



M·J·Murdock
Charitable Trust

WWW.MURDOCK-TRUST.ORG

p 360.694.8415

f 360.694.1819



GENERAL APPLICATION INSTRUCTIONS

Grant Application Overview

The staff and trustees of the M. J. Murdock Charitable Trust (Trust) look forward to reviewing your grant application. While the application is detailed, the Trust hopes that its questions will be helpful to your organization and may help to clarify and better define your proposed project. Take a moment to review the instructions, grant application, and required attachments checklist before starting. Be sure to visit the Trust's Toolbox at www.murdock-trust.org for examples of budgets and other information. More complex projects may invite a more detailed response. Please stay true to the scope of the project described in your Letter of Inquiry and approved by the Trust. Be as concise and specific as possible; edit carefully and invite others in your organization to review a draft of the application before submission.

The grant application is comprised of two components:

- (1) The first component of the application is a three-page PDF that includes the following sections: **Contact Information, Organizational Summary, Project Summary, and Organizational Financial Summary**. The first two pages of the PDF form provide blank spaces for requested information. You can complete this form by using Adobe Reader, downloading it free of charge at www.adobe.com.
- (2) The second component of the application includes the following sections: **Project Expense Budget and Narrative Summary, Project Funding Plan by Source Summary, Full Project Description, Project Outcomes and Evaluation, Future of Project—Sustainability, Organizational Programs and Services, and Board Governance**. We invite you to submit your response to Sections 5 through 11 using Word, Excel, Adobe, or other software. The instructions below will provide page limits for each application section. To assist Trust staff and trustees in reviewing the grant request, please use no less than 11-point font in narrative areas and no less than 10-point font in a matrix, chart, or spreadsheet. It is important to adhere to the page limits and font sizes described in the instructions.

The completed application should be no longer than 12 pages in total and include all sections starting with **Contact Information** and ending with **Board Governance**.

1. Contact Information

Please provide your organization's legal name as stated in your IRS ruling. If you have a post office box, enter it in the address section; otherwise, use your street address. Provide the name of the executive director or chief executive officer of your organization, a board contact (this could be the board chair, board treasurer, or a board member closely associated with the project), and a secondary contact person (a member of your fund development staff, program staff associated with the project, or in organizations with a small staff, another board member closely associated with the project). It is important to provide all contact information for the three people listed in the application to ensure timely processing of the grant request. Please inform the Trust if the contact information changes.

WWW.MURDOCK-TRUST.ORG

p 360.694.8415
f 360.694.1819



2. Organizational Summary

Provide your organization's mission statement or key elements of the statement. Complete the data table starting with the most recently completed fiscal year. We would like to know the number of staff in your organization and the full-time equivalents. For example: if your organization has 10 people on staff and 7 are full-time and 3 are half-time staff that would total 8.5 full-time equivalents. The number of staff/full-time equivalents would be entered as 10/8.5 on the application form. If possible, provide the unduplicated number of people served annually and number of individual volunteers. The Trust understands that unduplicated numbers of people served annually can be difficult for certain nonprofits, but please do the best you can to respond to this request and estimate if needed. You will have an opportunity to clarify, build upon, or add to this summary and include additional organizational information in Section 10.

3. Project Summary

Indicate the amount requested from the Trust and the total project cost. Provide a concise description of the project, including some or all of the following: the project goal(s), proposed outcome(s), number of people served, and how Trust funds would be used. You will have an opportunity to build on this summary in Section 7.

4. Organizational Financial Summary

The person completing this section of the application should be thoroughly familiar with all aspects of the organization's financial operations. Please consider having your chief financial officer, finance personnel, accountant, bookkeeper, or board treasurer complete this section. If you have questions about Section 4A, you may contact Julie Cieloha and for questions about Section 4B, please contact Dana Miller, both at the Trust at 360-694-8415. You may wish to visit the Toolbox on the Trust's website for additional ideas on presenting the organization's financial information.

Complete Sections 4A and 4B starting with the most recently completed fiscal year. Amounts for 4A can be found in your financial statement audit, financial statement review, or IRS Form 990. In 4B the Trust is seeking to better understand the organization's revenue sources for its annual operating budget (actuals). Specifically, identify the two largest sources of earned and or contributed income and combine all other sources (earned and or contributed) into line three. All three lines will be automatically totaled in line four. Organizations are invited to round amounts to the nearest whole dollar in 4A and to the nearest \$100 in 4B. In the 4C "Comments" box, please explain any negative changes in net assets in unrestricted funds reported in 4A and any other significant financial trends or anomalies that may have occurred during the four-year period being reported.

Sections 5 through 11

Submit your response to Sections 5 through 11 by using Word, Excel, Adobe, or other software. Attach your printed responses to Sections 5 through 11 to the first two pages of the PDF application form. **Please adhere to the specific page limits and use no less than 11-point font in narrative areas and no less than 10-point font in a matrix, chart, or spreadsheet.** The final printed and stapled application should be no longer than 12 pages and include all application sections from **Contact Information** through **Board Governance**.

Please note that by design, application Sections 5 through 9 are very closely related—often interrelated—and should be carefully considered as a whole. These sections will provide important information about the proposed project to Trust staff and trustees.

5. Project Expense Budget and Narrative Summary (up to one page)

There are many ways to present an expense budget. Please consider the following when developing an expense budget for your application. Provide a project budget and associated line item expenses, in column form, for the total project cost, not



just the portion of the project for which Trust support is being requested. An example would be to provide a project budget for the total project cost of the new science building construction and not just the chemistry classroom, for which funding is being sought.

Break down the project budget and associated line item expenses by category, such as personnel (specify positions or titles), equipment (list major items), travel, or whatever categories apply to your project.

Some project line item expenses may require some explanation, and so we request a brief budget narrative (about one sentence or less). An example may be a line item expense titled “Construction \$500,000.” The narrative may state: “Construction—bid by ACME of \$250 per square foot for new 2,000-square-foot office building.” Please provide information regarding the origin, basis, or assumptions for the line item expenses and amounts listed in the budget. For example, are the line item budget amounts based on salary surveys, vendor quotes, estimates from architects, actual bids from contractors or vendors, or other assumptions? Not all project line item expenses require a detailed explanation, but if additional information will help the reader, please include it in the one-page space provided in this section of the application.

If your organization is requesting Trust support for a specific item in the budget, please note the item and the amount with an asterisk. If Trust support is being requested toward a number of line item expenses, please develop an additional column titled Murdock Request (next to the project expense column) and note the amount being requested from each expense category. For projects of two years or more (these are typically a program expansion, capacity building initiative, or new initiative), please develop a Murdock Request column for each year. A multi-year project (a program expansion, capacity building initiative, or new initiative) may be illustrated in a landscape format. If you would like to submit an additional detailed budget and narrative longer than one page, you may include it in the grant application packet as an attachment. But **you must provide a summary project expense budget and narrative in Section 5 of the application that corresponds to the attachment.** The Toolbox on the Trust’s website will offer additional ideas on presenting project expense budgets. Depending on the complexity of the project, you may use up to one full page.

6. Project Funding Plan by Source Summary (up to one page)

List the project funding goals for each anticipated source (board members, other individuals, donors, foundations, businesses/corporations, government [grants or public agency sources], organization’s earned income, reserves, debt instruments, in-kind, etc.). Indicate the status of each funding source by listing the funds raised to-date (contributions in-hand, pledges in writing, written notice of government grants, etc.). List the top three or four gifts in-hand or pledges committed. If you are seeking support for a multi-year project, list the goals by source for each year. Finally, list your top three or four major prospects, the amounts being sought from each, and the actual or expected decision dates (MM/YYYY). The Toolbox on the Trust’s website will offer additional ideas on presenting a project funding plan. Depending on the complexity of the funding plan, you may use up to one full page.

7. Full Project Description (up to four pages)

Please start this section by stating the month and year (MM/YYYY) when planning for this project began, when the project was (or will be) implemented, and when the project is estimated to be completed. In addition, please provide contact information (phone number and extension, email address) for key administrative or program staff, board members, and consultants working on this project. (Note: If current staff members overseeing the proposed project require specific education, training, or expertise, you may include his or her resume or vita as an attachment. If the proposed project is seeking support for a new staff position(s), you may attach preliminary qualification requirements or a job description(s) for the new position(s). See Required Attachments Checklist.

There are a variety of ways your organization may approach the body of this section. The following are examples of information you may wish to provide to the Trust depending on the complexity of the project and other variables. How will



this project advance the mission of your organization? Why is the project significant to your organization and your constituency? What problem or opportunity are you addressing in this project? Why is this project or program needed, and why is the organization acting at this time to advance this project? What are the specific goals of the project? You may wish to include: the circumstances out of which this specific request arises; the planning that led your organization to believe you could raise the funds needed to complete the project; partner organizations associated with this project; community or region to be served; target population; number of people to be served; detailed description of the project; the timeline (if appropriate, discuss project phases); project oversight and management; and strategies and methodologies that will be incorporated to complete the project. Depending on the complexity of the project, you may use up to four pages.

8. Project Outcomes and Evaluation (up to one page)

List the three or four key outcomes of the project as they relate to the project goals described in Section 7. Please present outcomes in specific measurable terms or the changes you expect to occur as a result of this effort, including any applicable dates. Describe how you will evaluate the progress and ultimate success of your project. Who will conduct the evaluation? Depending on the complexity of the project, you may use up to one page.

9. Future of Project—Sustainability (up to one page)

Describe how the project will be sustained beyond the grant period. If this is a program expansion project, how will the program be funded in the future? If this is a capital project, what sources of income will be required to meet new operating budget expenses? Describe the program revenue and expense assumptions associated with the project. Please develop a pro forma (a statement of revenue and expense projections) illustrating the baseline or current operating revenue and expenses and a four-year projection of future operating revenue and expenses. The Toolbox on the Trust's website will offer additional ideas on presenting a pro forma. Depending on the financial complexity of the project, you may use up to one page.

10. Organizational Programs and Services (up to one page)

Describe the existing or current programs and services of the organization and their impact in more detail. Depending on the size and type of your organization, you may wish to include: organizational history; programs/services and number of people served within each program; geographical reach; size and expertise of staff (number of full- and part-time staff members); and how staff and volunteers carry out the mission of your organization. Are there similar organizations operating in the area? If so, who are they and how are they similar? Depending on the variety of programs and services offered by the organization, you may use up to one page.

11. Board Governance (up to one page)

Describe your board and how it operates. Depending on the size and type of your organization, you may wish to include a variety of information. For example: What is the size of your board? What is the role of your board? How does the board support and advance the mission of your organization? How does the board exercise its responsibility for financial oversight? Does the board provide individual financial support for the organization? If so, how much does the board (as a group) contribute and for what purpose? How often do the board and board committees meet? How are board members identified, recruited, oriented, and evaluated? Will members of the board be directly involved with the proposed project? You may use up to one page.

Required Attachments Checklist

Include one of each of the following, as applicable, and submit with your grant application.

- Cover letter from the Chief Executive Officer:
 - A. Endorsing the proposal and explaining how it furthers the organization’s mission and priorities;
 - B. Confirming that scheduled progress or final reports from all past Trust-supported projects are current; and
 - C. Certifying that your organization’s IRS rulings are still correct—specifically referring to both the 501(c)(3) tax exempt ruling and the 509(a) or 170(b) public charity ruling—and explicitly stating the following: “no modifications are planned or pending.”

- IRS document showing your 501(c)(3) tax exemption ruling and your 509(a) or 170(b) public charity ruling for the current legal name. Often, but not always, these rulings appear in the same IRS document. (For more information about the public charity ruling, visit the [Toolbox](#) on our website and see the document titled “IRS 509a/170b Explanation.”)
 - A. If your organization is tax exempt under a group ruling for a central organization, attach the latest certificate of membership or evidence of current affiliation.
 - B. If your organization is tax exempt as a government entity or tribal government, use the appropriate generic letter for Government Entity Status or Indian Tribe Status to certify your tax exempt status (copies can be found on the Trust’s website in the Toolbox).

- Organizational Financial Information:
 - A. Completed copy of the most recent financial statement audit. If an audit is not available, submit a copy of the financial statement review. If neither an audit nor reviewed financials are available, submit the most recently submitted IRS Form 990.
 - B. Current and most recently completed fiscal year organizational budget with comparison (planned versus actual).

- List of names, addresses, and professional affiliations of your Board of Directors.

- If appropriate and available, submit any or all of the following:
 - A. An executive summary of your current organizational strategic plan showing the relationship of this project to your plan. You may also include a business, marketing, and/or development plan if it correlates to the proposed project.
 - B. Any recent newsletters, news articles, or a special brochure describing the project and/or campaign.
 - C. One to three different 8-1/2” x 11” drawings of proposed plans for facility construction or renovation for which you seek Trust support.
 - D. Professional resume or vita of consultants, leadership, or program staff if special qualifications are warranted.
 - E. Preliminary qualification requirements or a job description(s) for the new position(s) for which funding is requested.



Final Steps and Procedures

Once you have completed the General Application Form, follow these final steps and procedures for submitting your application:

1. Review, edit, and double-check figures one last time. **Be sure the page and font limitations have been observed and the completed application is no longer than 12 pages** (excluding the Required Attachments).
2. Ensure that all Required Attachments outlined in the checklist are included with your application. Your proposal will not be processed until we receive a complete set of required attachments.
3. Electronic submission is not currently an option. Please print and assemble **three single-sided copies** of the completed General Application Form, plus **one copy of all pertinent required attachments**. Do not bind your proposal or place it in plastic covers. Simply staple the pages for each copy in the upper left-hand corner.
4. Address correspondence and mail materials to: Mr. Dana L. Miller, Senior Program Director, M. J. Murdock Charitable Trust, PO Box 1618, Vancouver, WA 98668.

The Trust will notify you by email when we have received your package. You can expect a written response within three weeks of your submission, which will include the name and contact information of your assigned program director. He or she will contact you within the following three months to schedule a site visit, and later your program director will present your request to Trustees for a decision, typically within six to nine months of the date of submission. If the requested amount is \$750,000 or greater and/or necessitates external reviewers, the review process may take longer.

If you need clarification of these instructions or have other questions, please visit the Trust's website at www.murdock-trust.org or call the Trust office at 360.694.8415.

