



ANZ Executors & Trustee Company Limited
ABN 33 006 132 332

Medical Research and Technology in Victoria Guidelines and Grant Application

Guidelines

For Internet access to these Guidelines <http://www.anz.com/wealth/trustees>
For enquiries: Telephone Freecall 1800 808 910 to leave a message

The Medical Advisory Committee

Prior to 1991 the major Trusts and Foundations administered through ANZ Executors & Trustee Company Limited in Victoria, independently made grants for medical research and technology. Discussions during 1991 with representatives from the William Buckland Foundation, the Alfred Felton Bequest and the Hugh D.T. Williamson Foundation resulted in a clear commitment to the introduction of a co-ordinated and co-operative approach to providing grants whilst retaining the individuality of each Foundation.

As a result, requests for grants for medical research and technology in Victoria are considered by a Medical Advisory Committee which makes recommendations on grants to the individual Trusts and Foundations.

The Committee meets in September each year to consider applications. The Committee passes its recommendations to each of the participating Trusts. Applicants are advised by the Trustees of the relevant Trust of their decision with respect to a grant by the end of **December** each year.

Members of the Medical Advisory Committee:

Professor Fred Mendelsohn, Chairman
Professor John Wark
Associate Professor Rachelle Buchbinder
Professor Ross Coppel
Professor Nick Hoogenraad
Ms Teresa Zolnierkiewicz

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

Participating Trusts and Foundations

The Alfred Felton Bequest
The Appel Family Bequest
The Arthur and Mary Osborn Charitable Trust
The Hugh D.T. Williamson Foundation
The William Buckland Foundation

Please read the Guidelines and Instructions on the following pages

Funding guide

- Funding is limited to projects **in Victoria**
- Grants range from \$1,000 to \$25,000
- Funding is given for one (1) year only
- Consideration is given to applications by women who have had career interruptions due to child bearing, child rearing or other family responsibilities and who wish to re-enter their profession and will be helped to do so by a University or Institution.

Grants are given for:

- Basic clinical and biomedical research;
- Clinically relevant research on major health problems dealing with women and children will be given special consideration by the Felton Bequest;
- Grants will be given only for specific projects and infrastructure directly related to and required for specific projects and not for infrastructure generally.

Preference for grants is given to the following:

- purchase of equipment (consideration is given to "topping up" equipment grants);
- younger investigators establishing new laboratories;
- seeding funds for good ideas with the potential to proceed further.

Grants will not be given:

- to other grant-making bodies and charitable foundations;
- for infrastructure generally.

All applications must be lodged with:

**ANZ Charitable Services
ANZ Executors & Trustee Company Limited
GPO Box 389D, Melbourne 3001**

Fax no: (03) 9273 2319

Instructions:

- Complete and sign the "Application Cover Sheet" and the "Privacy Statement and Consents".
- Type (single-spaced and no smaller than Times Roman 12 pt) your responses to the "Grant Proposal Information".
- Answer all of the questions in the order listed.
- 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.



Medical Research & Technology in Victoria Grant Application

APPLICATION COVER SHEET – SIX COPIES REQUIRED & ONE COMPLETED COPY OF THE PRIVACY STATEMENT

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
(one sentence only):

ABN number and Tax Status of the
sponsoring organisation:

ABN number:

Tax Status: You must show that the Australian Tax Office has endorsed your organisation's Section 30-15 tax status with effect from 1 July 2000 or later – either by its inclusion in legislation, inclusion in a publicly accessible register, or by providing us with a copy of a letter from the Tax Office.

**GST: Have you registered for the
GST?**

Please tick appropriate answer:

YES [] NO []

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

The Applicant Chief Investigator(s) named herein say(s) that the information contained in this application is true and correct.

(Signature)

(Signature)

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 to achieve in this endeavour.

B. Description of the Project for which funding is being requested –

Do not use more than six (6) pages in completing this section of the application. Do not use any font smaller than the standard, ie.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. the aims and significance of the project;
3. the background and research plan to the project - *(up to two pages only)*;
4. the expected results of the project;
5. those who will benefit from the project;
6. references to works of other scientists relevant to the project;
7. when the project will start and the anticipated length of time to complete it;
8. qualifications, background and achievements of the Chief Investigator (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 (3) 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.

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 attach your completed Privacy Statement and Consent (see next page)

PRIVACY STATEMENT AND CONSENTS

This statement applies to ANZ Executors and 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 we are informed by an Individual 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:

ANZ Charitable Services
ANZ Executors & Trustee Company Limited
GPO Box 389D, Melbourne, 3001
Freecall: 1800 808 910
Fax: 03 9273 2319

I have read the terms and conditions relating to the application for a grant, including this Statement and Consent to Use of Personal Information, and agree to those terms and conditions.

Signed: _____

Name
(print): _____

Witness: _____

Date: _____