

Recipient Information Pack



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Grants & Scholarships Manager Contact Details

Any questions regarding scholarships can be directed to:

Dorani Lacey

Grants & Scholarships Manager

Epworth Medical Foundation

Email: scholarships@epworth.org.au

Phone: 03 9426 8170

Background

The Epworth Scholarship Program is made possible with thanks to the generosity of our donors and sponsors to the Epworth Medical Foundation. Many of the Epworth donors and their families have been previous patients of Epworth and decide to invest in our people in recognition of the exceptional level of care and compassion they received through funding a scholarship. If you would like to know more information about your scholarship donor, don't hesitate to ask.

What you'll bring

As a scholarship recipient, you are responsible to take the lead with your activity and will be supported along the way to meet your goals and objectives outlined in your application.

The Epworth Medical Foundation as well as our donors and sponsors want to hear from you throughout the year about your activity, your learnings and the impact of your scholarship in your role and the organisation. To report this, you will be prompted to complete the reporting requirements outlined in this document.

You may also be asked to participate in promotional initiatives for the scholarship program. This could include interviews, internal and external features, newsletters, website, social media pages, annual report, written articles and attendance at Epworth Medical Foundation events on request, as an ambassador for the program.

Reporting Requirements

Letter of thanks to your donor – due in early December 2023:

You will be asked to handwrite a message on a thank you card or a typed message with your personal signature. The Epworth Medical Foundation will ensure each card or letter is shared with our donors and sponsors.

This letter, card or personal note should address the donor and thank them for their support of you, as well as outlining your scholarship activity and intended outcomes.

You will receive instructions on where to send this thank you message 4 weeks before the due date.

Mid-year report – due 30 May 2024:

You will receive a link to an online form 4 weeks before the mid-year report due date.

End of year report – due 13 December 2024:

You will receive a link to an online form 4 weeks before the end of year report due date.

Other

It is important that each report is submitted on time so they can be shared with your donor/sponsor. No payment will be made on your scholarship if you have not completed your reporting requirements.

Recipients who are completing a tertiary education will also be asked to submit a statement of results at the end of each semester (for internal scholarship records only).

Changes and Extensions

In the event of exceptional circumstances that prevent you from continuing or completing your scholarship, you may request an extension or a change to your activity.

To submit an initial request for a change or extension, please send a brief message to the Grants & Scholarships Manager who will send an online form to be completed. Each case will be reviewed

individually and may also require consideration by Executive Director Epworth Medical Foundation & Brand.

Leave Requests

Scholarship recipients are entitled to study leave entitlements under their relevant agreement or award, as approved by relevant divisional processes. Questions regarding study leave and other types of leave can be directed to P&C Assist.

Labour Hours

If your scholarship project is based on research, development and/or implementation of a program or innovation project, funding may be awarded for labour hours or backfill **if this was included in the budget** of your Scholarship application. Labour Hours are to be claimed via the Portal.

Note that scholarship funds cannot be used for labour hours or backfill when employees are returning to study, attending a conference or undertaking a study tour.

Payment and Reimbursement Information

Scholarship recipients have the full 2024 calendar year to spend awarded scholarship funding. Any remaining funds at the end of 2024 will be returned to Epworth Medical Foundation.

The award amount **includes GST**. GST is NOT in addition to the award amount. For example, if you pay an invoice that is \$550 inclusive of GST and the GST is \$50, \$550 will be deducted from the award amount.

All payments and reimbursements requested must relate to the activity detailed at the time of application (no past expenses can be reimbursed).

Scholarship funding is only available to applicants noted on the original application form and cannot be transferred to another staff member. Expenses that do not relate to the original project will not be approved.

If you are completing study and withdraw from or do not complete a unit with a passing grade, you will be required to return the scholarship funds to Epworth HealthCare.

Payment of University Tuition Fees

Recipients who have received a scholarship for tertiary study are encouraged to contact the provider or institute to determine if they can register as a sponsored student. If this is possible, necessary paperwork can be provided to the Grants & Scholarships Manger to complete to organise fee payments to be made on your behalf. Epworth HealthCare will need to be invoiced directly for your 2024 course fees to the value of your Scholarship.

Please note that if you elect to studying under a *Commonwealth Supported Place*, you will no longer be eligible for your scholarship funding.

Expense Claims Procedure

To claim an expense relating to your scholarship, please visit the [Scholarship Reimbursement Portal](#). Instructions will be available on the portal.

Please also note the following:

- Scholarship payment and reimbursement requests are not approved by your manager.
- In the event of an overpayment, funds will need to repaid. The Grants & Scholarships Manger will work the recipient to determine a mutually agreeable payment schedule.
- Any international expenses should be converted to \$AUD prior to submitting an expense claim along with a screenshot of the transaction from your bank statement to show the exact converted amount.
- Credit card statements are not sufficient proof of payment, original itemised receipts are required e.g. tax invoice, receipt, statement of fees.
- Payments and reimbursements can take up to 2-3 pay cycles for the funds to transfer.
- Direct payments can take up to a maximum 60 days for payment to clear as per the Epworth Accounts Payable Policy.

Expenses not permitted

Expenses that *cannot* be reimbursed under the scholarship program may include, but are not limited to:

- Parking
- Public transport to and from university campuses or educational institutions
- Alcoholic beverages
- General stationery
- Vaccinations or personal medical expenses in preparation for travel
- Passport application or renewal fees
- Tech items e.g. computer, laptop, smart phone or tablet.

If you are unsure whether an expense is permitted, please contact the scholarship coordinator to check before proceeding with payment.

Travel Expenses

Flights

Only standard economy fares can be claimed. Please review the terms and conditions of your flights and ensure they can be refunded or credited should you need to reschedule or postpone your activity.

Accommodation

Only standard/basic accommodation rates can be claimed. As a general rule, it is requested that accommodation rates do not exceed \$320AUD per night, unless unavoidable. Accommodation expenses can be claimed from the night prior to the activity commencing up until the final night of the activity (i.e. checking out the day after the activity concludes). If the scholarship activity is a reasonable travelling distance from your home (i.e. less than 60km distance), you may not be reimbursed for accommodation.

Melbourne Business School – New Leaders Development Program

The MBS New Leaders Development program will take place at Melbourne Business School – Carlton. The dates of the 2024 program are being finalised. You will be contacted with the available dates by mid-December 2023.

If you are completing the MBS program, you are still required to complete the scholarship reporting requirements as outlined in this document, as well as additional pre-work which will be provided in 2023 such as orientation, personality assessment, 360 review and project work during the course.

As a recipient of the MBS leaders' program, you will not need to submit any expense claims as the program costs will be paid on your behalf.

During the week of the program, you will receive a complimentary lunch each day.

Further information will be provided by the Grants & Scholarships Manager and Melbourne Business School contacts.

Terms and Conditions

By accepting a 2024 Scholarship, you acknowledge and agree to the following Terms and Conditions:

Employment Status

You confirm you are employed on an ongoing contract and intend to continue this for the duration your Scholarship in 2024.

Values and Behaviours

You aspire to uphold the Epworth Values and Behaviours throughout your scholarship activities. When attending a conference, education provider/institute, completing research or visiting another organisation, you will be representing Epworth Healthcare.

Reporting

All reports must be completed and submitted by the due date. The reports will be shared with your donor/sponsor once completed. Not meeting the reporting requirements may impact access to scholarship funds or may be escalated to my manager.

- Early December 2023: Letter of thanks and project summary
- 30 May 2024: Mid-year report
- 13 December 2024: End of year report

Leave

You understand that requests for leave need to be submitted to your direct manager and/or local People & Culture Manager for entitlements that are in line with my individual agreement or Enterprise Bargaining Agreement. Questions regarding study leave can be directed to P&C Assist.

Study

Recipients who receive a scholarship to complete a tertiary education course will be required to submit a statement of results at the end of each semester.

Commonwealth Supported Place Agreements

Commonwealth Supported Place are not eligible for scholarship funding.

Sharing and Embedding Learnings

By accepting this scholarship, you agree to be committed to sharing and embedding the learnings from your scholarship opportunity through your reporting and nominated strategies detailed in your application.

Brand and Communications

By accepting this scholarship, you agree to participate in promotional initiatives for the Epworth Scholarship Program. This may include interviews, internal and external features, newsletters, website content, social media pages, annual report, written articles and attendance at Epworth Medical Foundation events on request.

Funding

The award amount **includes GST**. GST is NOT in addition to the award amount. If you pay an invoice that is \$550 inclusive of GST and the GST is \$50, \$550 will be deducted from the award amount.

You can only make financial claims for expenses that relate to your project, activity or area of study detailed in your application. If the purpose of the scholarship changes, you will need to seek approval in writing to the Grants & Scholarships Manager for consideration.

Funding is available up until 31 December 2024. Any request for an extension must be submitted in writing to scholarships@epworth.org.au for consideration.

Scholarship funding is only available to applicants noted on the original application form and cannot be transferred to another employee. In the event that a recipient is overpaid, excess funding will need to be returned. The Grants & Scholarships Manager will work with the recipient to develop a mutually agreeable payment plan if required.

Flights and Accommodation

You agree to adhere to the guidelines provided in this information pack.

Applicable only to Melbourne Business School New Leaders Development Program participants

You confirm that you will be available to attend and participate in the 4-day short course at MBS Carlton Campus on the dates that you are allocated. You are committed to completing the work required by Melbourne Business School e.g. pre-work, orientation, personality assessment, 360 review with support and project work. In addition, you will also complete the reporting requirements outlined for my donor/sponsor.

Scholarships are made possible thanks to our generous donors and the Epworth Medical Foundation.