

# ROYAL SOCIETY OF QUEENSLAND RESEARCH FUND FUNDING POLICY

## **Purpose of this paper**

This paper outlines the criteria that The Royal Society of Queensland (the Society) will apply when considering offers to donate money to the Fund and applications for grants from the Fund.

This Policy is made by the Council of The Royal Society of Queensland acting as the Trustee under section 4.3 of the Trust Deed. This Policy must be read in association with the Trust Deed. If there is any inconsistency, the Trust Deed prevails.

## **Background**

1. The Central Queensland Koala Volunteers expressed a desire to establish an ongoing trust fund to sponsor Central Queensland-related research into koalas and associated environmental subjects. The Volunteers chose the Society as a partner in this venture, given the Society's long history and its mandate to encourage and promote science. The Volunteers donated the first contribution to the Fund.

## **Taxation issues**

2. To satisfy the criteria for tax deductibility, the Fund is a Public Ancillary Fund. All deductible moneys donated to it are to be disbursed only to Eligible Entities (a deductible gift recipient under Item 1 of the table in section 30-15 of the *Income Tax Assessment Act 1997* and registered as a charity. Most universities and research institutions – but not the Society – are Eligible Entities).
3. Accordingly, the Fund cannot grant funds derived from deductible gifts to independent individual researchers unless their research is associated with entities that have already been approved by the Australian Tax Office for this purpose.
4. The Australian Tax Office specifies that members of the Society must not receive a “material benefit” not available to researchers at large.

## **Donation policy**

5. Donors may indicate preferences as to how their funds are to be applied. Separate line notations will be maintained within the Fund's records for this purpose. However, under law the Trustee is not obliged to observe such preferences. Donors are discouraged from expressing preferences in any but the most general terms.
6. If a donor's expressed preference is inconsistent with the purpose of the Fund or would generate an inappropriate conflict of interest with the objects and policies of the Society, the donation will be declined.
7. The Fund can receive tax deductible and non-deductible donations. Non-deductible donations can be used to support individual researchers who might not qualify for connection to an Eligible Entity. (This does not apply in 2020).
8. The Fund can receive bequests and donations that will preserve the name of the donor. Separate line notations will be maintained within the Fund's records for this purpose. Normally, this facility will be offered only to “substantial donors” – who contribute \$50,000 or more.
9. Where a substantial donor expresses a preference for a particular broad field of research, the Trustee may issue a call for applications in that field.
10. The Fund will maintain a single investment pool. Donors are contributing to an investment strategy and not supporting specific projects or individual researchers.

## **Investment policy**

11. All monies are invested in interest-bearing products with a high level of security and a conservative risk profile.
12. The Trustee will endeavour to preserve a capital pool of \$40,000. To augment this pool the Trustee will disburse only a proportion of donations above that amount.
13. The Society will not deduct any monies from the Fund for administrative expenses associated with the general operation of the Royal Society of Queensland, except expenses incurred directly in administering the Fund.

## **Eligibility of applicants**

14. Any person, community organisation, public servant or employee of a commercial firm may apply for a grant except that current Councillors or employees or contractors of The Royal Society of Queensland are not eligible to apply.

15. If the applicant is not an Eligible Entity, the applicant must apply through such a body or give evidence of its consent to hosting the project.
16. Current undergraduate and postgraduate students are welcome to apply, but should explain in their application how the proposed project will be additional to the research they would otherwise have conducted anyway. *Please note that in 2020, preference will be given to citizen science projects.*
17. The Fund is not intended to augment the capacities of organisations that already have substantial budgets. However, a grant may be used to top up other funding, so long as the additional research will yield identifiable results of its own that would not otherwise be possible.

### **Subject fields of inquiry**

18. The focus of the grants program will lie within the general purview of the sciences: the natural sciences, physical sciences, the social sciences (but not economics) and biomedical sciences (but not clinical medicine). The focus will be on applied studies with practical or policy implications. In 2020, preference will be given to citizen science projects.
19. To honour the intention of the Central Queensland Koala Volunteers the Trustee welcomes applications for projects relevant to the management of koalas in central Queensland. However, in 2020, the assessment criteria will not be weighted to favour koala-related research.
20. Grants will be made only for research conducted in Queensland, or research about Queensland, or research that illuminates phenomena particularly relevant to Queensland.
21. Grants will not be made for projects that constitute primarily policy formulation, being focused on generating original scientific information and insights. Portions of grants may be used to develop policy arising from the research, or to publicise the research.
22. Grants will not be used for environmental campaigns, opposing development projects or other forms of political advocacy, although reports may include recommendations for advocacy or policy.

### **Selection criteria**

23. Successful applications will demonstrate the following to the satisfaction of the Trustee:

#### ***Mandatory criteria (yes or no)***

- a. The application does not include corporate overheads for the hosting entity, but only for direct costs associated with original research.
- b. Funds can be paid via an Eligible Entity.
- c. The applicant has access to experienced researchers or naturalists to guide the project.

#### ***Assessable criteria (scorable)***

- d. The project has scientific merit and the applicant understands scientific method and the principles of independent, evidence-based intellectual inquiry. A measure of this standard is that the project will yield a result publishable in a peer-reviewed journal such as *Proceedings of the Royal Society of Queensland*.
- e. The project will shed light on an issue of material and practical concern.
- f. The research will not replicate any research already carried out or in train.
- g. The researcher has the logistical capacity to complete the project on time and within budget.

### **Format of applications**

24. Applicants should address the following items, ensuring that the selection criteria are addressed within these items. Applications need not exceed 1000 words:
  - background and significance of the topic (criteria e, f);
  - research questions to be addressed (objectives) (criterion d);
  - approach, study design, methods (criterion d);
  - timelines for undertaking the project and expending the grant (criterion g);
  - capability of the applicant to achieve the outcome (criterion g);
  - signature of applicant and supervisor, if applicant is a student; or office bearer if the application is in the name of an organisation (criteria a, b, c).

**Procedures**

25. Applications must be in writing. To satisfy taxation rules, a copy of all applications will be held by the Society until five years after the project is completed.
26. Applications are to be reviewed by an Assessment Panel of independent, suitably qualified individuals. No assessor or their work group will be eligible to receive a grant. The recommendations of the panel are submitted for approval by the Council of the Society acting as Trustee.
27. The Society must satisfy itself that the project(s) are consistent with the aims and objectives of the Society in addition to the aims and objectives of the Fund.
28. No preference will be shown for applicants who are members of the Society or research teams that include a member.
29. Where no application in a given round is sufficiently meritorious, the Trustee will make no award.
30. The Society will not support projects where academic independence might be compromised or perceived to be compromised.

Endorsed by Council of The Royal Society of Queensland

21 September 2020