

Strategic Project LOI (v3)

Gray italic text indicates instructions.

Letter of Inquiry (LOI)

Your LOI briefly describes your organization and project. If approved, you will be invited to submit an application. Please be as concise and specific as possible, edit carefully, and use correct punctuation and capitalization for readability. You can invite additional people to collaborate on the form. You may save your draft and finish later.

Organization Information

Does your organization have an EIN? (required)

Yes No

If Yes is selected, the next field below will populate

EIN BRANCH

EIN (required)

Organization Name (required)

If your organization operates with an assumed business name, doing business as, subsidiary name, etc., please list that here. If not, simply enter your organization's legal name. Please do NOT include acronyms in this field.

Do you have a related or affiliate organization that is part of this grant application? (required)

Yes No

If Yes is selected, the next two fields below will populate

For example, a hospital and its supporting foundation, a university, and its foundation, or a "friends of" organization, etc.

AFFILIATE ENTITY BRANCH

Affiliate Entity Name (required)

Does the related or affiliate entity have an EIN? (required)

Yes No

If Yes is selected, the next field below will populate

Related/Affiliate EIN (required)

Organization Physical Address (required)

Organization Phone Number (required)

Head of Organization (CEO/ED/President, etc.) Name (required)

Head of Organization Title (required)

Head of Organization Email (required)

Head of Organization Phone (required)

Local / Regional Contact

If the head of your organization does not serve as the primary contact on this Letter of Inquiry, please provide the following:

Organization Contact Name

Organization Contact Email

Organization Contact Phone

Organization Background

Website Address (required)

Mission Statement (required)

Year Founded (required)

Programs and Services (required)

Limit: 300 words

Describe existing/current programs and services. You might include numbers served within each program, percentage of operational budget for each activity, geographical reach, expertise of staff, and how staff and volunteers carry out your mission.

Geographic Area Served (select all that apply) (required)

Alaska Idaho Montana Oregon Washington British Columbia

Other United States

Other International

If the Other United States or Other International fields are selected, the next question below will populate

List all other United States geographic areas served: (required)

Limit: 300 words

List all other U.S. geographic areas served outside of the Trust region (AK, ID, MT, OR, WA, BC)

List all other international geographic areas served:(required)

Limit: 300 words

List all other international geographic areas served outside of the U.S.

Annual Operating Budget in USD (required)

Project Description

What type of Strategic Project grant are you applying for? (required)

(with branching)

New Staff or Program Expansion

Capital

Equipment and Technology

Please note that additional project questions populate after you select either *New Staff or Program Expansion* or *Capital*

Describe the project: (required)

Limit: 300 words

Total Project Cost in USD (required)

Amount Requested in USD (required)

*Notes:

Total project cost and amount requested should reflect 3 years of cost and 3 years of funding

Capital projects must raise a minimum of 40% of funding by the time Murdock Trust Trustees review the request.

Describe How You Intend to Use Murdock Trust Funding (required)

Limit: 300 words

Anticipated Project Start Date (required)

Proposed Project End Date (required)

Status of Project Timeline (required)

Tentative Firm

Choose "tentative" if your project start date depends on Trust funding or other external factors.

Choose "firm" if your project is already underway or the timeline is set regardless of grant outcomes.

NEW STAFF BRANCH

Total FTE Increase (required)

- *Requests for added staff capacity are limited to no more than 1.0 full-time equivalency (FTE)*
- *Requests must constitute an addition or increase of permanent, strategic positions with a minimum of 0.5 FTE per position.*

Percentage of Government Funds Toward the Project (required)

*Positions or programs sustained with revenues of more than 50 percent from government funding are ineligible. The Murdock Trust **does** fund projects and organizations that obtain significant funding from government sources if they are tied to contracts or fees for service (e.g., Medicaid reimbursements)*

Is the grant request for fundraising staff? (required)

Yes No

Guidelines for Fundraising Positions:

*The Murdock Trust anticipates a return on investment (ROI) with **new funds raised** that, **at a minimum**, are double the cost of the position after the grant is complete (Year 4). The return on investment will be analyzed based on the size and context of the organization.*

FUNDRAISING STAFF BRANCH

**Note: The Trust only funds the first full-time fundraising position in an organization.*

Is the executive director and/or board currently implementing an organized donor development effort? (required)

Yes No

Additional Guidelines for Fundraising Positions:

- *Applicant's leadership is currently implementing an organized development effort.*
- *Board giving should reflect a spirit of philanthropy in the organization.*
- *Organizational leadership should reflect engagement in fund development.*

Private Contributions Raised Last Year in USD (required)

CAPITAL BRANCH

Percentage of Government Funds Toward the Project (required)

*As a general policy, capital projects with government sources contributing **70 percent** or more of the required funding are ineligible for a grant.*

Will the applicant organization own the property? (required)

Yes No

LEASE AGREEMENT BRANCH

Years of Lease Agreement (required)

Tenant leasehold improvement projects require a minimum 10-year lease agreement.

Lease Agreement Type (required)

Fixed

Renewable

Other

LEASE TYPE OTHER BRANCH

Explain the key details of your lease agreement: (required)

Key obligations and responsibilities

Outline the expected measurable outcomes from the proposed project: (required)

Limit: 300-350

How will the proposed project enable your organization to grow, learn, improve, or develop?

What will be different as a result of the proposed project for those you serve?

Examples could include:

- *New or added constituents or services*
- *Increased efficacy of programs or systems*
- *Upgrading operational capabilities or streamlined system processes*
- *Collaboratives, consolidations, or strategic restructuring*

What impact do you anticipate this project will have on the field, sector, and/or community? (required)

Limit: 300 words

Examples could include:

- *New or innovative approach that will inform the sector*
- *Closes an existing program services gap in our region*
- *Increases geographic and/or cross-sector collaborations*

Describe any contact you've made with Murdock Trust staff regarding this project: (required)

Limit: 300 words

Contact with Trust staff is not a pre-requisite for submitting an LOI, but we would like to know if you've had any contact. If you have not had any contact with our staff, please indicate 'None'.

Anything else we should know?

Limit: 300 words

Please Note: Board Engagement Expectations

If your organization is invited to submit an application, in the application, you will be asked about board engagement. The Murdock Trust will measure engagement using three primary metrics:

- Time (attendance and engagement at board meetings, volunteering, cultivating donors)
- Treasure (direct financial support, securing other funding, access to networks, in-kind donations)
- Talents (wisdom, leadership, lived experience, or expertise)

LOI Time

Please estimate how many hours your organization spent on project planning. (required)

Please estimate how many hours it took to complete this LOI, not including project planning. (required)