OUR BENEFACTOR

While still in the spring of his life, Jack Murdock displayed swelling buds of scientific curiosity and a philanthropic heart. These opened more fully later in life and continue to mature in our activities here at the Trust.

In his autobiography, written in 1934 when only 16 years old, Jack set several goals for himself. He wrote, “After leaving high school and establishing a business of my own, I intend to go further into the study of radio phenomena. I would like to learn all there is to know about radio if it is possible. I shall probably carry on many experiments in this field, and also, possibly some other branches of science… I have at present several ideas for inventions, which if put into use would be of great benefit to the people of the world.”

Jack did indeed establish a business, out of which was born the oscilloscope that gave Tektronix its start and eventual success. Through Tektronix, and with the help of those he gathered around himself, he introduced a high-tech emphasis in our region that has grown remarkably, all based ultimately on solid scientific research. In this sense, the scientific buds of his youth burst into full bloom and produced a high yield of tech fruit still being harvested today.

His youthful statement of doing things to benefit others, the philanthropy buds, also came into bloom, yielding fruit before his death. He established his own foundation, the Millicent Foundation (named for his mother), which was his personal vehicle for giving in the region. Simply by opening a box of hand-written records on a shelf in our offices we see his heart for others – a wide variety of organizations he believed worthy of his support, and a guide to our philanthropy today.

As Jack’s youth was replaced by adulthood and his career interests took root, so did his interests in humankind expand beyond that of radios and science. This was evident in a speech he gave to the Portland Chamber of Commerce in 1966, thirty-two years after his autobiography was penned.

There he reflected on the importance of work, play, the pursuit of knowledge, and the human need for creative expression. He believed that these activities, and certainly others as well, lead to healthier, happier, and more productive people, more able to solve society’s problems and make significant contributions to our world.

So it is that both Jack’s wide ranging interests and his practice of philanthropy live on today in the form of the charitable Trust established from his estate in 1975 to “enrich, and nurture the spiritual, educational, cultural, and social lives of individuals, families, and communities.” Since then, thousands of grants worth hundreds of millions of dollars have been invested in the work, play, education, and creativity of people in the region. Surely he would have enjoyed seeing the harvest of his dreams and the “ripple” effect of his work.
FROM THE EXECUTIVE DIRECTOR

No doubt 2008 will be remembered by all of us as a pivotal year in the early part of the new millennium. Presented with exciting elections, economic upheaval, and the challenges of cultural intersections around the globe, we will all be reverberating in our “new realities” for some time to come.

It was a year of historic proportions for the Murdock Trust as well—the largest number of grants (257) and the largest number of grant dollars ($42,367,068) that the Trust has ever provided in its 33-year history.

While we do not anticipate meeting that high-water mark again any time soon, we do see the opportunities for partnership increasing throughout our region. Challenging times call for creative responses and we never cease to be amazed at the creative ways organizations rise to meet the challenges of these days in which we live.

2008 was also a time of change for leadership at the Trust. John Van Zytveld, who has deftly guided our grants management for over a dozen years, stepped down from his role as senior program director. John passed the baton to one of our newest additions, Dana Miller, who brings a wealth of experience in business, development, and higher education leadership. We are also fortunate to have Dr. Van Zytveld continuing with us in a part-time role as an advisor in the areas of research, science, and program development.

We also welcomed to our program team Jill Tatum, who most recently served on the faculty at Calvin College in Michigan. Jill brings training and experience in both the life sciences and the social sciences.

The Trust is blessed with one of the most experienced group of staff in the foundation world. Kit Gillem has served with distinction as President of the Board of Directors of Philanthropy Northwest. His leadership and vision have helped raise to a new level the role of philanthropy in serving the nonprofit sector in the Northwest. And never have the need been any greater. We were also enriched by two “firsts” for our staff. Rick Ganz, S.J., joined the staff as a one-year visiting scholar. Coming from his role as vice president at Gonzaga University and a career in education, Fr. Ganz was a source of wise counsel and thoughtful input to our Leadership Initiative efforts. He was joined by our first senior fellow, Dr. Jay Barber. Recently retired from the presidency at Warner Pacific College, Dr. Barber’s wealth of experience in development and team building will be a great asset in our capacity building initiatives. As always, interns brought an energy and perspective to our work that enriches all we do. Our 2008 interns included: Conner Peckham, Warner Pacific College; Carrie Horton, Concordia University; Mandee Spotts, George Fox University; and Shane Walker, George Fox University.
In addition to the record number of grants made in 2008 is the record number of participants who took part in our leadership development, enrichment activities, and capacity-building initiatives. These programs have become a strategic part of the Trust’s mission of contributing to the life and work of nonprofit leaders which, in turn, strengthens the infrastructure and capacity of their organizations and institutions. With a generational transfer of resources and leadership happening in our midst, we anticipate that this investment in broadening and deepening the leadership base will reap dividends throughout the Northwest and beyond into the next generation.

Representative of those special initiatives would be the Trust’s efforts to strengthen K-12 private schools. We have sought to advance this important sector of the education world by engaging school leaders, examining best practices, and identifying high-leverage opportunities. Our Partners in Science program is an example of a mature initiative whose ripple effects into public and private education continue to grow.

We know that the Trust cannot address every problem or help every organization, and so we remain especially grateful for those across our region, our nation, and around the world who respond in a wide variety of ways to serve the common good. A recent research study helped provide a clearer picture of the ways foundations, such as the Murdock Trust, impact the social and economic realities of the worlds in which we live. The Shapiro and Mathur research

(The Social and Economic Value of Private and Community Foundations) also demonstrates with great clarity the importance of protecting the freedom and creativity that is present in the philanthropic sector.

In unexpected and turbulent times it is a temptation to retreat, protect, or seek safe ground. Our goal instead, toward the end of 2008 and into 2009, was to stay the course, take the long view, and rise to the challenges of a new day. Perhaps never before in human history has our inter-connectedness been more of a reality, or been felt almost daily in all those things we experience, feel, and observe. And perhaps never before in human history has it become clearer that what each one of us does, matters. At the Murdock Trust we count it a great privilege and a great responsibility to carefully steward our responsibilities and resources to nurture and enrich the educational, social, and spiritual fabric of our culture to serve the common good. And we are happy to say 2008 was a very good year.

Steven G. W. Moore
Executive Director
2009 Special Olympics World Winter Games, Inc.  
**Education Initiative**  
To promote understanding of intellectual disabilities  
Health & Human Services | Boise, ID | $100,000

**Africa New Life Ministries International**  
**Technology Update**  
To improve office infrastructure and service to donors  
Health & Human Services | Beaverton, OR | $19,500

**Aglow International**  
**Ministry Internship Program**  
Health & Human Services | Edmonds, WA | $70,400

**Agros International**  
**Expand Development Program**  
To impact families in Latin America  
Health & Human Services | Seattle, WA | $126,000

**Alaska Christian College**  
**New Counseling Center**  
To serve students and staff  
Education > Formal Education | Soldotna, AK | $110,000

**Allelon International, Inc.**  
**Western Culture Research Project**  
To identify best practices and leadership characteristics  
Health & Human Services | Eagle, ID | $300,000

**Alliance Defense Fund, Inc.**  
**Program Support**  
To provide education and public awareness among college students  
Education > Informal Education | Scottsdale, AZ | $300,000

**Aloha High School**  
**Investigating Membrane Receptors Through Nonfluorescent Immunohistochemistry**  
Scientific Research > Partners in Science Supplemental | Beaverton, OR | $7,000

**American Indian Business Leaders**  
**New Membership and Communications Coordinator**  
To serve chapters teaching business principles to Native American students  
Health & Human Services | Missoula, MT | $137,000

**American Prairie Foundation**  
**Bison Reintroduction and Restoration Project**  
To establish a prairie preserve in Montana  
Health & Human Services | Bozeman, MT | $113,000
Americans United for Life
Education Program Expansion
To improve information distribution system
Education > Informal Education | Chicago, IL | $210,000

America’s Foundation for Chess
New Director of Program Development and Training
To serve more elementary school students in the greater Pacific Northwest
Education > Informal Education | Kirkland, WA | $138,000

Amerson Music Ministries, Inc.
Media Production
For public entertainment and education
Health & Human Services | Granada Hills, CA | $100,000

Anchor Arms Incorporated
New Transitional Housing Facility Purchase
To expand support for low-income and mental health clients
Health & Human Services | Anchorage, AK | $250,000

Asian Counseling and Referral Service
New Facility
To improve and expand services
Health & Human Services | Seattle, WA | $100,000

Association for Sacred Encounters, Inc.
Old Mission State Park Exhibit Fabrication
For visitor education of historic region
Education > Informal Education | Cataldo, ID | $334,000

Association of Christian Schools International
K-12 Christian Schools Capacity Building Initiative
For fund development training program
Education > Informal Education | Colorado Springs, CO | $503,000

AtWork!
Computer and Network Systems Upgrade
To expand employment opportunities for disabled adults
Health & Human Services | Issaquah, WA | $42,000

Bakke Graduate University
Establish Development Program
To expand educational opportunities in urban settings
Education > Formal Education | Seattle, WA | $216,000

Bear Lake Valley Health Care Foundation
New X-Ray and Fluoroscopy Machine
To better serve rural patients
Health & Human Services | Montpelier, ID | $125,000

Benton Habitat for Humanity
Facility Expansion
To increase programs, services, and revenue
Health & Human Services | Corvallis, OR | $200,000

Bible Mennonite Fellowship
New Assisted Living Facility
To improve service to the elderly
Health & Human Services | McMinnville, OR | $50,000

Billings West High School
Behavioral Ecology and Population Genetics of Fishes
Scientific Research > Partners in Science Supplemental | Billings, MT | $7,000
Black Lake Bible Camp and Conference Center
Establish Development and Marketing Departments
To increase organizational capacity
Health & Human Services | Olympia, WA | $112,000

Boy Scouts of America, Great Alaska Council
Develop Denali High Adventure Scout Base
To expand camping opportunities for young people
Health & Human Services | Anchorage, AK | $400,000

Boys & Girls Club of Corvallis
New Free Dental Clinic Coordinator and Equipment
To provide care for children
Health & Human Services | Corvallis, OR | $120,000

Boys & Girls Clubs of Whatcom County
Facility Construction
To expand program in Ferndale area
Health & Human Services | Bellingham, WA | $250,000

Camp Fire USA Juan de Fuca Council
Staff Expansion
To serve youth in rural communities
Health & Human Services | Port Angeles, WA | $92,000

Camp Fire USA Portland Metro Council
Camp Namanu Water System Upgrade
To extend program season
Health & Human Services | Portland, OR | $250,000

Camp Fire USA, Snohomish County Council
New Camp Killoqua Lodge
To increase camper capacity
Health & Human Services | Everett, WA | $100,000

Cancer Lifeline of King County
Service Center Renovation
To facilitate increased demand for services
Health & Human Services | Seattle, WA | $25,000

Cannon Beach Conference Center
Building Construction
To expand capacity for summer staff and
Ecola Bible School students
Health & Human Services | Cannon Beach, OR | $180,000

Cascade Policy Institute
Expand Oregon Asset Policy Initiative
To encourage personal asset building throughout the state
Education > Informal Education | Portland, OR | $225,000

Catholic Charities of the Archdiocese of Portland in Oregon
New Service Center
For consolidation and expansion of services to needy populations
Health & Human Services | Portland, OR | $750,000

Center for Religion and Diplomacy, Inc.
Expand Education Reform Project
To provide teacher training
Education > Informal Education | Washington, DC | $225,000

Centralia High School
Core Sample Studies of Past Climates
Scientific Research > Partners in Science Supplemental | Centralia, WA | $3,000
Christ Clinic
New Clinic Facility
To increase service to Spokane’s low-income population
Health & Human Services | Spokane, WA | $250,000

Clark Fork Coalition
New Ranchlands Community Outreach Staff
To serve the upper Clark Fork River Valley communities
Health & Human Services | Missoula, MT | $141,000

College of Idaho, Inc.
Ministry Internship Program
Health & Human Services | Caldwell, ID | $48,000

College of Idaho, Inc.
Start-Up Research Package for New Position in Biology
Scientific Research > Faculty Start-Up | Caldwell, ID | $40,000

College Success Foundation
New Development Staff
To expand college scholarship program
Education > Informal Education | Issaquah, WA | $270,000

Columbia Theatre Association for the Performing Arts
Historic Theater Renovation
To enhance visitor services and safety
Arts & Culture | Longview, WA | $250,000

Community Cultural Project of Tonasket
Community Center Renovation
To promote informal education and community building
Health & Human Services | Tonasket, WA | $150,000

Cornerstone Associates, Inc.
Forklift Purchase
To expand business opportunities
Health & Human Services | Corvallis, OR | $35,000

Corporation for Northern Rockies Sustainable Communities
New Staff
To increase marketplace opportunities for ranchers and farmers
Health & Human Services | Livingston, MT | $105,000

Cottage Grove High School
Student Investigations Using Light-Based Instrumentation
Scientific Research > Partners in Science Supplemental | Cottage Grove, OR | $7,000

Council for Christian Colleges & Universities
Leadership Development and Spiritual Formation Program
To strengthen campus ministry
Education > Informal Education | Washington, DC | $248,000

Crook County Historical Society, Inc.
New Exhibits
To educate visitors on regional history
Education > Informal Education | Prineville, OR | $75,000

Dahl Memorial Healthcare Association, Inc.
Emergency Department Upgrade and Equipment Purchase
To better serve residents of southeast Montana
Health & Human Services | Ekalaka, MT | $104,000

Defenders of Wildlife
New Web-based Conservation Registry
To catalog, map, and track multiple-agency activities
Health & Human Services | Washington, DC | $100,000
DePaul Industries
Purchase Production Equipment
To create jobs for people with disabilities
Health & Human Services | Portland, OR | $250,000

Ecumenical Ministries of Oregon
New Membership Director
To expand involvement of congregations
Health & Human Services | Portland, OR | $152,000

Entiat High School
Survival and Growth of Replanted Riparian Zones and their Affect on Water Quality
Scientific Research > Partners in Science Supplemental | Entiat, WA | $6,400

Evergreen State College
Using Quantum Dot Microspheres to Measure Regional Blood Flow
Scientific Research > Partners in Science | Olympia, WA | $15,000

Faithful Friends Ministry
Internship Program
Health & Human Services | Portland, OR | $15,400

Fellowship Foundation, Inc.
Ministry Internship Program
Health & Human Services | Bethesda, MD | $39,600

Fellowship of Christian Athletes
Area Director for Northwest Washington
To expand ministry to athletes and coaches
Health & Human Services | Kansas City, MO | $160,000

Filer High School
DNA Extraction and Analysis of Tissue Samples from Populations of White Sturgeon
Scientific Research > Partners in Science Supplemental | Filer, ID | $7,000

Flying H Youth Ranch
New Classroom Building
To increase services to at-risk boys
Education > Formal Education | Naches, WA | $84,000

Focus on the Family
Integrate Software Platforms
To enhance constituent services
Health & Human Services | Colorado Springs, CO | $360,000

Food Alliance
New Marketing Director
To promote business development and organizational visibility
Health & Human Services | Portland, OR | $200,000

Foraker Group
Nonprofit Support Organization Initiative
To build internal capacity and serve the non-profit community
Health & Human Services | Anchorage, AK | $600,000

Forward Edge International
Establish Marketing Program
To increase short-term service opportunities
Health & Human Services | Vancouver, WA | $173,000
Foundation Center
2008-2010 Public Service Programs
To support the non-profit and philanthropic community
Education > Informal Education | New York, NY | $60,000

Foundation for Teaching Economics
Pacific Northwest Educational Workshops
To enable teachers to apply economic principles in the classroom
Education > Informal Education | Davis, CA | $90,000

Foundation of Montana State University – Billings
Acquisition of Science Laboratory Equipment
To support undergraduate nursing and allied health science programs
Education > Formal Education | Billings, MT | $251,000

Fred Hutchinson Cancer Research Center
Acquisition of Medical Research Equipment
To support cancer immunotherapy studies
Scientific Research > General Scientific Research | Seattle, WA | $497,000

Free Clinic of Southwest Washington
Project Access Program Expansion
To serve low-income patients with free specialty care
Health & Human Services | Vancouver, WA | $179,000

Friends of Montana PBS, Inc.
Television Transmission Equipment Purchase
To extend service to Great Falls
Education > Informal Education | Bozeman, MT | $250,000

Friends of Timberline
New Winter Lodge Entrance Construction
To better serve the public
Health & Human Services | Portland, OR | $125,000

Gardner School
New Science Classroom
To enhance instruction and increase capacity
Education > Formal Education | Vancouver, WA | $60,000

General Assembly of the Church of God in Oregon and Southwest Washington
New Multipurpose Building at Camp White Branch
To enhance service and increase use
Health & Human Services | Salem, OR | $150,000

George Fox University
K-12 Christian Schools Capacity Building Initiative
For mentoring and professional development for educators
Education > Formal Education | Newberg, OR | $405,000

Fox Theater
Restoration of Historic Fox Theater
To serve as a regional performing arts theater
Arts & Culture | Spokane, WA | $500,000

Franciscan Foundation Washington
Equipment for New St. Anthony Hospital
To serve residents of Key Peninsula and Gig Harbor
Health & Human Services | Tacoma, WA | $250,000
Gonzaga University, Corporation of
Ministry Internship Program
Health & Human Services | Spokane, WA | $78,600

Gonzaga University, Corporation of
Ministry Internship Program
Health & Human Services | Spokane, WA | $39,600

Great Basin Society, Inc.
Malheur Field Station Renovations
To support educational programs in field ecology and geology
Education > Informal Education | Princeton, OR | $80,000

Happy Canyon Foundation, Inc.
Roof Replacement
To enhance pageant and community events
Health & Human Services | Pendleton, OR | $250,000

Healing Center
New Development Staff
To augment grief support services
Health & Human Services | Seattle, WA | $150,000

Henry Gallery Association, Inc.
Digital Interactive Galleries Project
To improve public access to collection
Arts & Culture | Seattle, WA | $80,000

Heritage Foundation
Religion in Civil Society Project
To increase public understanding
Education > Informal Education | Washington, DC | $375,000

Heritage University
New Science Building Construction
To serve undergraduate science and nursing students
Education > Formal Education | Toppenish, WA | $1,000,000

Hidden Valley High School
DNA Finger Printing for the High School Science Labs
Scientific Research > Partners in Science Supplemental
Grants Pass, OR | $7,000

Home Life Incorporated
New Facility
To provide housing for developmentally disabled adults
Health & Human Services | Corvallis, OR | $100,000

Idaho Foodbank Warehouse
Warehouse Purchase and Renovation
To expand services in eastern Idaho
Health & Human Services | Boise, ID | $150,000

Idaho Human Rights Education Center, Inc.
New International Education Program
To promote citizenship and cultural education
Education > Informal Education | Boise, ID | $171,500

Idaho Nonprofit Development Center, Inc.
Nonprofit Support Organization Initiative
To build internal capacity to serve the non-profit community
Health & Human Services | Boise, ID | $90,000
<table>
<thead>
<tr>
<th>Organization</th>
<th>Project Title</th>
<th>Category</th>
<th>Location</th>
<th>Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Idaho State University</td>
<td>Exploring Sex Differences in Cardiac Energy Metabolism and Function in Rainbow Trout: A Tour from Isolated Mitochondria to Swimming Fish</td>
<td>Scientific Research</td>
<td>Pocatello, ID</td>
<td>$15,000</td>
</tr>
<tr>
<td>Inland Northwest Lutheran Outdoor Ministries, Inc.</td>
<td>Ministry Internship Program</td>
<td>Health &amp; Human Services</td>
<td>Coeur d’Alene, ID</td>
<td>$68,200</td>
</tr>
<tr>
<td>Inland Northwest Lutheran Outdoor Ministries, Inc.</td>
<td>Shoshone Base Camp Purchase</td>
<td>Health &amp; Human Services</td>
<td>Coeur d’Alene, ID</td>
<td>$300,000</td>
</tr>
<tr>
<td>INN University Ministries at First Presbyterian Church of Bellingham</td>
<td>Ministry Internship Program</td>
<td>Health &amp; Human Services</td>
<td>Bellingham, WA</td>
<td>$132,000</td>
</tr>
<tr>
<td>Institute for Humane Studies, Inc.</td>
<td>Pacific Northwest Program</td>
<td>Education</td>
<td>Arlington, VA</td>
<td>$90,000</td>
</tr>
<tr>
<td>Intercollegiate Studies Institute, Inc.</td>
<td>Expand Distance Learning Program</td>
<td>Education</td>
<td>Wilmington, DE</td>
<td>$390,000</td>
</tr>
<tr>
<td>International Justice Mission</td>
<td>Establish Pacific Northwest Regional Office</td>
<td>Health &amp; Human Services</td>
<td>Washington, DC</td>
<td>$280,000</td>
</tr>
<tr>
<td>International Snow Leopard Trust</td>
<td>New Conservation Education Project</td>
<td>Health &amp; Human Services</td>
<td>Seattle, WA</td>
<td>$57,000</td>
</tr>
<tr>
<td>InterVarsity Christian Fellowship USA</td>
<td>Ministry Internship Program</td>
<td>Health &amp; Human Services</td>
<td>Madison, WI</td>
<td>$88,000</td>
</tr>
<tr>
<td>Island Conservation</td>
<td>Aleutian Island Restoration Project</td>
<td>Health &amp; Human Services</td>
<td>Santa Cruz, CA</td>
<td>$250,000</td>
</tr>
<tr>
<td>IslandWood</td>
<td>Campus Expansion</td>
<td>Education</td>
<td>Bainbridge, WA</td>
<td>$400,000</td>
</tr>
<tr>
<td>Jesuit Volunteer Corps</td>
<td>Northwest Expand Development Department</td>
<td>Health &amp; Human Services</td>
<td>Portland, OR</td>
<td>$101,000</td>
</tr>
<tr>
<td>Kitsap Mental Health Services</td>
<td>New Residential Unit</td>
<td>Health &amp; Human Services</td>
<td>Bremerton, WA</td>
<td>$150,000</td>
</tr>
</tbody>
</table>
La Clinica del Valle Family Health Care Center, Inc.  
**New Central Point Clinic**  
To serve Hispanic and low-income residents  
Health & Human Services | Medford, OR | $200,000

La Grande High School  
**Use of Short Wavelength Near Infrared Spectroscopy in the High School Laboratory**  
Scientific Research > Partners in Science Supplemental | La Grande, OR | $7,000

Lake County Library District  
**Community Room Construction**  
To serve citizen groups  
Health & Human Services | Lakeview, OR | $175,000

Lakeside School  
**Stochastic Process Studies in High School Math and Science**  
Scientific Research > Partners in Science Supplemental | Seattle, WA | $3,000

Lathrop High School  
**Environmental Variables in Habitat Predictions**  
Scientific Research > Partners in Science Supplemental | Fairbanks, AK | $7,000

Leadership Catalyst  
**Establish Development Department**  
To expand training programs  
Health & Human Services | Scottsdale, AZ | $245,000

Lewis & Clark College  
**Mechanism of Export of Chicken Ciliary Neurotrophic Factor**  
Scientific Research > Murdock College Research Program for Life Sciences | Portland, OR | $42,000

Lewis County Work Opportunities Services  
**Purchase Equipment**  
To improve production capabilities for disabled workers  
Health & Human Services | Chehalis, WA | $47,500

Life Services of Spokane  
**Nursing Staff Expansion**  
To extend medical clinic services in Spokane and Cheney  
Health & Human Services | Spokane, WA | $267,000

Linfield College  
**Expanded Simulation Laboratory Program**  
To improve nursing education  
Education > Formal Education | McMinnville, OR | $148,000

Luis Palau Evangelistic Association Portland CityFest 2008  
**To create long-term community service initiatives**  
Health & Human Services | Portland, OR | $239,600

McLaughlin Research Institute for Biomedical Sciences, Inc.  
**Acquisition of Biomedical Research Equipment**  
To upgrade laboratory facilities  
Scientific Research > General Scientific Research | Great Falls, MT | $498,000
Metlakatla Indian Community
Community Center Improvements
To serve residents
Health & Human Services | Metlakatla, AK | $150,000

Mid-Columbia Health Foundation
New Diagnostic Imaging Equipment
To better serve local patient needs
Health & Human Services | The Dalles, OR | $250,000

Mike Silva Evangelism International, Inc.
New Communications Manager
To upgrade external communication
Health & Human Services | Portland, OR | $156,000

Minidoka Memorial Hospital
New Surgical and Diagnostic Imaging Equipment
To better serve rural patients
Health & Human Services | Rupert, ID | $117,000

Montana Food Bank Network, Inc.
New Warehouse and Freezer
To increase acquisition and distribution of food
Health & Human Services | Missoula, MT | $200,000

Montana Natural History Center, Inc.
New Naturalist and Volunteer Coordinator Positions
To increase educational programming
Education > Informal Education | Missoula, MT | $130,000

Montana Nonprofit Association, Inc.
Nonprofit Support Organization Initiative
To build internal capacity to serve the non-profit community
Health & Human Services | Helena, MT | $168,000

Montana State University – Billings
Detection of Platinum-Group Elements Using Laser-Induced Breakdown Spectroscopy
Scientific Research > Partners in Science | Billings, MT | $15,000

Montana State University Bozeman
Acquisition of Engineering Research Equipment
For studies of human factors in traffic safety
Scientific Research > General Scientific Research | Bozeman, MT | $495,000

Montana State University Bozeman
Effects of Antibiotic Resistance on Biofilm Formation Capabilities in Clinical Isolates
Scientific Research > Partners in Science | Bozeman, MT | $15,000

Montana State University Bozeman
Acquisition of Clean Room Research Equipment
To support research on micro and nano materials and devices
Scientific Research > General Scientific Research | Bozeman, MT | $510,000

Mount St. Helens Institute
New Volcano Exhibit
To educate visitors and students about current research
Education > Informal Education | Amboy, WA | $163,000
Museum of Flight Foundation
Space Exposition Theater Renovation
For education and enjoyment by the public
Education > Informal Education | Seattle, WA | $107,000

Museum of Glass
Mobile Hot Shop Equipment
To expand outreach and education program
Arts & Culture | Tacoma, WA | $100,000

Museum of the Rockies
Children’s Discovery Center Expansion
To serve children and families
Education > Informal Education | Bozeman, MT | $200,000

National Forest Foundation
New Regional Field Representative
To support conservation projects in Washington, Idaho, and Alaska
Health & Human Services | Missoula, MT | $243,000

Native American Youth and Family Center
School Technology and Science Lab Equipment
To support secondary education
Education > Informal Education | Portland, OR | $201,000

NATIVE Project
New Dental Clinic Addition
To serve Native Americans and low-income persons
Health & Human Services | Spokane, WA | $150,000

Nature Conservancy of Montana
Rocky Mountain Front Land Protection Initiative
To secure vital wildlife habitat
Health & Human Services | Helena, MT | $450,000

New Avenues for Youth, Inc.
Purchase and Renovation of Downtown Facility
To expand opportunities for homeless youth
Health & Human Services | Portland, OR | $250,000

New Horizons Ministries
Ministry Internship Program
Health & Human Services | Seattle, WA | $52,800

Nonprofit Center
Nonprofit Support Organization Initiative
To build internal capacity to serve the non-profit community
Health & Human Services | Tacoma, WA | $160,000

North Medford High School
Impact of Human Activities on the Water Chemistry and Biology of the Bear Creek Watershed
Scientific Research > Partners in Science Supplemental | Medford, OR | $7,000

Northwest District - Lutheran Church Missouri Synod
K-12 Christian Schools Capacity Building Initiative
For financial management training
Education > Informal Education | Portland, OR | $224,000
Northwest Family Services
New Service Center
For expanded services to low-income and Hispanic youth
Health & Human Services | Portland, OR | $200,000

Northwest Harvest EMM
Purchase and Retrofit Warehouse
To relieve hunger in Washington
Health & Human Services | Seattle, WA | $300,000

Northwest Leadership Foundation
Ministry Internship Program
Health & Human Services | Tacoma, WA | $176,000

Northwest Medical Teams International, Inc.
Pacific Northwest Flood Relief
To assist with recovery from the December 2007 disaster
Health & Human Services | Portland, OR | $29,500

Northwest Nazarene University, Inc.
K-12 Christian Schools Capacity Building Initiative
For financial and professional development
Education > Formal Education | Nampa, ID | $300,000

Northwest Vintage Car and Motorcycle Museum, Inc.
Building Construction
For visitors’ education about automotive history and mechanics
Education > Informal Education | Salem, OR | $100,000

Norton Sound Health Corporation
New Computed Tomography Installation
To enhance detection of disease and injury
Health & Human Services | Nome, AK | $206,000

Okanogan County Public Hospital District #4 dba North Valley Hospital
Emergency Department Construction
To better serve the needs of residents and travelers
Health & Human Services | Tonasket, WA | $200,000

Okanogan Douglas District Hospital
New Cardiac/Pulmonary Rehabilitation Equipment
To serve patients of rural north central Washington
Health & Human Services | Brewster, WA | $85,000

Olympia High School
Environmental Studies
Scientific Research > Partners in Science Supplemental | Olympia, WA | $7,000

Olympia Regional Learning Academy
Implementing Inquiry and Scientific Research with High School Students
Scientific Research > Partners in Science Supplemental | Olympia, WA | $7,000

Oneida Stake Academy Foundation, Inc.
Historic School Restoration
To provide a new community center
Health & Human Services | Preston, ID | $150,000
Oregon Coast Community Action
New Regional Food Distribution Center
To increase acquisition and distribution of food
Health & Human Services | Coos Bay, OR | $200,000

Oregon College of Art and Craft
New Construction
To expand studio and classroom space for students
Education > Formal Education | Portland, OR | $500,000

Oregon Department of State Lands, South Slough National Estuarine Research Reserve
Comparison of the Ecological Performance of Two Broodstock Sources of Olympia Oysters (“Ostrea conchaphila”) Within the South Slough Estuary, Oregon
Scientific Research > Partners in Science | Salem, OR | $15,000

Oregon Environmental Council, Inc.
New Research Director
To support environmental initiatives
Health & Human Services | Portland, OR | $141,000

Oregon Health & Science University
Molecular Neurobiology of Aging
Scientific Research > Partners in Science | Portland, OR | $15,000

Oregon Health & Science University
Role of Snf5 in Schwann Cell Tumorigenesis
Scientific Research > Partners in Science | Portland, OR | $15,000

Oregon Health & Science University
Effects of a High Fat Diet on Behavior in Young Japanese Macaques
Scientific Research > Partners in Science | Portland, OR | $15,000

Oregon Health & Science University Foundation
Prototype High-Speed Camera Development
For studies of ultrasonic bubble dynamics
Scientific Research > Exceptional Opportunity | Portland, OR | $50,000

Oregon Museum of Science and Industry
Facility Remodel
To better serve visitors
Education > Informal Education | Portland, OR | $395,000

Oregon State University
Biological Effects of Nitrogen Management on Winter Canola Production for Biodiesel
Scientific Research > Partners in Science | Corvallis, OR | $15,000

Oregon State University
Identification of Genes Important for Root Growth in the Model Plant “Arabidopsis thaliana”
Scientific Research > Partners in Science | Corvallis, OR | $15,000

Oregon State University
Effects of Nutrient Enrichment on the Dynamics of Amphibian Hosts and Pathogens
Scientific Research > Partners in Science | Corvallis, OR | $15,000

Oregon Zoo Foundation
New Africa Exhibit Construction
To educate visitors about predators
Education > Informal Education | Portland, OR | $369,000
Our Place Community Ministries
Facility Expansion
To better serve low-income people
Health & Human Services | Spokane, WA | $100,000

Pacific Lutheran University, Inc.
Acquisition of Equipment for FM Radio Studio
For signal digitization and improved service
Education > Informal Education | Tacoma, WA | $233,500

Pacific Lutheran University, Inc.
Start-Up Research Package for New Position in Biology
Scientific Research > Faculty Start-Up | Tacoma, WA | $35,000

Park Academy
Establish Development Program
To enhance education for students with learning disabilities
Education > Formal Education | Marylhurst, OR | $120,000

Pearl Buck Center, Inc.
Purchase and Renovation of New Facility
To serve the developmentally disabled
Health & Human Services | Eugene, OR | $245,000

Philanthropy Roundtable
Support for the Alliance for Charitable Reform
To educate the public about charitable organizations
Education > Informal Education | Washington, DC | $100,000

Philomath Scout Lodge
New Facility
To serve community youth
Health & Human Services | Philomath, OR | $200,000

Pilchuck Glass School
Staff Housing Construction
To improve accommodations
Arts & Culture | Seattle, WA | $81,000

Political Economy Research Center, Inc.
Research, Outreach, and Education Program
To examine Western resources markets
Education > Informal Education | Bozeman, MT | $360,000

Portland Actors Conservatory
New Executive Director Position
To expand professional education program
Education > Informal Education | Portland, OR | $131,000

Portland State University
Diffusion Dark Current in Digital Imagers
Scientific Research > Partners in Science | Portland, OR | $15,000

Portland State University
Floral Scents of Hybrids: Bridges or Barriers to Gene Flow?
Scientific Research > Partners in Science | Portland, OR | $15,000

Portland State University
Watershed Land Use and Sediment Loading in Rocky Intertidal Marine Habitat
Scientific Research > Partners in Science | Portland, OR | $15,000
Portland State University
Preparation and Characterization of Conductive Porphyrin Polymers for Solar Cells
Scientific Research > Partners in Science | Portland, OR | $15,000

Portland State University Foundation
Acquisition of Terahertz Measurement Equipment
For studies of the properties of materials
Scientific Research > General Scientific Research | Portland, OR | $450,000

Powell County Memorial Hospital Association, Inc.
New Equipment
To improve diagnostic services for rural patients
Health & Human Services | Deer Lodge, MT | $150,000

Pratt Fine Arts Center
New Registration System
To maximize enrollment and staff capacity
Arts & Culture | Seattle, WA | $60,000

Puget Sound Neighborhood Health Centers
Pike Market Clinic Expansion
To serve more low-income adults
Health & Human Services | Seattle, WA | $250,000

R. Merle Palmer Minority Scholarship Foundation
New Mentor Coordinator Position
To enhance services to college students
Education > Informal Education | Tacoma, WA | $89,000

Reed Institute DBA Reed College
Mechanisms of Estrogen Receptor-Mediated Gene Repression in Breast Cancer Cells
Scientific Research > Murdock College Research Program for Life Sciences | Portland, OR | $39,500

Reed Institute DBA Reed College
Molecular Characterization of Soybean/Fungal Interactions
Scientific Research > Partners in Science | Portland, OR | $15,000

Rocky Mountain College
Start-Up Research Package for New Position in Biology
Scientific Research > Faculty Start-Up | Billings, MT | $40,000

Safe Place Ministries, Inc.
New Administrative Service Center
To better serve abused women and children
Health & Human Services | Boise, ID | $300,000

Saint Martin’s University
Identification of a Gene Involved in the Response of “Arabidopsis thaliana” Seedlings to Gravity
Scientific Research > Murdock College Research Program for Life Sciences | Lacey, WA | $44,000

Salem Leadership Foundation
Staff Expansion
To better equip churches to serve the community
Health & Human Services | Salem, OR | $143,400
Salvation Army, a CA Corporation (Medford Citadel)
Building Construction and Renovation
To expand services to homeless families
Health & Human Services | Medford, OR | $300,000

Salvation Army Cascade Division
Construction of Ray and Joan Kroc Corps Community Center
To provide services to Mid-Willamette Valley residents
Health & Human Services | Portland, OR | $500,000

Salvation Army, Spokane Citadel Corps
Construction of Kroc Community Center
To provide services to northern Idaho communities
Health & Human Services | Spokane, WA | $500,000

Seattle Pacific University
K-12 Christian Schools Capacity Building Initiative
For professional learning communities program
Education > Formal Education | Seattle, WA | $300,000

Seattle University
Identification of Packaging Determinants Within the Foamy Virus Polymerase Polyprotein
Scientific Research > Murdock College Research Program for Life Sciences | Seattle, WA | $50,500

Seattle University
Start-Up Research Package for New Position in Physics
Scientific Research > Faculty Start-Up | Seattle, WA | $40,000

Serendipity Center, Inc.
Facility Construction and Remodel
To expand education and mental health services for children and youth
Education > Formal Education | Portland, OR | $250,000

South Anchorage High School
A Model Organism Study of “Alces alces”
Scientific Research > Partners in Science Supplemental | Anchorage, AK | $7,000

South County Area
Human Services Alliance Building Purchase and Improvements
To increase access to services
Health & Human Services | Kent, WA | $100,000

Spokane Valley Partners
Facility Expansion
To better serve people in need
Health & Human Services | Spokane Valley, WA | $100,000

Samaritan Hospital
New Digital Mammography Equipment
To better serve central Washington patients
Health & Human Services | Moses Lake, WA | $125,000

Seattle Area Youth for Christ
Ministry Internship Program
Health & Human Services | Seattle, WA | $95,700
St. Joseph Family Center
Service Center Capital Improvements
To increase counseling and retreat capacity
Health & Human Services | Spokane, WA | $190,000

Syringa General Hospital
Medical Building Renovation
To house physical therapy department and women’s clinic
Health & Human Services | Grangeville, ID | $250,000

Tacoma Art Museum
New Equipment and Furnishings
To increase attendance and support
Arts & Culture | Tacoma, WA | $160,000

Tacoma Goodwill Industries Rehabilitation Center, Inc.
Work Opportunity Center Construction
To increase and enhance employment training
Health & Human Services | Tacoma, WA | $250,000

Tape Ministries NW
Upgrade Technology
To serve visually impaired persons
Health & Human Services | Seattle, WA | $22,100

Taproot Theatre
Expand Development Department
To support theater programs
Arts & Culture | Seattle, WA | $195,000

Technical Assistance for Community Service
Nonprofit Support Organization Initiative
To build internal capacity to serve the non-profit community
Health & Human Services | Portland, OR | $750,000

TechRanch Foundation
New Technology Staff
Expand computer programming services and training to entrepreneurs
Health & Human Services | Bozeman, MT | $117,000

Touchet Valley Arts Council
Liberty Theater Annex Building Renovation
To improve services and expand programs
Arts & Culture | Dayton, WA | $50,000

Transitional Resources
New Peer Case Aide Position
To enhance mental health services
Health & Human Services | Seattle, WA | $79,000

Trey McIntyre Project Ltd
New Artistic Staff and Equipment
To support repertoire for national producing dance company
Arts & Culture | Boise, ID | $183,000

Trigg-C.M. Russell Foundation, Inc.
New Permanent Exhibit: The Bison
To educate visitors about the Northern Plains
Arts & Culture | Great Falls, MT | $300,000

Union County Museum Society
Building Construction and New Exhibits
To highlight historic pioneer life
Education > Informal Education | Union, OR | $30,000

University of Alaska-Anchorage
Life Span Extension by Metformin in Fruit Fly, “Drosophila melanogaster”
Scientific Research > Partners in Science | Anchorage, AK | $15,000
University of Alaska-Fairbanks
*Acquisition of Micro-Fourier Transform Infrared Spectrometer*
To support north-Polar studies
Scientific Research > General Scientific Research | Fairbanks, AK | $116,000

**University of Alaska-Fairbanks**
*Effect of Exercise and Diet on Circulating VEGF (Vascular Endothelial Growth Factor)*
Scientific Research > Partners in Science | Fairbanks, AK | $15,000

**University of Montana Foundation**
*Acquisition of X-Ray Diffraction Equipment*
For studies of the structure of large organic molecules
Scientific Research > General Scientific Research | Missoula, MT | $285,500

**University of Oregon**
*Acquisition of Materials Science Research Equipment*
To support studies of nanoscale materials
Scientific Research > General Scientific Research | Eugene, OR | $513,500

**University of Portland**
*Effects of Exercise on Cognitive Behavior and Gene Expression in the Brain*
Scientific Research > Murdock College Research Program for Life Sciences | Portland, OR | $58,500

**University of Portland**
*Impact of Enriched Environment and Transplantation of Neuronal and Glial Precursors on Recovery*
From Controlled Cortical Contusion Injury
Scientific Research > Murdock College Research Program for Life Sciences | Portland, OR | $59,000

**University of Portland**
*Kinetics of Usnic Acid Instability in Methanol and Analysis of its Products*
Scientific Research > Partners in Science | Portland, OR | $15,000

**University of Puget Sound**
*Start-Up Research Package for New Position in Chemistry*
Scientific Research > Faculty Start-Up | Tacoma, WA | $40,000

**University of Puget Sound**
*Evolution of Female Ornamentation: Understanding Male Preference for Brighter Females*
Scientific Research > Murdock College Research Program for Life Sciences | Tacoma, WA | $40,500

**University of Puget Sound**
*Investigation of Elements of a cAMP-CRP Global Regulon in the Bacterial Predator, “Bdellovibrio bacteriovorus”*
Scientific Research > Murdock College Research Program for Life Sciences | Tacoma, WA | $32,000
**University of Washington**

**Acquisition of Science Research Equipment**
For studies of thin-film organic electronics and photonics
Scientific Research > General Scientific Research | Seattle, WA | $600,000

**University of Washington**

**Acquisition of Electrical Engineering Research Equipment**
To establish a shared laboratory for optoelectronic device testing
Scientific Research > General Scientific Research | Seattle, WA | $470,000

**Urban Impact**

**Ministry Internship Program**
Health & Human Services | Seattle, WA | $105,600

**Valley Cities Counseling and Consultation**

**New Telephony Equipment**
To better serve mental health consumers
Health & Human Services | Auburn, WA | $32,000

**Vancouver Symphony Orchestra**

**New Marketing Director**
To raise public awareness and launch season ticket campaign
Arts & Culture | Vancouver, WA | $135,000

**Washington State University**

**A Computational Chemistry Study of the Optical Properties of Organic Dye Aggregates**
Scientific Research > Partners in Science | Pullman, WA | $15,000

**Washington State University**

**Chloroplast Bio-Info-Genomics in Rosaceae Horticultural Crops Important to the Pacific Northwest**
Scientific Research > Partners in Science | Pullman, WA | $15,000

**Washington State University Foundation**

**Acquisition of Laboratory Equipment**
To support faculty and student classroom and research activities
Education > Formal Education | Pullman, WA | $220,000

**Washington State University Foundation**

**Understanding the Dynamics of Nuisance Algae (“Cyanobacteria”) Blooms in Vancouver Lake**
Scientific Research > Partners in Science | Pullman, WA | $15,000

**West Albany High School**

**Using Probeeware to study the Carbon Cycle**
Scientific Research > Partners in Science Supplemental | Albany, OR | $7,000

**West Valley High School**

**Remote Astronomical Observing Program**
Scientific Research > Partners in Science Supplemental | Fairbanks, AK | $7,000
West Valley High School
Incorporating Digital Microscopy Using Inquiry-Based Labs
Scientific Research > Partners in Science Supplemental | Fairbanks, AK | $7,000

White Bird
New General Manager Position
To strengthen dance presenting organization
Arts & Culture | Portland, OR | $160,500

Whitefish Community Aquatics and Health Center
Facility Expansion
To increase services to regional population
Health & Human Services | Whitefish, MT | $150,000

Whitworth University
Ministry Internship Program
Health & Human Services | Spokane, WA | $70,400

Wiconi International
Establish Development Department
To increase Native American ministry
Health & Human Services | Vancouver, WA | $155,000

Willamette University
Start-Up Research Package for New Position in Biology
Scientific Research > Faculty Start-Up | Salem, OR | $40,000

Willamette University
Mechanisms Underlying Heat-Induced Auxin Hormone Insensitivity in Cultured Guard Cell Protoplasts and Parallel Investigation in Intact Plants
Scientific Research > Murdock College Research Program for Life Sciences | Salem, OR | $47,900

Willamette University
Evolutionary Divergence and Hybridization in “Camassia” (Agavaceae): Insights from Phylogeographic Patterns and Pollinator-Mediated Reproduction
Scientific Research > Murdock College Research Program for Life Sciences | Salem, OR | $44,000

Willamette University
Start-Up Research Package for New Position in Physics
Scientific Research > Faculty Start-Up | Salem, OR | $40,000

Willamette University
Using Video to Analyze Lateralization and Development of Prey Handling Skills in Caspian Terns
Scientific Research > Partners in Science | Salem, OR | $15,000

Woodland Park Zoological Society
New Humboldt Penguin Exhibit
To educate about endangered species
Education > Informal Education | Seattle, WA | $300,000

Yellowstone Art Center Foundation
New Public Collection Facility and Gallery
To enhance collection and exhibition capabilities
Arts & Culture | Billings, MT | $400,000
Yellowstone Baptist College, Inc.
New Library Furnishings and Equipment
To better serve students and faculty
Education > Formal Education | Billings, MT | $50,000

YMCA of the Inland Northwest
New North Spokane Facility
To expand services to families
Health & Human Services | Spokane, WA | $300,000

Young Life
Ministry Internship Program
Health & Human Services | Colorado Springs, CO | $176,000

Young Men's Christian Association of Boise
New Camp Construction
To provide camping opportunities for youth at Horsethief Reservoir
Health & Human Services | Boise, ID | $250,000

Young Men's Christian Association of Idaho Falls, Inc.
Big Elk Creek Camp Bridge Replacement
To improve camp access
Health & Human Services | Idaho Falls, ID | $55,500

Young Women's Christian Association of Salem, Oregon
New Service Center
To provide the life-skills training for women, girls, and families
Health & Human Services | Salem, OR | $150,000

Youth for Christ USA, Inc. – Missoula
Construction of Community Center
To enhance and expand adolescent programs
Health & Human Services | Missoula, MT | $300,000

Youth for Christ U.S.A., Inc./Tacoma Area
Ministry Internship Program
Health & Human Services | Tacoma, WA | $67,470

Youth Transition Network, Inc.
Web Communication Pilot Project
To connect college freshmen to student ministries
Health & Human Services | Phoenix, AZ | $225,000

<table>
<thead>
<tr>
<th>CATEGORY</th>
<th># OF GRANTS</th>
<th>$ GRANTED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Arts &amp; Culture</td>
<td>14</td>
<td>$2,654,500</td>
</tr>
<tr>
<td>Education</td>
<td>50</td>
<td>$11,581,000</td>
</tr>
<tr>
<td>Health &amp; Human Services</td>
<td>123</td>
<td>$21,895,870</td>
</tr>
<tr>
<td>Scientific Research</td>
<td>70</td>
<td>$6,061,300</td>
</tr>
<tr>
<td>Trust Gifts Program*</td>
<td>1</td>
<td>$174,398</td>
</tr>
<tr>
<td><strong>Total Grants Awarded</strong></td>
<td><strong>258</strong></td>
<td><strong>$42,367,068</strong></td>
</tr>
</tbody>
</table>

* Trust Gifts Program: Promoting and encouraging charitable giving, the Trust matches gifts made to eligible organizations by Trust employees and Trustees.
Since the beginning, the M.J. Murdock Charitable Trust has embraced a long-term investment strategy—see “strategic asset allocation,” focusing on total return, using “best of breed” outside investment managers. As illustrated in the accompanying graph, the Trust’s commitment to a long-term, well-diversified plan has resulted in growth in assets from approximately $200 million at December 31, 1988, to over $626 million at December 31, 2008 (see auditors review report).

Even with the worst market conditions I have ever seen and a resulting significant drop in our assets, Trust assets grew from $480 million in 1998 to over $626 million at the end of 2008 while at the same time approving over $300 million in grants. Our ability to achieve this growth at a time when the S&P 500 was negative is a tribute to our conviction and adherence to our strategic asset allocation. None of us had seen markets such as those experienced in 2008. Hopefully, we have seen the worst—if not, we are comfortable knowing our allocation can withstand almost any test.

I am blessed to be able to work with some of the brightest investment minds in the world and so very fortunate to be governed by Trustees who are willing to “think outside the box” and help create investment mandates focusing on making money (total return), while minimizing risk. Notwithstanding the daily trauma associated with world “markets” and the economy, it is a humbling honor and pure pleasure to be a small part of managing the Trust investment program—working with Trustees who “get it,” an Executive Director who “supports it,” and a loyal and talented staff, all with the single focus of doing whatever it takes to maximize our grant making potential for our charitable beneficiaries.

James R. Martin
Chief Investment Officer
# INVESTMENT MANAGERS

## LOW RISK (RISK BUCKET I)
- Anchor Point Capital, LLC
- Common Sense Investment Management, LLC
- Hoisington Investment Management Company
- Metropolitan West Asset Management, LLC
- Oaktree Capital Management, L.P.
- Pacific Alternative Asset Management Company, LLC
- Rimrock Capital Management, LLC

## MEDIUM RISK (RISK BUCKET II)
- Anchor Point Capital, LLC
- Blackrock Realty Advisors, Inc.
- Brandes Investment Partners, L.P.
- Capital Guardian Trust Company
- Capital International, Inc.
- Chinook Capital Management, LLC
- Commonfund Realty, Inc.
- KSL Capital Partners, LLC
- Nicholas Applegate Capital Management
- Oaktree Capital Management, L.P.
- Pinnacle Associates Ltd.
- Primecap Management Company
- VEF Advisors, LLC
- W.P. Stewart & Co., Ltd.
- Zevenbergen Capital Investment, LLC

## HIGH RISK (RISK BUCKET III)
- Abbott Capital Management, LLC
- ABRY Partners, LLC
- Acorn Investors, LLC
- Alchemy Partners
- AXA Private Equity
- Brooke Private Equity Advisors
- Capital International, Inc.
- Coller Capital
- Endeavour Capital
- First Reserve Corporation
- Keyhaven Capital Partners, Ltd.
- Knightsbridge Advisers, LLC
- New Venture Partners, LLC
- Oaktree Capital Management, L.P.
- Resource Capital Funds
- Sequoia Capital
- Spur Capital Partners, LLC
- Standard Life Investments
- Technology Partners
- The TCW Group, Inc.

## STRATEGIC ASSET ALLOCATION
- **Capital Preservation (Risk Bucket I)**
  - Alternative Cash; Fixed Income Relative Value; Hedge Funds; Mezzanine; Long US Treasuries
- **Equities/Value-Added Real Estate (Risk Bucket II)**
  - Diversified Style Disciplines; Domestic & Global Mandates; Long/Short; Specialized Equity Portfolios; Value-Added Real Estate
- **Alternative Investments (Risk Bucket III)**
  - Buyouts; Distressed Securities; Energy & Natural Resources; International Private Equity; Mezzanine & Senior Financing; Secondaries, Special Situations; Venture Capital
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.
4. Submit a completed formal application.

This information 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:

**Mr. Dana Miller**
Senior Program Director for Grants Programs
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.