UTR1.61 - THE A.J. SCHULZ BEQUEST

A. In 1957, the late Adolf John Schulz bequeathed £4,500 to the University to promote postgraduate research work in the theory of education, and the study of the German language, literature and culture generally:-

"...As to the sum of £4,500 for the University of Adelaide to be invested and accumulated as hereinafter directed and the proportion of annual income available for distribution to be devoted to the following purposes – one-half to the promotion of post-graduate research work in the theory of education but so that this should always be dealt with as part of a comprehensive philosophy – the other half to be used to promote the study of the German language, literature and culture generally by firstly the establishment of annual prizes consisting of German books in connection with the public examinations (intermediate, Leaving and Leaving Honours, or their equivalents) the winners to be entitled to a choice of books, and secondly the establishment of annual awards in each of the main courses in German leading to the first degree in Arts and if funds later make it possible to postgraduate work in German. I request that a larger amount should be devoted annually to the provision of the said awards than is devoted to the said prizes.

With respect to any gifts herein or in any codicil hereto contained to any University or other Institution for educational invested by the respective beneficiaries in any authorised securities and that such beneficiaries shall apply only one-half of the annual income to arise in each year for the purposes specified and shall each year add the remaining one-half of such income to the capital funds from which it arose...."

B. According to the Will of Mr Schulz:-

- One-half of the available income is to be used for the “promotion of post-graduate research work in the theory of education but so that this should always be dealt with as part of a comprehensive philosophy”;

- The other half of the income to be used to promote the study of the German language, literature and culture generally.

C. The University accepted the bequest upon the trusts specified by the donor and the bequest therefore became the capital subject to those trusts (‘capital sum’).

Name of the fund

1. The capital sum, all income arising from the capital sum and any accumulations and additions thereto together form a fund called ‘The Schulz Bequest’ (‘fund’).

Investment of the fund

2. The fund is to be amalgamated for the purposes of investment, and held in a common fund, and the net income earned by the common fund shall be credited, rateably, to the funds so amalgamated and thereafter distributed according to the trusts specified by the donor.

Obligations

3. In administering the fund, the University must adhere to the terms specified and is obliged:-
(a) to invest the capital sum according to the directions of the donor; and

(b) to establish a fund to be administered according to the following Rules.

Rules

The following rules are hereby made in accordance with the terms of the bequest:

A. Education

The Schulz Postgraduate Award for the Study of Education

1. There will be an award called “The Schulz Postgraduate Award for the study of Education”.

2. Up to 3 awards will be available each year.

3. The awards will be available to postgraduate students of the School of Education undertaking a research project relevant to the theoretical study of education from varying perspectives.

4. The value of each award will be up to $500 at the discretion of the Head, School of Education, so long as the total does not exceed half of the available annual income distribution from the Endowment Fund.

5. Applications in writing are to be made to the Head, School of Education.

6. Selection will be made by the Head of School, at his/her discretion, on the basis of academic merit, financial need and relevance of the research relating to the theoretical study of education from its varying perspectives as part of a comprehensive philosophy. It is anticipated that the recipients will have demonstrated high academic achievement in his/her undergraduate studies.

7. Any unspent funds after granting the awards each year, will be added to the capital sum.

Rules approved by Deputy Vice Chancellor & Vice President (Research) 6 April 2016

B. German

(Rules currently under review)

5. (a) A prize, to be known as the ‘A.J. Schulz Prize’, shall be available for award annually at the SACE Stage II Examinations as follows:

A book or books to the value of $50 for the candidate under nineteen years of age on 31 December of the year in which the examination is held who obtains the highest marks in German the SACE Stage II Examination.

20 December 2017
(b) The book or books constituting the prize shall be chosen by the prize winner with the approval of the Head of the Department of German.
(c) No award of a prize shall be made if the examiners are of the opinion that there is no candidate worthy of the award.

6. (a) Prizes, to be known as A.J. Schulz Prizes, shall be available for award annually as follows:
   (i) Books to the value of $200 for the candidate placed first in the annual examination in German III.
   (ii) Books to the value of $300 for the candidate placed first in the final examination for the Honours degree of Bachelor of Arts in the Department of German Studies.
(b) No award of a prize shall be made if the examiners are of the opinion that there is no candidate worthy of the award.

7. (a) An award, to be known as the A.J. Schulz Award and consisting of books to the value of $200 shall be available annually for a candidate of sufficient merit who, having qualified for the Honours degree of Bachelor of Arts in the Department of German Studies, proceeds to postgraduate work in German studies.
(b) The award will be made by the Faculty on the recommendation of the Head of the Department of German.

8. The books constituting a prize under rule 6 or rule 7 of the award shall be chosen by the successful candidate with the approval of the Head of the Department of German and furnished with a book-plate designed for the purpose.

9. If in any year a prize be not awarded under rule 6 or an award be not made under rule 7 the value of the prize or award for that year shall be used for the purchase of books for the Barr Smith Library. Such books shall be chosen by Head of the Department of German in consultation with the Librarian and shall be furnished with an appropriate book-plate.

C. The Schulz Scholarship in German

1. There shall be a scholarship called the “Schulz Scholarship in German”.
2. One scholarship is available annually to assist a student of German to take the course German in Germany or to participate in a recognised German-Australian semester exchange program.
3. The scholarship is valued at $1,500 for one year and is paid in one lump sum after the Semester 2 census date (usually 31 August).
4. The scholarship is available to students who have completed at least 6 units of German and who are completing a Bachelor of Arts with a Major in German.
5. Selection of the successful candidate will be undertaken by the Head of German Studies and representatives from German Studies and the School of Humanities. Selection will be made according to academic merit and applicant's responses. Academic merit for continuing students will be determined according to Grade Point Average (GPA).
6. The successful candidate will be expected to submit a written report to the committee on activities undertaken with scholarship support and to participate in public events to promote German.

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7. No awards shall be made if, in the opinion of the Selection Committee, there is no candidate of sufficient merit.

8. The scholarship must be taken up in the year in which it is offered; acceptance of the scholarship offer cannot be deferred. If a student declines the scholarship offer, the scholarship will be offered to the next eligible student.

9. The scholarship shall be administered by the Coursework Scholarships Office of the University.

10. The scholarship will be terminated where:
   - a student ceases to be enrolled in the approved program of study at the University;
   - a student has provided false or misleading information with regard to their personal details;
   - a student has failed to maintain satisfactory academic progress for two consecutive semesters;
   - a student is guilty of serious misconduct in terms of the University Policy Rules for Student Conduct in the University.

11. The University may vary the rules from time to time in a manner consistent with the University’s legal obligations and policies.

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<th>Date</th>
<th>Approved by</th>
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<tbody>
<tr>
<td>19 December 2017</td>
<td>Deputy Vice-Chancellor and Vice-President (Academic)</td>
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<td>1 September 2017</td>
<td>Deputy Vice-Chancellor and Vice-President (Academic)</td>
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<td>22 February 2016</td>
<td>Deputy Vice-Chancellor and Vice-President (Academic)</td>
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