M.J. Murdock
CHARITABLE TRUST

# Guidelines for Grantseekers

To make an application to the Trust, the following four steps should be *done in the following order:*

1. Review your organization's potential eligibility to apply to the Trust.
2. Determine the potential match of your project with Trust interests and limitations.
3. Prepare and submit a Letter of Inquiry.
4. If eligible, complete and submit an application.

## STEP 1: IS YOUR ORGANIZATION ELIGIBLE TO APPLY FOR A GRANT?

Requests for grants are considered from organizations that fit with current Trust interest and have been ruled to be tax exempt under Section 501(c)(3) of the Internal Revenue Code and are not private foundations as defined in Section 509(a) of the Code (an explanation regarding this IRS Code is available in the Application Planning Resources on our website). Charitable organizations applying for support must have in hand the most current IRS documentation reflecting their status or qualification as a tax-exempt government entity or tribal government.

Requests for support are generally limited to projects that occur within five states of the Pacific Northwest: Alaska, Idaho, Montana, Oregon, and Washington. Generally speaking, preference is given to organizations that receive the majority of their funding from private sources.

Please note that eligibility to apply for a scientific research grant, any of the focused Trust programs in science, or other enrichment or special initiative grants is limited. To learn more about these programs and their individual application processes and timelines, visit the Grant Opportunities section of the Trust's website or call the Trust office.

## STEP 2: IS THE PROJECT FOR WHICH YOU SEEK SUPPORT WITHIN TRUST INTERESTS?

While the Trust supports a wide variety of projects in the region, there are limitations to what the Trust will fund. The best indicator of current Trust interest is generally reflected in past successes. To review a list of recently funded projects, please visit the Grants Awarded section of the Trust's website.

The following kinds of requests are not considered:

1. For specific individuals and/or their personal benefit.
2. For individuals unauthorized to act on behalf of a qualified tax-exempt organization.
3. For funds that will ultimately be passed through to other organizations.
4. For propagandizing or for influencing legislation and elections.
5. For institutions that in policy or practice unfairly discriminate against race, ethnic origin, sex, creed, or religion.
6. For sectarian or religious organizations whose principal activity is for the primary benefit of their own members.
7. For long-term loans, debt retirement, or operational deficits.

The following kinds of requests are rarely considered:

1. For normal ongoing operations or the continuation of existing projects.
2. For endowments or revolving funds that act as such.
3. For continuation of programs previously financed from other external sources.
4. For urgent needs, emergency, or gap funding.
5. For organizations organized and operating outside any state or territory of the United States.

## STEP 3: PREPARE AND SUBMIT A LETTER OF INQUIRY

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. If you believe your organization and project may be of Trust interest, you should consider submitting a Letter of Inquiry (LOI). The LOI should minimally address the following:

1. A brief background on your organization, including an abbreviated mission statement, the date founded, the size of staff and board, the constituency and geographic region served, the type of service provided, and the size of the annual operating budget.
2. A description of the project for which you are requesting support. Include a discussion of how you reached the decision to mount this project, the factors that contribute to the need or opportunity, the project's importance to your organization and constituency, and the level and nature of commitment of your staff and board.
3. A proposed expense budget, in summary form, for the total cost of this project and for the amount you intend to request from the Trust. If possible, identify the specific budget item(s) for which you would be requesting Trust support. Indicate potential or real sources of support in addition to the Trust.
4. A brief discussion as to why you are approaching the Trust for this 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.

### Timing considerations:

A Letter of Inquiry may be submitted to the Trust at any time. Letters of Inquiry are reviewed to determine if an organization and proposed project sufficiently fit Trust interest and guidelines to warrant submission of a full proposal. Once the Trust has your Letter of Inquiry in hand, it will be reviewed and you can expect a response within about two weeks. The response is likely to be one of two types:

1. What you propose is eligible for consideration by the Trust, and an invitation to submit a full application is given. If appropriate, specific advice will be provided.
2. What you propose is not eligible for formal consideration by the Trust.

## STEP 4: COMPLETE AND SUBMIT AN APPLICATION

If you receive an invitation to submit a full application, you will be given instructions on how to complete an application using the Trust's online grants application system.

Unless specifically noted, there are no deadlines for the receipt of an application. An application may be submitted at any time when sufficient information is available for the applicant to thoughtfully address the questions outlined in the application instructions. In general, an application should be submitted early enough to allow staff sufficient time to thoroughly study it and, if appropriate, conduct a site visit to meet with the principals of the project.

### The Application Review Process

An application is reviewed initially to determine whether all required materials have been submitted. Each application is assigned to a program director, who will take the lead in preparing the request for submission to the Trustees for action. The program director may request additional information, an interview with the applicant, or a visit to the applicant's organization.

The application, including staff summary and analysis, is made available to the Trustees for their consideration and decision. Due to the nature of projects considered by the Trust, the size of most requests, and the thorough evaluation of proposals, the typical time frame for most decisions is six to nine months. The applicant is notified promptly when a decision has been reached.

While merit is evident in nearly every application 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, resubmission of an application that was declined is not permitted.

Each application becomes the property of the Trust and is treated as a privileged communication. In some circumstances it may be peered reviewed. It will not be returned or made available to others.

## For More Help

If your questions have not been answered or additional information is needed, please call the Trust at 360-694-8415.