

Research Australia Philanthropy Toolkit: Giving to Health and Medical Research

This toolkit contains information, advice and resources to guide and promote philanthropic giving to health and medical research. As a practical resource, it will help those who do the research, and those who seek to support a worthy philanthropic cause. It will also foster improved understanding and encourage mutually beneficial, collaborative and lasting relationships.

Whatever your involvement in the philanthropic process – grant maker, grant seeker, corporate giver, or professional adviser– we hope that Giving to Health and Medical Research: Research Australia Philanthropy Toolkit provides a useful starting point.

Guiding Principles

Research Australia has developed this toolkit with the following principles in mind.

We endeavour to:

- Respect donor choice
- Promote informed and ethical decision-making by philanthropists and grant making organisations
- Promote support of quality health and medical research
- Encourage the development of professional, sustainable, collaborative and accountable grant seekers from the health and medical research sector.

Section 1: Why Give to Health and Medical Research?

This section discusses the importance and benefits of giving to health and medical research.

Section 2: An Introduction to Philanthropic Giving to Health and Medical Research

This section will assist philanthropists to understand the needs of the research sector and ways you can support health and medical research.

Section 3: How to Seek Support from Philanthropists

This section focuses on how to seek philanthropic support for health and medical research from charitable trusts and foundations, corporations and individual philanthropists.

This section is written primarily for development and fundraising officers, independent researchers and researchers working within universities and medical research institutes.

It covers a range of issues including:

- Why you should ask for philanthropic support
- The legal and taxation environment
- The kind of support you can ask for
- How to develop and implement your philanthropic grant seeking strategy, and
- How to develop long-term relationships with philanthropic grant makers.

Section 4: How You Can Support Health and Medical Research

This section focuses on how you can support health and medical research, whether you are making a one-off donation or setting up a planned philanthropic grant making program.

This guide is written for a wide range of people involved in philanthropic giving. They may include:

- Individual givers who want to make a one-off gift to health and medical research
- Individual philanthropists who want to develop a planned giving program
- Founders or trustees of Private Ancillary Funds
- Trustee company staff responsible for administering charitable trusts with different purposes, including health and medical research
- Grant making staff working in a philanthropic foundation
- Grant making staff or donors to a community foundation
- Executors of estates that involve direct bequests to health and medical research-related causes
- Newly appointed trustees of charitable trusts who may not be sure where to start
- Trustees or grant making staff seeking to revamp their grant making process or incorporate independent expert advice into their decision-making
- Professional advisers seeking to help their philanthropic clients develop a giving strategy.

It covers a range of issues including:

- How to identify areas of health and medical research that best match your personal motivations or the giving obligations of your philanthropic vehicle
- How to make a direct donation or set up an administrative process that supports your grant making
- How to target your call for applications or direct approach to grant seekers
- How to streamline your selection of applicants
- How to make informed decisions and reduce risk
- How to manage and evaluate your grant making program.

Section 5: How Can Your Company Contribute to Health and Medical Research?

This section focuses on ways in which companies become involved in supporting community causes, and how health and medical research and corporate giving strategies can be developed to deliver mutual benefits.

Corporate Social Responsibility (CSR) is distinct from philanthropy in that it is motivated by a range of objectives that can include private returns to the company. Definitions vary, but generally relate to ethical and responsible business conduct, including contributing to the wider community. CSR community activities take on many forms, from grants to community organisations through to volunteering and pro bono work. All of these forms of giving and support can be utilised by the health and medical research sector.

Section 6: How to Build Your Health and Medical Research Partnership

This section outlines the opportunities that exist for partnerships involving health and medical research, and provide some key points for partners to consider in setting up philanthropic and business relationships.

Many corporate givers, trusts, foundations and community groups move beyond making simple cash donations or grants and develop partnerships that aim to achieve shared objectives over an extended period of time.

Section 7: Making the Most of Your Client/Advisor Relationship

This section provides information to assist those seeking professional advice and professional advisers who may wish to promote philanthropic giving to their clients.

We explain the benefits of giving to health and medical research and outline how Research Australia Philanthropy can support the client/advisor relationship. We also identify useful sources of information and advice to assist financial advisers in providing assistance to their clients.