



ANZ Trustees Limited
ABN 33 006 132 332

Philanthropy Partners

GRANT GUIDELINES: OVERVIEW

THE MASON FOUNDATION – MEDICAL AND SCIENTIFIC RESEARCH GRANTS

WEBSITE: <http://www.anz.com/aus/fin/trustees/>

The Foundation

The Judith Jane Mason & Harold Stannett Williams Memorial Foundation (The Mason Foundation) was established as a result of a generous donation in 2003 from Judith Jane Mason (nee Williams). The Foundation is named in honour of the benefactor and her father, Harold Stannett Williams.

ANZ Trustees Limited is the sole trustee of The Judith Jane Mason And Harold Stannett Williams Memorial Foundation. The Foundation is a Prescribed Private Fund.

The Benefactor

Through astute financial management, Judith Mason has taken an inheritance received from her father in the early 1990s and grown it into a considerable sum that is beyond her personal needs. As she has been very ill with Chronic Fatigue Syndrome, her needs are small. With the establishment of this Foundation, she wishes to make a significant social contribution to medical research in her own lifetime into two areas of need in the community.

The first is Alzheimer's Disease. The second, which is perhaps dearer to her heart, is Chronic Fatigue Syndrome. This is due to the fact that Chronic Fatigue Syndrome is such a damaging, yet poorly understood, illness and causes immense suffering. In recent years, prior to establishing this Foundation, Judith Mason donated generously and regularly to these two areas of research.

The Foundation also honours Harold Stannett Williams, father of Judith Mason. Harold Williams was born in the last years of the 19th Century. While he was attending university, he studied Chinese/Japanese writing to divert his mind from the medical dissections involved in the medical studies he was undertaking. A holiday to the "Far East" intrigued him. He eventually became a silk merchant and never returned to medicine. He lived a long and fruitful life. His daughter describes him as "a most intelligent, wonderful and charitable man". The memory of his personal generosity is enhanced through this Foundation, created by Judith Mason to benefit others in perpetuity.

Goal of The Mason Foundation

The goal of The Mason Foundation is to achieve ***enduring, positive impact in the areas of Chronic Fatigue Syndrome and Alzheimer's disease through funding medical research*** principally into the causes, prevention and/or management of these diseases.

GRANT GUIDELINES: GRANT CATEGORIES
THE MASON FOUNDATION – MEDICAL AND SCIENTIFIC RESEARCH GRANTS

There are two categories of grants open to applications for The Mason Foundation:

1. Medical and Scientific Research Grants – Chronic Fatigue Syndrome

- Research into more effective diagnosis, therapeutic intervention, care or treatment of Chronic Fatigue Syndrome; and/or
- Research into cures for Chronic Fatigue Syndrome.

In assessing projects, the Foundation will favourably consider applications from Chief Investigator(s) who:

- Are leaders in their field;
- Demonstrate best practice;
- Provide high quality research aimed at making a positive impact in the area of Chronic Fatigue Syndrome;
- Have a commitment to collaboration with other organisations.

Projects will be funded for one year only. Applicants may reapply.

Individual grants of in the vicinity of \$100,000 will be considered, and the total annual income available for this grant category is in the order of \$500,000 - \$600,000 (indicative only).

Grants will be made to organisations in Australia.

2. Medical and Scientific Research Grants – Alzheimer's Disease

- Research into more effective diagnosis, or treatment of Alzheimer's disease; and/or
- Research into cures for Alzheimer's disease.

In assessing projects, the Foundation will favourably consider applications for emerging research concepts requiring seed funding or young investigators being established.

Projects will be funded for one year only. Applicants may reapply.

Individual grants of up to \$50,000 will be considered, and the total annual income available for this grant category is in the order of \$350,000 – \$400,000 (indicative only).

The Mason Foundation has similar goals to The Wicking Trust (Medical and Scientific Research Grants) with respect to Alzheimer's Disease. Researchers in this area need lodge only one application in order to be considered by both trusts. The grants are made separately and will be acknowledged appropriately.

Making an Application

Applicants should phone the Account Manager to discuss their grant proposal ideas, prior to completing and submitting a proposal.

Applications should be made using the forms and guidelines attached.

An independent panel of medical experts will review all applications, and make recommendations to the Trustees. All applications will remain confidential.

From time to time the Trustees may invite researchers to submit particular proposals of interest.

The closing date for both grant categories is 1 July each year.



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GRANT GUIDELINES: APPLICATION PROCESS

THE MASON FOUNDATION – MEDICAL AND SCIENTIFIC RESEARCH GRANTS

WEBSITE: <http://www.anz.com/aus/fin/trustees/>

Information for organisations seeking a grant from charitable trusts administered by ANZ Trustees Limited ("ANZ Trustees", ABN 33 006 132 332), a statutory trustee company operating in the mainland states and territories of Australia. ANZ Trustees is sole trustee or co-trustee of over 300 charitable trusts and foundations. Please consult the ANZ Trustees' website for further information, guidelines and application processes.

Applying for a grant from ANZ Trustees:

1. Read all material in these Grant Guidelines.
2. For a fuller understanding of requirements, we recommend you read additional papers and background material provided on the website, including "Creative Grantmaking at ANZ Trustees: A Discussion Paper", and our regular publication "Trustee Focus".
3. Prepare your application using the Grant Application Form and submit
 - Application Cover Sheet, and the
 - Application Checklist,and supply all the information requested, including signatures and dates, and copies of all requested documentation.
4. You must have the required tax status to be legally eligible for a grant. You must provide copies of documents that show that the Australian Tax Office (ATO) has endorsed your organisation as a Tax Concession Charity (formally referred to as Income Tax Exempt Charity - ITEC), and Deductible Gift Recipient Status (DGR). You must also provide your ABN Number.
5. Complete a separate application for each project for which you are seeking a grant.
6. Provide the original and five copies of all documentation.
7. Do not include any materials other than those specifically requested.
8. Sign and date all forms.
9. Review the checklist, ensure all activity is complete, and enclose a copy with your application
10. Post or deliver the application to ANZ Philanthropy Partners. Email submissions will not be accepted.

Closing dates:

Closing times are 5pm on 1 July each year and late applications will not be accepted. If the closing date falls on a weekend, you may submit until 5pm on the following business day. Trustee meetings are usually held within eight weeks of the closing date of applications – check our website for expected advice dates.

Postal address

Philanthropy Partners
ANZ Trustees
PO Box 389D Melbourne Vic 3001

Delivery address

Philanthropy Partners
ANZ Trustees
4/100 Queen Street Melbourne Vic 3000

Telephone: FREECALL™ 1800 808 910

Facsimile: (03) 9273 2319

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PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Trustees Limited ABN 33 006 132 332 (**ANZ Trustees**), the other Trustees of the particular charitable trust, settlement or foundation (**Trust**) to which your grant application relates (together, **Trustees**) and advisors appointed by the Trustees or otherwise under the terms of the Trust to advise or assist the Trustees in considering your grant application.

Collection of personal information

In its application to ANZ Trustees for a grant, your Organisation (the Applicant) gives ANZ Trustees contact details and other personal information about directors and other key personnel (Individuals). In the future ANZ Trustees, its researchers and advisors may obtain other information about the Individuals from the Applicant, from any of them, or from other sources. We may collect 'sensitive information' but only when it is necessary for the purpose of the Application. This is all "Personal Information".

Use of personal information

We use Personal Information for the primary purpose of assessing the Applicant's application, and if it is successful, to provide a grant to the Applicant.

We may also use Personal Information for our internal operations including accounting, record keeping, archiving, compliance monitoring and compliance with legislative and regulatory requirements.

Without some or all of your information, we might not be able to process your application.

If your application is not successful, we may hold Personal Information we collect in relation to the application for our records. If your application is successful, after the grant is completed we may hold Personal Information concerning the grant for our records. We will not continue to hold Personal Information if it is not necessary.

Disclosure of Personal Information

We may disclose Personal Information for the purposes set out above, to people and organisations who carry out functions for us, for example our agents and our researchers, any person you authorise, your legal advisers, any party to whom we are authorised or required by law to disclose the Personal Information, and any party to whom the person whose Personal Information we hold authorises us to disclose it.

Data quality

We take reasonable steps to make sure that the Personal Information we collect, use and disclose is accurate complete and up to date.

Data security

We take reasonable steps to protect the Personal Information we hold from misuse and loss and from unauthorised access, modification or disclosure.

Access and correction to personal information

Subject to exceptions permitted by law, an Individual may obtain access to the Personal Information we hold about them by contacting the Trustees at the address set out below. An access fee may apply. If we are informed by an Individual that the Personal Information we hold about them is not accurate, complete or up to date, we will take reasonable steps to correct it.

Where we receive and keep Personal Information about an Individual from another source, generally that person will have the same access to that information and it can only be used for the same purposes and shared with the same persons as the Personal Information that you give us. However, to the extent permitted by law, Personal Information that we receive from other sources will be kept confidential.

Informing Individuals

You must inform each Individual of the contents of this Statement and Consent. By signing the Application for a grant, you acknowledge you are aware of this Statement and, on behalf of each Individual, consent to sensitive information being collected if it is necessary for the purposes of the Application.

If you require any further information about privacy, please contact us:
Philanthropy Partners, ANZ Trustees Limited, GPO Box 389D, Melbourne, 3001
FREECALL™: 1800 808 910
Facsimile: (03) 9273 6354

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GRANT GUIDELINES: APPLICATION FORM
THE MASON FOUNDATION – MEDICAL AND SCIENTIFIC RESEARCH GRANTS

We welcome short, succinct applications that respond clearly and thoughtfully to each item. Applications are assessed according to fit with the guidelines.

1. Executive Summary

Provide a single-page, double-spaced, Executive Summary of your project, using some or all of the elements contained in Description of the Project (below). The purpose of this page is for assessors to gain an overview of exactly what you are trying to do and to achieve in this endeavour.

2. Description of the Project for which funding is being requested

Do not use more than six pages to complete this section of the application. Do not use any font smaller than 12 point.

Describe the project for which you are seeking funding and include the following information:

- The scientific project title (20 words maximum);
- Brief lay explanation of project;
- The aims and significance of the project;
- The background and research plan to the project (up to two pages only);
- The expected results of the project;
- Those who will benefit from the project;
- References to works of other scientists relevant to the project;
- When the project will start and the anticipated length of time to complete;
- Name, background and achievements of the Chief Investigator(s) (over the last 5 years) and a list of publications of the Chief Investigator(s) published in the last 3 years.

3. Evaluation

- Explain how you will measure the effectiveness of the activities for which you are seeking funding.
- Describe your criteria for a successful project and the results you expect to have achieved by the end of the period for which you are seeking funding.

4. Other Funding

- List all sources that you are currently approaching for funding and the status of your application with each;
- List all sources of support and funding that you have received in the last three years for this project;
- List any past approaches to ANZ Trustees Medical and Scientific Research programs.

5. Financial Information

- Provide a current budget for the Project.
- List each staff line separately and include % of time spent on project.
- Indicate specific uses of the requested grant, if possible.

6. Letter of Support

Please enclose a letter in support of this application from the Head (or other relevant higher authority) of the Sponsoring Institution or Department.



GRANT GUIDELINES: APPLICATION CHECKLIST
THE MASON FOUNDATION – MEDICAL AND SCIENTIFIC RESEARCH GRANTS

This checklist is intended to assist you to lodge a complete application. Complete and sign the checklist and attach a copy behind each application cover sheet.

Have you read the Privacy Statement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you read the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Does your project fit the Guidelines?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you specified which Mason Foundation program you are applying to?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included copy of your Tax Concession Charity (formerly ITEC) documentation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included copy of your Deductible Gift Recipient (DGR) documentation?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Has the Application Cover Sheet been signed?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included a response to each item under Project Information and all other categories of questions?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included all the requested attachments?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you included the original and <u>five copies</u> of everything requested?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Signed:		
Date:		

If you have not received an acknowledgement of your application three weeks after the advertised closing date, please phone FREECALL™ 1800 808 910 and tell us.

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