
JAN PENTLAND



FOUNDATION

Guidelines for the Jan Pentland Scholarship

Applications close Monday 5th April 2021

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

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.

For the 2021 scholarship round, the Foundation is encouraging applicants who live in rural or remote areas (or who would be willing to move to a rural or remote area). This is because there are still shortages of financial counsellors in rural and remote areas.

2. THE 2021 APPLICATION ROUND

2.1. Opening and Closing Dates, Announcement

Applications open: Monday 8th February 2021

Applications close: Monday 5th April 2021

The recipients of the Jan Pentland Scholarship will be announced on Wednesday 19th May, 2021 at the Jan Pentland Foundation dinner.

2.2. Application Process

Applications are made online. Please go to <https://www.janpentlandfoundation.org/> and click "2021 application form".

You will need to upload a CV, a short video and two references, so please have these ready.

If you have questions contact: Tamara How
Financial Counselling Australia
PH: 0402 923 750
Email: 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 covers 17 units and 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.

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

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
- South Metropolitan Tafe

For contact details please go to <https://www.financialcounsellingaustralia.org.au/about-financial-counselling/diploma-of-financial-counselling>

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

For the 2021 scholarship round, the Foundation is encouraging people who are living in a rural or remote area, or who are willing to move to a rural or remote area to apply.¹

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:

- living in a rural or remote area, or be willing to move to a rural or remote area
- 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.

¹ We define rural or remote areas as being outside of the 'greater metropolitan population base' of any capital city and more than 100 kilometres away from the state or territory capital. If you are unsure whether your location fits within these parameters, please notify us on your application form.

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 2021.

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.

I acknowledge that if I am enrolled with the Australian Institute of Professional Counsellors (AIPC), that I will need to pay any course costs and the Foundation will reimburse these costs. This reimbursement will be 50% on commencement and 50% on completion of the course if I am paying upfront and If I am paying in instalments, I will be reimbursed when I provide copies of my invoice and receipt.

If I receive any other subsidies toward the cost of my study, I will disclose these amounts to the Foundation, and I agree that the Foundation may reduce the amount of my scholarship to offset these.

Recipient's Signature)

(Date)

(Foundation's Representative's Signature)

(Date)
