Prize/Scholarship Variation Process Flowchart (Endowed)

1. **Identify need to amend prize/scholarship rules**
   - Liaise with Trusts Officer, L&R to determine next steps

2. **Trusts Officer reviews proposed amendment to check compliance with trust conditions incl determination of minor or major rule changes**
   - Major Rule Changes
     - Cy Pres Application required? L&R consider and advise
     - YES Cy Pres required
       - L&R work with local area to agree rule changes for Cy Pres Application
     - NO Cy Pres not required
   - Minor Rule Changes

3. **Donor Contact**
   - Donor contact required? – local area to liaise with External Relations (Development Officer for relevant Faculty)
     - YES Local area or External Relations make contact with donor (or donor’s family) to discuss or agree revised rules
     - NO Donor contact not required
   - Minor rule changes do not require donor contact

4. **Send amended rules (approved by HoS) to L&R for compliance checking**
   - L&R does not approve – further amendments required
   - L&R approve

5. **Send revised rules to Head of School or Discipline for approval**
   - OR
   - Draft revised rules using relevant Rule template (use Track Changes)
     - Refer to Giving Resources

6. **DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application**
   - Approval received from Attorney General/Supreme Court
   - L&R submit Cy Pres application
   - Trusts Officer forwards approval to local area; and updates UTR on web and Bequests & Trusts Database
   - DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application

7. **L&R prepare Memo for DVC(A) or DVC(R) and then to VC&P for approval on Rules and Cy Pres Application**
   - Approval received from Attorney General/Supreme Court
   - L&R submit Cy Pres application
   - Trusts Officer forwards approval to local area; and updates UTR on web and Bequests & Trusts Database
   - DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application

8. **L&R prepare Memo for DVC(A) or DVC(R) and then to VC&P for approval on Rules and Cy Pres Application**
   - Approval received from Attorney General/Supreme Court
   - L&R submit Cy Pres application
   - Trusts Officer forwards approval to local area; and updates UTR on web and Bequests & Trusts Database
   - DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application

9. **DONOR CONTACT**
   - L&R to advise whether Major or Minor

10. **Draft revised rules using relevant Rule template (use Track Changes)**
    - Refer to Giving Resources

11. **Send amended rules (approved by HoS) to L&R for compliance checking**
    - L&R does not approve – further amendments required
    - L&R approve

12. **Send revised rules to Head of School or Discipline for approval**
    - OR
    - Draft revised rules using relevant Rule template (use Track Changes)
      - Refer to Giving Resources

13. **DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application**
    - Approval received from Attorney General/Supreme Court
    - L&R submit Cy Pres application
    - Trusts Officer forwards approval to local area; and updates UTR on web and Bequests & Trusts Database
    - DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application

14. **L&R prepare Memo for DVC(A) or DVC(R) and then to VC&P for approval on Rules and Cy Pres Application**
    - Approval received from Attorney General/Supreme Court
    - L&R submit Cy Pres application
    - Trusts Officer forwards approval to local area; and updates UTR on web and Bequests & Trusts Database
    - DVC(A) or DVC(R) approves rules and VC&B approves Cy Pres Application

15. **Local area**
    - Amend relevant Rules on Website
    - Update RMO file

Key Contacts:
- Trusts Officer, Legal & Risk Branch – Jackie Morris (x35804)
- Development Officer, External Relations Office (x35800)

What is a Cy Prés Application? Click here

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