

SCHOLARSHIPS AND BURSARIES POLICY

Section	Provost
Contact	Dean, Postgraduate Research
Last Review	June 2022
Next Review	May 2028
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Purpose:

The primary purpose of scholarships and bursaries is to assist students with their education. Scholarships and bursaries attract and retain high quality students; increase research output at postgraduate level; and provide financial assistance to students.

The purpose of this policy is to ensure clarity and consistency of practices and processes for the development, administration, and awarding of scholarships and bursaries at Massey University. The policy provides guidance for Massey University staff, students, and benefactors to ensure an equitable, consistent, and robust approach to financial support for students in undergraduate and postgraduate study. To provide a consistent framework, Massey University operates centralised systems by which all scholarships and bursaries are established and considered.

Policy:

This policy outlines responsibilities and processes in relation to the management and administration of financial support provided to Massey University students through scholarships and bursaries, which are internally funded or externally funded or co-funded (as defined below).

To ensure prudent financial and legal management and to mitigate the associated risks, Massey University operates a consolidated system by which all scholarships and bursaries are established and managed.

Massey University staff provide support and guidance for applicants, recipients and benefactors of scholarships, and bursaries to ensure fair, robust, and consistent administrative practices. Scholarships and bursaries are offered to students based on the principles of equitable access to education, as detailed in the Human Rights Act 1993, the New Zealand Bill of Rights Act 1990 and Te Tiriti o Waitangi.

Those responsible for the administration of any scholarship or bursary will ensure the integrity of the information, systems, and processes to facilitate safe and effective practices for all concerned.

Definitions:

Financial support at Massey University is provided to students through scholarships and bursaries, defined as:

A **scholarship** is a sum of money, or its equivalent (e.g., fees or in-kind support) granted to a person for the primary purpose of assisting them with their education where the recipient is selected on merit and, sometimes, other factors (e.g., gender, disability, cultural affiliation). Usually, a scholarship is awarded based on excellence – academic, creative, sporting, leadership or cultural. At Massey, the term ‘scholarship’ is used in reference to a range of funds directed towards supporting students, including what might be called fellowships, awards, or grants, with the distinguishing factor a basis on merit.

A **bursary** is granted to a person meeting certain criteria (often need-based), also for the primary purpose of assisting the recipient with funding their education. At Massey, bursaries are most often granted based on the financial need of students and may be called grants or hardship funds. In addition to financial need, bursaries may also include other factors like merit, leadership, culture, or research.

Co-funded means a scholarship or bursary partially funded by Massey University and partially funded by a third party.

Externally funded means a scholarship or bursary funded by a third party.

Internally funded means a scholarship or bursary funded or managed by Massey University and/or Massey University Foundation, including research grants and awards.

Responsibilities:

The Provost has delegated authority to approve or ratify the award of scholarships and bursaries according to their criteria, guidelines, terms, and provisions, and may further delegate such authority or specific responsibilities.

The Dean Postgraduate Research (in the Provost's Office) has responsibility for scholarships and bursaries and leads the Scholarships and Scholar Development Team. The Dean is the Chair of the University Scholarships Advisory Committee and Chair of the University Scholarships Selection Committee. The Dean, Postgraduate Research has overall strategic and operational, including budgetary, responsibility for scholarships and bursaries.

The Scholarships and Scholar Development Team works within the Graduate Research School and Ethics. The Scholarships and Scholar Development Team has operational responsibilities for the management of scholarships and bursaries across all levels of study. The team is responsible for overseeing advertisements, applications, screening processes, offers, payments, monitoring budgets, reporting, monitoring, monitoring, evaluation, and any required follow-up (e.g., student reporting, recording on transcripts).

The Scholar Development Coordinator in the Scholarships and Scholar Development Team is responsible for providing support for applicants through the provision of advice and information and supporting all scholarship recipients by facilitating scholar development opportunities.

The Massey University Foundation fosters philanthropy to enable excellence at Massey University. The Foundation attracts donations to support scholarships and bursaries. The Foundation builds and develops relationships with donors, fund-manages gifts, and donations, and disburses annual funds to the Scholarships and Scholar Development Team for distribution to approved recipients.

The **Research Operations** team is responsible for any research agreements providing for student scholarships. The Research Operations team ensure agreements are retained against the relevant research project accounts in Massey University's research management system and funding for scholarships is spent in accordance with agreements and any variations of those. The Research Operations team works with the Scholarships and Scholar Development Team to administer externally funded research scholarships for students.

Research supervisors of students holding research scholarships have responsibility for ensuring students meet admissions requirements for their programme of study prior to scholarship selection. Research supervisors and students are responsible for ensuring any changes to their research programme or enrolment status are communicated to Research Operations and the Scholarships and Scholar Development Team.

The Colleges have responsibility for ensuring representation on the University Scholarships Advisory Committee, and University Scholarships Selection Committee, managing any funding support that is administered within the College or its academic units (including tuition fees discounts, and paid teaching/research opportunities), engaging in selection processes on behalf of the University Scholarships Selection Committee and providing academic and operational support to ensure responsive engagement with the Scholarships Team.

Massey University Central Service Lines (including, amongst others, University Services, DVC Students and Global Engagement, DVC Māori, and the Pacific Student Success Team) will be engaged to provide advice and assistance in relation to selection and awarding of scholarships and bursaries and will provide operational support to ensure responsive engagement with the Scholarships and Scholar Development Team.

The University Scholarships Selection Committee reviews applications against the criteria for the awarding of scholarships and recommends recipients to the Dean, Postgraduate Research for the offer of scholarships¹.

The University Scholarships Advisory Committee provides strategic advice to the Dean, Postgraduate Research and Scholarships and Scholar Development Team in the Graduate Research School and Ethics on scholarships and scholar development as a collective, representative body of staff and students from the Colleges, central services, and Foundation.

Student Applicants are responsible for ensuring they 1) read and understand the application process and scholarship or bursary regulations; 2) follow instructions for application completion; 3) seek assistance before the deadline date; 4) complete application and submit all required documentation on time; 5) have referees, if required, who meet expectations and meet deadlines; and 6) ensure all information provided is current and the Scholarships and Scholar Development Team are informed of any changes.

Student Recipients are responsible for 1) adhering to the conditions of the scholarship or bursary, and 2) enrolling in Massey University coursework or research for the tenure of the financial support. It is the responsibility of the recipient to inform the Scholarships and Scholar Development Team of any changes in their circumstances which might affect their eligibility for support (e.g., change in enrolment status, employment, receipt of additional funding). Recipients are expected to participate and contribute to Massey's scholars' community through Scholars Massey, led by the Scholar Development Coordinator.

Scholarship and Bursary Regulations:

Regulations (or Contracts for externally funded student research) set out the purpose and conditions of award and will be developed by the Scholarships and Scholar Development Team, or Research Operations, working collaboratively with funders, the University Scholarships Advisory Committee, and key stakeholders. Regulations, and the application of them, are expected to be guided by principles of equitable access.

Regulations approved by the Team Leader, Scholarships and Scholar Development or Dean, Postgraduate Research. The regulations are made available on the university website by the Scholarships and Scholar Development Team.

Regulations are reviewed annually, at the time of advertising. Changes to regulations do not affect current scholarship or bursary holders, unless recommended by the University Scholarships Advisory Committee and approved by the Provost (or delegate).

Regulations are interpreted and applied by the University Scholarships Selection Committee in the nomination process for the awarding of financial support. However, the Provost (or delegate) approves the recipients of financial support, and their decision is final.

Value of Scholarships and Bursaries:

As a general guide, the minimum values for any new scholarships or, bursaries² should be:

- Undergraduate – a minimum of \$2,000 per annum for scholarships, and a minimum of \$500 per annum for bursaries.
- Postgraduate (excluding doctoral) – a minimum of \$3,000 per annum for scholarships, and a minimum of \$1,000

¹ Note: The Delegations of Authority Policy delegates the ratification and awarding of scholarships to the Provost (or delegate).

² Note: These minimum values do not apply to externally funded research contracts, which are dealt with under the University's Research and Consultancy Contracts Policy.

per annum for bursaries.

- Doctoral - a minimum of \$30,000 per annum for scholarships, and a minimum of \$1,000 per annum for bursaries.

Minimum values do not include the value of indirect benefits (e.g., administration fees, guaranteed accommodation, scholar development programmes).

Donations for the purpose of scholarships or bursaries of lesser value than those set out above may still be considered by Massey University. The Scholarships and Scholar Development Team will in such cases work with the applicable donor (including the Massey Foundation) to determine the most appropriate use of the donation, and will have a discretion, subject to relevant delegations of authority, to accept the donation.

Monitoring and Support:

Recipients are monitored against relevant regulations or contractual agreements by the Scholarships and Scholar Development Team. In cases of recipients not meeting enrolment criteria, making inadequate progress or performance, failing to meet expectations, or failing to adhere to conditions, the funding may be suspended or terminated.

Recipients are provided with ongoing support and learning through a scholar development programme facilitated by the Scholar Development Coordinator and Scholars Massey.

Reporting and Evaluation:

The Scholarships and Scholar Development Team reports quarterly to the University Scholarships Advisory Committee and annually to the University Scholarships Selection Committee.

Evaluations of the impact of specific financial support for scholars, including their progress and achievements, may be undertaken on behalf of the University Scholarships Advisory Committee by the Scholarships and Scholar Development Team.

Review Process:

Selection panel decisions are final. An unsuccessful applicant may only seek review of the decision, in writing, based upon the following grounds:

- 1) *Eligibility*: If an applicant is deemed ineligible, they may seek a review if they believe the assessment to be incorrect or that an error has been made in applying the eligibility criteria.
- 2) *Late or incomplete application, incorrect information, technical issues beyond the control of the applicant*

Reviews of scholarship and bursary decisions on procedural grounds should be made in writing to the Team Leader of the Scholarships and Scholar Development Team within 30 days of the decision. The Team Leader, or such other person assigned by the Dean, Postgraduate Research, will review the evidence to determine whether there were procedural deficiencies. If no deficiencies are found, the applicant will be notified in writing.

Where deficiencies are found to have materially impacted the applicants' case for a scholarship or bursary, the application and supporting evidence will be provided to the Provost (or delegate) for re-consideration. The Provost (or delegate) will ensure that funding is available should an appeal be upheld on procedural deficiencies. Applicants who have requested a review will be notified in writing of the decision.

The principles of procedural fairness, also referred to as Natural Justice, apply to all appeals made under this Policy, including that staff do not adjudicate an appeal in which they have, or may be perceived to have, an interest or prior knowledge.

Decisions on appeals will be based exclusively on the consideration of written submissions and supporting evidence provided to the Team Leader by or on behalf of the student making the appeal and the University. Oral submissions will only be permitted in exceptional cases.

Audience:

All staff, students, prospective students, and benefactors.

Relevant legislation:

Education and Training Act, 2020
Income Tax Act 2007
Official Information Act, 1982
Privacy Act, 2020

Legal compliance:

Under section CW36 of the Income Tax Act 2007, “A basic grant or independent circumstances grant under regulations made under section 645 of the Education and Training Act 2020 is not exempt income, but any other scholarship or bursary for attendance at an educational institution is exempt income.”

Related policies and procedures:

Delegation of Authority Policy
Kaupapa Here Tiriti O Waitangi - Tiriti O Waitangi Policy
Student Complaints and Grievance Procedures
Research and Consultancy Activities Policy
Research and Consultancy Activities Procedures