of award

Ph.D. Year: at time of tenure of award

**Attachments:**

**Curriculum Vitae**

**Short Description of Research:**

Attach, in easily understandable terms, a summary of the research project (maximum 1000 words) including a **clear statement** on how it conforms to the conditions of the award

**Transcripts:**

First year M.Sc. students - attach official transcript for 4th year undergraduate degree

Current M.Sc. or Ph.D. students - attach official transcript for the last 2 years of current degree program

**Letters of recommendation:**

Attach 2 letters of recommendation, including 1 letter of support from current supervisor (Total of 2 letters)

**OSOTF Financial Needs Assessment Form:**

Attach completed Financial Needs Assessment Form

Applicant Name & Student Number

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**Declaration**

I hereby declare that all information given on this application is true and complete in every respect. I understand that I may be required to repay all or part of this assistance if the information is found to be inaccurate for any reason.

Student:	Signature	Printed name	Date
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**Signatures**

Supervisor:	Signature	Printed name	Date
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Graduate Coordinator:	Signature	Printed name	Date
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**UNIVERSITY OF TORONTO**  
**FACULTY OF MEDICINE**

**GRADUATE ONTARIO STUDENT OPPORTUNITY TRUST FUNDS (OSOTF) AWARD**  
**FINANCIAL NEEDS ASSESSMENT FORM**  
Faculty of Medicine

**INTRODUCTION:**

The "OSOTF awards" refer to a class of awards, which have resulted from Ontario government's "matching" program. Under the program every dollar of donation received for student assistance has been matched by the government as well as the university on a dollar-for-dollar basis.

**ELIGIBILITY:**

What are the OSOTF eligibility requirements?

These awards are restricted to individuals who meet all of the following criteria at the time of application:

1. Canadian citizen, Permanent Resident of Canada or Protected Person;
2. Resident of Ontario\*; and
3. Demonstrates financial need\*\*.

**\*What are the requirements to be considered a resident of Ontario?**

- you need to have always lived in Ontario or
- Ontario is the last province you lived in for 12 months in a row without being a full-time postsecondary student
- you live in Ontario now AND have lived in Canada for less than 12 months in a row

**If you are married/common-law, you can be considered an Ontario resident if:**

- your spouse has always lived in Ontario or
- your spouse has lived in Ontario for the last 12 months in a row without being a full-time postsecondary student or
- **All** of these statements are true:
  - you now reside in Ontario
  - you've lived in Canada for less than 12 months in a row
  - your spouse has lived in Canada for less than 12 months in a row

**If you qualify as a dependent student, you're considered an Ontario resident if:**

- Ontario is the last province in which your parent(s) have lived in for at least 12 months in a row or
- **All** of these statements are true:
  - you now reside in Ontario
  - you've lived in Canada for less than 12 months in a row
  - your parent(s) have lived in Canada for less than 12 months in a row

*The above requirements are the guidelines established by OSAP to determine Ontario residency for OSAP purposes.*

**\*\*How is financial need demonstrated?**

The OSOTF Financial Need Assessment Form (below) serves to confirm the residency requirement (student must attest to this) and demonstrate financial need by calculating the student's expected resources and expenses for the academic year (typically the study period months between September and August).

Financial need is normally demonstrated when a negative balance appears in the "TOTAL NEED" field on page 2 of the form (e.g., "Total Expected Expenses" is higher than "Total Expected Resources"). Showing a positive balance in the "TOTAL NEED" field is not typically considered a demonstration of financial need, unless extenuating circumstances are also reported (additional page for explanation may be submitted).

**Note:**

- This Financial Need Assessment Form must be completed with an OSOTF Application.
- For additional information on completing the Financial Need Assessment, refer to the *Faculty of Medicine Expenses and Resources Guide for OSOTF Financial Need Assessment Form*.

The University of Toronto respects your privacy. Personal information that you provide to the University is collected pursuant to section 2(14) of the University of Toronto Act, 1971. It is collected for the purpose of administering admissions, registration, academic programs, university-related student activities, activities of student societies, financial assistance and awards, graduation and university advancement, and for the purpose of statistical reporting to government agencies. At all times it will be protected in accordance with the *Freedom of Information and Protection of Privacy Act*. If you have questions, please refer to [www.utoronto.ca/privacy](http://www.utoronto.ca/privacy) or contact the University Freedom of Information and Protection of Privacy Coordinator at 416-946-7303, McMurrich Building, room 104, 12 Queen's Park Crescent West, Toronto, ON, M5S 1A8.

**Ontario Student Opportunity Trust Funds (OSOTF)  
Financial Need Assessment Form**

**Section 1**

Name:

Address:

Student Number:

Department:

Email address:

Telephone  
number:

**Section 2**

Have you applied for OSAP/UTAPS?

Have you received the result of the OSAP/UTAPS assessment?

**Section 3**

Name of the OSOTF award(s) that you are applying or being considered:

**Section 4**

Marital Status

Single

Married

Other

Children

Do not include children who have been out of high school for at least 5 years.

Number of dependent children

Other dependents

Number of other dependants

Relationship:

**Section 5**

**Declaration**

I hereby certify that the information provided on this application is, to the best of my knowledge, true and complete. I understand I may be required to supply documentation, specifically my tax return (or spouse's, if applicable), for the previous year, if this application is successful and if I am requested to do so.

\_\_\_\_\_  
Signature of applicant

\_\_\_\_\_  
Date



**Budget Outline:**

Please provide the following summary for the **twelve-month period for which funding is being requested** (e.g., September 1, 2019 to August 31, 2020). Make notes wherever explanation is useful.

**Period from:**

**to**

<b>Expected Resources:</b>	<b>Amount</b>	<b>Expected Expenses<sup>1</sup> :</b>	<b>Amount</b>
Awards (specify)		Fees	
Student Stipend/ Research Assistantship <sup>2</sup>		Books & Academic supplies	
Teaching Assistantship		Rent/Mortgage & Utilities	
Other income		Food & Household supplies	
Income of spouse/partner		Transportation	
Less Tax		Child care	
Total net income		Medical/Dental	
OSAP/UTAPS		Clothing	
Savings		Others (specify)	
<b>Total Resources:</b>		<b>Total Expenses</b>	
<b>TOTAL NEED (Expected Resources – Expected Expenses):</b>			

<sup>1</sup>Include expenses for your spouse/partner, if applicable.

<sup>2</sup>If your graduate department provides a guaranteed stipend (i.e. supervisor's stipend), you should include that amount as a resource in your budget. Please note that the needs-assessment we perform may be used either to locate particular sources of funding for that stipend, and/or to augment the total amount of funding you will receive.

**Additional Information:**

**If there are additional details that you wish to provide, please use the space below. Outstanding student loans may be listed below.**

## Expenses and Resources Guide for OSOTF Financial Need Assessment Form Faculty of Medicine

To apply for an OSOTF award, you need to complete an OSOTF Financial Needs Assessment in the form of a budget to demonstrate financial need. Provide your expenses and resources for a 12-month budget (September – August). *This guide is intended to assist you with completing the Financial Need Assessment Form.*

### Please note:

1. **Provide reasonable academic related expenses.** Financial need is normally demonstrated with a shortfall (deficit) in the Financial Needs Assessment budget (e.g., Total Expenses higher than Total Resources). Showing a positive balance in the budget will normally not be considered as demonstrating financial need unless extenuating financial circumstances are reported in the budget.
2. The minimum funding commitment for doctoral-stream students **must be** declared in Resources under 'awards' and/or 'Supervisor's Research Grant' sections of the Form.
3. Students living with dependent(s) and/or a spouse/partner may have additional expenses and resources. Expenses may vary according to individual student needs and requirements.

**Expected Resources** (estimated basic resources for a typical full-time domestic doctoral-stream student with single marital status studying at U of T for one academic year):

**Awards** – Any awards, scholarships or studentships that have been confirmed to be awarded to you at the time of the OSOTF application should be reported. For example, \$15,000 OGS or a \$30,000 CIHR Doctoral Research Award. If funding for the upcoming academic year is not known yet (e.g., waiting for award results), report the expected total funding amount in the 'Supervisor's Research Grant' section.

**Supervisor's Research Grant** – Doctoral-stream students are offered a minimum funding commitment established at each Graduate Department. Your funding commitment is derived from multiple sources. Your supervisor may also provide funding from his/her research grant, up to the amount of your funding commitment.

**Teaching and/or Research Assistantships** – Some students may obtain a RA or TA position during their studies to gain academic experience and earn extra income. This is treated as employment income and does not contribute toward the students' funding commitment in the Faculty of Medicine.

**Other Income** – Include employment income that is outside of your funding commitment (e.g. work-study, off-campus employment, paid internships).

**Income of Spouse/Partner** – Spousal or partner net income and expenses must be reported.

**OSAP/UTAPS** – If you have applied and are eligible for government student loans (e.g., Ontario Student Assistance Program) for your upcoming studies, provide the assessed/estimated eligible amount.

**Available student line-of-credit / bank loan** - Only include the amount currently available to you through your student line-of-credit or bank loan.

**Accessible savings** - Only include the total amount of savings you currently have access to (i.e., money that you could withdraw today, that is not locked into an investment). Include any RESP funds that you expect to withdraw to fund your education for the upcoming year.

**Expected Expenses** (estimated basic costs for a typical full-time domestic doctoral-stream student with single marital status studying at U of T for one academic year):

**Tuition & Incidental Fees** – As tuition for the upcoming year will not be posted until July, enter your fees for the current academic year as an estimate. The total cost of tuition and other fees for most full-time domestic graduate students in the academic year 2018-2019 was \$8,489.52. Review the Tuition Fees Schedules at <http://www.fees.utoronto.ca/Page13.aspx> for detailed information.

**Books & Supplies** – You can expect to pay \$100 - \$1,000 for books, photocopying, supplies, equipment, thesis binding, etc. The expense is higher if you need to purchase a computer/laptop.

**Residence/Rent/Mortgage plus utilities** - The type of accommodation you choose will range from \$0 to \$1,500/month or higher, depending if you live at home (e.g., with parents), on campus residence, or off-campus (rent or mortgage). Utilities may include hydro, water, gas, cable, internet, home phone line, and cell phone.

**Food & Household supplies** – Food and household supplies may range from \$250 to \$600 per month. Based on our past student applications, students spend on average \$3,000/year on food.

**Transportation** – This expense will vary depending on where you live. Typically, students will rely on public transportation such as the TTC and/or GO train. In January 2019, a student TTC pass is \$116.75/month (<https://www.utsu.ca/services>).

**Medical/Dental** - The Graduate Students Health Plan included with tuition fees provides students with a health benefits plan that covers many expenses not covered by a basic health-care plan (i.e. OHIP). Include medical expenses not covered by OHIP and the Graduate Students Health Plan.

**Clothing** - This cost may vary from \$100 to \$500 per year.

**Additional Information** - A short explanation for special circumstance may be provided here. Any outstanding debt from previous educational studies (e.g., OSAP) should be listed here.

**Note:**

- For OSOTF assessments, the provincially determined (OSAP) allowable claims may be taken into consideration to help determine need. For example, in 2018-19:

	<b>OSAP Allowances</b>
<b>Accommodations</b>	Single student living at home: \$0 Single student away from home: \$ 600 Single parent (one child): \$ 1225 Married student <i>and</i> spouse: \$ 1197 Each additional dependent person: \$ 257. <i>* Note: OSAP assessments are based on the family's entire income so the allowances reflect the family's expenses.</i>
<b>Food</b>	Single student living at home: \$ 211 Single student away from home: \$ 270 Single parent (one child): \$ 481 Married student <i>and</i> spouse: \$ 491 Each additional dependent: \$ 211

<p><b>Miscellaneous</b> <i>(incl. personal &amp; health care, clothing, h/h cleaning, communication)</i></p>	<p>Single student living at home: \$ 222 Single student away from home: \$ 290 Single parent (one child): \$399 Married student <i>and</i> spouse: \$ 527 Each additional dependant: \$ 109</p>
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