

## Bequests and Donations for Library and Information Science Research



Australian  
Library and  
Information  
Association

The ALIA Research Fund welcomes gifts and bequests to enable it to fund Library and Information Science research now and in the future, thus contributing to the growth of a research culture within the profession.

Research is conducted into the many aspects of library and information services in order to support and enhance practice of the profession as it continues to develop to meet crucial client information needs.

Donors are welcome to nominate a particular type of research to benefit from their gift or bequest, either in general terms (for example, collection management) or in more specific terms (for example, services to users with vision disabilities). Should you wish to endow a specific research award, this may be possible and can be discussed with the Executive Director.

Only research projects that can lead to an enhanced understanding of library and information services and hence improved professional practice will be considered for funding and all must be recommended to the ALIA Board of Directors by the ALIA Research Committee.

There are several ways of contributing to the ALIA Research Fund.

### **Donations:**

- With your annual ALIA membership renewal.
- Directing a donation to the ALIA Research Fund at any time.

### **Bequests:**

- Whole of estate – leaving your entire estate to the ALIA Research Fund.
- Residual bequest – directing the rest (residue) of your estate to the ALIA Research Fund after making provision in your will for others, for example family and friends.
- Percentage – allocating a percentage of your estate to the ALIA Research Fund. This will take into account changes in your estate over time or compensate for inflation without you needing to regularly review your will.
- Specified cash sum. This is a common form of bequest. However this does not allow for inflation and can mean a loss in the real value of the gift between the time the will is made and the assets allocated.
- In memorial giving – a special way of honouring departed family, friends and colleagues. This is a thoughtful way of expressing sympathy to the bereaved at

the time of the funeral or on the anniversary of a person's death, birthday or at any time.

Donations may be made using the form ([link to online form](#)) provided or may be forwarded directly to the Association. Recommended wording for making a bequest is also available ([link to wording](#)).

The ALIA Research Fund is an approved research institute endorsed by the Australian Taxation Office as a Deductible Gift Recipient. **All contributions to the Fund of \$2.00 or more are tax deductible.**

The Association acknowledges all donations to the ALIA Research Fund and you receive a receipt for taxation purposes. Unless otherwise requested your name is entered into our list of donors mounted on the ALIA website.

Names of those remembered in memorial gifts are recorded and the next of kin or nearest family member receives a letter of condolence and expressing special thanks to all those who have made a memorial donation in their honour. No dollar amounts are included.

The Executive Director will be pleased to assist you with any matters you may wish to discuss in confidence about making a gift or bequest to the ALIA Research Fund.

To speak with the Executive Director or for more information generally about donating to the ALIA Research Fund, contact ALIA on 02 6215 8222.

**BEQUEST AND DONATION FORM** (for website – to submit online and/or print and mail in)

Your donation or bequest to the ALIA Research Fund is an investment in LIS services now and in the future. It will encourage continuous improvement in the practice of the profession which you have been involved in and contributed to during your professional career.

**All donations to the ALIA Research Fund of \$2.00 or more are tax deductible.**

- I wish to donate \$ \_\_\_\_\_ to the ALIA Research Fund.
- I wish to donate to the ALIA Research Fund and I would like the Executive Director to contact me to discuss this further.
- I have made a bequest to the ALIA Research Fund in my will and I would like my name to be included in the list of donors.
- I have made a bequest to the ALIA Research Fund in my will and I request that this remain anonymous.
- I wish to make a memorial donation of \$ \_\_\_\_\_ to the ALIA Research Fund in honour of *please insert name and address of deceased*

\_\_\_\_\_

\_\_\_\_\_

Please also include name and address of next of kin/ nearest family member, so that we can inform them of your kind donation, without including the amount.

\_\_\_\_\_

\_\_\_\_\_

Please include in the box below details of any bequest you have made

ALIA Member no:  
(if applicable)

Title:

First name:

Name:.....

Address:.....

Suburb:.....

State:.....

Postcode:.....

Home phone:.....

Work phone:.....

Mobile:.....

Email address:.....

## Recommended wording for making a bequest to the ALIA Research Fund

We very much encourage you to discuss your decision to make a bequest with your legal advisor as this is important for your peace of mind.

To include the ALIA Research Fund in your will, you could use the following words:

I give, free of all duties and taxes (choose from 1 – 6 of the following options)

1. the whole of my estate (or .....% of my estate, OR
2. the residue of my estate (or .....% of the residue of my estate), OR
3. the sum of \$....., or my units/shares in.....Trust/Ltd, OR
4. my real property (or.....% of my real property) situated  
at.....  
having the title reference.....
5. the proceeds from the sale of  
..... as liquidated by the  
executor of the estate (nominate the specific item or items to be sold, for  
example jewellery, etc)
6. Life insurance policy no ..... held by.....

to the ALIA Research Fund of the Australian Library and Information Association Ltd, ABN 40 090 953 236 of 9-11 Napier Close, Deakin, Australian Capital Territory, 2600. The receipt of the Australian Library and Information Association Research Fund is an absolute discharge to my executor.

*Should you wish to nominate a particular area or aspect of library and information science in which you would prefer research to be undertaken, you may choose to include the following paragraph in your bequest:*

Without creating a binding obligation on my executor or the Australian Library and Information Research Fund, I request that the bequest be used for the purpose of research into ..... (nominate a specific area, aspect or project in library and information science research) and I request the Australian Library and Information Association Research Fund to use these funds if at all practicable for this purpose or the purpose in its absolute discretion which most closely matches this purpose and failing that for the general purposes of the Australian Library and Information Association Research Fund.

**Updating your will**

If your situation changes, for example if you marry divorce or have children, you should change your will. But to make a bequest it is not necessary to make a new will. Simply by adding a [codicil](#) you can include the Australian Library and Information Association Research Fund as a beneficiary of your will. We encourage you to seek legal advice should you wish to add a codicil to your will.