

# Coursework Scholarships Procedure

Version 3 – Approved 1 April 2024

## Contents

Purpose.....	1
Applicable governance instruments.....	1
Procedure .....	2
1. Background.....	2
2. Establishing new scholarships .....	2
3. Advertising scholarships .....	4
4. Applications .....	4
5. Shortlisting and selection .....	5
6. Awarding scholarships.....	5
7. Tenure management .....	6
8. Conflicts of Interest .....	8
9. Risk Management.....	8
Related procedures .....	8
Versioning.....	8

## Purpose

This procedure describes how University coursework scholarships are established, advertised, applied for, assessed and awarded and how the tenure of award recipients is managed.

This procedure does not apply to HECS scholarships, waivers and fee discounting arrangements.

## Applicable governance instruments

Instrument	Section	Principles
<i>Scholarships, Prizes and Medals Policy</i>	1 Scholarships	1.1 - 1.5
<i>Fundraising and Naming Policy</i>	2 Management of Philanthropic Gifts	2.1 - 2.2
<i>General Delegations Ordinance</i>		
Australian Taxation Office regulations in relation to gifts and donations		
<i>University Foundation Committee Ordinance</i>		

Definitions and acronyms can be found at: <https://www.utas.edu.au/policy/policy-definitions>

Related policies and procedures can be found at: <https://www.utas.edu.au/policy>

## Procedure

### 1. Background

The University Scholarships Program is a fundamental component of the University's brand – it articulates both quality and distinctiveness through four key principles:

- Removing financial barriers to enable access to study at higher education for a diverse population.
- Attracting students to study – retaining Tasmanian talent on the island and drawing in talent from interstate and overseas by recognising and rewarding academic merit.
- Retaining students through offering experience-based learning opportunity scholarships.
- Fostering community partnerships and growth.

The objectives of this procedure are to ensure that:

- Scholarships are established in accordance with the above key principles.
- Scholarships are advertised and open for application to commencing and continuing students and in a timely and fair manner.
- Scholarships are awarded in an ethical, open and transparent manner on the basis of merit achievement, potential, a commitment to learning and/or evidence of need.
- Award recipients' ongoing eligibility is monitored as part of tenure management.
- Scholarships are reviewed regularly so they remain fit for purpose.

This procedure applies to coursework scholarships. Coursework scholarships are offered when the assessable content by research is less than two thirds of the total assessable content.

For the requirements in relation to HECS scholarships, waivers and fee discounting arrangements, see the *HDR Research Training Program and Other Scholarships Procedure* and the *Student Fee Waivers and Discounts Procedure*.

### 2. Establishing new scholarships

2.1. Scholarships are established in accordance with the University's Scholarships Strategy theme areas:

- **Access** – supporting students whose financial situation is a barrier to them being able to study.
- **Diversity** – supporting students from diverse backgrounds. For example: Aboriginal and Torres Strait Islanders, women in science, technology, and mathematics (STEM), disability.
- **Academic Merit** – rewarding students who have succeeded academically and who with further support are likely to excel.
- **Relocation** – supporting students from interstate, and regional and remote areas of Tasmania with the costs of relocating to study.
- **University Enrichment** – providing learning opportunities for students which enhance the student experience. For example: travel scholarships, engineering cadetships, summer research programs.
- **Honours** – encouraging and supporting students to study a project in a particular area as part of their Honours degree. For example, cardiovascular research, wildlife conservation.

2.2. In order to be established, a scholarship must:

- a) align with one or more of the Scholarship Strategy theme areas
- b) have clear eligibility criteria

Version 3 – Approved 1 April 2024

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- c) specify the amount and duration of the scholarship – for example set dollar amount reviewed annually, set dollar amount per year for a fixed term duration, or a scholarship to be set up in perpetuity.

2.3. Eligibility criteria should be broad in order to maximise the number of applicants who can apply, and clearly identify who is eligible to apply by specifying:

- i. The student cohort the scholarship is supporting (e.g. commencing, current, Honours or Postgraduate).
- ii. The course/broad area of study of scholarship relates to (e.g. Bachelor of Business, or Business, Economics and Law), or project (in the case of an Honours scholarship).
- iii. Any other eligibility requirements - such as applicants of Aboriginal and Torres Strait Islander identity, or applicants from certain regional areas (eg North West Coast of Tasmania).

The Scholarships Office must review and approve the eligibility criteria for all scholarships prior to the scholarship being established.

2.4. The procedure to establish a new scholarship depends on how the scholarship is funded:

a) *Donor funded*

Scholarships funded by donations and bequests are managed by University's Advancement Office. The Advancement Office will coordinate conversations with prospective donors and in conjunction with the Scholarships and Prizes Office will devise a scholarship which meets the requirements of section 2.2 above.

b) *Internally funded*

Colleges and Divisions wishing to set up a new scholarship which is funded by an internal budget centre are to submit a request to the Scholarships and Prizes Office (via AA Activation of Scholarship Form provided by the Scholarships and Prizes Office) addressing the requirements of section 2.2 above, including clear alignment with the Scholarships Strategy.

c) *Government funded*

Most government funded scholarships are awarded following a funding application process. Colleges or Divisions which identify opportunities for government funded scholarships will contact the Scholarships Manager who will coordinate the submission of the application on behalf of the University.

2.5. Prior to establishment, all scholarships are assessed using a risk-based approach by the Scholarships Manager considering the following:

- a) Scholarship Overview (description of the scholarship) and alignment to overarching university mission
- b) Eligibility criteria (including ongoing eligibility)
- c) Apply criteria (closing date and any additional documentation require)
- d) Value, either \$ amount or other benefits
- e) Duration
- f) Closing date

- g) Scholarship questions
- h) Committee structure
- i) Risk profile and relevant mitigation strategies
- j) Offer Note, and
- k) Financial approvals (including donor endorsements), ledger codes and project numbers and if relevant waiver codes

This assessment is recorded and retained.

- 2.6. All scholarships are approved by the Scholarships Manager following consultation with relevant stakeholders and the budget centre owner or their nominee .
- 2.7. All new scholarships must be documented appropriately (for example in a gift agreement, memorandum of understanding, deed of agreement or AA Activation of Scholarship Form). This documentation must be stored in accordance with the University's record management keeping processes.

### **3. Advertising scholarships**

- 3.1. Coursework scholarships are advertised strategically to ensure the broadest participation possible
- 3.2. For each scholarship, the Scholarships and Prizes team will ensure that the following details are published and available on the University's website:
  - i. an outline of the purpose of the scholarship
  - ii. the eligibility criteria
  - iii. details of the amount and duration of the scholarship
  - iv. application process (including any supporting documentation if required)
  - v. and the closing date.
- 3.3. The Marketing Office will ensure that scholarships are promoted using a variety of digital and social media platforms including, but not limited to, electronic direct messaging (eDM), Facebook, MyLO and scholarship brochures and flyers.
- 3.4. The Marketing Office will be responsible for sending commencing and continuing students information about available scholarships using the available platforms outlined in 3.3. Communication will be managed carefully so that students receive information aligned to their interests and what they may be eligible for.
- 3.5. Professional staff and academics within the colleges will also assist with promoting scholarships available to continuing students, in particular those pursuing Honours research courses.

### **4. Applications**

- 4.1. Applications are submitted by students through the Scholarship Application Portal. Students can apply for multiple scholarships..
- 4.2. There are two main application rounds for coursework scholarships.
  - i. Main scholarship round: Applications for scholarships commencing in February will open at

Version 3 – Approved 1 April 2024

the end of August in the year prior.

- ii. Mid-year scholarship round: Applications for scholarships commencing in July each year will open at the beginning of May in the same year. This round also includes engineering scholarships which have a summer industry placement and commence in February the following year.

## 5. Shortlisting and selection

- 5.1. The Scholarships and Prizes Office manages the shortlisting and selection for all coursework scholarships.
- 5.2. Shortlisting and selection are based on relevant eligibility criteria. Scholarships are awarded to applicants who meet these criteria as part of a competitive process on the basis of merit, achievement, potential, a commitment to learning, and/or evidence of financial need.
- 5.3. The shortlisting and selection process is undertaken in accordance with assessment guidelines created at the point of establishing the scholarship. For donor funded scholarships and Government funded scholarships, assessment guidelines may be agreed as part of a Grant Deed (for government) or Gift Agreement (for donor). For internally funded scholarships, the assessment guidelines will be determined by the College or Division. Assessment guidelines are to be reviewed regularly and assessments are to be clearly documented.
- 5.4. Selection is undertaken by either:
  - a) the Scholarships and Prizes Office by a trained assessor
  - b) a selection committee which will be:
    - i. Coordinated and supported by the Scholarships and Prizes Office.
    - ii. Keep the selection process confidential and declare any conflicts of interests.
    - iii. Comprise of a minimum two people, have a gender balance and the appropriate expertise to assess applicants, and
    - iv. have membership comprising internal stakeholders (external stakeholders will only be considered on a case-by-case basis).

Occasionally a donor under grandfathered or legacy arrangements may have involvement in the selection process as a member of a selection committee member or by endorsing the decision of the committee.

- 5.5. Prior to any offer being made, the selection must be approved by an appropriate delegate in accordance with the *General Delegations Ordinance*.

## 6. Awarding scholarships

- 6.1. An individual may hold a scholarship package up to a total annual value of AUD\$20,000. Scholarship packages exceeding this amount may be considered on a case-by-case basis (e.g. student need or new donor funded scholarships exceeding AUD\$20,000) and approved by the Scholarships Manager.
- 6.2. Scholarship packages may consist of any combination of scholarships (e.g. financial need, merit, accommodation, sporting), but no more than one scholarship of each category, with the exception of the following:
  - a) A Catalyst Program Overseas Travel scholarship may be combined with a second travel

Version 3 – Approved 1 April 2024

scholarship.

- b) Honours 'top-up' scholarships may be held with other Honours scholarships.
- c) two travel scholarships may be held from different funding sources (for example donor and operational).
- d) The following scholarships cannot be held together with another scholarship:
  - i. Tasmanian Asylum Seeker Scholarship
  - ii. Zoe Ewart Memorial University of Tasmania Scholarship in Law
  - iii. Destination Australia (International and Domestic)
  - iv. Lloyd Robson Memorial Australian History Scholarship
  - v. Philip John Medhurst Scholarship in Engineering

Variation to scholarship packages may be considered on a case-by-case basis (e.g. student need, combining low value scholarships within one category) and approved by the Scholarships Manager following consultation with the budget centre owner or their nominee.

- 6.3. Prior to making an offer, the Scholarships and Prizes Office will confirm whether the selected applicant is in receipt of any other scholarships to determine eligibility.
- 6.4. Where the applicant's scholarship package exceeds the \$20,000 total annual value maximum, the scholarship package will be the combination that is:
  - a) the highest total value of the combined scholarships,
  - b) highest total value within the first five years of the scholarship, and/or
  - c) the longest duration of funding.
- 6.5. Successful applicants will be provided with a letter of offer which includes the details of the scholarship, the terms and conditions to be met to maintain the award, and information regarding how they can accept or decline their award. Applicants will have 10 business days to accept the offer, after which the offer may lapse.
- 6.6. Applicants are required to be enrolled prior to payment of the scholarship.
- 6.7. Following award, the Scholarships and Prizes office must keep records of the following:
  - a) application documentation
  - b) shortlisting documentation
  - c) signed selection documentation (including selection criteria and conflict of interest declarations).

## **7. Tenure management**

- 7.1. Students must meet the terms and conditions of each scholarship as outlined in their letter of offer, for the duration of the scholarship in order to retain eligibility. These include:
  - a) maintaining a minimum enrolment load

Version 3 – Approved 1 April 2024

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- b) academic requirements
- c) financial position
- d) visa status
- e) enrolment in a specific course and/or major
- f) observing the University rules of conduct and behaviour.

7.2. The University may withdraw a scholarship if the student is unable to meet the terms and conditions of their award, however, if the student is unable to meet the minimum academic requirement or enrolment load, the University may take into consideration special or extenuating circumstances that affected the student's ability to meet this requirement including:

- i. Medical – where a student's medical condition has changed.
- ii. Family/personal reasons including bereavement, caring responsibilities for immediate family members or financial difficulties.
- iii. Course related – where the University changed the arrangements for the course or unit of a study package and as a result the student is disadvantaged.
- iv. Employment – where a student's employment status or arrangements changed or where their employment directly relates to their course of study, ie cadetship.
- v. Sporting or national service duties – where a student is required to participate in sporting at an elite level or required to undertake mandatory national service, ie military, army.

In cases of under-enrolment, scholarships can be paid on a pro-rata basis and the duration of the award extended so that the student continues to receive the award for the revised duration of their scholarship.

In the case of donor funded Scholarships, donors must be advised if any of the above is being considered.

7.3. Commencing students (students enrolling into the first year of a university degree for the first time) who are offered a scholarship, will not be able to defer their scholarship offer for their first year of study. The scholarship must be taken up in the first year it is offered. The University can, in exceptional circumstances, allow a student to defer their scholarship for one study period (or two for accelerated programs), so long as the scholarship is taken up in the first year. This is communicated to the student when a request for a deferral is received by the Scholarship and Prizes Office.

7.4. Continuing students may suspend their scholarship for up to 12 months in the case of special or extenuating circumstances, including the circumstances listed in section 7.2 above. This will be communicated to students when a request for a deferral is received by the Scholarship and Prizes Office.

7.5. Students who withdraw from their units or course of study *before* the census date of the study period they have received payment for, will be required to make repayment for that study period. Students who withdraw from their units or course of study *after* the census date of the study period will not be asked to make repayment for that study period unless there are circumstances which warrant repayment (i.e., misleading, or false information).

7.6. As per the University's *Scholarships, Prizes and Medals Policy*, the University reserves the right to

withdraw a scholarship after it has been awarded, for any reason. In addition to not meeting the terms and conditions of award (see section 7.1), reasons for withdrawal may also include, but are not limited to, a situation where a scholarship has been awarded incorrectly. The decision to withdraw a scholarship will be made by the Scholarships Manager in consultation with the Chief Marketing Officer. The Advancement Office will also be consulted in the case of donor funded scholarships.

## 8. Conflicts of Interest

- 8.1. When establishing, advertising, assessing, awarding and managing the tenure of scholarships, all conflicts must be identified, disclosed, monitored and effectively managed. The *University's Conflict of Interest Policy and Procedure* will be followed.
- 8.2. If a person involved in the establishment, advertising, assessment, awarding or tenure management of a scholarship has an interest that could affect the decision or functioning of the scholarship, the person must disclose the interest, whether actual or perceived.
- 8.3. A certification that no conflict of interest exists must be used for all shortlisting and selection reports. The Chair of the selection committee or Scholarships Manager is responsible for confirming these. In the case where an actual or perceived conflict is known, Scholarships Manager must be informed, a Conflict-of-Interest Declaration Form completed, and an appropriate management plan put in place.
- 8.2. The Scholarships and Prizes Office will maintain a conflict of interest register in accordance with risk and audit practices. The Scholarships and Prizes Office reserves the right to exclude any person where there is an actual or perceived conflict of interest.

## 9. Risk Management

- 9.1. The Scholarship Manager is responsible to conduct risk assessments and design risk mitigation strategies in accordance with the Risk Management and Business Resilience Policy.

### Related procedures

*Conflicts of Interest and Gifts and Benefits Declarations Procedure*

*University Medal Procedure*

### Versioning

<b>Version</b>	<b>Action</b>	<b>Approved by</b>	<b>Business Owner/s</b>	<b>Approval Date</b>
Version 1	Approved	Vice-President – Strategy, Finance and Marketing	Chief Marketing Officer Scholarships Manager	30 March 2022
Version 2	Approved	Vice-President – Strategy, Finance and Marketing	Chief Marketing Officer Scholarships Manager	3 April 2023
Version 3	Approved	Deputy Vice-Chancellor, Student Services and Operations	Chief Marketing Officer Scholarships Manager	1 April 2024

Version 3 – Approved 1 April 2024

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