



Carnegie Trust for the Universities of Scotland

Undergraduate Fee Grants: Guidance and Regulations

Andrew Carnegie House
Pittencrieff Street
Dunfermline KY12 8AW
Phone: 01383 724 9990
Email admin@carnegie-trust.org
Web www.carnegie-trust.org

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Background

The scheme derives from the intention of the Trust Founder, Andrew Carnegie, “to render attendance at the Universities of Scotland and the enjoyment of their advantages more available to the deserving and qualified youth of Scotland to whom the payment of fees might act as a barrier”.

The scheme aims to support students who do not receive government funding towards the costs of their studies and is not intended as a substitute to public grants or loans.

Applicants must demonstrate that their financial circumstances will hinder access to their chosen course of study when making a request for funding to the Carnegie Trust. To be considered for support, the eligibility criteria listed below must be met.

I. Criteria for support

A. Course eligibility

1. Application can be made **only** in respect of study at one of the following **Higher Education Institutions (HEIs) in Scotland**: University of Aberdeen, Abertay University, University of Dundee, University of Edinburgh, Edinburgh Napier University, University of Glasgow, The Glasgow School of Art, Glasgow Caledonian University, Heriot-Watt University, University of the Highlands and Islands, Queen Margaret University, Robert Gordon University, The Royal Conservatoire of Scotland, University of St Andrews, University of Stirling, University of Strathclyde and University of the West of Scotland.
2. Students enrolled on a course validated by one of the above institutions but delivered at a different institution located in Scotland (for example Scotland’s Rural College or FE Colleges) are also eligible for support.
3. No restriction is placed on the subject or mode of study, and students can be enrolled on, or hold an unconditional offer to study for, a **full-time, part-time, or distance learning undergraduate degree courses** offered by one of the above listed Scottish institutions.
4. In all cases, courses of study acceptable for Trust support must be directly connected with the acquisition of a **first** degree from an eligible HEI. Access courses, postgraduate qualifications, and sub-degree qualifications cannot be supported. See Section C for information on funding for a 2nd undergraduate degree.

B. Applicant eligibility

5. At the time of applying, applicants must have:
 - a. **at least two full years of secondary education** in Scotland
 - OR
 - b. **a substantial connection with Scotland** on the basis of factors such as residency, education (excluding university level education), family or working life, be judged by the Trustees to have.

Applicants wishing to be considered on the latter basis should contact the Trust in the first instance.

6. Applicants must **not be eligible** for support towards the cost of fees from the Student Awards Agency for Scotland, or any other public body such as Student Finance England, Student Finance Wales or Student Finance Northern Ireland, US Federal Loans or Canadian Loans etc.
7. Part-time students, who **only** receive tuition fee support from SAAS and are **not eligible** for any grants, bursaries or loans from SAAS, their employer or for a university scheme, may apply if the amount awarded by SAAS is less than the total amount of fees payable.
8. At the time of applying applicants must **reside in Scotland** and continue to do so during the period of their course.
9. The scheme is open to students who are not UK nationals. In such cases, applicants must either:

- a. be entitled to remain indefinitely in the UK, **OR**
 - b. if an immigrant with Limited Leave to Remain, hold a visa that is valid for the entire duration of the course; **OR**
 - c. be an asylum seeker.
10. Applicants must normally have passed the examinations relating to the previous stage of their curriculum before being eligible for tuition fee assistance.

C. Funding for a 2nd degree

11. The Trust will consider applications from students who meet the general eligibility criteria of the undergraduate tuition fee grant scheme AND also meet ALL the following criteria:
- a. They completed their first degree at least two years before the start of their new course;
 - b. They will enter the first year of their course in academic year 2022-23;
 - c. They have been unable to gain employment in the subject area of their previous degree, are unemployed, have been made redundant or are facing redundancy;
 - d. They wish to reskill in a different field of study, unrelated to their previous qualifications (whether at undergraduate, postgraduate or vocational level) and recognised as being in a skills shortage area for the Scottish economy. Eligible undergraduate degree courses are (listed by subject area):
 - i. **Medicine and health:** medicine; dentistry; nursing; midwifery; medical and diagnostic radiography; paramedic science; speech and language therapy; occupational therapy; psychology (BSc); veterinary science
 - ii. **Social work**
 - iii. **IT & Computing:** software development and engineering; web design, cyber security; big data analysis
 - iv. **Engineering and architecture:** civil, mechanical and electrical engineering; chemical and production engineering; building engineering, quantity surveying and architecture
 - v. **Quantitative sciences:** economics, actuarial science, statistics
 - vi. **Geosciences:** geology; geochemistry; geophysics; hydrology
 - vii. **Biosciences:** biology; biochemistry
 - viii. **Cultural and creative studies:** performing arts; arts, culture and heritage studies, specifically management and enterprise studies in the heritage, creative and performing art sectors
12. In considering applications, the Trust will take into account, in addition to evidence of eligibility, the following:
- a. previous qualifications (whether vocational, undergraduate or postgraduate)
 - b. length of time since previous qualification was obtained
 - c. current circumstances of the individual and motivations for returning to university in academic year 2022-23.

D. Type and level of award made

13. Applications must be made only in respect of **undergraduate tuition fees** and requests for maintenance costs cannot be considered.
14. Applications will be subject to a **financial means test** (indicative thresholds for support can be found in the Annex below).
15. Successful applicants may receive **either** the full fees for the relevant year of study **or** such part thereof as may appear appropriate to the Trust, having regard to all the circumstances disclosed in the application.
16. All awards provided by the Trust are in the form of grants, paid directly to the recipient's university.

II. Additional information about the scheme

A. New applicants

1. General information

Students who meet the scheme's criteria for support can apply for each year of study in which they are not receiving government funding but a new application must be submitted in each academic year. In normal circumstances, the Trust will support students for each year of the standard length of their chosen course.

The level of award will normally cover the cost of the fees for the full academic year. In certain circumstances, the Trust may reduce the amount awarded depending on the student's personal situation and the level of household income listed in the application.

2. Making an application

Applications must be made through the Trust's website between **1st June and 1st December** in the year in which the course starts. Students accepted on a January or February start course should contact the Trust as soon as they have been offered a place on the course.

Applications submitted after 1st December by a student who has already started his/her course and which relate to the academic year in which the course started may be considered at the discretion of the Trust. Applicants should state the reason for the late submission and explain why they are now seeking financial support for their fees. Late applicants should note that they must demonstrate to the satisfaction of the Trustees that their circumstances have changed since the course begun and they no longer have sufficient funds to pursue their studies.

B. Tuition fee support for students on a part-time degree course

1. General information

Part-time students who meet the scheme's criteria for support can apply for fee support for **either** the part-time fee for each year of study when the university attended charges a part-time fee per year, **or** for fees for the number of modules studied if the university attended charges fees per module.

The trust will not cover fees for stand-alone modules and all part-time students **must** be registered for a clearly defined first undergraduate degree programme.

Applicants should be studying for a minimum of 30 SCQF credits in the academic year in which they are applying. A new application must be submitted for each academic year, or part of the year.

2. Support for students receiving a part-time fee grant from SAAS

Students eligible for a part-time fee grant from SAAS may apply for support from the Trust if the amount awarded by SAAS does not cover the amount of fees payable, and they are not eligible for any further support from either SAAS, or the university they are attending. The Trust may not fully fund the remaining fee amount: the level of award will be determined on the basis of the student's financial and personal situation, not on the amount of fees payable.

3. Making an application

Applications for part-time fee support must be submitted by 1st December in the year in which the course starts. Students accepted on a January or February start course should contact the Trust as soon as they have been offered a place on the course.

Normally, the Trust will only accept one request for support per student per academic year. Students charged per module who do not know how much they will be charged during the entire academic should contact the Trust for further guidance.

C. Tuition fee support for students registered on Distance Learning courses

Students enrolled on distance learning courses meeting the scheme's criteria for support will generally be considered as part-time students, unless they can demonstrate they are studying a minimum of 120 credits in the academic year for which they are seeking support. Please see Section B. above for further details regarding support for part-time study.

Students registered on a distance learning course **must be residents of Scotland** while taking the course. The Trust may require proof of residency.

D. Tuition fee support for students classed in the “Overseas-fee” category

1. Students with a substantial link to Scotland

Students who have been resident overseas prior to attending a Scottish university and who have not undertaken at least two years full-time, or equivalent, secondary level education in Scotland must be able to demonstrate to the Trust's satisfaction that they possess a substantial link to Scotland. Such applicants will also be expected to provide an explanation as to why it is not practical or feasible for them to study in their country of normal residence. The Trust may request further information about the course chosen and the applicant's ties to Scotland.

Students with a substantial link to Scotland but residing overseas should note that the Trust will only cover the cost of fees at the equivalent level for Home Students, currently £1,820 per annum.

2. Non-EU students residing in Scotland and attending a Scottish university

Students, who have had two years full-time, or equivalent, secondary level education in Scotland OR can demonstrate a substantial link to Scotland and are classed by universities as “Overseas” because of their immigration status, may apply for support from the Carnegie Trust.

Applicants will be required to prove they meet the Trust's residency requirements and may be asked to provide details of their immigration status. Any Visa should be valid for at least the full length of the course.

Applications will be subject to a financial means test as with any other application received by the Trust.

Applicants should note that the Trust will not cover the full cost of the fees charged. The Trust will only cover the cost of fees at the equivalent level for Home Students, currently £1,820 per annum.

III. Assessment of applications submitted to the Trust

All applications will be subject to means-testing. When assessing applications, the Trustees will look at different factors before deciding whether an award should be made, and if so, how much will be awarded.

For example, Trustees will review the personal situation of the student; whether, he/she is classified as dependent or independent from their parent(s), step-parent or guardian; the number of other dependents in the household; the level of household income and the monthly expenditure incurred by the student and their household members as well as the student's academic performance to date and future career plans and ambitions.

A. Independent or dependent status of applicants

The Trust follows the criteria used by SAAS in determining whether students are classified as dependent or independent from their parents or guardians.

1. Dependent (young) student status

An applicant will be considered as a dependent student, provided he or she meets **all** of the following criteria:

- Under 25 years of age on the first day of the academic year for which he or she is seeking support.
- Has no child of any age dependent on him/her at the start of the academic year for which he or she is seeking support.
- Has not supported him- or herself from earnings or benefits outside full-time education for the last three years prior to the first day of the first academic year of the course.
- Is not married, in a civil partnership or living with a partner before the start of the academic year for which support is being sought.

2. Independent student status

An applicant will be considered an independent student, if he or she meets **any** of the following criteria:

- Is over 25 years of age on the first day of the academic year for which he or she is seeking support.
- Has one or more dependent children at the start of the academic year for which support is being sought.
- Has been supporting himself or herself from earnings or benefits outside full-time education for at least three years prior to the first day of the first academic year of the course.
- Is married, in a civil partnership or living with a partner before the start of the academic year for which support is being sought.

IV. Completing the application form

To access the online application form applicants must first register through the Trust's website using the Eligibility Checker provided on the scheme webpage at <https://www.carnegie-trust.org/award-schemes/undergraduate-tuition-fee-grants/>.

Shortly after registering applicants will receive a link to the online application form via email. Applicants will be asked to create a password to protect their form. The form may be completed over multiple sessions, however the 'Save' button must be used each time before leaving the form. Failure to do so will result in the loss of all information inputted during that session. All mandatory form fields must be completed and the required supporting evidence uploaded before the application form is submitted.

The Trust requires that admission to the course has been confirmed by the University (See the requirements for supporting evidence).

A. Details of household income and expenditure

The student's status as independent or dependent will determine what information must be provided to assess the income of the student and other members of their household. In particular, the Trust will want to receive details of household expenditure and household income. The status of the student will determine whose income and expenditure should be included when completing the application form.

1. Household income and expenditure for dependent (young) students

Dependent students must include on their applications, details of:

- Their personal income from salaries, self-employment, and rental property, etc. as well as grants,

- bursaries and loans, parental contributions or maintenance payments towards their living expenses;
- Income of any parent, step-parent or guardian with whom they normally reside, received from salaries, self-employment, pensions, rental property, social benefits and tax credits, interests from Trusts or savings;
- A breakdown of the student's personal expenditure (including rent for shared student accommodation or halls of residence, other living expenses during their course and any costs associated with their studies such as books, travel costs etc.);
- A breakdown of the monthly household expenditure, including rent or mortgage repayments, food, utility bills, council tax, debt repayments etc.
- A list of all members of the same household (e.g. parents, siblings or relatives cared for).

2. Household income and expenditure for independent students

Students who are considered to be independent, must include:

- Details of their personal income from salaries, self-employment, grants, bursaries or loans as well as any other income from rental property, interests from savings or trusts, etc.
- If married, in a civil partnership or living with a partner: details of the spouse or partner's income from salaries, self-employment, grants, bursaries or loans as well as any other form of income from rental property, interests from savings or trusts, etc.
- A list of all members of the household (e.g. parents, siblings or relatives cared for).
- A breakdown of the monthly household expenditure, including rent or mortgage repayments, food, utility bills, council tax, clothing, debt repayments etc.
 - Single students living in shared accommodation should include their personal contribution to the shared bills as well as their personal expenditure (travel costs, clothing, food etc.).
 - Students who are married, in a civil partnership or living with a partner should include the full household expenditure as well as a breakdown of the cost relating to their personal study (e.g. equipment, travel costs, books etc.)

B. Reference

Applicants must provide the name and contact details of **one referee** who should be familiar with the student's academic record to date. You may wish to use the same referee as for your UCAS application, for example. Family members, friends and fellow students cannot act as referees.

School or college leavers attending university for the first time should give, as a referee, the name of a teacher and/or lecturer at their school or college.

Mature students who have not been in education for several years may list a line manager, employer or supervisor capable of providing a character reference.

Note: If you are unable to identify a suitable referee, please contact the Trust for further guidance.

C. Supporting evidence

Applicants are required to provide supporting evidence when making an application for support. Supporting evidence should be uploaded to the online application form and may be submitted as documents or images (acceptable electronic file formats include PDF, Word, OpenOffice, TIFF, GIF, JPEG).

If you do not have access to a scanner, you may take photos of documents on your mobile phone and upload the images.

The table below explains what evidence should be provided to help the Trust confirm your eligibility when you apply for an Undergraduate Tuition Fee Grant for the first time.

NOTE: The Trust reserves the right to request additional information and evidence from applicants in order to determine their eligibility.

| Applicant category | Criteria for support | Supporting evidence |
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| Applicants eligible for a SAAS/Student Loans Company maintenance loan | Applicant eligibility | <p>(i) If applying on the basis of 2 years of secondary level education in Scotland, please provide a scan or image of your passport or driver's licence and one of the following;</p> <ul style="list-style-type: none"> • Scottish Qualifications Authority (SQA) transcript • Standard grade/Intermediates/National Qualifications/Highers/Advanced Highers certificates • A letter from your school, college or equivalent (on letter headed paper) confirming the dates of your attendance. <p>(ii) If applying on the grounds of a substantial link to Scotland on the basis of residence, education or upbringing it is strongly recommended that you contact the Trust to discuss your link to Scotland prior to submitting your application. Examples of substantial links may include; an extended period of recent/current residency, strong family ties (i.e. Scottish born children) or having spent a significant portion of your life as a resident of Scotland.</p> |
| | Course eligibility | <p>Offer letter from a Scottish university showing the course title, degree type and fee amount charged.</p> <p>For continuing students, evidence of enrolment for the academic year in question will be required, for example; a student status letter, certificate of matriculation or equivalent document, issued by your university.</p> |
| | Financial situation | A copy of your SAAS Award Notice letter showing the maintenance loan amount awarded and that SAAS are not paying your fees |
| Applicants NOT eligible for SAAS Student Loans Company maintenance loan | Applicant eligibility | <p>(i) If applying on the basis of 2 years of secondary level education in Scotland, please provide a scan or image of your passport or driver's licence and one of the following;</p> <ul style="list-style-type: none"> • Scottish Qualifications Authority (SQA) transcript • Standard grades/Intermediates/National Qualifications/Highers/Advanced Highers certificates • A letter from your school, college or equivalent (on |

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| | | <p>letter headed paper) confirming the dates of your attendance.</p> <p>(ii) If applying on the grounds of a substantial link to Scotland on the basis of residence, education or upbringing it is strongly recommended that you contact the Trust to discuss your link to Scotland prior to submitting your application. Examples of substantial links may include an extended period of recent/current residency, strong family ties (i.e. Scottish born children) or having spent a significant portion of your life as a resident of Scotland.</p> |
| | Course eligibility | <p>Offer letter from a Scottish university showing the course title, degree type and fee amount charged.</p> <p>For continuing students, evidence of enrolment for the academic year in question will be required, for example; a student status letter, certificate of matriculation or equivalent document, issued by your university.</p> |
| | Financial situation | <p><i>For dependent (young) students (aged 25 or under):</i></p> <p>Copy of P60 for tax year ending 5 April 2022 or last 3 pay slips for both the student making the application, and for any parent(s), step-parent or guardian(s) with whom the student normally resides.</p> <p><i>For independent students:</i></p> <p>Copy of applicant's P60 for tax year ending 5 April 2022 or last 3 pay slips (independent student), and P60 or last three pay slips for spouse/partner, if applicable.</p> |
| Part-time or distance learning students receiving a SAAS part-time fee grant | Applicant eligibility | <p>(i) If applying on the basis of 2 years of secondary level education in Scotland, please provide a scan or image of your passport or driver's licence and one of the following;</p> <ul style="list-style-type: none"> • Scottish Qualifications Authority (SQA) transcript • Standard grade/Intermediates/National Qualifications/Highers/Advanced Highers certificates • A letter from your school, college or equivalent (on letter headed paper) confirming the dates of your attendance. <p>(ii) If applying on the grounds of a substantial link to Scotland on the basis of residence, education or upbringing it is strongly recommended that you contact the Trust to discuss your link to Scotland prior to submitting your application. Examples of substantial links may include; an extended period of recent/current</p> |

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| | | residency, strong family ties (i.e. Scottish born children) or having spent a significant portion of your life as a resident of Scotland. |
| | Course eligibility | Offer letter from a Scottish university showing the course title, degree type and fee amount charged. For continuing students, evidence of enrolment for the academic year in question will be required, for example; a student status letter, certificate of matriculation or equivalent document, issued by your university. |
| | SAAS part-time fee grant | Copy of SAAS letter showing the amount of the part-time fee grant awarded. |
| Part-time or distance learning students not eligible for SAAS part-time fee grant | Applicant eligibility | (i) If applying on the basis of 2 years of secondary level education in Scotland, please provide a scan or image of your passport or driver's licence and one of the following; <ul style="list-style-type: none"> • Scottish Qualifications Authority (SQA) transcript • Standard grades/Intermediates/National Qualifications/Highers/Advanced Highers certificates • A letter from your school, college or equivalent (on letter headed paper) confirming the dates of your attendance. (ii) If applying on the grounds of a substantial link to Scotland on the basis of residence, education or upbringing it is strongly recommended that you contact the Trust to discuss your link to Scotland prior to submitting your application. Examples of substantial links may include; an extended period of recent/current residency, strong family ties (i.e. Scottish born children) or having spent a significant portion of your life as a resident of Scotland. |
| | Course eligibility | Offer letter from a Scottish university showing the course title, degree type and fee amount charged. For continuing students, evidence of enrolment for the academic year in question will be required, for example; a student status letter, certificate of matriculation or equivalent document, issued by your university. |
| | Financial situation | <i>For dependent (young) students (aged 25 or under):</i> Copy of P60 for tax year ending 5 April 2022 or last 3 pay slips for both the student making the application, and for any parent(s), step-parent or guardian(s) with whom the student normally resides. |

For independent students:

Copy of applicant's P60 for tax year ending 5 April 2022 or last 3 pay slips (independent student), **and** P60 or last three pay slips for spouse/ partner if applicable.

D. Personal statement

Applicants should use the Personal Statement section to describe their circumstances and explain why they think the Trust should provide assistance, having regard to the requirements of both merit and hardship, and explaining why they wish to pursue the course for which they have been admitted.

V. What happens next?

Shortly after submitting your online form you will receive an automatic acknowledgement email confirming that the Trust has received your application. The Trust aims to inform applicants of the outcome of their request for tuition fee support within one month of receipt of a completed application. Incomplete applications, i.e. with supporting evidence missing or those where additional information is required, may take longer to process.

If an award is made, the successful applicant will receive an email with a Confirmation of Award attached stating the amount awarded. **The Confirmation of Award must be presented to the University, by the recipient, at the time of matriculation or as soon as possible thereafter.** No payment is made to the award recipient directly and the University will subsequently invoice the Trust for the student's fees.

VI. Policy Statement on the General Data Protection Regulations 2018 and the Freedom of Information (Scotland) Act 2002

The Trust is registered under the General Data Protection Act 2018 (GDPR 2018, Registration No. Z9592913) and adheres to the Data Protection principles implicit in the Act. It is not bound by the Freedom of Information (Scotland) Act (FoISA) since it is not a Scottish Public Authority. Nevertheless, in responding to any request for information, the Trust seeks to comply with the spirit of the Act.

Many of the Trust's Schemes are competitive. The Trust receives more applications than it can fund, so it has to make choices on which awards to make and which to decline. It is imperative that these choices are soundly based and objective. In some Schemes the Trust asks for references from referees nominated by the applicant or the university. The Trust may also seek independent advice from other referees and from academic assessors. Confidentiality between the Trust and the referees or assessors is essential to ensure that the advice given is candid.

By submitting their application form, applicants

- confirm that they have read and understood the above Data Protection statement.
- confirm that, to the best of their knowledge, the information provided in their application is accurate and complete and agree to inform the Trust of any changes to this information during the period of award.
- understand that the provision of false information or the failure to give complete information may lead to the Trust's withdrawing its support.
- agree that the reference provided by a referee will remain confidential between the referee and Carnegie Trust.
- agree that details of their application may be shared with the university to which the grant will be paid if an award is made.
- agree to information regarding enrolment status, academic results, progression and graduation being shared by the university with the Trust.

- have read the Undergraduate Tuition Fee Assistance Regulations and agree to abide by them should an award be made.

While the Trust is prepared to explain why an application has been considered ineligible for support, the Trust will not enter into correspondence which would involve, directly or indirectly, discussion of, or comparison with, other applications, whether successful or unsuccessful.

The Carnegie Trust for the Universities of Scotland

Andrew Carnegie House

Pittencrieff Street

Dunfermline, Fife KY12 8AW

Tel: 01383 724990 Fax: 01383 749799

E-mail: admin@carnegie-trust.org

Website: www.carnegie-trust.org

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