

M. J. Murdock Charitable Trust

General Purpose Grant Application Guidelines

These guidelines apply to all requests other than scientific research or formal Trust programs. To make an application to the Trust for financial support, the following FOUR steps should be done *in the following order*:

1. Determine your organization's eligibility to apply for Trust support.
2. Determine the match of your project or program with Trust interests and limitations.
3. Submit a Letter of Inquiry.
4. Submit a completed formal application.

This document will lead you *through Step 3*. Step 4 can only be taken if the project you proposed is determined by the Trust to be eligible for a formal application.

Step 1: Is your organization eligible to apply for a grant?

Applications for grants are considered from organizations which have been ruled to be tax-exempt under Section 501(c)(3) of the Internal Revenue Code and which are not private foundations as defined in Section 509(a) of the Code. Charitable organizations applying for support must have in hand such IRS documentation of status. If tax exempt as a government entity, the Trust will provide a generic letter to use in certifying such status. This will be made available for those reaching Step 4.

Priority is given to applications for the support of projects and programs conducted by qualified organizations within five states of the Pacific Northwest: Alaska, Idaho, Montana, Oregon, and Washington. Of major interest are organizations and projects which are not primarily or normally financed by tax funds.

Step 2: Is the project for which you seek support within Trust interests?

While the Trust supports a wide variety of projects and programs in the region, there are limitations in Trust interest. Some brief guidelines follow to assist you in determining if your project is clearly out of the question or perhaps only of marginal interest.

The Following Kinds of Applications ARE NOT Considered:

1. For the benefit of specific individuals.
2. By individuals acting on behalf of, but without the authority of, qualified tax-exempt organizations.
3. For grants to conduit organizations, i.e., to tax-exempt organizations for passing funds on to organizations not tax-exempt in their own right.
4. For propagandizing or for influencing legislation and elections.
5. By institutions which in policy or practice unfairly discriminate against race, ethnic origin, sex, creed, or religion.
6. By sectarian or religious organizations whose principal activity is for the benefit of their own members or adherents.
7. For loans, debt retirement, or operational deficits.
8. For grants to organizations which are organized and operated outside any state or territory of the United States.



The Following Kinds of Applications USUALLY ARE NOT Considered:

1. For normal ongoing operations or their extension.
2. For contributions to general fund drives or annual charitable appeals.
3. For continuation of programs previously financed from other external sources.
4. For emergency funding, such as in filling gaps between grants or for crash programs.
5. For granting of funds to an organization for distribution to ultimate beneficiaries of its own choosing.
6. For endowment.

A recommended way to test the fit of your project with Trust interests is to review lists of recently awarded grants.

Step 3: Submit a Letter of Inquiry

If your organization and project appear to pass these first two steps, the only way to find out for sure whether your anticipated request is appropriate is to submit a Letter of Inquiry to the Trust. This letter should carefully address all items outlined below.

In order to avoid unnecessary work, both for a potential applicant and for the Trust, it is important to determine as early as possible the degree to which a proposed project coincides with areas of Trust interest. To determine this, it is essential to submit a Letter of Inquiry before submitting a formal application to the Trust. This letter, no longer than two pages, should minimally address the items below.

What to address:

1. A brief background on your organization, including an abbreviated mission statement, a history of its existence, the size of staff and board, the constituency and geographic region served, and the type of service provided.
2. A description of the project for which support is being requested. Include a discussion of how the decision was reached to mount the project, the factors that contribute to the need or opportunity for the project, the importance of the project for your organization and your constituency, and the level and nature of commitment of staff and board to the project.
3. A proposed budget for the total cost of the project and for the amount you intend to request from the Trust. If possible, identify the budget items for which you would be requesting Trust support. Indicate potential or real sources of support for the project in addition to the Trust.
4. A discussion as to why you are approaching the Trust for the project. Indicate any past history with the Trust or any contacts you have made with Trust staff or others leading to your decision to approach the Trust. Add anything else you believe would help the Trust understand your situation and request.

The Trust will provide a written response to your Letter of Inquiry indicating if Step 4 is appropriate for you. If so, you will receive instructions on how to proceed. After completing Step 4 and submitting a completed formal application, the Trust requires an additional 6-9 months to process, evaluate, and make a decision on your request.



Timing Considerations

A Letter of Inquiry may be submitted to the Trust at any time. Once the Trust has it in hand, it will be reviewed and you can expect a response within about three weeks. The response is likely to be one of three types:

1. What you propose is eligible for formal consideration by the Trust.
2. What you propose is eligible, but some advice is provided to help in the development of a formal request.
3. What you propose is not eligible for formal consideration by the Trust.

A positive response will include instructions to follow in submitting a formal request to the Trust.

Step 4: Submit a completed formal application.

You will be given instructions on how to download the application form from our website, with a provided password, and complete the proposal on electronic application forms. Following directions, hard copies of the completed application form should be submitted to the Trust.

There are no specific deadlines for receipt of formal applications for general purposes. Applications may be submitted at any time when sufficient information is available for the applicant to thoughtfully address the questions outlined in the application form. In general, a proposal should be submitted early enough to allow staff sufficient time to thoroughly study the proposal and, if appropriate, conduct a site visit to meet with the principals of the project.

The thorough nature of the review process and considerations of fairness to all applicants precludes responding to crisis situations.

The Review Process

Letters of Inquiry are reviewed to determine if a proposed project sufficiently fits Trust interests and guidelines to warrant submission of a full proposal. A positive response to the Letter of Inquiry will include directions for application completion. Completed formal application forms are reviewed initially to determine whether all required materials have been submitted. Each proposal is assigned to a Program Director who will take the lead in preparing the request for submission to the Board of Trustees for action. The Program Director may request additional information, an interview with the applicant, or a visit to the applicant's organization. The full proposal, including staff summary and analysis, is made available to the Trustees for their consideration and decision.

The applicant is notified promptly when a decision has been reached. While some level of merit is evident in nearly every proposal received by the Trust, only a fraction of the requests reviewed can result in awards. When an application has been declined, it will not be carried over for future consideration. Under normal circumstances, re-submission of a proposal that was declined is not encouraged.

Each proposal becomes the property of the Trust and will not be returned. It will be treated as a privileged communication with the understanding, however, that it may be peer reviewed.



All letters of inquiry and completed formal applications should be mailed in hard copy to:

John Van Zytveld, Ph.D.
Senior Program Director
M. J. Murdock Charitable Trust
P. O. Box 1618
Vancouver, WA 98668

For More Help

If your questions have not been answered by this document or you need some additional information, please call us at 360.694.8415.

