

## ADJUDICATION GUIDE

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Dear Adjudicator

On behalf of the Oppenheimer Memorial Trust, we would like to extend our sincere gratitude for your time as an adjudicator in selecting the most eligible applicants to be awarded an Oppenheimer Memorial Trust scholarship, postdoctoral fellowship or sabbatical leave grant.

The document below explains the scoring guidelines, as well as the objectives and requirements of the adjudication process.

- The application process and guidelines
- The evaluation process
- How to score the applications

If you have any problems or questions, please feel free to contact me, Tracey Webster, at [TWebster@omt.org.za](mailto:TWebster@omt.org.za) or 073 192 6502.

### Privacy Notice

All adjudicators agree to preserve confidentiality regarding information disclosed in applicant responses. Adjudicators should not at all disclose any information about individual applicants. If speaking about your participation as an Adjudicator, please keep your remarks general. Please do not make any public or online (blog, Twitter, etc.) comments about individual applicants or ideas during the evaluation process.

Kind regards



Tracey Webster  
CEO: Oppenheimer Memorial Trust

## OMT GUIDELINES

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### Background

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The Oppenheimer Memorial Trust (OMT) was founded in 1958 by Harry Oppenheimer. Endowed at inception, the OMT has a long tradition of investing in education, arts & culture and social justice. Over the past five years, the Trust has distributed R100 million to R130 million annually, with allocations to higher education constituting roughly 50% of the total in keeping with the Trust's consistent focus on this sector and its efforts to contribute to building the local academy.

OMT awards a limited number of scholarships (at Masters and Doctoral level) annually for postgraduate study at international and local Higher Education Institutions. The Trust also supports postdoctoral fellowships and sabbatical leave study.

The selection process needs to be as fair and rigorous as possible. For this reason, applicants are requested to submit the following to assist the adjudicator to get a better understanding of the submission:

- Intended study **(please note that candidates submit budgets, which are not reviewed by adjudicators, but are reviewed internally by OMT)**
- Motivation
- Personal Information, including Curriculum Vitae
- Academic record and academic transcripts / publication history, where applicable
- Letters of recommendation

### Selection Criteria and Scoring Guide

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- Evaluations are done remotely, via our application portal, SmartSimple
- Please review the SmartSimple system guide to assist with registration and navigation.
- Please reach out to Bailey Corder ([bcorder@omt.org.za](mailto:bcorder@omt.org.za)) if you are experiencing login issues
- Every application will be adjudicated by 2 adjudicators
- The evaluation guide and guidelines will be provided
- Scores and ratings will be completed on the portal
- We estimate each evaluation will require 30 – 40 minutes per application
- Results from the adjudication process will be collected and collated within the portal after which time, the shortlist will be prepared for the final selection
- The shortlist will be presented to the OMT Trustees for final decision

### How to Score the Applications

- You have been sent login credentials to the application portal. Please complete the login procedure and set a password.
- All applications allocated for your review will appear on your dashboard (by type of application: masters, doctoral, postdoctoral and sabbatical)
- Each application will also include detail regarding the proposed study, motivation and the candidate's CV and reference letters
- The criteria are tailored for evaluation according to qualification type
- Each criteria is represented by a question on the adjudication online form. You are required to score the application/applicant as either a 1, 2, 3 or 4 star candidate with a detailed scoring guide shown below.
- The overall score for the application is automatically calculated by the system with some criteria/questions carrying a double weight.
- Final scores are shown as a %
- Please also rank the application in terms of desirability for award allocation.
- **Please include a short additional comments/considerations on any applications in the comment's column.**

## Criteria

**The following criteria will be given consideration for the adjudication and award process**

### Masters and Doctoral candidates

#### High Academic Achievement (Total: 8)

This is based on the academic transcripts, and by testimony to consistent academic excellence. Recommendation awards for excellence by the university as well as academic achievements should be included as proof. Please assess transcripts that are available and note that programmes in progress will not have transcripts. OMT has requested a progress report in this case. Adjudicators may look to academic transcripts in the "Academic History" section of the application as well as navigate to the applicant's CV in the "Personal Information" section. Referees may further corroborate academic excellence in their letters.

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

	Masters	Doctoral
<b>1 star candidate</b>	Undergraduate degree not completed in minimum time due to courses failed	Masters results <60%
<b>2 star candidate</b>	Undergraduate degree completed within minimum time; Graduation results <75%	Masters results 60% - 69.9%
<b>3 star candidate</b>	Undergraduate results show improvement from first year to final year; Undergrad degree awarded with Distinction ( $\geq 75\%$ )	Master results 70% - 74.9%
<b>4 star candidate</b>	Consistently outstanding academic achievement; Undergraduate degree awarded with Distinction / first class pass ( $\geq 75\%$ ), or cum laude, or summa cum laude	Masters degree awarded with Distinction / first class pass ( $\geq 75\%$ ), or cum laude, or summa cum laude

#### Body of work, practical excellence (Performing & Creative Arts students only | Total: 8)

This is based on the applicant's body of work uploaded under the "Academic History" tab. Candidates have been given an opportunity to upload a body of work that demonstrates their talent. This should help adjudicators review the level of their practical expertise, and if the candidate will cope with the demands of their chosen programme. Adjudicators may also navigate to the applicant's CV in the "Personal Information" section. Referees may further corroborate the standard of their work.

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

	Masters and Doctoral
<b>1 star candidate</b>	Very ordinary, unprofessional
<b>2 star candidate</b>	Demonstrates potential
<b>3 star candidate</b>	Professional, competent, technically excellent
<b>4 star candidate</b>	Extraordinary talent, something special

#### Significance of intended study (Total: 8)

The candidate is required to demonstrate the relevance and significance of topic and intended study. Clearly articulate how the merits of the studies will impact his/her life as well as the greater academia, and the value it adds to the South African community.

- a) Applicants are required to demonstrate how their studies will contribute to the South African academy as a direct result of their studies.
- b) Applicants are required to demonstrate, over and above academia, how they currently actively contribute to South Africa.
- c) Applicants references should demonstrate their contribution to the South African Academy and Community.

This should be judged on the below 3 metrics:

- a) Intellectual significance: Applicants describe the chosen course and institution and how it will clearly contribute to the applicant's depth and breadth of knowledge and benefit academia and the world of research.
- b) Social / societal significance: Relevance and anticipated significance of the study and how the work will extend current knowledge on the topic and/or societal / social impact.
- c) Personal significance: The perceived benefits to them personally, to the South African academy and to the broader community.

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

<b>Masters and Doctoral</b>	
<b>1 star candidate</b>	Subject of study is very ordinary, of no particular significance
<b>2 star candidate</b>	Subject is interesting, but not especially relevant/applicable for South Africa
<b>3 star candidate</b>	Subject of study is innovative OR of particular relevance to South Africa
<b>4 star candidate</b>	Subject of study is innovative AND applicable in South Africa AND has the potential to be recognised globally

#### **Personal motivation (Total: 4)**

The personal motivation should be a compelling account of the applicant's life story, their journey from childhood into adulthood and their passion and enthusiasm for what they intend on studying. It should include the applicant's background, schooling/academic history, general interests, and personal philosophy.

Scoring guidelines are as follows:

<b>Masters and Doctoral</b>	
<b>1 star candidate</b>	Uninspiring personal motivation
<b>2 star candidate</b>	Personal values not clear; Priorities are self-focused
<b>3 star candidate</b>	Values show outward-focus, desire to make a contribution to community/society
<b>4 star candidate</b>	Strong personal motivation showing tenacity (might have overcome some obstacles) and / or driven by deep sense of purpose and impact

#### **Personal motivation - Plans to achieve a vision (Total: 4)**

The personal motivation - plans to achieve a vision should include their passion and enthusiasm for what they intend on studying, and the impact that this opportunity will bare upon their life. It should include the following:

- a) Short to medium term plans and priorities
- b) Career aspirations

Scoring guidelines are as follows:

<b>Masters and Doctoral</b>	
<b>1 star candidate</b>	Motivation very generic life plans, no substance

<b>2 star candidate</b>	Unrealistic/unremarkable visions, impractical plans
<b>3 star candidate</b>	Realistic achievable vision, practical planning
<b>4 star candidate</b>	Strong vision/ plans for future, ambitious to lead in chosen field

### **Motivation for overseas study (International students only | Total: 4)**

Candidates that intend on pursuing their studies overseas need to motivate for their choice. Only **exceptional candidates who present specific and purposeful plans** to undertake programmes in **unique or highly specialised disciplines** in which advanced studies are **not readily available in South Africa** or who are able to demonstrate that they have advanced to a level where international tuition under the direction of global leaders in their particular discipline is **appropriate to proceed meaningfully** in their chosen fields, will be considered.

Scoring guidelines are as follows:

<b>Masters and Doctoral</b>	
<b>1 star candidate</b>	Study available locally, weak motivation, motivated by self-interest
<b>2 star candidate</b>	Same course available locally and overseas, weak motivation to justify the additional cost
<b>3 star candidate</b>	Strong motivation for overseas exposure to advance thinking
<b>4 star candidate</b>	Specialisation unavailable in SA, OR leading institution / faculty / academics based overseas

### **References (Total: 4)**

The candidate is required to invite 3 referees to submit reference letters on the adjudication portal. Referees must be familiar with the applicant's current work and study plans and well-placed to attest to the candidate's academic achievements. **To view the reference letters, please open the candidate's "Application Summary" and scroll to the end of the document.**

Scoring guidelines are as follows:

<b>Masters and Doctoral</b>	
<b>1 star candidate</b>	One or more references merely confirm participation OR One or more references raise concerns.
<b>2 star candidate</b>	References are personal and don't reference academic ability
<b>3 star candidate</b>	Majority of references are positive and supportive, confirming candidate's academic standing
<b>4 star candidate</b>	All references are strongly supportive and at least one reference rates the candidate as extraordinary

## Postdoctoral candidates

### Research Excellence (Total: 4)

This is evidenced by research activity, and dissemination of research. Adjudicators may look to the specific question housed in the "Academic History" section of the application which may be corroborated further by referencing academic transcripts as well as the applicant's CV in the "Personal Information" section and reference letters.

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Few (3 or less), local: publications (co-authored); conference presentations
<b>2 star candidate</b>	Several (more than 3), local: publications (co-authored); conference presentations
<b>3 star candidate</b>	Some international: publications (lead author); conference presentations; supervision / co-supervision of Masters or PhD students (can be underway)
<b>4 star candidate</b>	Prolific, Significantly recognised (international): publications, books (lead author); conference presentations; supervision of Masters or PhD students (can be underway); keynote lectures

### Body of work, practical excellence (Performing & Creative Arts students only | Total: 4)

This is based on the applicant's body of work uploaded under the "Academic History" tab. Candidates have been given an opportunity to upload a body of work that demonstrates their talent. This should help adjudicators review the level of their practical expertise, and if the candidate will cope with the demands of their chosen programme. Adjudicators may also navigate to the applicant's CV in the "Personal Information" section. Referees may further corroborate the standard of their work.

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Very ordinary, unprofessional
<b>2 star candidate</b>	Demonstrates potential
<b>3 star candidate</b>	Professional, competent, technically excellent
<b>4 star candidate</b>	Extraordinary talent, something special

### Academic Mobility (Total: 4)

Preference is given to postdoctoral candidates that have achieved or are aspiring to "academic mobility" and gained experience at a variety of academic institutions over their academic career, **most especially from Doctoral to Postdoctoral**. Adjudicators can reference the "Academic History" table in the application.

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Faculty located in 'home' university. No attempt to gain experience/exposure from a variety of institutions.
<b>4 star candidate</b>	Exposure to different institutions, potentially even different faculties. Academic mobility demonstrated from PhD to Postdoctoral, or no change from Doctoral to Postdoctoral is highly motivated.

### Personal motivation - Ideals, values, plans to achieve a vision (Total: 4)

The personal motivation - ideals, values, plans to achieve a vision should include their passion and enthusiasm for what they intend on studying/researching, and the impact that this opportunity will bare upon their life. It should include the following:

- a) Short to medium term plans and priorities
- b) Career development and aspirations
- c) Contribution to the South African academy

Adjudicators can look to the "Motivation" and "Intended study" tabs to find the information.

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Uninspiring motivation, very generic career plans, no sense of values, substance
<b>2 star candidate</b>	Self-focused with unrealistic/ unremarkable vision, impractical career plans
<b>3 star candidate</b>	Realistic achievable vision, practical career planning
<b>4 star candidate</b>	Strong personal motivation driven by deep sense of purpose and desire to build the South African Academy; Ambitious to lead in chosen field, supported by strong career plans

### Significance of intended study (Total: 8)

The candidate is required to demonstrate the relevance and significance of topic and intended study. Clearly articulate how the merits of the studies will impact his/her life as well as the greater academia, and the value it adds to the South African community.

- a) Applicants are required to demonstrate how their studies will contribute to the South African academy as a direct result of their studies.
- b) Applicants are required to demonstrate, over and above academia, how they currently actively contribute to South Africa.
- c) Applicants references should demonstrate their contribution to the South African Academy and Community.

This should be judged on the below 3 metrics:

- a) Intellectual significance: Applicants describe the chosen course and institution and how it will clearly contribute to the applicant's depth and breadth of knowledge and benefit academia and the world of research.
- b) Social / societal significance: Relevance and anticipated significance of the study and how the work will extend current knowledge on the topic and/or societal / social impact.
- c) Personal significance: The perceived benefits to them personally, to the South African academy and to the broader community.

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Subject of study is very ordinary, of no particular significance
<b>2 star candidate</b>	Subject is interesting, but not especially relevant/applicable for South Africa
<b>3 star candidate</b>	Subject of study is innovative OR of particular relevance to South Africa
<b>4 star candidate</b>	Subject of study is innovative AND applicable in South Africa AND has the potential to be recognised globally

### Research Plan (Total: 8)

The candidate is required to articulate the problem statement of their research, its intended outputs and the rigour of the research methodology. Adjudicators may look to the "Intended study" section, found in the "Application tab". Referees may further corroborate academic excellence in their letters.

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Weak problem statement OR intended outputs OR methodology
<b>2 star candidate</b>	Some concerns around either problem statement OR intended outputs OR methodology
<b>3 star candidate</b>	Solid problem statement, intended outcomes and methodology
<b>4 star candidate</b>	Problem clearly articulated; Envisaged outputs will be significant; Rigorous methodology

### Reputation of host institution (Total: 4)

This is based on the reputation or academic standing of the host institution, research team to be joined, postdoctoral supervisor OR access to host institution's resources (laboratories, technology/equipment, libraries). Adjudicators may look to the "Intended study" section which can be found in the "Application" tab. Referees may further corroborate academic standing of the host institution in their letters.

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	Poorly ranked institution, unknown supervisor/team OR no notable resources
<b>2 star candidate</b>	Leading institution, mediocre faculty OR some notable resources
<b>3 star candidate</b>	Nationally top-ranked supervisor/team OR relevant resources available
<b>4 star candidate</b>	Internationally top-ranked supervisor/team at highly ranked institution OR with outstanding/cutting edge resources

### Reference letters (Total: 4)

The candidate is required to invite 3 referees to submit reference letters on the adjudication portal. Referees must be familiar with the applicant's current work and research plans and well-placed to attest to the candidate's academic achievements. Candidates should include letters of support from both their home and host institutions (where applicable) **To view the reference letters, please open the candidate's "Application Summary" and scroll to the end of the document.**

Scoring guidelines are as follows:

	Postdoctoral
<b>1 star candidate</b>	References are personal and don't reference academic ability
<b>2 star candidate</b>	Generic references, with no particular endorsement of candidate or research topic
<b>3 star candidate</b>	Majority of references/letters are positive and supportive, confirming candidate's academic standing and research topic
<b>4 star candidate</b>	All references are strongly supportive, rating the candidate as extraordinary, and or referees of prominent standing. Must include letter of support from home institution and/or prospective host, reinforcing importance of research topic



## Sabbatical Applicants

### Research Excellence (Total: 4)

This is evidenced by research activity, and dissemination of research, as well as academic positions held (past and present). Adjudicators may look to the applicant's CV, as well as list of publications in the "Personal Information" section. Referees may further corroborate research excellence in their letters.

Scoring guidelines are as follows:

	Sabbatical
<b>1 star candidate</b>	Few, local publications; conference presentations; junior or senior lecturing positions
<b>2 star candidate</b>	Several, local publications; conference presentations; supervision of post-grad students; Associate professor
<b>3 star candidate</b>	Some international publications (lead author); conference presentations; supervision of PhD students; Professor
<b>4 star candidate</b>	Prolific, Significantly recognised (international): publications, books (lead author); conference presentations; supervision of PhD students; keynote lectures; visiting Professorships

### Body of work, practical excellence (Performing & Creative Arts students only | Total: 4)

This is based on the applicant's body of work uploaded under the "Academic History" tab. Candidates have been given an opportunity to upload a body of work that demonstrates their talent. This should help adjudicators review the level of their practical expertise, and if the candidate will cope with the demands of their chosen programme. Adjudicators may also navigate to the applicant's CV in the "Personal Information" section. Referees may further corroborate the standard of their work.

Scoring guidelines are as follows:

	Sabbatical
<b>1 star candidate</b>	Very ordinary, unprofessional
<b>2 star candidate</b>	Demonstrates potential
<b>3 star candidate</b>	Professional, competent, technically excellent
<b>4 star candidate</b>	Extraordinary talent, something special

### NRF rating (Total: 4)

Sabbatical applicants are required to disclose their NRF rating. Adjudicators can look to the "Personal Information" Tab, on the CV document.

Scoring guidelines are as follows:

	Sabbatical
<b>1 star candidate</b>	No rating
<b>2 star candidate</b>	Y1 or Y2 rating
<b>3 star candidate</b>	B or C rating
<b>4 star candidate</b>	A, or P rating

### Personal motivation - Ideals, values, plans to achieve a vision (Total: 4)

The personal motivation - ideals, values, plans to achieve a vision should include their passion and enthusiasm for what they intend on studying/researching, and the impact that this opportunity will bear upon their life. It should include the following:

- a) Short to medium term plans and priorities
- b) Career development and aspirations
- c) Contribution to the South African academy

Scoring guidelines are as follows:

	Sabbatical
<b>1 star candidate</b>	Uninspiring motivation, very generic career plans, no sense of values, substance
<b>2 star candidate</b>	Self-focused with unrealistic/ unremarkable vision, impractical career plans
<b>3 star candidate</b>	Realistic achievable vision, practical career planning
<b>4 star candidate</b>	Strong personal motivation driven by deep sense of purpose and desire to build the South African Academy; Ambitious to lead in chosen field, supported by strong career plans

### Significance of intended study (Total: 8)

The candidate is required to demonstrate the relevance and significance of topic and intended study. Clearly articulate how the merits of the studies will impact his/her life as well as the greater academia, and the value it adds to the South African community.

- a) Applicants are required to demonstrate how their studies will contribute to the South African academy as a direct result of their studies.
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This should be judged on the below 3 metrics:

- a) Intellectual significance: Applicants describe the chosen course and institution and how it will clearly contribute to the applicant's depth and breadth of knowledge and benefit academia and the world of research.
- b) Social / societal significance: Relevance and anticipated significance of the study and how the work will extend current knowledge on the topic and/or societal / social impact.
- c) Personal significance: The perceived benefits to them personally, to the South African academy and to the broader community.

Please refer to the "Intended study" section found on the "Application" tab

**Please note this question is weighted double for scoring purposes.**

Scoring guidelines are as follows:

	Sabbatical
<b>1 star candidate</b>	Subject of study is very ordinary, of no particular significance
<b>2 star candidate</b>	Subject is interesting, but not especially relevant/applicable for South Africa
<b>3 star candidate</b>	Subject of study is innovative OR of particular relevance to South Africa
<b>4 star candidate</b>	Subject of study is innovative AND applicable in South Africa AND has the potential to be recognised globally

### Research Plan (Total: 8)

The candidate is required to articulate the problem statement of their research, its intended outputs and the rigour of the research methodology. Adjudicators may look to the "Intended study" section, found in the "Application tab". Referees may further corroborate academic excellence in their letters. Please note this question is weighted double for scoring purposes.

Scoring guidelines are as follows:

	<b>Sabbatical</b>
<b>1 star candidate</b>	Weak problem statement OR intended outputs OR methodology
<b>2 star candidate</b>	Some concerns around either problem statement OR intended outputs OR methodology
<b>3 star candidate</b>	Solid problem statement, intended outcomes and methodology
<b>4 star candidate</b>	Problem clearly articulated; Envisaged outputs will be significant; Rigorous methodology

### Reputation of host institution (Total: 4)

This is based on the reputation or academic standing of the host institution, research team to be joined, collaborator OR access to host institution's resources (laboratories, technology/equipment, libraries). Adjudicators may look to the "Intended study" section which can be found in the "Application" tab. Referees may further corroborate academic standing of the host institution in their letters.

Scoring guidelines are as follows:

	<b>Sabbatical</b>
<b>1 star candidate</b>	Poorly ranked institution, unknown supervisor/team OR no notable resources
<b>2 star candidate</b>	Leading institution, mediocre faculty OR some notable resources
<b>3 star candidate</b>	Nationally top-ranked supervisor/team OR relevant resources available
<b>4 star candidate</b>	Internationally top-ranked supervisor/team at highly ranked institution OR with outstanding/cutting edge resources

### Reference letters (Total: 4)

The candidate is required to invite 3 referees to submit reference letters on the adjudication portal. Referees must be familiar with the applicant's current work and research plans and well-placed to attest to the candidate's academic achievements. Candidates should include letters of support from both their home and host institutions (where applicable). **To view the reference letters, please open the candidate's "Application Summary" and scroll to the end of the document.**

Scoring guidelines are as follows:

	<b>Sabbatical</b>
<b>1 star candidate</b>	No letters of support from home institution, or from prospective host institution
<b>2 star candidate</b>	Generic references, with no particular endorsement of candidate or research topic
<b>3 star candidate</b>	Majority of references/letters are positive and supportive, confirming candidate's academic standing and research topic
<b>4 star candidate</b>	All references are strongly supportive, rating the candidate as extraordinary, and or referees of prominent standing. Must include letter of support from home institution and/or prospective host, reinforcing importance of research topic

## Ranking Score

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Now that you have scored each candidate utilising the rubric guidelines you will have a good feel for the pool of candidates you are adjudicating. Taking into consideration both the total score(s) and the entire application, please rank your candidates from 1 to 5, 5 being the highest. The highest-ranking candidates should be:

- those that have demonstrated **exceptional potential** and who will **benefit the most** from receiving this funding opportunity;
- not necessarily the highest achieving academically, but have shown **grit and determination** to get where they are today; or
- clearly **extraordinary individuals that have demonstrated leadership potential**; or
- are **driven by a deep sense of purpose** and vision for the future.

The Trust aims to support candidates that demonstrate potential (both academically and at a leadership level), and who would benefit greatly from this opportunity. **The candidate must be able to cope with the academic demands of their chosen study / research programme.**

Rate each of your candidates as follows:

1. Not scholarship/postdoctoral fellowship/sabbatical leave grant material
2. An outside chance of being awarded a scholarship/postdoctoral fellowship/sabbatical leave grant
3. A reasonable chance of being awarded a scholarship/postdoctoral fellowship/sabbatical leave grant
4. A very good chance of being awarded a scholarship/postdoctoral fellowship/sabbatical leave grant
5. Should definitely be awarded a scholarship/postdoctoral fellowship/sabbatical leave grant

## Comment

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Please provide one comment per application. The comments are extremely important when selecting the shortlist and provide great insights into the applicant's potential and why they should be considered or not.