

**REGULATIONS FOR THE AWARD  
OF SIR GEORGE ELLIOT SCHOLARSHIPS**

**Including amendments and notes to**

**March 2012**

**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.

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

“**Scholarship**” means a Sir George Elliot 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.

“**Trustees**” means the Trustees for the time being of the Sir George Elliot Charitable Trust.

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 providing 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 or related costs, by raising student or other loans.

- (c) Over time to promote Elliot Scholars as examples of young people whose pursuit of educational achievement despite difficult circumstances is worthy of emulation.
- (d) Over time to promote in Elliot Scholars characteristics of confidence, leadership, humour and humility, with a view of each of them completing Tertiary Study with academic success and as well rounded individuals.

**Notes:** Regulation 2(a) was amended on 24 February 2006 for scholarships awarded in and after 2006. The former Regulation provided: "To support young people during successful Tertiary Study who would, but for the Scholarship, face distinct financial difficulty in pursuing such study as a result of their family, personal and/or economic circumstances."

### 3. **AWARD OF SCHOLARSHIPS**

- 3.1 The Trustees shall award, on the terms and conditions set out in these regulations, up to three Scholarships for Tertiary Study in each year.
- 3.2 The Scholarships will be called *Sir George Elliot Scholarships* and Scholars shall be known as *Elliot Scholars*.
- 3.3 The Scholarship amount shall be determined from time to time by the Trustees. Initially Scholarships shall be for NZ\$20,000.

**Notes:** The Scholarship amount was raised in February 2004 by the Trustees to \$25,000 for scholarships awarded in and after 2004.

### 4. **QUALIFICATION AS A SCHOLARSHIP CANDIDATE**

- 4.1 Candidates shall:
  - (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 achievement;
  - (c) Be considered by their Principal to have the potential to complete Tertiary Study with distinction;
  - (d) 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.

**Notes:** Regulation 4.1(e) was amended on 24 February 2006 for scholarships awarded in and after 2006. The former regulation provided: "Face family, personal and/or economic circumstances the affects of which would, in the opinion of their Principal, prevent or seriously limit their ability to undertake Tertiary Study without a Scholarship."

Regulation 4.1(a) was amended on 29 March 2012 by adding the words commencing with "and intend to commence tertiary study...". This was to reflect the Trustees' preference not to allow a gap year before a scholar takes up an award.

## 5. APPLICATIONS ON BEHALF OF SCHOLARSHIP CANDIDATES

- 5.1 Applications shall be made in the form approved for the time being by the Trustees and by the date prescribed in the application form.
- 5.2 Applications may be made only by a candidate's Principal.
- 5.3 Unless there are extraordinary circumstances, the Trustees expect a Principal to submit only one application each year.

## 6. PAYMENT OF SCHOLARSHIPS

- 6.1 Scholars will receive their Scholarship funds in equal annual instalments calculated according to the number of years usually involved in the Tertiary Study they elect to pursue.
- 6.2 Payment of each annual instalment shall be made by the Trustees in the following priority:
- (a) First, by payment, to the extent permitted by the amount of the annual instalment, directly to the tertiary educational institution which the Scholar will attend that year, of all course, tuition and other similar fees; and
  - (b) Secondly, by payment of any balance of the annual instalment to the Scholar to defray general costs of education or living in that year.
- 6.3 Payment in terms of regulation 6.2 shall be effected as soon as practicable at the start of each academic year in which an annual instalment of a Scholarship is due to a Scholar.
- 6.4 Payment of any annual 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 Trustees or the Scholarship or other Scholars into disrepute, as to which matters the Trustees shall be the sole judge.

## 7. OTHER CONDITIONS OF AWARD

- 7.1 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.
- 7.2 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.
- 7.3 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 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.

- 7.4 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 Trustees.
- 7.5 In each year a Scholar receives an annual 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.

**Notes:** The abatement regime was introduced as a standard term in November 2008 with effect on Scholarships awarded in that year onwards. It is designed to ensure that a Scholar who receives other awards still benefits by receiving part of the Sir George Elliot award if the total of the other awards is less than 150% of the Elliot award. However the Elliot award will abate to zero if the other awards are 150% or more of the value of the Elliot award. The rationale for that is that, although the Trustees would want still to recognize a highly successful scholar, they prefer to reserve the option of benefiting someone else if a Scholar's tuition and other costs are already being supported to a very significant extent. On present numbers the abatement to zero would only occur if the combined value of other awards received by a Scholar was \$37,500 or more.