



***ANZ Trustees
Medical Research and Technology in Victoria***

Guidelines and Grant Application Form

Background

The Medical Research and technology in Victoria grant program commenced in 1991 as a partnership of Victorian based philanthropic funders. The objective of the program is to support medical research including the purchase of equipment essential to a specified project. A Medical Advisory Committee assesses applications based on scientific merit and excellence.

In 1991 Trustees of The William Buckland Foundation, The Felton Bequest and The Hugh D.T. Williamson Foundation committed to introducing a co-ordinated and co-operative approach to providing medical research grants in Victoria, which also retained the individuality of each Foundation. Since establishment other trusts have also contributed funds to this grant program. During 2005 the Felton Bequest notified the committee that it was withdrawing from the program as it wished to refocus its work, particularly on women and children.

Philanthropic funding is distinct from government funding. It can offer encouragement for developing projects or new ideas while also supporting excellence, often prior to government funding being obtained. Philanthropic funds are a "gift" from a benefactor who wishes to contribute towards public good. Often benefactors apply conditions on their funding, and the Medical Advisory Committee takes these individual conditions into account when making recommendations of grants.

Medical Advisory Committee

Each contributing charitable foundation has a representative on the Medical Advisory Committee.

Representative	Foundation
Professor Nick Hoogenraad, Chairman <i>School of Molecular Sciences, La Trobe University</i>	The Hugh D.T. Williamson Foundation
Associate Professor Rachelle Buchbinder <i>Cabrini Research Institute</i>	The William Buckland Foundation
Professorial Fellow Bevyn Jarrott <i>Howard Florey Institute, University of Melbourne</i>	
Professor Joe Proietto <i>Centre for Obesity Research and Education, Austin Medical Centre</i>	
Professor Ross Coppel <i>Faculty of Microbiology, Monash University</i>	ANZ Trustees Victorian Community Foundation - James and Vera Lawson Trust Victorian Community Foundation - The Dean William Robert Winter Trust Victorian Community Foundation - The George Perry Fund The Arthur & Mary Osborn Charitable Trust The Appel Family Bequest
Ms Teresa Zolnierkiewicz	ANZ Trustees

ANZ Trustees has created fourteen grant programs. The Programs are an initiative that brings together discretionary charitable trusts for which ANZ Trustees is the sole Trustee which have the same or similar purposes.

The Programs aim to:

- ensure a focus on the particular charitable areas nominated by the benefactors;
- provide a pool of funds that can support those projects and initiatives more likely to achieve some sustainable benefit to the community;
- offer more exposure to substantial projects to the smaller trusts, some of which have relatively small amounts of income to distribute; and
- make the process of applying for funding from ANZ Trustees easier for the organisations seeking support.

ANZ Trustees is a wholly owned subsidiary of ANZ with a long history of trustee and charitable services. In addition, ANZ Trustees provides estate planning, private client, deceased estate administration and portfolio management services. ANZ Trustees manages over 300 charitable foundations and more than 40 different grant programs. It generates over \$50 million annually for distribution to a wide variety of charitable organisations in Australia.

Reporting

Successful grant recipients are requested to lodge a report at the conclusion of the grant detailing the achievements and evaluating the success of the activities for which funding was given.

Acknowledgment

ANZ Trustees encourages organisations to publicly acknowledge the support received from a charitable foundation.

Guidelines

To ensure you are using the most recent guidelines and application form and for more information on granting go to www.anz.com/aus/fin/trustees or telephone 1800 808 910 from anywhere in Australia.

Funding guide

- Funding is limited to projects **in Victoria**. This is a requirement of the contributing Charitable Trusts and not of ANZ Trustees.
- Grants of up to **\$30,000** will be awarded.
- Funding is given for **one year only**.
- Scientific merit and excellence as assessed by the Committee is the crucial factor in success of applications.
- Projects will not be funded retrospectively.

Grants are given for

- Basic clinical and biomedical research.
- Clinically relevant research on major health problems. Note: some foundations have specific interests related to cancer research and cardiovascular research, and applicants with such areas of interest are encouraged to apply.
- Grants will be given only for specific equipments directly related to and required for nominated projects, and not for general equipment and needs of an organisation.

Preference is given to

- Purchase of equipment specific to the nominated research project.
- Younger investigators establishing new laboratories.
- Novel ideas requiring seed funding, with the potential to develop further.
- Applicants with projects related to cancer or cardiovascular conditions.

Grants will not be given

- To other grant-making bodies and charitable foundations.
- For general infrastructure, core and standard equipment for research laboratories.
- To directly support PhD student projects.

Important dates

- Closing date: 1 July each year.
Late applications cannot be accepted.
- Outcome notification date: Late November.

Instructions on completing the application form

- Complete and sign the "Application Cover Sheet" read the "Privacy Statement and Consents".
- Type responses, single-spaced with font size no smaller than Times New Roman 12 pt to the "Grant Proposal Information".
- Answer all of the questions in the Grant Proposal Information and in the order listed.
- Include a quotation for all equipment requests over \$5,000.
- Enclose a letter in support of your application from the Head (or other relevant higher authority) of the sponsoring institution or department. (Please note that if letters are not included applications can not be considered).
- Submit six (6) copies with numbered pages on A4 paper.
- Do not include any materials other than those specifically requested.

All applications must be lodged by mail

Medical Research and Technology in Victoria

Philanthropy Partners

ANZ Trustees Limited

GPO Box 389D

Melbourne Vic 3001

Medical Research & Technology in Victoria Grant Application

Application Cover Sheet

Applications which do not include the information or the attachments requested are unable to be considered.

Official name and postal address of sponsoring organisation (Institution/Department etc):	
Telephone number:	
Fax number:	
Email address:	
Chief Investigator/s Give full names and title:	
Simplified project title in one sentence only, using lay terms:	
ABN number and Tax Status of the sponsoring organisation:	ABN number:

Tax Status: You must provide certification from the Australian Tax Office (ATO) that shows that the ATO has endorsed your organisation's tax status with effect from 1st July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by notification.

Funding required for this project:	
a) Specify total budget for your project:	\$
b) Specify total amount of grant money you are seeking through this specific application:	\$

APPLICANT'S STATEMENT

I, (insert full name) _____ am authorised by the organisation to make this application on its behalf and say that all the information provided is true and correct. I have read the terms and conditions relating to the application for a grant from ANZ Trustees Medical Research and Technology in Victoria Program, including the Privacy Statement and Consent to use of personal information, and agree to those terms and conditions.

Signature and Date

SIX COPIES TO BE SUBMITTED



Medical Research & Technology in Victoria Grant Application

Grant Proposal Information

- A. Executive Summary (1 page max)**
Provide a single-page, double-spaced, Executive Summary of your project, using some or all of the elements contained in B. Description of the Project. The purpose of this page is for assessors to gain an overview of exactly what you are trying to do and achieve in this endeavour.
- B. Description of the Project for which funding is being requested (6 page max)**
Please describe the project for which you are seeking funding and include the following information:
1. the scientific project title (*20 words maximum*);
 2. brief lay explanation of project;
 3. the aims and significance of the project;
 4. the background and research plan for the project (*up to two pages only*);
 5. the expected results of the project;
 6. those who will benefit from the project;
 7. references to works of other scientists relevant to the project;
 8. when the project will start and the anticipated length of time to complete; and
 9. qualifications, 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 three years.
- C. Evaluation**
Please 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.
- D. Other Funding List:**
1. all sources (including governments, ARC and NH&MRC) that you have approached for funding and the status of your application with each. If your application to the NH&MRC for this project has been declined, give the reasons; and
 2. all sources of support and funding that you have received in the last three years.
- E. Tax Status**
Provide evidence that the Australian Tax Office has endorsed your organisation's tax status (as an income tax exempt and/or deductible gift recipient) with effect from 1 July 2000 or later – either by its inclusion in legislation, its inclusion in a publicly accessible register, or by providing us with a copy of the letter of endorsement from the Tax Office.
- F. ABN Number and GST**
You must provide your ABN Number and answer the question on the Application Cover Sheet.
- G. Attachments**
Please label all attachments.
- I. Financial Information: A current budget for the Project. List each staff member on a separate line and include percentage of time spent on the project. Equipment requests over \$5,000 must include a copy of the quotation. Include the total cost of the project, contributions received or pledged and the amount you are seeking funding for.
 - II. 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.
- H. Privacy**
Please read the Privacy Statement and Consents (on last page). By signing the Application for a Grant, you acknowledge you are aware of this Statement.

SIX COPIES TO BE SUBMITTED



GRANT GUIDELINES: APPLICATION CHECKLIST
Medical Research and Technology in Victoria

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 included a copy of your Tax Concession Charity (formerly ITEC) documentation?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Have you included a copy of your Deductible Gift Recipient (DGR) documentation*?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Has the Application Cover Sheet been completed and signed?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Have you included a response to each item under Grant Proposal Information and all other categories of questions?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Have you included Financial Information including quotations for all equipment requests over \$5,000?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Have you included a letter of support for your application?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No
Have you included the original and five copies of everything requested?	<input type="checkbox"/>	Yes	<input type="checkbox"/>	No

* Deductible Gift Recipient (DGR) documentation is required for you to receive funding from some of the charitable trusts in this program.

Signed: _____

Date: _____

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

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 an Individual informs us 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 Vic 3001

Telephone: 1800 808 910

Fax: 03 9273 6354

www.anz.com/aus/fin/trustees/

