7.2.1 Fellowships and Other Stipend Support: Policy

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Summary

Fellowships, typically including a full or partial tuition payment and a stipend for living expenses, are awarded as a form of financial support to a student. They are not provided in exchange for services provided by the student. They may be awarded by Stanford University, or any of its departments, or by external sources, on the basis of merit or need.

Policy

A fellowship is an award of financial aid to a student, providing a stipend and/or tuition support. No service is expected in return for a fellowship; it is awarded on a merit or need basis to assist the student in the pursuit of a degree. Fellowships may be provided by Stanford University, or any of its departments, or may be provided by external sources. The amounts of stipend and tuition support are determined by the source of the funds; graduate fellowships from Stanford-based funds generally are controlled by the school or central office and administered by the department, which determines requirements and restrictions as well as the level of support.

Fellowships and support on federal training grants are distinguished from research project funding awarded in the form of a research assistantship in exchange for work performed on the project (see GAP 7.3, Assistantships [1]).

Authority:

- Vice Provost for Graduate Education [2] (policy)
- Departmental staff (implementation)

Applicability:

All graduate students and programs. See GAP 7.4, Postdoctoral Scholar Support [3], for guidance related to Postdoctoral Scholars.

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1. General Eligibility

Fellowship support may be awarded to either matriculated or nonmatriculated graduate students. Named Stanford fellowships (e.g., Stanford Graduate Fellowships, Lieberman Fellowships, and other named school or departmental fellowships) are reserved for matriculated graduate students and for those who have been admitted to matriculated study.

During Autumn, Winter and Spring quarters, matriculated students must be enrolled in at least 8 units to receive stipend or tuition support from a fellowship. This enrollment requirement is reduced to one unit during Summer quarter. Exceptions to this enrollment requirements may be approved for students:

- with TGR status
- who have been approved for a Graduate Tuition adjustment
- who are enrolled for an approved Graduation Quarter
- in an approved childbirth accommodation period
- with an approved disability accommodation
- enrolled through the Honors Co-op program.

A "full fellowship" is defined as one that provides the same amount of support as a 50% FTE assistantship, at the minimum salary level stablished by Stanford University and providing the equivalent level of tuition support (see current funding levels on the Graduate Financial Support website [4]). Because full fellowships are intended to enable students to work exclusively on their studies, concurrent hourly employment is limited to eight hours per week during the academic year (16 hours per week in summer quarter). Students on full fellowships may hold a concurrent research or teaching assistantship appointment up to a maximum of 25% with no additional hourly employment during the academic year (50% with no additional hourly employment in summer).

Individual departments and programs may establish more specific eligibility requirements for the fellowship programs that they manage.

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2. Payment of Stipends

Stipend payments are initiated in GFS, processed by Student Financial Services, and normally provided to matriculated graduate students as a quarterly payment at the beginning of each quarter. Students may make arrangements to have their stipends direct-deposited to a personal banking account. Stipend checks being mailed will be sent to the student's mailing address in Axess.

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3. Types of Fellowships

Fellowships Awarded by Stanford Departments and Programs

The Office of the Vice Provost for Graduate Education manages several university-wide graduate fellowship

programs, including the Stanford Graduate Fellowships in Science and Engineering (SGF) and the Stanford Interdisciplinary Graduate Fellowships (SIGF) programs, among others. The amounts of support provided by these programs, and the general rules governing eligibility and administration of the program, are defined on the VPGE fellowships web sites [5].

Schools, departments and programs also administer the awarding of their own funds to graduate students. Adhering to the general principles and definitions in GAP 7.1, Graduate Financial Support: General Funding Guidelines and Definitions [6], departments set their own eligibility requirements and amounts to be awarded. Schools, departments and programs may use their own funds to award full fellowships or to supplement other student funding. As with all fellowship support, matriculated students with school or department-based fellowships are required to enroll for at least 8 units during the school year, and for at least one unit during Summer quarter. Exceptions, for example for summer travel awards, may be allowed by a Home Department Approver.

Training Grants

Some federal agencies award funds to universities for the purpose of providing training for selected participants. Such awards are designated as Training Grants, and are administered through Stanford's Office of Sponsored Research. Proposals for Training Grants describe the educational program, including the required enrollment, for trainees. Upon the award of a training grant to Stanford University, the department or program selects the students to be funded and manages the payment of tuition, fees and stipends in GFS. Support from Training Grants is administered as fellowship support. Training Grants often have their own eligibility, administrative and reporting requirements.

Nationally-Competitive External Fellowships

Many graduate students hold fellowships won in national competition from national organizations or government agencies, local civic groups or foundations. Information on application procedures and terms of such fellowship programs may be obtained from the applicant's current academic institution or the office of the agency administering the program. A student who receives support from an outside source must notify his or her Stanford academic department immediately; Stanford funding may be adjusted.

The Financial Aid Office (FAO) is responsible for administering nationally-competitive external fellowships that:

- are awarded cross-school (e.g., National Science Foundation and Howard Hughes fellowships)
- are need-based, requiring need-analysis by federal guidelines (e.g., Jacob Javits fellowships)
- require central administration.

External fellowships have their own policy guidelines: most require enrollment and matriculation, some require supplementation while others allow tuition only for the amount of a tuition shortfall, some allow part-time assistantships while others disallow any additional support or employment, and some prohibit concurrent receipt of other federal funds. See, for example, requirements related to Supplemental Pay for Stanford students on an NSF Graduate Research Fellowship [7] [pdf form].

With such a diversity of policy rules and regulations, department administrators are advised to contact the FAO with any questions regarding such fellowships (for example, required tuition supplementation and/or payment of fees). The FAO can advise as to whether a specific fellowship is to be administered by the school, the department or the FAO.

Stanford Graduate Fellowships (SGF) and certain nationally-competitive fellowships may be used to supplement one another, up to the level of an SGF award. The SGF Program Officer, jointly with the Financial Aid Office, distributes information each year regarding GFS data entry for students holding both an SGF and a nationally-competitive

fellowship. For guidance related to the implementation of Stanford Graduate Fellowships and nationally competitive fellowships, see the SGF Fellowship Accounts and Entry [8] web page [Stanford access only].

While the Financial Aid Office staff will enter and approve stipend and tuition payments made under the terms of nationally-competitive fellowships, departmental personnel with the appropriate GFS access will be able to see those payments in GFS. Students should also advise their school and department of any external fellowship support they are receiving, so as to avoid conflicts with other Stanford support.

External Fellowships Paid Directly to Students

In some cases, an external agency may award a fellowship directly to an individual, so that the funding is not processed through Stanford. In this case, the student is billed for tuition and fees in the same manner as other students, and pays those expenses directly. Such aid is not processed by means of the GFS system.

Students with competitive fellowship awards paid directly to them are eligible for a Cardinal Care health insurance subsidy in the same way as students with financial aid processed through Stanford. Departments should request and keep a copy of appropriate documentation defining such fellowship awards, and then document the fellowship by means of an "Information Only" entry in GFS.

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4. Funding From Multiple Sources

Acceptance of a Stanford award obliges a student to inform the department of any other aid received. The Stanford award may be adjusted.

Because graduate students often receive funding from multiple sources during their studies at Stanford, it is important to know and abide by the policy conditions of each funding source. Sometimes, receiving financial support from one source prohibits additional support from another. See, for example, requirements related to Supplemental Pay for Stanford students on an NSF Graduate Research Fellowship [7] [pdf form].

In cases where a student has multiple sources of funding for tuition or health insurance, outside funds must be used before university funds. School and department funds are the last source of funds to be applied to support graduate students.

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5. Other Stipend Support

Departments may use stipend payments from appropriate sources of funds to provide the following other types of financial support for graduate students. In most cases, these types of payments are NOT allowable charges on sponsored projects.

With the exception of health insurance payments, stipend payments made from university sources of funding will be charged a "stipend surcharge." The amount of the surcharge is set annually to cover the cost of the Cardinal Care subsidy program.

Health Insurance Payments

Stanford University subsidizes up to half of the quarterly insurance premium for qualified graduate students (see

definition of Cardinal Care Subsidy in GAP 7.1, [Graduate Financial Support: General Funding Guidelines and Definitions](#) [6]). Departments may elect to pay the balance of a student's health insurance with a separate stipend payment. Student paying for any portion of their health insurance themselves will need to do so directly with the Student Financial Services office.

Payments to Offset Educational Expenses

Payments to help a grad student pay education-related expenses (other than travel expenses) are considered to be student support and not a university business expense. As such, these kinds of payments are processed as stipends in GFS. This includes money to buy books or other materials that the student will use and keep. When money is being awarded in advance to pay education-related expenses, including anticipated travel, the funds are provided as a stipend. As student support, these payments are tax-reportable income. The student may be able to deduct their education-related expenses on their taxes (and should save their receipts for this purpose). If a student is being reimbursed for materials purchased for the department (where the materials will belong to Stanford, and not to the student), the expense should be treated as university business and processed through the Travel and Reimbursement office, not by means of a stipend payment in GFS.

Departments who wish to reimburse a student's travel expenses may do so through the normal procedures for [travel and reimbursement](#) [9], handled through the university's general accounting systems.

Awards and Honoraria-type Payments

Special accomplishments or assistance provided by a student may be recognized with a one-time stipend payment, processed through GFS.

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6. Cardinal Care Subsidy

Students who are enrolled in the Cardinal Care insurance program, and who receive a fellowship stipend equivalent to the minimum salary for at least a 10% assistantship, are eligible for a Cardinal Care subsidy (see definition in GAP 7.1, [Graduate Financial Support: General Funding Guidelines and Definitions](#) [6]).

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7. Taxability of Stipends

Stipend payments will normally be considered taxable income to the student, although no deductions will be withheld at the time the payment is made (withholding may be necessary for some international students). Tuition payments, or payments of other required fees, are generally not considered taxable income to the student. For further guidance related to taxes, the student should consult the [Student Financial Services office](#) [10] web site.

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Related Content:
Related Policies
- GAP 2.1, [Admitting Graduate Students to Matriculated Study](#) [11]
- GAP 6.1, [Graduate Tuition Categories](#) [12]
- GAP 6.2, [University Fees](#) [13]

- All other documents in GAP Chapter 7 [14]

Related Bulletin Sections
- Graduate Financial Aid [15]

Related Information and Forms
- GFS Policy Manual [16]
- SGF Fellowship Accounts and Entry [17] [Stanford access only]
- Supplemental Pay for Stanford students on an NSF Graduate Research Fellowship [7] [pdf form]
- Financial Aid Office [18]
- Student Financial Services [19]