TA RATIONALE APPROVAL & TA FUNDING PROCESS
TA Rationale Approval Process
The Resource Implication Form and TA Rationale Form are two separate forms, and are both required to be submitted when the Academic Unit seeks TA resources for a New Course.

TA Rationale Forms can be found here: Lecture only Course or Lecture with Tutorial or Practical.

For any TA rationale related inquiries, please contact the Dean’s Office below and cc your assigned Financial Officer at Budget, Planning and Finance:

- Anita Srinivasan (anita.Srinivasan@utoronto.ca)
- Sara da Silva (src.dasilva@utoronto.ca)
TA Rationale Approval Process for Changes to Existing Courses

Changes may include: Addition or deletion of tutorial and practical sections (or changes in their delivery hours), structural changes to course delivery, material revisions to existing approved TA Rationale Form on file etc.

The Resource Implication Form and TA Rationale Form are two separate forms, and are both required to be submitted when changes in TA resources are required by the Academic Unit due to a change to an existing course.

TA Rationale Forms can be found here: Lecture only Course or Lecture with Tutorial or Practical.

For any TA rationale related inquiries, please contact the Dean’s Office below and cc your assigned Financial Officer at Budget, Planning and Finance:
- Anita Srinivasan (anita.Srinivasan@utoronto.ca) or Sara da Silva (src.dasilva@utoronto.ca)
Timing of Submission & Approval

- **September**
  - Rationales for new courses or changes to existing courses are evaluated every September for incorporation into the following Academic Year.
  - For example: proposals submitted in September 2020 for the following Academic year will be considered for implementation in the 2021-22 Academic Year.

- **April**
  - Deadline for Academic Unit to submit TA Rationale Form to be considered for the following Academic Year.
  - For example: April 2021 is the deadline for submitting rationales to be considered for the 2021-22 Academic Year.

- **Summer**
  - The Dean’s Office will review TA Rationale Forms submitted by April and evaluate over the summer months.
  - Proposals submitted during the summer will not be implemented in the upcoming fall Academic Year.

Note: If any approved TA Rationale Forms have not been incorporated into the annual Base Budget file, in-year funding will be provided.
TA Funding Process
Base Budget is funded based on Approved TA Rationale Forms, using Prior year enrolment data. Enrolment changes are reflected through an in-year funding process, refer to “TA Funding Process – Top up” on page 8.

**Summary of Key Calculations:**

- Attrition Rate = 1 – (Average Enrolment\(^{*1}\)/Peak Enrolment\(^{*2}\))
- TA Ratio = Total TA Hours Required for Course/Peak Enrolment

\(^{*1}\) Average Enrolment is based on the monthly enrolment within the term.

\(^{*2}\) Peak Enrolment is the maximum enrolment within the term.
TA Funding Process – Top up

**Fall Term Top-Up (Occurs in December)**

- Only F courses are topped up (H5F & Y5F)
- Current Year Enrolment Data Used
  - F Course → Sept 1st, Oct 1st, Nov 1st, Dec 1st

**Winter Term Top-Up (Occurs in April)**

- S & Y courses are topped up (H5S, Y5S & Y5Y)
- Current Year Enrolment Data Used (as of Apr 1st)
  - S Course → Jan 1st, Feb 1st, Mar 1st, Apr 1st
  - Y Course → Full Academic year

As long as there is an approved TA Rationale Form for an underlying course, any increases in enrolment, whether as a result of cap changes or not, will be funded through the in-year top up process. For any top up stemming from enrolment fluctuations, please contact your assigned Financial Officer at Budget, Planning & Finance.