

## 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.

Shorn G. W. Moone

Steven G. W. Moore Executive Director



# 2008 GRANTEES

### ARTS & CULTURE s 2,654,500 14 GRANTS



#### 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



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

#### 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

For mentoring and professional development for educators Education > Formal Education | Newberg, OR | \$405,000





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





#### **Idaho State University**

Exploring Sex Differences in Cardiac Energy Metabolism and Function in Rainbow Trout: A Tour from Isolated Mitochondria to Swimming Fish Scientific Research > Partners in Science | Pocatello, ID | \$15,000

Inland Northwest Lutheran Outdoor Ministries, Inc.

Ministry Internship Program Health & Human Services | Coeur d'Alene, ID | \$68,200

#### Inland Northwest Lutheran Outdoor Ministries, Inc.

Shoshone Base Camp Purchase To expand camping ministries Health & Human Services | Coeur d'Alene, ID | \$300,000

## INN University Ministries at First Presbyterian Church of Bellingham

Ministry Internship Program Health & Human Services | Bellingham, WA | \$132,000



#### Institute for Humane Studies, Inc.

**Pacific Northwest Program** To advance the principles of liberty through education Education > Informal Education | Arlington, VA | \$90,000

#### Intercollegiate Studies Institute, Inc.

**Expand Distance Learning Program** To further students' understanding of economic, political, and spiritual values Education > Informal Education | Wilmington, DE | \$390,000

#### **International Justice Mission**

**Establish Pacific Northwest Regional Office** To engage the church in the work of justice Health & Human Services | Washington, DC | \$280,000

#### **International Snow Leopard Trust**

**New Conservation Education Project** To reach students, teachers, and other Northwest zoo visitors Health & Human Services | Seattle, WA | \$57,000

#### InterVarsity Christian Fellowship USA

Ministry Internship Program Health & Human Services | Madison, WI | \$88,000

#### **Island Conservation**

Aleutian Island Restoration Project To improve breeding seabird habitat Health & Human Services | Santa Cruz, CA | \$250,000

#### IslandWood

Campus Expansion To increase outdoor education opportunities Education > Informal Education | Bainbridge, WA | \$400,000

#### **Jesuit Volunteer Corps**

**Northwest Expand Development Department** To support volunteer workers Health & Human Services | Portland, OR | \$101,000

#### **Kitsap Mental Health Services**

New Residential Unit For adults with acute and severe disorders Health & Human Services | Bremerton, WA | \$150,000





#### 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



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

#### 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





#### 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 Portland**

Start-Up Research Package for New Position in Chemistry Scientific Research > Faculty Start-Up | Portland, OR | \$40,000

#### **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



#### Washington State University Foundation

Acquisition of Engineering Research Equipment For studies of contaminants in marine sediments Scientific Research > General Scientific Research | Pullman, WA | \$348,000

#### West Albany High School

Using Probeware 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

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

\* Trust Gifts Program: Promoting and encouraging charitable giving, the Trust matches gifts made to eligible organizations by Trust employees and Trustees.





David L. Coleman

Program Director



Lynwood W. Swanson

John W. Castles

Neal O. Thorpe

Mark Pyatt Investment Analyst Assistant Controller

#### **GRANTS STAFF**

Colleen D. Allbee Sheila J. Flannigan Grants Manager & **Computer Specialist** & Events Coordinator



Grants Program Assistant Receptionist



Program Director

Janice W. Kennedy

John Van Zytveld



Christopher (Kit) J. Gillem Senior Program Advisor Program Director



Barton A. Hadder

**INVESTMENT/FINANCIAL STAFF** 

Program Director

**GRANTS PROGRAM STAFF** 

Jennifer M. Larson





Mary E. Hill Grants Program Assistant Program Assistant for Christian Leadership



Rick Ganz, S.J. Visiting Scholar



Marybeth Stewart Goon Administrative Assistant Senior Program Assistant

Steven G. W. Moore Executive Director



James R. Martin Julie D. Cieloha Chief Investment Officer **Chief Financial Officer** 



Dana Miller Senior Program Director for Grant Programs









# FROM THE CHIEF INVESTMENT OFFICER

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. Mantin

James R. Martin Chief Investment Officer



#### **ASSETS/CUMULATIVE GRANTS APPROVED**



## **INVESTMENT** MANAGERS

#### LOW RISK (RISK BUCKET I)

Anchor Point Capital, LLC Common Sense Investment Management, LLC Hoisington Investment Management Company

#### 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.

#### (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. Metropolitan West Asset Management, LLC Oaktree Capital Management, L.P.

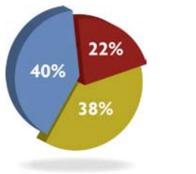
Chinook Capital Management, LLC Commonfund Realty, Inc. KSL Capital Partners, LLC Nicholas Applegate Capital Management Oaktree Capital Management, L.P.

Coller Capital Endeavour Capital First Reserve Corporation Keyhaven Capital Partners, Ltd. Knightsbridge Advisers, LLC New Venture Partners, LLC Oaktree Capital Management, L.P. Pacific Alternative Asset Management Company, LLC Rimrock Capital Management, LLC

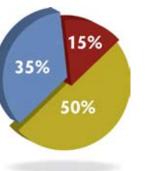
Pinnacle Associates Ltd. Primecap Management Company VEF Advisors, LLC W.P. Stewart & Co., Ltd. Zevenbergen Capital Investment, LLC

Resource Capital Funds Sequoia Capital Spur Capital Partners, LLC Standard Life Investments Technology Partners The TCW Group, Inc.

#### **ACTUAL ALLOCATION**



#### TARGET ALLOCATION



#### 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:

- Determine your organization's eligibility to apply for Trust support.
- Determine the match of your project or program with Trust interests and limitations.
- Submit a Letter of Inquiry.
- **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:

- For the benefit of specific individuals.
- By individuals acting on behalf of, but without the authority of, qualified tax-exempt organizations.
- For grants to conduit organizations, i.e., to tax-exempt organizations for passing funds on to organizations not taxexempt in their own right.
- For propagandizing or for influencing legislation and elections.
- By institutions which in policy or practice unfairly discriminate against race, ethnic origin, sex, creed, or religion.
- By sectarian or religious organizations whose principal activity is for the benefit of their own members or adherents.
- For loans, debt retirement, or operational deficits.
- Solution 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:

- For normal ongoing operations or their extension.
- For contributions to general fund drives or annual charitable appeals.
- For continuation of programs previously financed from other external sources.
- For emergency funding, such as in filling gaps between grants or for crash programs.
- 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:

• 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.

- 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.
- 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.
- 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:

- What you propose is eligible for formal consideration by the Trust.
- What you propose is eligible, but some advice is provided to help in the development of a formal request.
- 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:

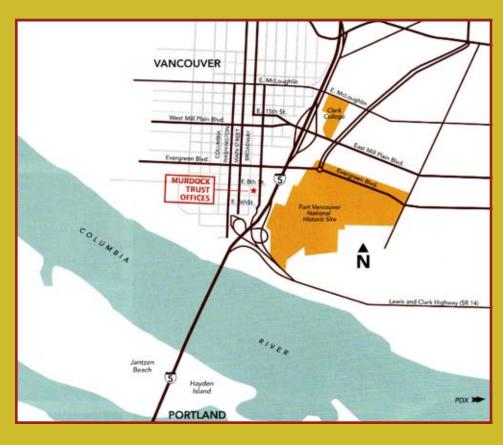
#### Mr. Dana Miller

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.





#### Mailing Address:

M. J. Murdock Charitable Trust PO Box 1618 Vancouver, Washington 98668

**Office Location:** M. J. Murdock Executive Plaza 703 Broadway, Suite 710 Vancouver, Washington 98660 **Contact:** Tel: 360.694.8415 Fax: 360.694.1819 www.murdock-trust.org

