# SCHOLARSHIPS AND STUDY GRANTS MANUAL

# OF THE

# AMERICAN LIBRARY ASSOCIATION

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## I. COMMITTEE FUNCTION AND CHARGE

**A. Function.** The American Library Association seeks to promote and advance the library profession through academic scholarships for graduate library education and study grants for continuing education. Scholarships and study grants recognize and support those individuals who have demonstrated academic excellence, leadership, and evidence of commitment to a career in librarianship.

### B. ALA Scholarships and Study Grants Committee Charge:

The ALA Scholarships and Study Grants Committee shall make recommendations to the Executive Board and the ALA Council on all policies relating to ALA scholarships, study grants, conference sponsorships or research grants to be made or sponsored by ALA and its units. It shall administer the general scholarships, study grants, conference sponsorships, and research grants presented in the name of the American Library Association, known as "ALA General Scholarships and Study Grants." All ALA General Scholarships and Study Grants shall exist to advance study or knowledge in library science. The Committee shall review periodically the appropriateness of existing ALA General Scholarships and Study Grants; shall recommend modification, elimination, or suspension of existing ALA General Scholarships and Study Grants, as needed; and shall make recommendations with respect to proposed new ALA General Scholarships and Study Grants. The Committee shall appoint juries to select recipients of ALA General Scholarships and Study Grants (i.e., scholarships and study grants not administered by a unit of the Association), with the exception of Spectrum juries, and shall coordinate the work of these juries and committees. The committee will work with other units of the Association to coordinate tracking, statistics, and other information about all scholarships and study grants sponsored by ALA and its units.

The Scholarships and Study Grants Committee shall be responsible for maintaining the ALA Scholarships and Study Grants Manual, which includes information for all scholarships and study grants presented by ALA or any of its units; it shall also provide general guidance regarding the procedural aspects of the Scholarships and Study Grants Program (such as information concerning deadline dates and publicity releases).

Each unit of ALA shall determine, within general ALA policies, new scholarships and study grants relating to its specific area of responsibility, known as "ALA Unit Scholarships and Study Grants." Each unit shall review periodically the appropriateness of its existing scholarships and study grants; and shall, as needed, modify, eliminate, or suspend its existing scholarship and study grant(s) and shall handle all details and expenses with respect to its scholarship and study grant(s).

Each unit will submit its proposals for new scholarships and study grants or changes to

existing ones as prescribed in the ALA Scholarships and Study Grants Manual to the ALA Scholarships and Study Grants Committee at a regular meeting of the committee at least six months prior to the anticipated date of advertisement. The Scholarships and Study Grants Committee will review and provide assistance to the unit on questions of procedure and coordination with other ALA units. All new scholarships and study grants must be reported prior to the implementation date to the Scholarships and Study Grants Committee, Executive Board, and Council.

Each unit is also responsible for submitting complete records as prescribed in the ALA Scholarships and Study Grants Manual concerning its award(s) to the Scholarships and Study Grants Committee in order that the ALA Scholarships and Study Grants Manual may be maintained.

## II. POLICY

**A. Jurisdiction.** Administration of ALA scholarships and study grants is under the jurisdiction of the ALA Scholarships and Study Grants Committee, appointed by the President-elect and approved by the Executive Board.

**B. Scope.** No limit is imposed on the number of general scholarships and study grants. The minimum amount for general scholarships is $3,000. The minimum amount for conference scholarships is $1,000. (See ALA policy 11. 2.) Scholarships and study grants awarded by ALA Offices, Divisions, and Roundtables do not have to adhere to the minimum monetary amounts.

**C. Applicant Selection.** The recipient of each scholarship and study grant is selected according to the criteria of the particular scholarship or study grant. Jury members may not participate in the selection process of applicants with whom they have a professional or personal relationship. Applicants may not be selected to receive more than one scholarship simultaneously. Applicants may be selected to receive the same scholarship in subsequent years if permitted by the guidelines of the particular scholarship or study grant.

**D. Administration.** The Chair of the ALA Scholarships and Study Grants Committee appoints juries to select recipients of ALA general scholarships and study grants, with the exception of the Spectrum scholarship juries. The staff liaison coordinates the work of ALA general scholarships and study grant juries.

**E. One Time Scholarships and Study Grant Awards.** Occasionally a proposal to fund and grant an award on a one time basis is received. The Committee works with the appropriate ALA offices in determining the appropriate steps to create the award. (See Section VI of this manual for guidance in proposing one-time awards.)

**F. Name and Logo Usage / External Partnerships.** Neither the American Library Association (ALA) name nor its logo may be used or associated with any new scholarship or study grant without prior review and formal approval by the ALA Scholarships and Study Grants Committee. This requirement applies to all scholarships, grants, and co-sponsored partnerships, regardless of whether ALA is involved in the administration, funding, or other aspects of the award.

## III. SCHOLARSHIPS AND STUDY GRANTS COMMITTEE

### A. Committee Membership.

1. Composition and appointment. The committee shall consist of eleven (11) members:
   - 1 member to be appointed by the Spectrum Advisory Committee
   - 1 member to be appointed by the ERT board
   - 2 members to be selected by the Divisions
   - 1 member to be selected by the Round Table Coordinating Committee (excluding ERT)
   - 1 member to be appointed by the Endowment Trustees
   - 1 member from ALA Conference Committee Bash Subcommittee, to be appointed by the Conference Committee
   - 1 member to be appointed by the HRDR Advisory Committee
   - 2 members to be appointed by the ALA President-Elect
   - 1 ALA staff liaison serves in an ex-officio capacity
2. Eligibility. Donors and/or sponsors of ALA Scholarships and Study Grants are not eligible for appointment to the Committee.
3. Term of Office and Vacancies.
   a. Term. Members are appointed for two-year terms, and reappointment may be made for a second, but not a third, consecutive term.
   b. Vacancies. Any vacancy occurring on the Committee is filled by appointment by the Executive Board. Such member is expected to serve until the expiration of the conference year in which the vacancy occurs, at which time an appointment shall be made to complete the unexpired term.

### B. Duties of the Committee. Members of the Scholarships and Study Grants Committee are responsible for:

1. Coordinating and administering the general ALA Scholarship Program;
2. Monitoring and reporting on the funding available in the various ALA scholarship endowments. The Committee will work with the Endowment Trustees to develop recommendations for shifts or transfer of funds to adequately fund scholarships. These recommendations will be made to the ALA Executive Board for approval.
3. Establishing the fundamental requirements for scholarship and study grants and providing general guidance regarding the procedural aspects of the Program (such as funding prerequisites, information concerning deadline dates, publicity releases, etc.);
4. Reviewing existing ALA scholarships and study grants on an annual basis to ensure that there is sufficient financial support
5. Ensuring conformance with ALA goals and objectives and consistency of application based on reports of jury chairs.
6. Recommending modifications, elimination, or suspension of existing ALA scholarships and study grants.

7. Making recommendations with respect to proposed new scholarships and study grants;
8. Maintaining the ALA Scholarship and Study Grant Manual, which includes information for all scholarships presented by ALA or any of its units; and shall prepare proposals for changes in policy;
9. Ensuring a seamless scholarship and study grant program by working closely with other units, particularly the ALA Development Office, its advisory committee and the Endowment Trustees.

**C. Duties of the Chair. It is the duty of the Chair to:**

1. Call meetings of the Committee during the Midwinter Meeting and the Annual Conference, and to call any other meetings that may be needed throughout the year.
   a. Meetings during the Annual Conference are for the purpose of outlining the year's work with both incoming and outgoing members of the Committee and jury chairs, and for transacting other business as necessary.
   b. Meetings during the Midwinter Meeting are the principal business meetings of the year when, for example, proposals for new scholarships and study grants are considered, reviews of existing scholarships and study grants are presented, and the discontinuance of current scholarships and study grants are recommended.
4. Present recommendations for changes to the policies or to the scholarship and study grant awards to ALA Council. The meeting takes place during the Midwinter Meeting Conference and must be scheduled with the Council in advance.
5. Appoint juries for all scholarships and study grants administered by the Committee as soon as possible. Suggestions are requested from the current jury chairs regarding potential members to serve as chairs and members of the next year's jury. Suggestions for jury appointments may be requested from division presidents and units within ALA, state agencies and associations, Scholarships and Study Grants Committee members, headquarters staff, and the association membership, at large. In most cases, it is appropriate to seek a representation of people from different types of libraries; in some cases, the specifics of the award require designated representation.

**D. Meetings of the Committee.**

1. The Committee meets during the Midwinter Meeting and the Annual Conference of the Association. Additional meetings may be called by the chair if appropriate.
2. Closed meetings may be held only for the discussion of matters affecting the privacy of individuals or institutions. (See ALA policy 7.4.3.)
3. Minutes of all meetings of the Committee are prepared by the Staff Liaison and filed according to ALA procedures. Actions taken during

"virtual" meetings shall be formally adopted at the ALA Midwinter Meeting or the Annual Conference.

## IV. ALA STAFF LIAISON AND ALA SCHOLARSHIP PROGRAM OFFICER.

**A. Duties as the ALA Staff Liaison in support of the Scholarships and Study Grants Committee. It is the duty of the ALA Staff Liaison to:**

1. Serve as an ex-officio member of the Scholarships and Study Grants Committee;
2 Work directly with the Scholarships and Study Grants Committee chair for overall administration and policy oversight;
3. Provide summary reports regarding administrative problems relating to scholarships and recommend changes in award amounts to the Committee;
4. Conduct the initial review of new scholarship proposals and assist the sponsoring unit in defining the scholarship criteria. Forward completed proposal and criteria to the Committee for review and approval;
5. Submit meeting request forms and coordinate all logistical arrangements with ALA Conference Services;
6. Distribute and maintain all minutes of meetings of the Committee and maintain an archive of such documents in the ALA office.

**B. Duties in Support of the ALA Scholarship Juries and Clearinghouse. It is the duty of the ALA Scholarship Program Officer to:**

1. Function as the staff liaison to the ALA "General" Scholarship juries and acts as the juries' contact at ALA Headquarters;
2. Prepare timetables, jury orientation packets, rosters, and general information for the juries;
3. Coordinate with other ALA units in the preparation of scholarship announcements, press releases and publicity;
4. Prepare letters and appointment acceptance forms for ALA scholarship jury members from names provided by the Chair;
5. Forward scholarship and study grant proposals and applications to juries, as appropriate and monitor progress of the juries to ensure timely progress in the selection process;
6. Contact the jury chair to request an alternate recipient in the event that the same person is selected for two or more scholarships and/or study grants in the same year;
7. Prepare and order the citations, requests scholarship and grant monies, and arranges for checks to be processed prior to Annual Conference;
8. Communicate with deans & directors of the appropriate library schools to determine the status of student scholarship recipients;
9. Notify recipients and coordinate the distribution of their scholarship

payments;

10. Maintain communication with recipients throughout their program of study to track their academic progress;
11. Update and maintain the Scholarships and Study Grants Committee web page: www.ala.org/scholarships.

## V. ALA SCHOLARSHIPS AND STUDY GRANTS JURIES AND PROCEDURES, (THIS SECTION DOES NOT APPLY TO UNIT SCHOLARSHIP AND STUDY GRANT JURIES).

**A. Purpose.** The role of the juries is to review eligible individuals from the pool of nominations and applicants for scholarships and study grants and, based on the established criteria for the scholarship or grant, select recipients.

**B. Composition and Appointment of Juries.**

1. Jury members are appointed annually by the Scholarships and Study Grants Committee Chair. Each jury includes five members and one chair.
2. Potential jury members should decline the nomination if there is a known conflict of interest. Neither jury members nor their institutions are eligible for nominations for the award jury on which they are currently serving.

**C. Administrative Duties of the Jury Chair.** It is the duty of the Jury Chair to:

1. Schedule meetings during the Midwinter Meeting for the selection of a scholarship or grant recipient. Jury deliberations are “closed sessions." (ALA policy 7.4.3.)
2. Oversee the selection process for a specific scholarships and study grants award.
3. Become familiar with the general description, selection criteria, and previous recipients of the scholarship or study grant. Review the previous jury's file, if necessary.
4. Ensure that the jury understands the criteria and selection process for that particular scholarship or study grant.
5. Forward the scholarship or study grant award selection and appropriate documentation to the ALA Liaison. A statement supporting the selection to be used in the formal press release must be included.
6. Jury chairs should inform the ALA Scholarships and Study Grants Committee Chair of any problems that arise in the handling of their duties and make any recommendations concerning the award which they deem necessary.

**D. Procedures for the Scholarships and Study Grants of the Scholarships and Study Grants Juries.**

1. Each jury member will be provided with the names of all eligible candidates/projects, the nominating statements, and other supporting

documentation prior to the Midwinter Meeting. A systematic procedure for evaluating nominations shall be agreed upon prior to selection. If a vote is taken, all jury members, including the chair, are entitled to vote.

2. The criteria for each scholarship and study grant is distributed to each member of the jury by the ALA Staff Liaison as part of the orientation process.
   a. Each jury must rule on the eligibility of nominations based on the criteria provided. Jury chairs may seek the advice or clarification of the ALA Staff Liaison in regard to policy and terms.
   b. Jury members must avoid conflicts of interest. In the case where an application is received from a jury member's institution or when there is a personal relationship with an applicant, the jury member must recuse him or herself from discussion and voting. If necessary, final determination shall be made by the jury chair. If there is any other conflict of interest, it should be discussed with the ALA Scholarships and Study Grants Committee Chair who will make the final determination.
3. The jury chair will notify the Staff Liaison, and jury members of the jury's selection, as soon as it is made.
4. Juries are not obligated to make a selection of a recipient in any year when appropriate candidates for the scholarship or study grant are not available.
5. NO APPLICANT MAY RECEIVE MORE THAN ONE ALA SCHOLARSHIP. In the event the same individual is selected by juries to receive an award, the Staff Liaison will contact the Chair to request an alternate recipient.
6. Nominations which were considered worthy by a jury may be forwarded to the incoming chair of the jury for consideration in the next year. Nominations which have been pending for more than three years are to be destroyed.

**E. Jury Meetings**

1. In concurrence with ALA open/closed meeting policy, all jury meetings will be closed when considering merits of individuals or projects for scholarships and grants. (See ALA policy 7.4.3.)
2. Juries can meet at the Midwinter Meeting, electronically, via conference call, or at other times as appropriate.

## VI. ESTABLISHING NEW SCHOLARSHIPS AND STUDY GRANTS

**A. Who may request new scholarship or study grant.** A request that a new ALA or unit scholarship or study grant be established may come from any member or unit of the Association or from any individual or group outside the Association interested in the recognition and development of libraries and librarianship.

**B. Policy. (**See Section II of this manual for scholarship and study grant policies**.)**

**C. Criteria for establishing a scholarship or study grant.** The following points will be carefully considered before a new ALA scholarship or study grant is established:

1. The intent and purpose of the individual or group making the proposal or donating a sum of money. ALA scholarships and study grants should not serve primarily as advertisements for the donor.
2. The existence of already established scholarships and study grants in the same or similar areas of interest. Overlapping scholarships and study grants are to be avoided.
3. The amount of monetary award to the recipient of the scholarships or study grant. (See Section II of this manual for minimum award amounts.) Note: Scholarships and study grants that are sponsored by offices, divisions and roundtables do not have to adhere to the minimum monetary awards.
4. A minimum funding commitment of five years from the donor/sponsor, with the exception of scholarships or grants intended to be given on a one time basis.
5. Provision of administrative fees.
   a. The Scholarships and Study Grants Committee will consider the administrative fees in reviewing a request for a new scholarship or study grant, and the cost of administering a scholarship or study grant. The administrative fee for new scholarships and study grants is 20% of the scholarship or study grant amount, not to exceed $1,000. The administrative fee does not apply to Endowment Scholarships.
   b. For scholarships and study grants by a unit of ALA, administrative costs by the unit shall be included in the proposal and in budget requests as needed.
   c. The purpose of the administrative fee is to pay for:
   (1) Costs of preparation, printing, and distribution of scholarships and study grants criteria and nomination forms.
   (2) Costs for preparing appropriate citations and/or plaques.
   (3) Publicity and promotion of scholarships and study grants.
   (4) Expenses for the scholarships and study grants presentation ceremonies.
6. A workable set of objective criteria for selecting a recipient.
7. Sufficient candidate pool size. There must be an adequate pool of potential candidates who have interest in the award and meet the criteria of the award.
8. The life expectancy of the scholarship or study grant:
   a. A date for the Scholarships and Study Grants Committee or unit to review and determine the continuation of the scholarship or study grant should be set at the time it is established. A trial period of three years is usual.
   b. Endowments to insure the continuation of recognized scholarships or study grants of five or more years standing are encouraged.

**D. Instructions for proposing a new scholarship or study grant:**

1. An electronic version of the proposal or ten print copies of the proposal must be submitted to the Scholarships and Study Grants Committee Staff Liaison or Chair at least six months prior to the anticipated date of an advertisement.
2. The Scholarships and Study Grants Committee shall consider each proposal via e-mail. Follow-up questions will be sent to the representative of the ALA unit most

closely connected with the proposal.

3. Preparing the proposal. See Appendix A for the application award form.

## VII. DISCONTINUING OR RESTRUCTING SCHOLARSHIPS AND STUDY GRANTS

**A. Criteria for discontinuing or restructuring a scholarship or study grant.** ALA scholarships or study grants may be discontinued, suspended, or restructured for any of the following reasons:

1. General lack of interest in the scholarship or study grant as shown by the failure of the review committee to receive any applications for three consecutive years.
2. Inability of three consecutive review committees to make a selection of a recipient because the terms of the scholarship or study grant are not relevant, impractical, or outdated.
3. Continuing pressure on a review committee by the sponsoring body(ies) or donor to influence the selection of the recipient. .
4. Withdrawal of financial support by the donor insufficient financial resources.
5. Any other reasons deemed appropriate by the Committee.

**B. Sunsetting procedures.**

1. Sponsoring Unit. When the sponsoring unit wishes to discontinue, suspend or restructure a scholarship or study grant for any one of the reasons stated above, a statement indicating one of the following reasons should be received by the Staff Liaison or the Chair of the Committee:

(a). A letter from the donor indicating the reason for discontinuation or restructuring of the scholarship or award, preferably six months to one year prior to discontinuation.

(b). If applicable, a letter from the estate of a personal donor in the event of death indicating procedures for the continuation or discontinuation or restructuring of the award.

(c). A letter from the unit indicating the reason for discontinuation or restructuring and the effective date, preferably six months to one year prior to discontinuation or restructuring.

2. ALA Scholarships and Study Grant Committee. The Committee will review each scholarship and study grant on a 3 year cycle or time frame specified by the donor. The following criteria in VII. A above will be used to determine whether the scholarship or study grant should be discontinued or restructured.

**C. A recommendation to discontinue, suspend or restructure an ALA scholarship or study grant is presented to Council for action.**

**VIII. OTHER UNIT AWARD RESPONSIBILITIES**. Each ALA division or unit is responsible for the administration of those scholarships and study grants it presents within the general ALA policies governing scholarships and study grants.

**A. Unit Responsibility.** Each unit will:

1. Review periodically the relevancy of its existing scholarships and study grants and report on this review to the ALA Scholarships and Study Grants Committee.
2. Modify, eliminate or suspend its existing scholarships and study grants and notify the ALA Scholarships and Study Grants Committee Chair and the Staff Liaison of any such action.
3. Handle all details and expenses with respect to its awards.
4. Submit its proposal for new scholarships and study grants or revisions of existing unit scholarships and study grants to the ALA Scholarships and Study Grants Committee Chair one month prior to a regular meeting of the Committee which is at least six months prior to the date of first presentation.

**B. ALA Scholarships and Study Grants Committee will**:

1. Review and provide assistance to the unit on questions of procedure and coordination with other units.
2. Report all new scholarships and study grants, for approval, prior to implementation date to Board and Council.

## Appendix A

## Scholarships and Study Grants Award Application Form

### 1. Name of the Scholarship or Study Grant

State the official name of the scholarship or study grant.

### 2. Definition, Purpose, and Criteria of the Scholarship or Study Grant

Describe the scholarship or study grant in detail, indicating the purpose of the scholarship or study grant and a detailed list of the criteria for bestowing the scholarship or study grant.

### 3. Number and Frequency of Scholarships or Study Grants

Indicate how many scholarships or study grants are proposed and the intervals in which the scholarships or study grants will be bestowed. Include projected date of the first award.

### 4. Selection of Jury or Review Committee

Describe the make-up of the review committee and who appoints the committee. Is there any particular group or groups from which the review committee members will be chosen? Include individuals who may serve as ex-officio (non-voting) members. Indicate the duties of the committee members (i.e. solicitation and selection), term of service, and any special qualifications needed by review committee members.

### 5. Applicant Submission Requirements and Deadlines

Indicate the number of copies of applications to be submitted. Specify the date applications are due and the form that the applications will take, e.g., a statement of outstanding contributions, etc. ALA scholarships and study grants March 1. Scholarships and study grants that are sponsored by offices, divisions and roundtables do not have to adhere to the March 1 deadline.

### 6. Screening of Candidates/Review of Applications

Indicate the process to be used in determining the scholarship or study grant recipient.

### 7. Presentation of the Scholarship or Study Grant

Specify dates for the announcement and presentation of the scholarship or study grant. ALA scholarships or study grants should be designated for presentation at an

appropriate meeting, e.g. Awards Reception, at the Annual Conference, etc.

**8. Amount, Form and/or Type of Award**

Indicate dollar amount and how the award will be transferred (i.e., award check to an individual, payment to an institution, etc.).

**Note: Scholarships and study grants that are sponsored by offices, divisions and roundtables do not have to adhere to the minimum monetary awards.

**9. Source of Funding or Donor Name**

State the source of funding and include how the funding will be renewed or sustained. Include a letter of financial commitment from the funding source.

**10. Contact Person**

Provide the name and contact information for this proposal.

Note: An electronic version of the proposal or ten (10) print copies must be submitted to the Scholarship and Study Grants Committee staff liaison or chair prior to the Midwinter Meeting or Annual Conference. The Staff Liaison will notify you when to attend the committee meeting for further discussion.