

STATEMENT of POLICY and PROCEDURE			
Policy Name:	HTAi Educational Scholarship	Approved:	Mar 31, 2021
Policy Type:	Board of Directors	Effective:	Mar 31, 2021
Scope:	Scholarship application and scholarship granting	Next Review:	June 2023
Issued to:	Board of Directors, Scientific Development and Capacity Building Committee, and Secretariat	Responsibility for review:	Manager of Scientific Activities

1 POLICY

- 1.01 The Health Technology Assessment international (HTAi) Educational Scholarship Program provides funding support for individuals studying or working in the healthcare field in low- or middle-income countries to advance their knowledge and skills directly related to health technology assessment (HTA). By providing financial assistance to complete educational programs or training in HTA for the purpose of applying their knowledge and skills in their country of origin, HTAi advances its mission of promoting the development, communication, understanding, and use of HTA around the world.
- 1.02 A total of \$20,000 CAD is available for the HTAi Educational Scholarship program each fiscal year.
- 1.03 Scholarship applications shall be accepted, reviewed, and awarded throughout the year until the total amount of funding is exhausted.
- 1.04 The Scientific Development and Capacity Building Committee will make decisions on awarding the Scholarships.
- 1.05 Scholarship funding may be requested to support the completion of Masters, PhD, Fellowship, or other certification or training program in HTA or a closely related field.
- 1.06 Scholarships may also support participation in an internship with an HTA agency or body, other public sector body, or non-governmental organization to gain practical experience and/or contribute to specific research projects in HTA. Both formal and informal internships will be considered. However, the latter requires a clear statement of the scope of work, role, and duties of the internship position and how this will lead directly to capacity building and development of the individual's knowledge and skills in HTA.
- 1.07 The Scientific Development and Capacity Building Committee may evaluate the credentials of an educational institution or internship host organization to verify eligibility before making a decision on awarding the scholarships.
- 1.08 Workshops, non-credited educational courses, and conferences are not eligible for scholarship support.
- 1.09 All scholarship applications must have an Organizational Sponsor.

2 PURPOSE

- 2.01 This Statement of Policy and Procedure provides details of the processes related to the HTAi Educational Scholarship.

3 SCOPE

- 3.01 This policy applies to
- (a) The Board of Directors in its function of policy and funding oversight.
 - (b) Individuals applying for the HTAi Educational Scholarship.
 - (c) The Scientific Development and Capacity Building Committee that makes decisions on awarding the scholarships.
 - (d) The Developing Countries Interest Group and Early Career Network that assign a mentor to the applicant and receive a presentation from the applicant after the completion of the program.
 - (e) The Secretariat that administers the program and disburses the funds to the awarded applicants.

4 RESPONSIBILITY

- 4.01 It is the responsibility of the Board of Directors to ensure the allocation of the funds to the program or to review and amend the program on a regular basis and at least every two (2) years.
- 4.02 It is the responsibility of the Scientific Development and Capacity Building Committee to make decisions on applicants and approve the awarding of the Scholarship.
- 4.03 It is the responsibility of the HTAi Secretariat to promote the availability of the scholarship and to collect and present applications to the Scientific Development and Capacity Building Committee at its meetings throughout the year. All communications regarding the HTAi Scholarships program should be directed to the Secretariat.
- 4.04 It is the responsibility of the Secretariat to ensure the payment is sent to the awarded scholarship applicants.
- 4.05 It is the responsibility of the applicant to ensure all relevant and correct information is included in their application.
- 4.06 It is the responsibility of the applicant to ensure they meet the eligibility criteria for the HTAi Educational Scholarship.
- 4.07 It is the responsibility of the Organizational Sponsor to support the applicant to apply the knowledge and skills gained in the scholarship program for the advancement of HTA in low- or middle-income countries. This may include, for example, the offer of a position of employment or study for the applicant after the completion of the program, mentorship of the applicant during or after the scholarship period, or by connecting the applicant by sharing network contacts or making formal introductions of the applicant to other health or HTA organizations where their skills and competencies can be applied to achieve the goal of increasing HTA capacity in low- and middle-income countries.

5 DEFINITIONS

- 5.01 “**Applicant**” is an individual who will apply and participate in the HTA education or internship program.
- 5.02 “**Eligible Applicant**” is an HTAi Educational Scholarship applicant who fulfils the following criteria:
- (a) A current student at an educational institution or employed by a health sector organization in a low- or middle-income country.

- (b) Registered in a qualifying educational or fellowship program in HTA or in a closely related field or have been accepted for an internship with a health technology assessment body, other public sector body, or non-governmental organization.
 - (c) Agrees to complete the educational/fellowship/internship program for which the scholarship is requested.
 - (d) Agrees to attend the HTAi Annual Meeting following the completion of the educational/fellowship/internship program to present a short report of the research undertaken and/or the experience gained through the program. Funding support for economy class travel and accommodation costs will be covered by HTAi.
 - (e) Attests to the intention that upon completion of the program, to apply to the best of their ability the knowledge and skills gained towards the advancement of HTA in low- and middle-income countries.
- 5.03 **“Eligible Expenses”**: An applicant may request scholarship funding to support the following expenses related to their education, fellowship, or internship program:
- (a) Tuition Fees
 - (b) Books and other educational materials
 - (c) Accommodations
 - (d) Travel Expenses
 - (e) General Living Expenses
- 5.04 **“Low- and Middle-Income Country”** as defined by the World bank. It can be viewed [here](#).
- 5.05 **“Organizational Sponsor”** is an organization in the low- or middle-income country that is involved in health technology assessment or a health organization where the applicant works or studies.
- 5.06 **“Eligible Organizational Sponsor”** is an Organizational Sponsor that fulfils the following criteria:
- (a) Operates in a low- or middle-income country and have an organizational mandate and/or undertakes activities in areas relevant to the field of HTA.
 - (b) It is an organization where the applicant is an:
 - i. Employee and/or
 - ii. Student in an undergraduate, masters, doctoral, or post-doctoral program.
 - (c) It is represented by a senior manager, supervisor, department head or equivalent, who is to complete the organizational sponsor portion of the application form.
 - (d) The Organizational Sponsor shall attest to the quality of the applicant, their competencies and career interests in HTA, and agrees to support the applicant during and after the program completion to apply the skills and knowledge gained to advance the production and use of HTA in low- or middle-income country settings. Support provided by the Organizational Sponsor may include but is not limited to providing: a job for the applicant during and/or post-program completion; grant support to the applicant for HTA-based research in low- or middle-income country settings; professional mentorship during and after the program; and/or sharing the organization’s network of contacts with the applicant so they may find suitable low- or middle-income country work or study opportunities in HTA related fields.

- (e) The Organizational Sponsor is not required to make a financial contribution to the program.

6 REFERENCES and RELATED STATEMENTS of POLICY and PROCEDURE

- 6.01 Scientific Development and Capacity Building Committee Terms of Reference can be viewed [here](#).
- 6.02 Jill Sanders Scholarship Policy and Procedure
- 6.03 Annual Meeting Participation Grant Guidelines can be viewed [here](#).
- 6.04 Annual Meeting Abstract Submission Guidelines can be viewed [here](#).

7 PROCEDURES

7.01 Scholarship Application Process

- (a) Applications for HTAi Educational Scholarships are made jointly by the applicant and the Organizational Sponsor. The connection between the applicant and the low- or middle-income country's Organizational Sponsor is intended to ensure the achievement of the primary scholarship program objective (i.e., to increase HTA capacity in the given country) by providing support for the integration of the HTA capacity and skills learned into the health system of the country of origin.
- (b) In exceptional circumstances, if the applicant does not have a suitable low- or middle-income country Organizational Sponsor, a 500-word letter is to be submitted describing the reasons why and providing compelling evidence that the applicant has strong career interests in developing HTA capacity in low- and middle-income countries.
- (c) Applicants are awarded funding for a single year at a time. Applicants shall be eligible to submit a separate application the following year for subsequent scholarship support. Multi-year awards will be considered for exceptional applicants, up to a maximum of \$20,000.00 CAD per year for two years.
- (d) Applications deadline is May 1 of each year. Scholarships will be awarded until the total scholarship fund has been expended in the given year.

7.02 Scholarship Application Documentation Requirements

- i. The HTAi Educational Scholarship Application Form completed and signed by both the Organizational Sponsor and the applicant.
- ii. Letter of support from the Organizational Sponsor representative on organizational letterhead.
- iii. Written confirmation of acceptance/registration of the applicant from the institution or organization offering the educational, fellowship, or internship program.
- iv. Documentation demonstrating the program costs and other eligible expenses with original receipts.

7.03 Scholarship Awarding Process

- (a) The Scientific Development and Capacity Building Committee will consider each application on a case-by-case first come, first served basis, and may choose to

- award partial funding support for the expenses claimed.
- (b) The decision to award the scholarship shall be made by the Scientific Development and Capacity Building Committee (SDCB) according to the degree to which requirements described in this Policy are met, the relevance and impact of the applicant's program of study/training in enhancing capacity for the production and/or use of HTA in low- and middle-income countries, and the overall strength of the submission.
 - (c) The amount of the awarded scholarship shall reflect a balance between the needs of the applicant, the strength of the application, and the overall budget available for scholarship awards, up to a maximum of \$20,000.00 CAD. Preference may be given to applicants from low-income countries and to applicants who have clearly demonstrated employment position, research, or other opportunity in the field of HTA in their country of origin or other low- and middle-income countries after the program completion. This criterion is to help ensure the achievement of the primary program objective to increase HTA capacity in low- and middle-income countries.
 - (d) The successful applicant will be assigned a mentor within the Society. This mentor will be a senior member of the Developing Countries Interest Group or Early Career Network. The Chair of SDCB will coordinate a call for interest with the Interest Groups for a mentor. The mentor's responsibility will be:
 - i. Mentor shall contact the applicant at least every two months to provide motivation, emotional support, examples of their own career path, and guidance.
 - ii. The mentor shall invite the applicant to participate in relevant Interest Group or Society activities.
 - iii. The mentor shall share resources that may be relevant to the applicant.
 - iv. The mentor shall help the applicant to work on the Annual Meeting presentation and abstract submission and on an article for IJTAHC journal, if applicable.

7.04 Disbursement of Funds

- (a) HTAi Educational Scholarships will be disbursed from the HTAi Secretariat to the applicant or to the educational institution, housing authority, etc., on behalf of the applicant. Scholarship funds will generally not be disbursed to the Organizational Sponsor.
- (b) As each scholarship award is unique, the Secretariat will discuss the most efficient payment structure for the disbursement of funds, which may involve payments made directly to the educational institution, host organization, travel agency, etc., on behalf of the applicant. Except for cases of acute need, scholarship expenses will be reimbursed only after they have been incurred, and after the paid receipts have been submitted to the HTAi Secretariat for reimbursement.

7.05 Proof of Expenses

Applicants shall provide proof of expenses in the form of official paid receipts or cost estimates from the educational institution registrar, faculty, or department, housing agency or landlord, travel agency or other official source. The Secretariat may request additional proof or evidence of expenses claimed.

7.06 **Post-Program Activity**

- (a) After the scholarship term is over, the applicants shall provide proof of completion of the educational, fellowship, or internship program. They shall provide a copy of a diploma, certificate, or letter from the Organizational Sponsor.
- (b) The applicant shall virtually attend the HTAi Annual Meeting following the completion of the program. The cost of the virtual registration for the Annual Meeting will be covered by the HTAi. The applicant will provide a short presentation of their research, learning, skills development, or professional experience at either the Developing Countries or Early Career Network Interest Group sessions. The applicant is encouraged to also submit an abstract to the Annual Meeting. The presentation content and format, and the logistics of attending the Annual Meeting will be discussed once the applicant begins the program and in accordance with HTAi Participation Grant Guidelines and Annual Meeting Abstract Submission Guidelines.
- (c) The applicant shall submit an article on their research, if applicable, to the IJTAHC journal.
- (d) A complimentary 1-year membership with HTAi will be granted to the applicant to encourage them to become a part of the dynamic Society of HTA researchers and professionals and give access to networking. The applicant will also be invited to join the Developing Countries Interest Group at HTAi. This group works to advance the science and application of HTA in low- and middle-income countries around the globe; thus, providing even greater opportunity for networking.
- (e) After the completion of the program, the applicant and Organizational Sponsor shall complete a questionnaire as part of the program evaluation. This questionnaire will provide an opportunity for the awarded applicants and Organizational Sponsors to provide input on the program evaluation and to identify areas for the improvement of the program in the future years.

8 ATTACHMENTS

Attachment A – HTAi Educational Scholarship Application Form

Attachment B – HTAi Educational Scholarship Evaluation Form

9 AMENDMENT HISTORY

DD.MM.YYYY [Insert summary of changes]