



# **Guidelines for the Jan Pentland Scholarship**

**Applications close Friday 29<sup>th</sup> March 2019**

The trustees of the Jan Pentland Foundation reserve the right to suspend, amend or vary these guidelines, the scholarship application process or any part of thereof.

Administrative support for the Jan Pentland Foundation is provided by Financial Counselling Australia.

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## **1. OVERVIEW**

### **1.1. The Jan Pentland Foundation**

The Jan Pentland Scholarship is awarded by the Jan Pentland Foundation. You can read more about Jan and the Foundation at [www.janpentlandfoundation.org](http://www.janpentlandfoundation.org)

The scholarship has been established in recognition of Jan Pentland's enormous contribution to the financial counselling sector over many years and her commitment to social justice.

The Foundation is a registered charity with deductible gift recipient status.

### **1.2. The Jan Pentland Scholarship**

The scholarship is awarded annually, at the Jan Pentland Foundation dinner. This is held in May of each year in conjunction with the annual financial counselling conference.

The scholarship provides financial assistance to individuals who are undertaking study or are intending to undertake study in financial counselling.

## **2. THE 2019 APPLICATION ROUND**

### **2.1. Opening and Closing Dates, Announcement**

Applications open: Monday 14<sup>th</sup> January 2019

Applications close: Friday 29<sup>th</sup> March 2019

The recipients of the Jan Pentland Scholarship will be announced on Wednesday 22<sup>nd</sup> May, 2019 at the Jan Pentland Foundation dinner.

### **2.2. Application Process**

Applications are made online please go to <http://www.janpentlandfoundation.org/scholarships.html> and click "apply online".

You can save this form and go back to it.

You will need to upload a CV so make sure you have one on hand. You will need to provide two references so please have these ready.

If you have questions contact: Tamara How  
Financial Counselling Australia  
PH: 03) 8554 6979  
Email: [tamara.how@financialcounsellingaustralia.org.au](mailto:tamara.how@financialcounsellingaustralia.org.au)

### **3. DETAILS OF THE SCHOLARSHIP**

#### **3.1. What does the scholarship cover?**

The scholarship provides financial assistance to individuals who are undertaking study or are intending to undertake the Diploma of Financial Counselling.

The relevant study/training must be undertaken through a registered training organisation (see 3.3 below).

The scholarship will cover costs relating to study relevant to financial counselling. These costs could include the cost of the course and/or related costs such as travel, accommodation, childcare or supervision. Applicants will need to show that related costs are directly connected to their study.

The course typically includes 17 units. Course durations vary and are often flexible (see Appendix 1 for more information).

#### **3.2. What won't the scholarship cover?**

The scholarship will not pay for costs already incurred.

#### **3.3. List of Registered Training Organisations**

Registered Training Organisations offering the Diploma of Financial Counselling are:

- Australian Institute of Professional Counsellors
- Australian Institute of Social Relations
- ICAN Learn
- RMIT
- TAFE NSW Western Institute
- TAFE SA
- Salvation Army Eva Burrows College Vocational Training

For contact details please go to

<https://www.financialcounsellingaustralia.org.au/Corporate/Financial-Counselling/Become-a-financial-counsellor>

*Important:* if you enrol with the Australian Institute of Professional Counsellors (AIPC), you will need to pay AIPC direct and the Foundation will reimburse you on proof of payment. Payments will be made as you undertake the study, for example, one payment at the beginning, another at the half way point and a final reimbursement. The reason for this approach is that AIPC requires full payment of their fees up front, something the Foundation will not do - see section 3.7 also.

### **3.4. Maximum and minimum amounts**

The scholarship is for a maximum of \$5,000.

There is no minimum amount.

### **3.5. People who can apply**

Scholarship recipients may be:

- A person who is already working as a financial counsellor or in a related discipline
- A person who wishes to become a financial counsellor
- A person who wishes to incorporate financial counselling functions in their current role

Scholarship recipients may seek assistance for the costs of a current course of study or for a course they have not yet started.

Aboriginal and Torres Strait Islander people and people with a refugee background are encouraged to apply.

### **3.6. Selection Criteria**

Scholarships will be awarded on the basis of responses to the questions on the Application Form. Unsuccessful applicants may re-apply the following year.

The selection criteria are:

- need financial assistance to study
- have a strong interest in financial counselling
- are committed to study
- will make, or are making, a strong contribution to the field of financial counselling (for example, as demonstrated by community involvement).

### **3.7. Payment arrangements**

#### *RTO costs*

Payment of course fees (if included in the application) will be made direct by the Foundation to the course provider, on the provision of a tax invoice.

The Foundation will not pay 100% of the costs of a course up front to a RTO. Payments will be made at appropriate points as the recipient undertakes the study, for example, at the beginning of each semester. (This is to manage the risk that a recipient could enrol with a RTO, the Foundation pays the full course cost up front, but the recipient actually completes few, if any, units.)

#### *Other associated costs*

Payment arrangements for other costs, such as travel, accommodation or supervision, will be negotiated with the successful applicant. Generally these will require the provision of supporting documentation and will be paid on a reimbursement basis. These payments will be made by Electronic Funds Transfer (EFT) to your nominated bank account.

## **4. CONDITIONS OF THE SCHOLARSHIP**

### **4.1 Scholarship agreement**

All scholarship recipients will be required to sign an agreement – see Appendix 1.

Please read this agreement as it sets out the conditions for the scholarship.

## **APPENDIX 1 - AGREEMENT**

*This is the agreement that successful scholarship recipients will be required to complete. Make sure you read and understand this.*

This agreement is between the recipient and the Jan Pentland Foundation Ltd as trustee for the Jan Pentland Foundation (ACN 141 552 847).

As a recipient of a Jan Pentland Scholarship for the amount above, I agree to the conditions below.

### **1 Enrolling in your course**

Scholarships are announced in May each year.

I agree to enrol with an institution offering the Diploma of Financial Counselling by the end of the calendar year in which my scholarship is announced. This is a period of approximately seven months.

I agree that if I am unable to enrol within this timeframe, I will notify the Foundation.

I acknowledge that if I am unable to enrol within this timeframe, the Foundation may decide to extend the enrolment timeframe or alternatively may withdraw the offer of the scholarship.

### **2 Suspension of study**

I agree that if I suspend my study for any reason, I will notify the Foundation, the reasons for doing this and how long this suspension will last.

I acknowledge that the Foundation may decide to extend the timeframe for completion of the qualification or alternatively may withdraw the offer of any funds remaining in the scholarship.

### **3 Withdrawal from your course**

I agree that if I withdraw from my course, I will notify the Foundation immediately.

If the Foundation has paid out scholarship funding, I agree to repay any monies that are either refunded to me by the course provider or that have been paid to me and that represent payment for the units in which I am no longer enrolled or completing.

### **4 Time limit for completing study**

I agree to complete my study within two and a half years from the time I begin studying.



## 5 Payment of the scholarship

I agree that if my scholarship provides for payment of any expenditure such as travel costs, these will be paid on a reimbursement basis. I agree that I will provide invoices/receipts or other appropriate documentation so that this can occur.

I understand that the Foundation will not pay an entire scholarship in advance, but will instead release funds in two (or more) tranches as study progresses. The Foundation will generally make these payments direct to the RTO.

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Recipient's Signature)

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(Date)

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(Foundation's Representative's Signature)

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(Date)

