



**Oncology Nursing
Society**

Educational Scholarship Toolkit

Providing Financial Aid for Continuing Education

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Links to Additional Toolkit Resources

- [Scholarship Application Template \(Google Forms\)](#)
- [Scholarship Application Template \(Paper\)](#)
- [Reimbursement Form Template](#)



Success Metric: Educational Scholarships

This toolkit provides information on the *Educational Scholarship* success metric. To complete this success metric, your chapter must provide at least two scholarships toward education or research.

Overview of Chapter Grants and Scholarships

Scholarships and grants are a wonderful way for chapters to utilize their funds to promote oncology nursing as a career and provide continuing education to chapter members. Educational grants and scholarships can take many forms, including:

1. **Conference support:** Funding to attend professional development conferences (e.g., ONS Congress®, ONS Bridge™).
2. **Higher education support:** Funding towards a degree or certification through an institute of higher education (e.g., BSN, DNP, PhD).
3. **Research support:** Funding to offset costs associated with oncology nursing-specific research.

Whenever possible, chapter grants and scholarships should be paid **as a reimbursement to the member**. This means the member pays the initial costs of their conference attendance or tuition, then provides receipts to the chapter for approval and reimbursement.

This method not only ensures that chapter funds are being used appropriately but also avoids tax implications and paperwork for the chapter and the recipient.

Creating a Chapter Scholarship Program

Step 1. Allocate Funding

The first step in offering grants or scholarships is determining the chapter's financial capacity. Does the chapter have excess funds in their operating budget that allow for this added expense? Upfront budgeting is key to ensure a successful scholarship program.

While there is no right or wrong amount for a grant or scholarship, a good rule is to provide recipients with enough funding to offset costs. It's also important to determine if the chapter's priority is offering larger scholarships to a few members or offering more modest scholarships to a larger number of members.

Consider creating a mock budget of the costs the member will incur. For example, in the case of a conference scholarship, this would include travel costs, registration, lodging, and other related costs. If the total budget is too high for the chapter to cover, consider offering a half scholarship or covering a portion of expenses, such as registration or travel.

Scholarship costs may vary from year to year, depending on tuition fees, conference locations, or other factors. It's important to recalculate scholarship amounts regularly to ensure they reflect current pricing. For some example expense caps, please see [Expense Recommendations](#).

Step 2. Identify Chapter Needs

Like the rapid advancement of oncology treatments, the educational needs of chapter members will change over the years. It is important to continually check with members to determine what educational opportunities they want to pursue and how the chapter can assist. In some areas, large employers may offset the cost of conference attendance, so demand is higher for tuition-related expenses, whereas in areas without employer support, conference scholarships may be a more desirable option. A scholarship program is useless if members don't apply.

Consider sending a needs assessment to your chapter members, asking them questions like:

- Which type of continuing education funding would be the most useful to you in your career?
- Does your employer offer financial support for employees to attend conferences?
- Are you interested in obtaining an oncology nursing certification?
- Are you considering pursuing additional nursing degrees (BSN, DNP, etc.)?

Step 3. Establish Applicant Criteria

Once the chapter has budgeted for scholarships and determined the focus and amount of each, it is time to establish the criteria for applicants. Although not a requirement, many chapters include criteria that may help incentivize participation in chapter activities. Some optional criteria for scholarship applicants can include, but are not limited to, the following:

- Applicant must have been a chapter member for [x] years.
- Applicant must have attended [x] chapter events in the past year.
- Applicant must not have received a chapter scholarship in the past [x] years.
- Applicant must be an early-career professional.
- Applicant must be a student member.

If the chapter establishes scholarships that board members are eligible for, ensure that the information regarding these scholarships is publicly available to all chapter members. Transparency is crucial; ensure that the selection committee for these awards is free of bias.

Step 4. Create and Distribute Applications

Once the criteria have been established, it's time to create the scholarship application. Application length can vary, from simple to in-depth. The application length and complexity should be informed by the amount of the scholarship. For example, a DNP scholarship may require a more robust application than a scholarship for a conference.

In addition to collecting basic demographic information (name, email, ONS member ID, etc.), some chapters like to include additional fields to help in the selection process. These additional fields can be particularly useful if the application field is particularly competitive. Some optional fields include the following:

- A paragraph or essay response detailing how the scholarship would support the applicant in their career as an oncology nurse
- A paragraph or essay response on what the member is most excited to learn or a conference session they are most excited to attend
- An agreement that the member will present on what they learned at a future chapter meeting

It is important to clearly state on the application what the scholarship **will** and **will not** cover. If providing a conference scholarship, disclose exactly what that entails, including any expense caps. It may also be useful to have members acknowledge their understanding of the reimbursement process on the application, if applicable.

Applications may either be entirely digital or may be printed and filled out on paper, depending on the preferences of the chapter and the scholarship committee. For templates of applications, see [Sample Scholarship Applications](#).

The application deadline must be clear. The chapter should share several reminders during the application period to ensure members have ample opportunities to apply.

Step 5. Select and Notify Applicants

Once all applications are submitted, the chapter can select recipients and notify members of their application outcomes.

It is important to remove bias when selecting scholarship recipients; this can be particularly difficult in a chapter setting, where many members are friends or colleagues. ONS recommends that the chapter employ a scholarship selection committee; this can be a standing committee or an ad hoc group created for the purpose of selecting a particular round of scholarship recipients.

Scholarship selection committee considerations:

- The committee is comprised of members from a variety of employers.
- Members are willing to recuse themselves from judging applicants they have close work or personal relationships with.
- If selecting board-specific scholarships, consider having members outside of the board participate.

It is important that the chapter have a uniform and formalized system for scoring scholarship applications. Please see [Sample Scholarship Scoring](#) for an example scoring set, including eligibility questions and a criteria scoring rubric.

Once recipients have been selected, the board can notify them that their applications have been successful. The chapter should provide recipients with the terms of the scholarship, as well as deadlines for submitting their receipts for reimbursement.

It is also important to notify members who were not selected to ensure the loop is closed with all applicants.

Step 6. Approve Receipts and Distribute Reimbursement

Receipt Submission

Recipients should submit their receipts by the specified deadline. The submission should include:

- Original receipts or electronic copies
- A completed reimbursement request form (if provided)
- Any additional documentation required as per the scholarship terms

Approval Process

The committee should follow a formalized system for approving receipts. This may include:

- Verifying that expenses align with the scholarship terms
- Ensuring the receipts are for eligible expenses (e.g., tuition, books, travel)
- Recusing any committee member from approving receipts if they have a close personal or professional relationship with the recipient

Follow-Up With Recipients

When receipts have been approved, complete the following:

- Notify recipients of the approval status of their reimbursement request.
- Provide details of any disallowed expenses and reasons for the decision.
- Inform recipients of the estimated timeline for receiving reimbursement.

Distribute Reimbursement

The committee should arrange for the prompt distribution of reimbursement funds:

- Ensure all paperwork is complete and funds are available.
- Process reimbursement payments through the designated financial channels (check or direct deposit are preferred).
- Confirm with recipients once the payment has been made.

Record Keeping

Maintain detailed records of the reimbursement process for the Internal Revenue Service (IRS) recommendation of seven years, including the following

- Copies of all submitted receipts and approval documentation
- Communications with recipients regarding the reimbursement
- Proof of payment and any follow-up actions required

If the member was not able to provide costs upfront, the chapter should consider alternative options, such as paying for conference registration or tuition directly on the recipient's behalf. If a lump sum payment is provided directly to a chapter member upfront, there are tax implications.

Please see the [Tax Implications](#) section for more information.

Sample Scholarship Applications

For online applications (preferred), ONS recommends using a platform like [Google Forms](#) or [Microsoft Forms](#), depending on the preferences of the chapter board. Google Forms does require a Google account login; the chapter may create a generic Google account for these purposes (e.g., OurONSChapter@gmail.com). It is also acceptable to create the application form under a board member's personal Google account; the complete set of application data is shared with the board.

[You can find a template for a basic scholarship application using Google Forms here.](#) You will need to update or add to this form to ensure it is relevant to your chapter's particular scholarship offerings. For additional assistance in creating an online scholarship application, please contact chapters@ons.org.

For a paper application, please see the following template. Information detailing any deadlines for submission, the preferred submission method, what the scholarship entails, and the chapter contact in case the applicant has any questions should appear at the top of the application.

Name:	
Email Address:	
Address:	
Phone Number:	
ONS ID Number:	
Current Employer:	
Position/Title:	

Please provide a short statement on why you should receive a chapter scholarship and how you will apply your newfound knowledge to your nursing practice.	
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Does your employer provide financial assistance to attend ONS Congress?	Yes	No
Do you agree to present a summary of what you learned at a future chapter meeting?	Yes	No
I certify that my answers are true and complete to the best of my knowledge.	Yes	No
I understand that scholarship funds are only to be used for appropriate costs (please see expense policy).	Yes	No
If this application leads to the receipt of a scholarship, I understand that false or misleading information in my application may result in loss of scholarship.	Yes	No

Sample Scholarship Scoring

Yes/no questions can be implemented at the beginning of the scoring to determine overall eligibility. If an applicant has submitted an answer that conflicts with a required criterion, the application can be disqualified without a need for more in-depth scoring.

Eligibility Questions			
Employer support	Applicant receives employer support for continuing education.	Yes	No
Membership	Applicant is a current active member of the chapter.	Yes	No
Previous support	Applicant has not received a chapter scholarship in the last [x] years.	Yes	No
Presentation follow-up	Applicant agrees to present a summary of what they learned at a future chapter meeting.	Yes	No

Once eligibility has been determined via yes/no questions, the committee can submit their scores for any other judging criteria that have been established. An example rubric is provided below; in this sample, scores would be tallied numerically, with the highest scorers being selected as recipients.

Criteria	Description	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Chapter participation	Applicant participates in and supports chapter activities.	1	2	3	4	5
Scholarship impact	Receiving this scholarship would have a meaningful impact in the applicant's professional development.	1	2	3	4	5
Essay response	The applicant's essay demonstrates a clear need for the intended professional development.	1	2	3	4	5
Chapter representation	The applicant would be a good steward of chapter funds and would represent the chapter well.	1	2	3	4	5

Expense Recommendations

The following travel policy is a recommendation for members if travel is included as part of their chapter scholarship funds. The chapter can edit as necessary; however, the general guidelines for spending maximums should remain relatively unchanged to ensure chapter funds are spent responsibly. This policy is intended to:

- Provide clear and consistent understanding of what expenses the chapter will and will not reimburse.
- Comply with IRS reporting regulations.
- Comply with internal controls as reviewed by auditors.

The chapter will reimburse member travel expenses if these four conditions are met:

- The expense is applicable to the grant or scholarship received.
- The member substantiates the actual expense with receipts.
- The expenses are approved by the chapter board.

- The member reimburses the chapter for any advance funding provided by the chapter if the advance exceeds the actual expenses substantiated by receipts.

The following items are not reimbursable under this policy:

- Expenses related to family or friends traveling with the member
- Gym and recreational fees
- Personal expenses (spa treatments, hairdresser, barber, massages, etc.)
- Upgrades (air, hotel, car, etc.)
- Child and pet care
- Loss or theft of cash or other personal funds or property
- Parking tickets or other financial penalties for breaking the law
- Personal automobile insurance and repairs
- Incidental personal expenses, including in-room movies
- Alcohol

The chapter expects its members to spend the organizations' funds responsibly. Members are responsible for submitting travel expenses to the chapter board via an approved reimbursement form within 30 days of completing their travel.

Transportation

Airfare: Members should purchase the lowest priced ticket available for a standard coach seating for round-trip airfare between the traveler's base and the travel destination. If the member deviates from the round-trip itinerary for personal reasons and the cost exceeds the cost of the round-trip itinerary without the personal travel, the member is responsible for paying the additional cost. If the cost is less, the chapter will not reimburse the member for the difference. Members should purchase airline tickets online and should make the flight arrangements as soon as possible after notification of travel dates to ensure the lowest reasonable rates.

Airport parking: The chapter will reimburse for airport parking while the member is out of town. The chapter expects members to use the lowest cost parking area considering their safety. The chapter discourages use of the short-term lots when a member is traveling overnight. If a member's plans include personal travel, either before or after ONS travel, the chapter will not reimburse for the personal segment of the parking charge. The member is responsible for allocating the total parking expense between ONS business and personal purposes.

Personal automobile: The chapter will pay the standard IRS rate per mile at the time of the travel for the actual miles driven.

Ground transportation: The chapter reimburses for ground transportation from the airport to the hotel or facility hosting the program or meeting. The chapter expects members to select the lowest cost method while considering the most convenient mode of ground transportation.

Decision to fly or drive: If a member opts to drive instead of fly to a business function less than 400 miles from their base, the chapter will reimburse at the current IRS mileage rate times the number of miles driven.

Meals

In general, the chapter will reimburse members for meals while traveling. However, the chapter can limit the amount spent. As a guide, the chapter agrees to reimburse the member for the following:

- Breakfast: up to \$20 per day
- Lunch: up to \$25 per day
- Dinner: up to \$50 per day

Under no circumstances will the chapter reimburse for meals for the member's family and friends, even if the total amount spent on meals is less than the dollars limits listed above. For example, a member and spouse eat dinner together for \$30, the chapter will only reimburse for the member's portion of dinner if the total cost is less than maximum allowable reimbursement for the meal.

Members must provide a detailed receipt (**receipt showing specific items purchased not only the total purchase price**) for any meal purchased. If a detailed receipt is not provided, the chapter will not reimburse for the meal. The chapter will not reimburse for any alcoholic beverages purchased with meals.

Lodging

The chapter will cover the cost of a standard hotel room and applicable taxes while the member travels away from home (up to \$300 per night). Members are responsible for their incidental expenses. Incidental expenses include, but are not limited to, in-room movies, mini-bar refreshments, and personal care expenses (e.g., spa treatments), gym facilities, laundry, and valet.

Sample Reimbursement Form

Download an Excel template version of this reimbursement form [here](#).

Members must fill out any cells highlighted in blue. Only expenses with a legible, itemized receipt will be considered for reimbursement. The board will provide justification for any items that are ineligible for reimbursement, if applicable. If expenses exceed the established expense maximum, the chapter reserves the right to only reimburse to the maximum threshold.

By submitting this reimbursement form, the member agrees that, to the best of their knowledge, all expenses were paid by them directly, and all chapter expense policies have been upheld.

Name	
Email Address:	
Phone Number:	
Reimbursement Check Mailing Address:	
Event Dates/Location:	

Expense	[Date]	[Date]	[Date]	[Date]	[Date]	[Date]	Total
Airfare/Bus/Railroad							
Mileage (at current IRS rate)							
Taxi/Uber							
Parking/Tolls							
Lodging (Hotel/AirBnb)							
Breakfast							
Lunch							
Dinner							
Registration Fees							
Tips							
Total Reimbursement Request:							

Tax Implications

Whenever possible, chapter scholarships should be completed via a reimbursement process to avoid tax implications and ensure responsible use of chapter funds. If the scholarship recipient is financially unable to cover upfront costs, the chapter may be able to pay for costs directly (e.g., sending a check for conference registration, using the chapter credit card to purchase airfare, paying tuition directly to an educational institution).

As a last resort, if chapters do need to provide funds upfront to a member in a lump sum, there are tax implications for any member receiving **more than \$2,000 total during a calendar year**.

If the chapter has paid a scholarship recipient more than \$2,000 upfront, please take the following steps:

1. Request a [Form W-9](#) from the recipient; you will need their social security number for your IRS paperwork.
2. Purchase [Form 1099-NEC](#); this form cannot be filled out and printed in its entirety, so you will need to purchase a packet of the form. These can be bought from a local office supply store or online retailers, like Amazon.
3. Fill out a Form 1099-NEC for each scholarship recipient who received upfront payments of over \$2,000 during the calendar year.
4. Once those are all filled out, complete [Form 1096](#). This is a cover sheet that is included in the 1099-NEC packet. Include the number of forms and total of payments on this cover sheet.
5. Once your 1099-NECs and the 1096 are completed, the copies must be distributed to the appropriate recipients by January 31 of each year:
 - **Copy A:** mailed to the IRS
 - **Copy 1:** mailed to the state
 - **Copy B and Copy 2:** sent to the scholarship recipient
 - **Copy C:** retained for the chapter records

For any questions related to filling out or distributing Form 1099-NEC, please contact chapters@ons.org.

Social Media Templates

Social Media Post 1

Attention oncology nurses! 📣 We're excited to announce our local scholarship offerings for aspiring and current oncology nurses. ✨ Apply by **[Deadline]**! Visit **[Link]** for more details on application requirements and start your journey today!

Social Media Post 2

Unlock your potential with our scholarships! ✨ Our chapter is offering scholarships to support oncology nurses in their career advancements. Deadline to apply: **[Deadline]**. Requirements include **[Requirement 1]**, **[Requirement 2]**, and **[Requirement 3]**. Don't miss out, apply today: **[Link]**

Social Media Post 3

Boost your career with scholarships! 🚀 We're now accepting applications for our local scholarships. Open to all chapter members! Ensure you meet the requirements and submit your application by **[Deadline]**. Visit **[Link]** for more details!

Social Media Post 4

Scholarship alert! 📚🎓 Our chapter is proud to support oncology nurses with scholarship opportunities. Apply here **[Link]** by **[Deadline]** to be considered. Requirements: **[Requirement 1]**, **[Requirement 2]**, and **[Requirement 3]**. Empower your career today!

Email Templates

Scholarship Announcement

Dear chapter members,

We are thrilled to announce that our chapter is offering local scholarships to support the professional growth of oncology nurses. These scholarships aim to provide financial assistance for **[Insert Here]**.

ONCOLOGY NURSING SOCIETY

The application deadline is **[Deadline]**. To apply, you will need to submit a completed application form. Additionally, proof of enrollment in an accredited nursing program or documentation of conference attendance may be required.

Visit **[Link]** for more detailed information on application requirements and start your application today! If you have any questions, please reach out to **[Contact]**.

Best regards,
[Your Chapter Name]

Scholarship Reminder 1

Dear chapter members,

Don't miss the opportunity to advance your career with our local scholarship offerings!

As a reminder, applications are open until **[Deadline]**. Make sure you meet the eligibility criteria, which include **[Requirements]**. You will also need to provide a plan on how you intend to use the scholarship funds to enhance your career.

Apply now by visiting **[Link]** and following the application guidelines. We are excited to help you unlock your full potential and make a significant impact in the lives of your patients.

Sincerely,
[Your Chapter Name]

Scholarship Reminder 2

Dear chapter members,

Just a friendly reminder that our scholarship application deadline is fast approaching on **[Deadline]**. We encourage you to apply if you meet the following requirements: **[Requirements]**.

Don't let this chance pass you by. Take the next step in your oncology nursing career by applying for our scholarships today at **[Link]**.

Kind regards,
[Your Chapter Name]



Last Call for Scholarship Applications

Dear chapter members,

This is a final call to apply for our local scholarships for oncology nurses. The deadline to submit your application is **[Deadline]**.

Submit your application ASAP to take advantage of this opportunity: **[Link]**. We are dedicated to supporting your growth and advancement in the field of oncology nursing.

Warm regards,
[Your Chapter Name]

For Scholarship Recipient(s)

Dear **[Recipient's Name]**,

Congratulations on being awarded a local chapter scholarship! We are thrilled to recognize your dedication and hard work in the field of oncology nursing. This scholarship is a testament to your commitment to advancing your knowledge and skills, and we are confident that you will continue to make significant contributions to the care of patients with cancer.

The scholarship will cover **[Amount]** toward **[ONS Congress, higher education, etc]**.

We look forward to seeing the amazing things you will accomplish with the support of this scholarship. Your success is an inspiration to all of us, and we are proud to have you as a member of our chapter.

As a reminder, the terms of the scholarship indicate that you must meet **[Requirements]**. Receipts must be submitted to **[Contact]** by **[Deadline]**. If you have any questions, please do not hesitate to reach out.

Once again, congratulations on this well-deserved achievement!

Warm regards,
[Your Chapter Name]



For Scholarship Applicants (Not Selected)

Dear [Applicant's Name],

Thank you for applying for our local chapter scholarship. We were impressed by your dedication and hard work in the field of oncology nursing. Your commitment to advancing your knowledge and skills is truly commendable, and we appreciate the time and effort you invested in your application.

After careful consideration, we regret to inform you that we are unable to award you a scholarship at this time. This decision was not easy, as we received many outstanding applications, each demonstrating remarkable achievements and potential in oncology nursing.

We encourage you to continue pursuing your goals and to apply again in the future. Your dedication to providing compassionate care to patients with cancer is an inspiration, and we are confident that you will continue to make significant contributions to the field.

If you have any questions or would like feedback on your application, please do not hesitate to reach out to [Contact].

Thank you once again for your interest in our scholarship program, and we wish you all the best in your future endeavors.

Warm regards,
[Your Chapter Name]

Metric Completion Checklist

To consider this metric completed, your chapter must have offered two educational scholarships during the calendar year. To confirm completion of this metric please complete the following checklist.

- ☐ Create a scholarship budget for the year to determine how many scholarships can be offered.
- ☐ Create a scholarship application and open the scholarship to chapter members.
- ☐ Select recipients, notify members, and collect expense receipts for reimbursement.
- ☐ Report scholarship recipients and amounts to confirm completion of this metric on your next [Quarterly Report](#).