



## Simon Schot Education Grants Policy

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<b>Related Documents</b>	ATMS Conflict of Interest Policy, ATMS Company Privacy Policy, ATMS Recordkeeping Policy, Simon Schot Education Grant – Marking Rubric and Judge Score Sheet, Scholarship Communications Templates (email templates), De-Identification and Redaction Checklist

### 1. Purpose

The Australian Traditional Medicine Society (ATMS) is dedicated to advancing the field of natural medicine through research, education, and professional excellence. The Simon Schot Education Grant provides modest financial assistance to members to undertake continuing education and professional development that strengthens the capability and sustainability of natural medicine practice in Australia.

### 2. Scope

This Policy applies to:

- The annual administration of the Simon Schot Education Grant round(s).
- Applicants, assessors/judges, ATMS staff and volunteers involved in administration, assessment, approvals, and communications.
- All records created or held in relation to these grants.

### 3. Grant Overview

- Grant name: Simon Schot Education Grant
- Number of grants: Ten (10) per round
- Number of rounds per year: One (1)
- Value: AU\$500 each
- Purpose of funds: Education/CPE costs related to natural medicine professional development
- Eligible applicant categories: Students and Accredited Members (subject to eligibility rules)
- Assessment approach: De-identified review and simple 1–4 rubric scoring

### 4. Definitions

- **Applicant:** A current ATMS member submitting an application in a grant round.



- **Eligible education activity:** A course, workshop, conference, seminar, supervised training, micro-credential, certificate/diploma module, or similar education activity directly related to natural medicine and professional development.
- **De-identified assessment:** Applications are reviewed using Applicant Identification Number with personal identifiers removed (e.g., name, email, location, clinic).
- **Previous round:** The immediately prior completed Simon Schot Education Grant round.
- **Duplicate application:** More than one application submitted by the same person in the same grant round.

## 5. Eligibility

To be eligible, an Applicant must meet all the following requirements:

1. Be a current financial ATMS member at the time of application, at the time of award decision, and for the duration of the education activity.
2. Hold an eligible membership category: Student or Accredited Member.
3. Propose an eligible education activity that supports continuing education in natural medicine.
4. Provide sufficient information to verify the education activity (activity name, provider, dates (at least month/year), and cost estimate), plus evidence such as a URL, invoice, quote, or registration confirmation.

## 6. Ineligibility (Exclusions)

An Applicant is not eligible if any of the following apply:

- Duplicate application in the same round (see Section 9.4).
- The Applicant received a Simon Schot Education Grant in the previous round.
- The Applicant is an ATMS Board Director or a member of any ATMS committee during their term of appointment.
- The Applicant is not a current financial member, or their membership category is ineligible.
- The proposed activity is not clearly education/CPE in natural medicine.
- The application is incomplete and cannot be remedied within any permitted clarification timeframe.

## 7. Grant Round Administration

### 7.1 Round timing

ATMS will open applications annually (typically in May), or as determined by ATMS and communicated publicly.

### 7.2 Communication

ATMS will publish the following for each round:

- Open and close dates
- Eligibility requirements and exclusions
- Application questions and word limits
- How applications are assessed
- Expected decision timeframe

### 7.3 Submission method



Applications must be submitted through the approved ATMS online form or other nominated submission channel.

## 8. Application Requirements

Applicants must complete all required fields and submit evidence. Responses should be clear and concise. Applications are assessed on relevance and clarity, not writing style.

### 8.1 Required questions and word limits

Q1 — Relevance to Natural Medicine & Learning Goals (maximum 100 words)

Please describe the education or professional development activity you wish to undertake and explain how it supports your ongoing learning in natural medicine.

Q2 — Expected Benefit / Impact (maximum 100 words)

What practical benefit do you expect to gain from this education or professional development activity, and how will it contribute to your professional development or future practice?

Q3 — Access and Financial Impact (maximum 75 words)

How will receiving the AU\$500 Simon Schot Education Grant assist you in undertaking this education or professional development activity?

### 8.2 Required declaration

Applicants must confirm (tick/agree) that:

- they are a current ATMS member;
- they have submitted only one application in the round;
- they were not awarded a Simon Schot Education Grant in the previous round;
- they understand that applications are assessed using a de-identified process.

## 9. Assessment Process (Fair, Transparent, de-identified)

### 9.1 Eligibility screening (non-scored)

ATMS staff verify eligibility and completeness before assessment. ATMS may request a brief clarification (e.g., course link/evidence) where information is missing or unclear but readily available.

### 9.2 De-identification

Before assessment:

- ATMS assigns each application with an Applicant Identification Number.
- ATMS removes personal identifiers (name, email, phone, member number, clinic name, location, social media, and identifying URLs where needed).
- Only the ATMS Office retains the Applicant Identification Number crosswalk (admin-only).

### 9.3 Judges/Assessors

Applications are assessed by at least two independent assessors, where practicable. Assessors are provided with the de-identified application pack, the marking rubric and score sheet, and the conflict-of-interest requirements.



#### **9.4 Duplicate applications (same round)**

Only one application per person may be assessed in each round. If duplicate applications are received, ATMS will assess the first received (or, at ATMS discretion, the most complete) and will publish which approach applies for that round.

### **10. Marking Rubric**

Each eligible application will be assessed using the approved de-identified marking process. Applications will be scored against the criteria set out in this Policy using the approved marking rubric. Each criterion is scored from **1 to 4**, where **1 = Low, 2 = Developing, 3 = Strong, and 4 = Excellent**. Total scores are used to support a fair, consistent, and transparent assessment process.

#### **10.1 Criteria**

##### **Criterion A — Relevance to Natural Medicine and Learning Goals (1–4)**

Assesses how clearly the proposed education or professional development activity supports learning in natural medicine and aligns with the Applicant's learning goals and membership stage.

##### **Criterion B — Expected Benefit / Impact (1–4)**

Assesses the practical outcomes of the activity and how it is expected to contribute to professional development, competence, confidence, or client care.

##### **Criterion C — Access and Financial Impact (1–4)**

Assesses how meaningfully the AU\$500 grant will assist the Applicant to participate in the proposed education or professional development activity.

#### **10.2 Scoring guidance**

Assessors should select the best-fit descriptor for each criterion in accordance with the approved marking form. Applications are assessed on relevance and clarity, not writing style.

### **11. Tie-Break Rules**

Where the number of eligible applications exceeds the number of grants available, applications will be assessed and scored in accordance with the approved de-identified marking process. If a final selection is still required, successful applicants will be determined by a documented random selection process administered by the ATMS Office, using a random number generator or other impartial method. ATMS will retain appropriate records of the process for transparency and audit purposes.

### **12. Conflicts of Interest**

- All assessors must complete a conflict-of-interest declaration prior to assessment.
- A conflict includes personal, professional, supervisory, financial, or close association with an Applicant that could compromise impartiality.
- Where a conflict exists (including where an applicant may be identifiable to an assessor from the content of a de-identified submission), the assessor must recuse themselves, and the application will be reallocated.

### **13. Decision and Approvals**

The top ten (10) eligible applications will be awarded grants, based on assessment and scoring conducted in accordance with this Policy and subject to eligibility confirmation and governance requirements. Where the number of eligible applications exceeds the number of grants available



and a final selection is required, the ATMS Office will determine the successful applicants in accordance with Section 11.

#### **14. Notification and Feedback**

- All applicants will be notified by email.
- Due to the small value and high volume, individual written feedback is not guaranteed; however, ATMS may provide brief general feedback guidance.

#### **15. Payment and Use of Funds**

##### **15.1 Payment**

Payment is made to successful applicants after the ATMS Office confirms identity (re-identification step), banking details, and evidence of enrolment/registration (or invoice/quote where acceptable).

##### **15.2 Use of funds**

Funds must be used for education-related costs such as:

- registration/tuition fees
- required course materials
- reasonable travel necessary to attend (where applicable)
- supervision or assessment fees (where applicable)

#### **16. Recipient Reporting**

To support accountability and impact reporting, recipients may be asked to provide a 100-word reflection within 60 days of completing the activity (or within a reasonable timeframe where activity end dates vary), outlining outcomes and benefits, or contacted to provide a testimonial for marketing purposes in future rounds.

#### **17. Recordkeeping, Privacy, and Confidentiality**

ATMS will retain appropriate records to support transparency and auditability, including:

- eligibility checklists
- de-identified applications
- assessor score sheets
- averaged scores and tie-break records
- conflict of interest declarations
- award and payment records

Personal information is handled in accordance with ATMS privacy and recordkeeping requirements. Only authorised staff can access the Applicant Identification Number crosswalk.

#### **18. Misconduct, False Information, and Withdrawal**

ATMS may deem an application ineligible or withdraw an award where:

- information is false or misleading;
- eligibility is not met;
- a material conflict of interest is not declared; or
- the applicant withdraws their application or is unable to proceed with the activity for any reason

ATMS will document the reason and retain appropriate records.



## **19. Policy Review and Continuous Improvement**

This Policy will be reviewed at least every 12–24 months, or sooner if operational issues arise, governance requirements change, or the Board requests updates.



## Appendix A – Public “How applications are assessed” panel

Eligible applications are assessed using a de-identified process, meaning assessors do not see names or other personal identifiers. Each eligible application is reviewed against the published assessment criteria using the approved marking rubric. Applications are assessed on relevance and clarity, not writing style.

- Relevance to natural medicine and learning goals — how well the proposed education or professional development activity supports the applicant’s learning and development in natural medicine.
- Expected benefit / impact — the practical skills, knowledge, or outcomes the applicant expects to gain and how these support professional development or future practice.
- Access and financial impact — how the AU\$500 grant would meaningfully assist the applicant to undertake the proposed activity.

The top ten (10) eligible applications will be awarded grants, based on assessment and scoring conducted in accordance with this Policy. If the number of eligible applications exceeds the number of grants available and a final selection is required, successful applicants will be determined by a documented random selection process administered by the ATMS Office using a random number generator or other impartial method. Appropriate records of the process will be retained for transparency and audit purposes.

Additional notes:

- Only one application per person is permitted per round.
- Previous recipients from the immediately prior round are not eligible in the current round.
- ATMS Board Directors and members of ATMS committees are not eligible to apply for or receive a Simon Schot Education Grant during their term of appointment.