

ESEAP Learning Clinic with [Wikimedia Australia](#) and [Chen Almog](#): Guidelines, best practices, documented learnings related to travel scholarships

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A. Context

- Organisations in the region are excited about participating/organising events, but may not know all the steps
- With Wikimania scheduled to take place in Singapore in August 2023, affiliates in the ESEAP region have requested budgets to fund travel scholarships for in-person participation. While we encourage wikimedia communities to apply for [travel scholarships through Wikimania](#), affiliates note that with their proximity to Singapore, it is a valuable opportunity to provide greater access and representation from the region. For example: more representation from emerging/underrepresented communities, newer wikimedians with the potential to grow within the affiliate/ movement; representation beyond core staff or long-time volunteers associated with affiliates.
- Many affiliates have successfully secured additional travel funding through their general support fund grant. This was also encouraged and aligned with the recommendations from the ESEAP funds committee.
- In this session, we hope to provide affiliates with the general framework, workflow and templates to think through the scholarship planning, selection, award process as well as the support that scholarship recipients may need and the support that affiliates can offer. These resources can be adapted and adjusted to the needs of each affiliate, while keeping in mind the principles of equity, transparency and accountability.
- While the learnings on travel scholarship can be wide and deep, we have chosen to cover the following topics for the 2 hour session.
 - Chen Almog: Sharing some tips and good practices from global event experience

- Wikimedia Australia: Sharing some learning and practices that worked and didn't work for us

B. What is the learning clinic for?

To share some learning and practices in inclusive and equitable practices when selecting participants for scholarships to events.

C. Learning outcomes

1. Participants will be able to be aware of some of the key aspects to consider when selecting participants to receive scholarships for events in ways that are more inclusive and equitable and what peers have learned from their experience.
2. Participants will be able to access some documentation (toolkit/templates) that may guide them in selection processes for event scholarships.

D. Session materials

- [Invitation](#); [video recording](#)

E. Acknowledgements

- Wikimedia Australia - [Pru Mitchell](#), [Gnangarra](#)
- Community Resources - [Chen Almog](#), [Jacqueline Chen](#)
- Let's Connect: [Jessica Stephenson](#), [Anthony Diaz](#) and [Dorra Guedri](#)
- Interpreters: [Omotecho](#) and [Venus Lui](#)

F. Toolkit

Note: This scholarship allocation process is for events you are not the one to organise.

Re-cap: In this learning clinic, we hope to provide affiliates with the general framework, workflow and templates to think through the scholarship planning, selection, award process as well as the support that scholarship recipients may need and the support that affiliates can offer. These resources can be adapted and adjusted to the needs of each affiliate, while keeping in mind the principles of equity, transparency and accountability. While this is not an exhaustive list, we hope it will provide you with the starting building blocks to set up a framework and process that works for you.

Acknowledgements: [Chen Almog](#) and [Wikimedia Australia](#) for contributing to the toolkit.

Steps	Considerations	Resources
1. Determine the budget and assess the scholarship costs.	<ul style="list-style-type: none">• What is the budget that we can allocate?• What do we want to offer as a scholarship?• Types of scholarships - full; partial; online	<p>Use global websites such as Expedia, skyscanner, KAYAK, booking etc. Those will give you a good idea of the average cost.</p> <p>The basics are travel and accommodation. But you might also want to consider including visa costs; data plan; covid test, health insurance; childcare; ground transportation etc.</p>
2. Consult and decide on a payment method.	<p>Possible options (non-exhaustive):</p> <ul style="list-style-type: none">• The affiliate/chapter to book the travel for the recipients or to pay a travel agency directly. If you have capacity within your team or the budget to outsource, this is the most recommended option.• Determine a benchmark (a standard or average cost) for the scholarship and allow the recipient to	<p><i>*In any case, if you are not sure, talk to your accountant to make sure you are able to reimburse. Cash reimbursements are not recommended and in many countries are not allowed for accounting reasons.</i></p>

	book it themselves and to get reimbursed up to the amount of the benchmark you identified.	
3. Form the scholarship committee/ panel and review framework	<ul style="list-style-type: none"> Form the scholarship committee and involve them in designing the process. 	<p>Here are a few recommended selection criteria that you might want to consider. But the basics will be: Gender, region; underrepresented communities; wikimedia projects; experience, role in the affiliate, level of engagement in the movement/ community activities/ affiliate.</p> <p>Learnings from the Scholarship Program of the WikiConference India 2023</p> <p>Here is a proposed application review document you can use. Please mind that this was created for a Hackathon, so you might want to adjust it.</p> <p>See Gnangarra's report to WMAU on the ESEAP scholarship process - includes criteria for affiliate selected scholarships and questions for open scholarships</p> <p>Also the Wikimania Scholarships process and handbook</p> <p>Scoring example -Wikimania</p>
4. Identify clear and diverse eligibility criteria	<ul style="list-style-type: none"> Form clear eligibility criteria. What is important to us, what kind of people do we want to support, what gaps could we improve through the scholarships? 	<p>Think about the conference target audience and who will benefit from it, who is best positioned to contribute to it; how will your community benefit from their attendance and what are the skills and capacities needed to attend.</p>

	<ul style="list-style-type: none"> When you have your eligibility criteria, design a review/vetting process for your committee. It can be a set of guiding questions, or a voting chart for example. 	<p>Consider both long term contributors, but also newcomers that you would like to encourage and motivate.</p> <p>Travel scholarship recipients must be in good standing with their local affiliates and with the Wikimedia Foundation. This means the scholarship applicant should not have any ongoing issues with friendly space policies or overdue grant reports.</p> <p>Travel scholarship recipients who represent an affiliate must be in good standing on the primary Wikimedia projects where their affiliate works.</p> <p>For more information on Scholarship eligibility and more, please see this link.</p>
<p>5. Communicate, inform and launch the scholarship application process</p>	<ul style="list-style-type: none"> First it is important to include a disclaimer or a statement that says why are you collecting the data and what will you do with it. Follow all data protection guidelines in your country. Collect only the data that you need! Prepare the communication that should give clear information about the selection criteria and the timeline. Please let people see all of the questions up front! They need to get their information together before they start on the form. Consistent email contact. Shared FAQs published so everyone receives the same information 	<p>Here is a suggested scholarship application form you can modify (make a copy).</p> <p>WMAU 2022 scholarship form for applicants for WMAU scholarships.</p> <p>Note the privacy statement and the applicant responsibility statement at the end of the form</p> <p>Also ensure COT and scholarship holders understand these Traveller responsibility from the Scholarships Policy</p>

	<ul style="list-style-type: none"> • After you agree on a list of selected applicants with the committee, Inform the confirmed scholars and let them know about the next steps, the information we need from them, what they should do, ask them to confirm that they are still interested • Inform the people who are rejected/in the waiting list. Yes - a waiting list is recommended. 	
6. Set up expectations on scholarship deliverables and report out to the community.	<ul style="list-style-type: none"> • Think about what would you like (if at all) the recipients to commit to. Is it a report out after the conference? Is it a blog post, a training? Do you expect them to submit a program session? • Remember that those are suggestions, but not necessarily a requirement. If you don't really need a formal report, it is ok to not to ask for it. Think of what would benefit your affiliate the most and what is a reasonable expectation given the capacity and skills of the recipient. 	<p>Check the specific deliverables and metrics you have to provide in your own grant or conference report to WMF, and ensure you collect the information you require. Example of ESEAP 2022 Conference report (template for Conference funding)</p>
7. Tips and resources for organisers	<ul style="list-style-type: none"> • Promoting the scholarships Part of a transparent scholarship process is to ensure anyone who is eligible and might be interested knows about the opportunity <i>in plenty of time to apply</i>. Lots of advance warning in newsletters, post it on Wiki and social media, and approach new people, and priority categories with 	<ul style="list-style-type: none"> • General Conference management resources • The former Events team portal (with a hosting/funding FAQ) • Platforms: Most require a login. A preference for data hosting in your country, but something that works for your target group. WMAU use Google Forms and Eventbrite plus direct email for identify and financial

	<p>direct invitation (not by a member of the scholarship committee).</p> <p>Possible categories to ensure balance & representation of:</p> <ul style="list-style-type: none"> • gender • languages • projects • cultural & ethnic groups • geographic <p>To ensure someone is an accepted representative beyond the scholarship committee or affiliate's language or knowledge, consider inviting that community to develop their own process for selecting their own representative</p> <ul style="list-style-type: none"> • Record keeping and Privacy: you need a secure and user-friendly way to collect data from applicants that minimises the private, personal information they have to provide. Separate the data into 1. application data, and 2. logistical/travel data - just for those selected or on shortlist. Financial recordkeeping - use existing finance system, or set up a spreadsheet linked to a file to store copies of invoices • Keep it simple but flexible The more options you have the more complex the process is, so keep it as simple as possible. 	<p>data</p> <ul style="list-style-type: none"> • Wikimedia Australia has policies which can save some time each year (but need to update regularly) Scholarships policy Travel policy • Financial recordkeeping - WMAU uses Xero with separate cost categories for Grants and for Volunteer reimbursements (due to different accounting). Both require tax invoices for expenses over \$82.50. Set up a system that works for you and your team.
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	<p>However, there is a personal time investment when travelling to a conference, and you want to be flexible to allow people to extend their visit, or undertake extra activities while they are away. Simplest way is to set a maximum amount for the scholarship and allow the traveller to organise and book their own. This may not be possible for those on low-income or inexperienced travellers</p> <ul style="list-style-type: none"> • What can go wrong? <ol style="list-style-type: none"> 1. Budget overrun or underspend <ul style="list-style-type: none"> • Talk to your grant person early if you see this issue • Don't accept all scholarships until you know the actual costs of the top-rated group • Have a waitlist, including those who can take up places at the last minute 2. Participant selected is not accepted by their community <ul style="list-style-type: none"> • Transparent process • Responsive direct communication • Note added responsibility of in-person versus online communication 3. Scholarship recipient cannot come at the last minute <ul style="list-style-type: none"> • Sickness or emergency: Budget for and insist all scholarships organise personal travel 	
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	<p>insurance. They can claim insurance or organise a credit on flights. This could be used for a future event. Offer hotel room or anything transferable to a local so it does not go to waste</p> <ul style="list-style-type: none">• Visa or passport: Ask about visa and passport at application stage. Link people to a mentor person from their country of passport to help them. Do not confirm or pay for flights until a visa is confirmed. Make a deadline date 2 - 4 weeks before, and have waitlist person ready to book• No show: Unfortunately, this is a reality where a scholarship person withdraws after bookings have been made. (Policy says this makes the person ineligible for future scholarships)	
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