

STATEMENT of POLICY and PROCEDURE			
Policy Name:	HTAi Educational Scholarship	Approved:	
Policy Type:	Board of Directors	Effective:	
Scope:	Scholarship application and scholarship granting	Next Review:	Oct 2026
Issued to:	Board of Directors, Scientific Development and Capacity Building Committee, Secretariat	Responsibility for review:	Manager, Scientific Initiatives

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 once a year.
- 1.04 The Scientific Development and Capacity Building (SDCB) Committee will make decisions on awarding the Scholarships.
- 1.05 Scholarship funding may be requested to support the completion of:
 - Educational programs (Master or PhD)
 - Fellowships programs
 - Other certifications by accredited institutions, internships or training programs in HTA or closely related field (such as public health evaluation and monitoring).
- 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 SDCB 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 (for definition of Organizational Sponsor please see 5.07).

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 SDCB Committee that makes decisions on awarding the scholarships and assigning a mentor to the scholarship recipient.
 - (d) The HTA in Developing Countries Interest Group and Early Career Network Interest Group that receive a presentation from the scholarship recipient after the completion of the funded 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 budget allocation of the funds to the program or to review and amend the program on a regular basis and at least every three (3) years.
- 4.02 It is the responsibility of the representatives of the following Committees to undertake the review of the applications: SDCB Committee, the Interest Groups Steering Committee (IGSC), and the International Scientific Program Committee (ISPC). Their review of the applications and recommendations shall be provided to the SDCB Committee.
- 4.03 It is the responsibility of the SDCB Committee to make decisions on applicants, approve the awarding of the scholarship, and assign a mentor to the recipient.
- 4.03 It is the responsibility of the SDCB Committee to make a decision whether the scholarship recipient attends the Annual Meeting in person or virtually considering a combination of the following criteria:
- i. Specifics of the Annual Meeting (in-person, virtual or hybrid);
 - ii. Scholarship amount received;
 - iii. Availability of HTAi funds for travels;
 - iv. Location of the Annual Meeting in respect to the recipient's location;
 - v. Whether the recipient has submitted a co-authored abstract(s) for the Annual Meeting and the abstract(s) has been accepted in the Annual Meeting program;
 - vi. Whether the recipient has received an invitation as a speaker at a Workshop or Panel session of the Annual Meeting;
 - vii. Income classification of the recipient's country of origin (recipients from Low-Income Countries may be favoured over the others).
- 4.04 It is the responsibility of the HTAi Secretariat to promote the availability of the scholarship, provide all necessary information to the Committees for decision-making, and collect and present applications to the SDCB Committee at its meetings. All communications regarding the HTAi Educational Scholarship program should be directed to the Secretariat at info@htai.org.
- 4.05 It is the responsibility of the Secretariat to ensure the payment is sent to the awarded scholarship applicant or as directed by them.
- 4.06 It is the responsibility of the applicant to ensure all relevant and correct information is included in their application.

- 4.07 It is the responsibility of the applicant to ensure they meet the eligibility criteria for the HTAi Educational Scholarship.
- 4.08 It is the responsibility of the Organizational Sponsor to support the scholarship recipient to apply the knowledge and skills gained in the program for the advancement of HTA in low- or middle-income countries. This may include, for example, offering a position of employment or study after the completion of the program, mentorship during or after the scholarship period, sharing network contacts or making formal introductions to other health or HTA organizations where their skills and competencies can be applied to achieve the goal of increasing HTA capacity in low- or middle-income countries.

5 DEFINITIONS

- 5.01 “**Applicant**” is an individual who has applied for the HTAi Educational Scholarship.
- 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 organization (academic institution, hospital/clinic, governmental entity, etc.) in a low- or middle-income country.
 - (b) Registered in a qualified program such as: educational programs (Master or PhD), fellowships programs, other certifications by accredited institutions, internships or training programs in HTA or closely related field (such as public health evaluation and monitoring).
 - (c) Agrees to complete the program for which the scholarship is requested.
 - (d) Agrees to attend (in person or virtually) the HTAi Annual Meeting following completion of the program to share personal and professional experience by briefly summarizing the research/study undertaken and the knowledge and skills gained through the program during the Annual Business Meeting of the HTA in Developing Countries Interest Group or Early Career Network Interest Group.
 - (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 African countries.
- 5.03 “**Scholarship recipient**” is a successful applicant who was approved by the SDCB Committee to receive the HTAi Educational Scholarship.
- 5.04 “**Program**” is an educational, fellowship, internship, or other program (as defined in 1.06 and 1.07) for which the scholarship is requested.
- 5.05 “**Eligible Expenses**” are those expenses related to the program that the applicant can include in their scholarship application according to the following list:
- (a) Tuition fees
 - (b) Books and other educational materials
 - (c) Accommodation/housing (maximum 3 stars)
 - (d) Travel expenses (economy class fare of most practical, economical, and direct route shall be used for all routes)
 - (e) General living expenses (defined as, internet, utilities, food; these expenses shall represent a maximum of 15% of the total amount requested)
- 5.06 “**Low- or Middle-Income Country**” is a country as defined by the World Bank on their website <https://datahelpdesk.worldbank.org/knowledgebase/articles/906519>;

applicants Low-income economies, Lower-middle-income economies and Upper-middle-income economies are eligible.

5.07 **“Organizational Sponsor”** is an organization in a low- or middle-income country that is involved in HTA or a health organization (academic institution, hospital/clinic, governmental entity, etc.) where the applicant works or studies. The Organizational Sponsor:

- (a) Operates in a low- or middle-income country and has an organizational mandate and/or undertake activities in areas relevant to the field of HTA.
- (b) Is an organization with which the applicant has one of the following status:
 - i. Employee
 - ii. Student in an undergraduate, masters, doctoral, or post-doctoral program
 - iii. Intern.
- (c) 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 a low- or middle-income country setting. Support provided by the Organizational Sponsor may include but is not limited to providing the applicant: a job during and/or after the program completion; grant support for HTA-based research in a low- or middle-income country setting; professional mentorship during and after the program; access to network of contacts so they may find suitable work or study opportunities in HTA or related fields in low- or middle-income countries.
- (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 (SDCB) Committee Terms of Reference
- 6.02 HTAi Jill Sanders Memorial Scholarship Policy and Procedure

7 PROCEDURES

7.01 Scholarship Application Process

- (a) Applications for HTAi Educational Scholarship are made jointly by the applicant and the Organizational Sponsor. The connection between the applicant and the 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 Organizational Sponsor in a low- or middle-income country, a 500-word letter is to be submitted describing how the applicant will develop their practical skills in HTA and providing compelling evidence of their strong career interests in developing HTA capacity in low- and middle-income countries.
- (c) Applicants are awarded funding for one (1) year at a time. Applicants shall be

eligible to submit a separate application the following year for subsequent scholarship support. Exceptionally, multi-year awards will be considered up to a maximum of \$20,000.00 CAD per year for the maximum of two (2) years.

(d) Applications deadline is May 1 of each year.

7.02 Scholarship Application Documentation Requirements

- i. The HTAi Educational Scholarship Application Form (Attachment A) 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 SDCB Committee will consider all applications received within the deadline of the call and may choose to award partial funding support for the potential expenses.
- (b) The decision to award the scholarship shall be made by the SDCB Committee 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- or middle-income countries, and the overall strength of the application.
- (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- or middle-income country after the program completion. This criterion is to help ensure the achievement of the primary program objective to increase HTA capacity in low- or middle-income countries.
- (d) Scholarship recipients will be assigned to a mentor within the Society.

7.04 Disbursement of Funds

- (a) The HTAi Educational Scholarship will be disbursed from the HTAi Secretariat to the successful applicant or directly to the educational institution, housing authority, travel agency, etc., on behalf of the successful 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. 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 Secretariat for reimbursement.

7.05 Proof of Expenses

Applicants shall provide proof of expenses in the form of official paid receipts or cost from the educational institution registrar, faculty, or department, housing agency or landlord, travel agency or other official source. These receipts must include the following details: date of purchase, name and address of seller/supplier, full description for item purchased for auditing standards. The Secretariat may request additional proof or evidence of expenses claimed.

7.06 Benefits and Obligations

- (a) A one-year membership fee will be included within the approved scholarship grant to encourage the scholarship recipient to become part of the Society. Given that the Educational Scholarship is awarded in June of every year, the scholarship recipient will get their membership for the subsequent year.
- (b) Once awarded, the scholarship recipient shall be automatically added to the members list of the Developing Countries Interest Group and Early Career Network Interest Group and invited to communicate their interest in other Interest Groups.
- (c) Scholarship recipients shall use the HTAi signature within their correspondence for one year from the date the scholarship was granted and for one year after it. The Secretariat shall provide such a signature indicating the Society's logo and links to its website and social media platforms together with the statement "Recipient of the HTAi Educational Scholarship".
- (d) After the scholarship term is over and the recipient had completed the program, they shall provide proof of completion (e.g., a copy of a diploma, certificate, or letter from the Organizational Sponsor).
- (e) Following the completion of the program, HTAi will offer the scholarship recipient the opportunity to attend the HTAi Annual Meeting. Attendance of the event may be in person or virtual, depending on the Annual Meeting format and other criteria presented in Section 4.3.
 - i. In the case of in-person attendance, HTAi will cover the costs for economy direct travel, accommodation for the duration of the Annual Meeting, and meeting registration costs at the early bird rate. Travel times can include, and are limited to no more than, one (1) night before and one (1) night after the official conference days. Incidentals such as visa application and fee, airport transfers, and subsistence (e.g., meals) will be also covered in accordance with the HTAi Business Travel Expenses Policy & Procedure. Travel insurance and *per diems* are not included.
 - ii. In the case of virtual attendance, HTAi will cover the cost of the registration to the Annual Meeting.
- (f) At the Annual Meeting, the scholarship recipient shall provide a short presentation of their research, learning, skills development, or professional experience at either the Developing Countries or Early Career Network Interest Group Annual Business Meeting. This will be agreed and coordinated by the Chairs of the two respective Interest Groups with the support of the Secretariat.
- (g) The scholarship recipient shall consider the submission to the Society's journal (IJTAHC) for any scientific article developed within the funded program.
- (h) Within 3 months from the completion of the program, the scholarship recipient and the Organizational Sponsor shall complete a survey as part of the scholarship

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

2024.01.26

4.02 was added to increase the pool of reviewers. The rest of the items in Section 4 were re-numbered accordingly.

5.02 – Eligible Applicant definition was clarified.

5.07 – Eligible Organizational Sponsor was changed.

Section 7.06 received the heading “*Benefits and Obligations*”. The benefits and the obligations of the Scholarship Recipients were explained in more details.