



General Application Instructions

GRANT APPLICATION OVERVIEW

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

The grant application is comprised of two components:

1. The first portion of the application is broken out into six sections that are filled out in our online forms. These sections include **Contact Information, Organizational Summary, Organizational Programs and Services, Organizational Financial Summary, Board Governance, and Project Summary.**
2. The second portion of the application includes the following: **Project Expense Budget and Narrative Summary, Project Funding Plan by Source Summary, Full Project Description, Project Outcomes and Evaluation, and Future of Project—Sustainability.** We invite you to upload your responses to Sections 7A–7E in Word, Excel, or PDF format. The instructions below will provide page limits for each of these sections. To assist Trust staff and trustees in reviewing the grant request, please use no less than 11-point font in narrative areas and no less than 10-point font in a matrix, chart, or spreadsheet. It is important to adhere to the page limits and font sizes described in the instructions.



1. CONTACT INFORMATION

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

2. ORGANIZATIONAL SUMMARY

Provide your organization's mission statement or key elements of the statement. Complete the data table starting with the most recently completed fiscal year. We would like to know the number of staff in your organization and the full-time equivalents. For example: if your organization has 10 people on staff and 7 are full-time and 3 are half-time staff, this would total 8.5 full-time equivalents (FTEs). The number of staff/FTEs would be entered as 10/8.5 on the application form. Provide the number of board members responsible for the organization's governance. Advisory boards can be outlined in Section 5, Board Governance. If possible, provide the unduplicated number of people served annually and number of individual volunteers. The Trust understands that unduplicated numbers of people served annually can be difficult for certain nonprofits, but please do the best you can to respond to this request and estimate if needed. You will have an opportunity to clarify, build upon, or add to this summary and include additional organizational information in Section 3, Organizational Programs and Services.

3. ORGANIZATIONAL PROGRAMS AND SERVICES

Describe the existing or current programs and services of the organization and their impact in more detail. Depending on the size and type of your organization, you may wish to include: organizational history; programs/services and number of people served within each program; percentage of the operational budget that applies to each activity; geographical reach; size and expertise of staff (number of full- and



part-time staff members); and how staff and volunteers carry out the mission of your organization. Are there similar organizations operating in the area? If so, who are they and how are they similar?

4. ORGANIZATIONAL FINANCIAL SUMMARY

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

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

5. BOARD GOVERNANCE

Describe your board and how it operates. Depending on the size and type of your organization, you may wish to include a variety of information. For example: What is the role of your board? How does the board support and advance the mission of your organization? How does the board exercise its responsibility for financial oversight? Does the board provide individual financial support for the organization? If so, how much does the board (as a group) contribute and for what purpose? Have they given specifically to this project? How often do the board and board committees meet?

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How are board members identified, recruited, oriented, and evaluated? Will members of the board be directly involved with the proposed project? Does the organization have an advisory board? If so, please describe how it differs from the governance board.

6. PROJECT SUMMARY

Indicate the amount requested from the Trust and the total project cost. Provide a concise description of the project. You may find it easier to complete this section after filling out the Full Project Description, Section 7C.

SECTION 7

Upload your responses to Sections 7A–7E in Word, Excel, or PDF formats. **Please adhere to the specific page limits and use no less than 11-point font in narrative areas and no less than 10-point font in a matrix, chart, or spreadsheet.**

Please note that by design, application Sections 7A–7E are very closely related—often interrelated—and should be carefully considered as a whole. These sections will provide important information about the proposed project to Trust staff and trustees.

7A. PROJECT EXPENSE BUDGET AND NARRATIVE SUMMARY (UP TO ONE PAGE)

There are many ways to present an expense budget. Please consider the following when developing an expense budget for your application. Provide a project budget and associated line item expenses, in column form, for the total project cost, not just the portion of the project for which Trust support is being requested. An example would be to provide a project budget for the total project cost of the new science building construction and not just the chemistry classroom, for which funding is being sought.

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

Some project line item expenses may require some explanation, and so we request a



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

If your organization is requesting Trust support for a specific item in the budget, please note the item and the amount with an asterisk. If Trust support is being requested toward a number of line item expenses, please develop an additional column titled Murdock Request (next to the project expense column) and note the amount being requested from each expense category. For projects of two years or more (these are typically a program expansion, capacity building initiative, or new initiative), please develop a Murdock Request column for each year. A multi-year project (a program expansion, capacity building initiative, or new initiative) may be illustrated in a landscape format. If you would like to submit an additional detailed budget and narrative longer than one page, you may upload it in the optional attachments screen. But **you must provide a summary project expense budget and narrative in Section 7A of the application that corresponds to the attachment.** The Toolbox on the Trust’s website will offer additional ideas on presenting project expense budgets. Depending on the complexity of the project, you may use up to one full page.

7B. PROJECT FUNDING PLAN BY SOURCE SUMMARY (UP TO ONE PAGE)

List the project funding goals for each anticipated source (board members, other individuals, donors, foundations, businesses/corporations, government [grants or public agency sources], organization’s earned income, reserves, debt instruments, in-kind, etc.). Indicate the status of each funding source by listing the funds raised to-



date (contributions in-hand, pledges in writing, written notice of government grants, etc.). List the top three or four gifts in-hand or pledges committed. If you are seeking support for a multi-year project, list the goals by source for each year. Finally, list your top three or four major prospects, the amounts being sought from each, and the actual or expected decision dates (MM/YYYY). The Toolbox on the Trust's website will offer additional ideas on presenting a project funding plan. Depending on the complexity of the funding plan, you may use up to one full page.

7C. FULL PROJECT DESCRIPTION (UP TO FOUR PAGES)

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

There are a variety of ways your organization may approach the body of this section. The following are examples of information you may wish to provide to the Trust depending on the complexity of the project and other variables. How will this project advance the mission of your organization? Why is the project significant to your organization and your constituency? What problem or opportunity are you addressing in this project? Why is this project or program needed, and why is the organization acting at this time to advance this project? What are the specific goals of the project? You may wish to include: the circumstances out of which this specific request arises; the planning that led your organization to believe you could raise the funds needed to complete the project; partner organizations associated with this project; community or region to be served; target population; number of people to be served; detailed description of the project; the timeline (if appropriate, discuss project phases); project oversight and management; and strategies and



methodologies that will be incorporated to complete the project. Depending on the complexity of the project, you may use up to four pages.

7D. FUTURE OF PROJECT—SUSTAINABILITY (UP TO ONE PAGE)

Describe how the project will be sustained beyond the grant period. If this is a program expansion project, how will the program (activity or staff) be funded in the future? If this is a capital project, what sources of income will be required to meet new operating budget expenses? If this is an equipment project, what is the life cycle of the item(s), and how will it/they be replaced? Describe the program revenue and expense assumptions associated with the project. Please develop a pro forma (a statement of revenue and expense projections) illustrating the baseline or current operating revenue and expenses and a four-year projection of future operating revenue and expenses. If this is an equipment request, a pro forma is not necessary; however, please describe any current or planned budgeting policies or practices for replacing such items. The Toolbox on the Trust's website will offer additional ideas on presenting a pro forma. Depending on the financial complexity of the project, you may use up to one page.

7E. PROJECT OUTCOMES AND EVALUATION (UP TO ONE PAGE)

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

ATTACHMENTS

Required IRS Attachments

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

If your organization is a 501(c)(3) charity:

- Cover letter from the Chief Executive Officer certifying that your organization's IRS rulings are still correct—specifically referring to



both the 501(c)(3) tax exempt ruling and the 509(a) or 170(b) public charity ruling—and explicitly stating the following: “no modifications are planned or pending.”

- IRS document showing your 501(c)(3) tax exemption ruling and your 509(a) or 170(b) public charity ruling for the current legal name. Often, but not always, these rulings appear in the same IRS document. (**For more information about the public charity ruling, visit the [Toolbox](#) and see the document titled “IRS 509(a) or 170(b) Explanation.”**)
- If your organization is tax exempt under a group ruling for a central organization, attach the latest certificate of membership or evidence of current affiliation.

If your organization is a Government Entity:

- Complete the generic letter for Government Entity Status, a sample of which may be found in the Toolbox.

If your organization is a Tribal Government:

- Complete the generic letter for Indian Tribe Status, a sample of which may be found in the Toolbox.

Other Required Attachments

- List of names, addresses, and professional affiliations of your Board of Directors.
- Completed copy of the most recent financial statement audit. If an audit is not available, submit a copy of the financial statement review. If neither an audit nor reviewed financials are available, submit the most recently submitted IRS Form 990.
- Current and most recently completed fiscal year organizational budget with comparison (planned versus actual).

Optional Attachments

- Cover letter from the Chief Executive Officer endorsing the proposal and explaining how it furthers the organization’s mission and priorities.
- An executive summary of your current organizational strategic plan showing the relationship of this project to your plan. You may also include a business, marketing, and/or development plan if it correlates to the proposed project.



- Any recent newsletters, news articles, or a special brochure related to the project and/or campaign.
- One to three different 8-1/2" x 11" drawings of proposed plans for facility construction or renovation for which you seek Trust support.
- Professional resume or vita of consultants, leadership, or program staff if special qualifications are warranted.
- Preliminary qualification requirements or a job description(s) for the new position(s) for which funding is requested.

FINAL STEPS AND PROCEDURES

Once you have completed the General Application Form, review, edit, and double-check figures one last time. **Be sure the page and font limitations have been observed.** You may then submit the application form through our online system. Please note that when you have filled out all required sections and uploaded all required documents in the online application system, your application is complete. However, while it is complete, your application has not yet been submitted for processing. Once you are satisfied with your completed application, you must click the submit button, at which point your application will be submitted to the Trust.

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

If you need clarification of these instructions or have other questions, please visit the Trust's website at www.murdock-trust.org or call the Trust office at 360-694-8415.