



Medical Research and Technology in Victoria Guidelines and Grant Application

Guidelines

For Internet access to these Guidelines go <http://www.anz.com/aus/fin/trustees>
For enquiries telephone **Freecall 1800 808 910**

This program commenced over 12 years ago 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. The Medical Advisory Committee assesses applications based on scientific merit and excellence; these are crucial factors in success of applications.

In 1991 representatives from The William Buckland Foundation, The Alfred 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.

Philanthropic funding is distinct from government funding because it offers 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 give towards the public good. Often benefactors apply conditions to their funding, and the Medical Advisory Committee takes these individual conditions into account when reviewing applications.

Applications close in **July**, and the Committee meet in September each year to consider these applications. The Committee passes its recommendations to each of the participating Trusts for a final granting decision. The Trustees of the relevant Trusts advise applicants of granting decisions by the end of **December** each year.

Members of the Medical Advisory Committee & Participating Trusts in 2006 include:

Professor Nick Hoogenraad, Chairman
Associate Professor Rachelle Buchbinder
Professorial Fellow Bevyn Jarrott
Professor Ross Coppel

The Hugh D.T. Williamson Foundation
The William Buckland Foundation
The William Buckland Foundation
ANZ Executors & Trustee Company Limited:

- 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 and Mary Osborn Charitable Trust
- The Appel Family Bequest.

ANZ Executors & Trustee Company Limited

Ms Teresa Zolnierkiewicz

Please read the Guidelines and Instructions on the following pages to help you complete your application.

Funding guide:

- Funding is limited to projects **in Victoria**.
- 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 a crucial factor in success of applications.

Grants are given for:

- Basic clinical and biomedical research.
- Clinically relevant research on major health problems. Note: some funds 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 projects and infrastructure directly related to and required for nominated projects, and not for general infrastructure of an organisation.

Preference for grants is given to:

- Purchase of equipment specific to the nominated research project and not for infrastructure generally.
- 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 are encouraged to apply.

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.

All applications must be lodged with:

**Medical Research and Technology in Victoria
Philanthropy Partners
ANZ Executors & Trustee Company Limited
GPO Box 389D
Melbourne Vic 3001**

Instructions:

- Complete and sign the "Application Cover Sheet" and the "Privacy Statement and Consents".
- Type (single-spaced and no smaller than Times New Roman 12 pt) your responses to the "Grant Proposal Information".
- Answer all of the questions in the order listed.
- Equipment requests over \$5,000 should include a copy of the quotation.
- Enclose a letter in support for this application from the Head (or other relevant higher authority) of the Sponsoring Institution or Department. (Please note that if letters are not included applications will not be considered)
- Submit **six (6) copies** with numbered pages on A4 paper.
- Provide us with your organisation's completed and signed "Privacy Statement and Consents".
- Do not include any materials other than those specifically requested.

Closing date: 1 July each year

Late applications cannot be accepted.

Grant Proposal Information

SIX COPIES REQUIRED

A. Executive Summary

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 –

Do not use more than six pages in completing this section of the application.

Do not use any font smaller than 12pt Times New Roman.

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 to 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

Please 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;
2. all sources of support and funding that you have received in the last three years;

E. Tax Status

You must show 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 line separately and include % of time spent on project. Indicate specific uses of the requested grant, if possible. Equipment requests over \$5,000 should include a copy of the quotation
- 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 Consent (on next page). By signing the Application for a Grant, you acknowledge you are aware of this Statement.



Medical Research & Technology in Victoria Grant Application

APPLICATION COVER SHEET – SIX COPIES REQUIRED

The information which you must include in your application is detailed below and overleaf. Unfortunately applications which do not include the information or the attachments requested are unable to be considered.

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)



Philanthropy Partners

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?	Yes	No
Have you read the Guidelines?	Yes	No
Does your project fit the Guidelines?	Yes	No
Have you included copy of your Tax Concession Charity (formerly ITEC) documentation?	Yes	No
Have you included copy of your Deductible Gift Recipient (DGR) documentation*?	Yes	No
Has the Application Cover Sheet been completed and signed?	Yes	No
Have you included a response to each item under Grant Proposal Information and all other categories of questions?	Yes	No
Have you included Financial Information including quotations for all equipment requests over \$5,000?	Yes	No
Have you included a letter of support for your application?	Yes	No
Have you included the original and <u>five</u> copies of everything requested (Medical/Scientific Research)?	Yes	No
Signed: Date:		

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

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.

FREECALL™ is a trademark of Telstra Corporation Limited ABN 33 051 775 556

PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Executors & Trustee Company 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 Executors & Trustee Company Limited
GPO Box 389D, Melbourne Vic 3001
Freecall: 1800 808 910
Fax: 03 9273 36354