

REGULATIONS FOR THE AWARD OF ELLIOT TERTIARY SCHOLARSHIPS

Stated at 21 July 2023

1 DEFINED TERMS

1.1 Defined terms are as follows:

“**Elliot Scholar**” or “**Scholar**” means any person chosen by the Trustees under these regulations to receive a Scholarship.

“**Panel**” means a panel of Trustees including all Trustees sitting for the purposes of the Panel and may include persons other than Trustees if the Trustees consider such persons would contribute advantageously to the work of the Panel.

“**Principal**” means the principal of the secondary school attended by a Scholarship candidate.

“**Scholarship**” means an Elliot Tertiary Scholarship awarded under these regulations.

“**Tertiary Study**” means an undergraduate or initial course of study at a recognised tertiary educational institution in New Zealand, leading to a degree, diploma or qualification of similar standing which is recognised by the New Zealand Qualifications Authority.

“**Trust**” means the Sir George Elliot Charitable Trust established by deed dated 8 June 1956 and registered under Charity number CC 21250.

“**Trustees**” means the Trustees for the time being of the Trust, including its trust board under the Charitable Trust Act 1957.

1.2 Unless the context otherwise requires:

(a) words importing the singular include the plural and vice versa;

(b) words importing one gender include the other genders.

1.3 Headings have been inserted for guidance only and do not form part of the context of these regulations.

2 OBJECTS

2.1 The objects of the Trustees in awarding Scholarships are:

(a) To support young people during successful Tertiary Study whose family, personal and/or economic circumstances during secondary schooling have, in the opinion of the Trustees, required of those people exceptional efforts that have been

successfully made, and/or imposed exceptional challenges that have been overcome.

- (b) To permit Elliot Scholars to complete Tertiary Study without a substantial burden of indebtedness occasioned by the need to fund tuition or course fees and other similar, related, or consequential costs (including living costs), by raising student or other loans.
- (b) Over time to promote Elliot Scholars as examples of young people whose achievements despite difficult circumstances, are worthy of being emulated.
- (d) Over time to promote in Elliot Scholars the characteristics of confidence, leadership, humour, and humility, with a view to each of them completing Tertiary Study with academic success and as well-rounded individuals contributing to their community.

3 AWARD OF SCHOLARSHIPS

- 3.1 In and for each year, the Trustees may award Scholarships, on the terms and conditions set out in these regulations.
- 3.2 The Trustees shall determine from time to time the number of Scholarships to be awarded each year.
- 3.3 Subject to regulation 3.4, The Scholarships will be called *Elliot Tertiary Scholarships* and Scholars shall be known as *Elliot Scholars*.
- 3.4 Notwithstanding regulation 3.3, the Trustees may name a Scholarship by associating it with the Elliot name and the name of a person, family or entity that has contributed (whether wholly or in part) to the funding of that Scholarship, or of the Trust's Scholarship programme generally.
- 3.5 The Scholarship amount shall be determined from time to time by the Trustees but shall be set having regard to the object in regulation 2.1(b).

4 QUALIFICATION AS A SCHOLARSHIP CANDIDATE

- 4.1 Candidates must:
 - (a) Be under 20 years of age at the time of application and intend to commence tertiary study in the year immediately following their application;
 - (b) Have a secondary school record of academic and other achievement;

- (c) Be considered by their Principal to have the potential to complete Tertiary Study with distinction;
- (c) Be considered by their Principal to be, or to have the potential to be, a well-rounded individual and a leader in their community; and
- (e) Have faced, during their secondary schooling, family, personal and/or economic circumstances which in the opinion of their Principal, have required from the candidate exceptional efforts that have been successfully made, and/or imposed exceptional challenges that have been overcome.

5 APPLICATIONS ON BEHALF OF SCHOLARSHIP CANDIDATES

- 5.1 Applications must be made on the form approved for the time being by the Trustees and by the date prescribed in the application form.
- 5.2 Applications must be made only by a candidate's Principal.
- 5.3 The Trustees expect a Principal to submit only one application each year.

6 DELIBERATIONS AND CHOICE OF SCHOLARS

- 6.1 From the applications received in a year, the Trustees shall appoint a Panel to shortlist a group of candidates for interview. The shortlist shall comprise no more than six candidates.
- 6.2 The shortlisted candidates shall be interviewed by a Panel convened by the Trustees for that purpose, and the Scholars for the year shall be decided by the Trustees after due consideration of the applications, supporting information and interviews of all the shortlisted candidates.
- 6.3 The criteria used for the processes under regulation 6.1 and 6.2 shall be entirely at the Trustees' discretion but shall be applied consistently with the objects in regulation 2.1 and as between candidates then being considered.
- 6.4 The Trustees shall advise all candidates of the outcome of their applications as quickly as possible after that outcome has been determined.
- 6.5 The Trustees shall arrange for each Scholar to be presented with a permanent record of their award at a ceremony marking its importance. For as long as it is agreeable to the incumbent, that ceremony shall be presided over by the Governor-General of New Zealand.

7 PAYMENT OF SCHOLARSHIPS

- 7.1 A Scholar will receive their Scholarship funds in instalments calculated according to the number of years usually involved in the Tertiary Study they elect to pursue, and as arranged between the Scholar and the Trust.
- 7.2 Payment of each instalment shall be made by the Trustees to an account nominated by the Scholar for the purpose of receiving their Scholarship funds.
- 7.3 Payment of any instalment of a Scholarship may be withheld if a Scholar's performance in Tertiary Study is poor or if a Scholar's behaviour in any respect is such as to bring, or to be likely to bring, the Trust, the Trustees or the Scholarship or other Scholars into disrepute, as to which matters the Trustees shall be the sole judge.

8 OTHER CONDITIONS OF AWARD

- 8.1 If a Scholar receives in the year of his or her award any one or more other scholarships or awards whose combined value is more than 50% of the value of their Scholarship, their Scholarship shall abate to the sum produced in accordance with the formula in clause 7.3.
- 8.2 If the product of the formula is a negative number the Scholarship shall abate to zero, but the Scholar shall still be afforded the style and title of a Scholar.
- 8.3 Subject to clause 7.2, the abatement provided for in clause 7.1 shall be to the amount produced by the formula:

$$A - (B - C)$$

Where:

A is the value of the Scholarship before abatement;

B is the value the other scholarships or awards received by the Scholar;
and

C is 50% of the value of the Scholarship before abatement.

Examples follow to illustrate how the abatement applies.

Examples 1

Scholar receives a university award for all fees to the value of \$75,000 in a year where the Elliot Scholarship is \$25,000:

$$25,000 - (75,000 - 12,500) = - 37,500$$

Because the sum is a negative number, the Scholarship abates to zero.

Example 2

Scholar receives other awards totaling \$17,500 and the Elliot award is \$25,000:

$$25,000 - (17,500 - 12,500) = 20,500$$

Scholarship abates by \$4,500 to \$20,500.

Example 3

Scholar receives other awards totaling \$10,000 and the Elliot award is \$25,000:

No abatement is required because the other awards are less than half the value of the Scholarship.

- 8.4 A Scholar shall co-operate with the reasonable requests of the Trustees to publicise the Scholarships generally, the award to the Scholar, and the objects of the Trust.
- 8.5 In each year that a Scholar receives an instalment of a Scholarship, he or she shall actively pursue reasonable opportunities to fulfil the objects referred to in regulation 2.1(c) and (d) and shall report to the Trustees at least once each year on those activities, their progress in tertiary study and involvement in other activities including sport, community, and leadership activities.
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