GUIDELINES FOR DIRECT GIFT RECIPIENT (DGR) GRANTS

1. The Occupational Therapy Australia Research Foundation

The Mission of the Occupational Therapy Australia Research Foundation (OTARF) is to:

To support research aimed at enhancing the inclusion, participation, health and wellbeing of Australians through occupation.

One function of the OTARF is to support occupational therapists to develop capacity and provide support for emerging occupational therapy researchers, through the administration of grants.

The OTARF is registered as a Public Ancillary Fund with Deductible Gift Recipient (DGR) status and funds for these grants are administered through a Trust Deed.

In accordance with the OTARF Trust Deed requirements, a grant can only be awarded to "Eligible Entities". These are authorities or institutions which are income tax exempt charities AND also deductible gift recipients (DGRs).

1.1 Aims of the Grant Scheme

The aims of the OTARF grant scheme are twofold: firstly, to generate new research knowledge relevant to occupational therapy practice; and secondly, to support the research capacity and career development of Australian occupational therapists. Research output (typically in the form of a peer-reviewed journal publication) is expected as a result of completing a project that is funded by this grant scheme.

1.2 Areas of Research

For this research grant process, no priority areas of research have been determined. Although consistent with the goals of the scheme to generate new occupational therapy research knowledge, the primary project aim must be to address an aspect of occupational therapy aligned to the Mission of OTARF. Also, in line with the aims of the scheme, it should be noted that those proposals solely oriented towards quality assurance will not be considered.

2. Applicant Eligibility

2.1 Applicant Attributes

As the purpose of the OTARF grants scheme is to stimulate new research knowledge and support the career development and capacity of researchers, priority will be given to those applicants who:

- Have an emergent rather than established research and publication track record.
- Have to date not obtained large, national or international competitive research grant funding.
- May have experienced interruptions to research track record due to carer or other responsibilities / circumstances.
- Will actively benefit from research team interaction and mentoring.

2.2 Eligibility Criteria

- The lead applicant must be an AHPRA-registered occupational therapist.

- If an individual applicant applies, rather than submitting a team application, and the applicant does not hold a PhD, he or she must identify, and provide a signed letter of support, from an AHPRA-registered occupational therapist who is an experienced researcher (doctorate or equivalent with evidence of scholarly publications in the past 5 years) who agrees to mentor the applicant for the project and monitor compliance with Human Research Ethics Committee approvals and requirements, if ethics approval by HRECs is needed.
- Lead applicants must have been a member of Occupational Therapy Australia Limited for at least 24 months prior to the grant application's commencement date. Student membership can be included.
- Lead applicants must retain membership for the period that they are reporting on the project.
- Applicants must be an Australian citizen or have permanent residency status.
- Applicants must reside in Australia for the duration of the grant.
- In accordance with the OTARF Trust Deed requirements, a grant can only be awarded to "Eligible Entities". These are authorities or institutions which are income tax exempt charities AND deductible gift recipients (DGRs). Applicants can check if the organisation where they work is eligible by searching (by organisation name) at http://abr.business.gov.au/ and checking if the organisation is classified as a charity and registered with the ACNC Charity Register (http://www.acnc.gov.au/) and also that it is a DGR which is not a private or public ancillary fund.
    - The DGR organisation must be identified as the administering institution on the application form and must agree to provide a detailed financial report of the grant's expenditure.
- Any research applications involving people (as opposed to policy/documentary reviews, for example) must provide written evidence that the research project has received approval from a Human Research Ethics Committee in Australia.
    - Applicants may be provided the grant conditional on obtaining ethics approval if it is required for the study, but not known at the time of application.

2.3 Additional Considerations

- Research higher degree students are eligible to apply.
- Individuals or teams may apply; teams may include people who do not have an occupational therapy background or who are not Australian citizens or permanent residents.
- Individuals are strongly encouraged to involve and include named co-researchers on their application to demonstrate collaboration as part of a research team, broaden the skills and experience to support the research, and increase the likelihood of project completion and publication.

2.4 Exclusion Criteria

The DGR grant is not intended for academic (University) Honours projects.

3 Number of Grants Available

In 2026, there is up to $14,800 available for award. This may be allocated to one project or shared amongst several projects.

4 Project Timelines

- OTARF expects that research projects will be completed within 12 months commencing July 2026. OTARF will consider time extensions to projects if requested on a case-by-case basis.
- The agreed funding will be allocated to the DGR by 30 June 2026 for disbursement according to each institution's administrative protocol.

5 Funding

5.1 Costs

Grants are to be used only for the approved project and need to comply with the requirements as set out below:

- **Inclusions** – direct costs related to the research project
    - Personnel (the applicant may be paid as a research assistant during the project or employ assistants)
    - Interstate travel (i.e., within Australia) related to the conduct of the project (not conference presentations / attendance)
    - Transport costs to enable research participation (e.g., taxi fares for participants)
    - Materials and equipment required for the study (e.g., play materials for a children's play session)
    - Modest catering for project-related groups, such as focus groups / social gatherings, required to facilitate best outcomes
    - Data collection methods inclusive of digital / IT platforms (e.g., teleconferencing via Zoom)
    - Venue hire
    - Interview transcription
    - General secretarial functions

- **Exclusions**
    - Large expensive items of equipment
    - Capital funds and building works
    - General fundraising appeals
    - Ongoing organisational operating expenses
    - Motor vehicles and other forms of transport

5.2 DGR Overheads

DGRs can negotiate an overhead fee up to a maximum of 10% of the total grant funding to cover overhead costs.

5.3 Managing GST

According to the Australian Taxation Office (ATO) a grant for research is a taxable supply if it meets certain conditions as per the ATO's GSTR 2012/2. Category 6 – "Supplies with insufficient nexus."

The ATO states that in the situation where the only supply the payee (the receiving DGR) makes is acknowledging the payment received; submitting an application for the payment; agreeing to repay an amount not spent; and/or giving a report to the payer about how the monies were spent, then no GST is payable by the payee (recipient DGR) and the payer (OTARF) is not entitled to an input tax credit.

6 Application Process

6.1 Application

The OTARF committee will review all submissions which are received on or before 5:00pm (AEDT) on Friday, 13 February 2026.

In 2025, applications will be reviewed by Trustees within 1 month of the closing date, and a decision made within 6 weeks of the closing date.

6.2 Notification of Outcomes

OTARF will advise the DGR “Research / Grants Office” of the review outcome. All applicant(s) will then be contacted with the outcome of their application via email. The decision of the panel will be final. No correspondence will be entered into.

7 Obligations of DGR Grant recipients

7.1 Reports

OTARF requires a final report at the completion of the project (12 months).

The DGR organisation must advise the OTARF if there are progress issues with the project.

Grant recipients are to acknowledge OTA as a funder in any communications / publications regarding this project.

7.2 Requirements of DGR organisations

A Conditions of Grant acceptance form needs to be signed by both the DGR organisation and Grantee, formally acknowledging the key conditions of the Grant. These are:

- Acknowledgement of OTARF as a funder in any communications / publications regarding the project.
- Completion of a signed budget acquittal statement to be provided to OTARF within 3 months of the conclusion of the project, which indicates the full income received, expenditure and identification of unexpended funds.
- Agreement that any unexpended funds less any approved overhead fee must be returned to OTA for use in future research grant rounds.
- That the DGR accepts all risks and liabilities with the study.