GRANT PROSPECT: Middlesex Canal Association Building Project

**Charles Koch Foundation**

**Prospect: Not suitable D**

1. Geographic area = mostly Washington DC & Virginia
2. Supports academic and public policy research directed at free markets and “science of liberty.”
3. Does not fund capital construction.

However, Tom Raphael has a personal contact which he should pursue, requesting a personal contribution (not a grant, as MCA is not suited).

Funding Range: $9317 - $3million+

**Charles Koch Foundation**  
(formerly Charles G. Koch Charitable Foundation)  
1515 N. Courthouse Rd., Ste. 200  
Arlington, VA 22201-2915  
Telephone: (703) 875-1770  
Contact: Admin.  
Fax: (703) 875-1766  
E-mail: [email@charleskochFoundation.org](mailto:email@charleskochFoundation.org" \t "_blank)  
URL: [www.cgkfoundation.org](http://www.cgkfoundation.org" \t "_blank)  
**Type of Grantmaker**  
Independent foundation  
**IRS Exemption Status**: 501(c)(3)  
**Additional Descriptor**: Family foundation  
**Financial Data** (yr. ended 12/31/10): Assets: $242,332,070; Total giving: $11,192,922  
**EIN**: 480918408  
**990-PF**: [2010](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_201012_990PF.pdf" \t "_blank) [2009](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200912_990PF.pdf" \t "_blank) [2008](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200812_990PF.pdf" \t "_blank) [2007](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200712_990PF.pdf" \t "_blank) [2006](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200612_990PF.pdf" \t "_blank) [2005](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200512_990PF.pdf" \t "_blank) [2004](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200412_990PF.pdf" \t "_blank) [2003](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200312_990PF.pdf" \t "_blank) [2002](http://990s.foundationcenter.org//990pf_pdf_archive/480/480918408/480918408_200212_990PF.pdf" \t "_blank)

**Last Updated:** 8/14/2012

**Donor(s)**  
Charles G. Koch  
Fred C. Koch Foundation  
Fred C. Koch Trusts for Charity

**Background**  
Established in 1981 in KS.  
Founded by Charles G. Koch, Chairman and C.E.O. of Koch Industries, Inc., which is involved in refining, chemicals and consumer products. In 2008 the company was identified by Forbes as the second largest privately held company in America after Cargill. He is also the co-founder of the libertarian think tank the Cato Institute and the author of the book "Science of Success: How Market-Based Management Built the World's Largest Private Company."  
At the close of 2010, the market value of the foundation's assets totaled $242.3 million, a 17 percent increase over the 2009 value ($206.4 million)

**Limitations**  
Giving primarily in the Washington, DC area, including VA; some giving nationwide.  
No support for lobbying activities or candidates for political office.  
No grants to individuals (except through summer fellows program), or for capital construction, debt reduction or general fundraising drives or events.

**Purpose and Activities**  
The mission of the foundation is to advance social progress and well-being through the development, application, and dissemination of the "Science of Liberty". Funding for academic and public policy research directed at solving significant social problems through voluntary action and free enterprise. Support for projects that find market-based solutions to problematic social issues. For research, the foundation primarily funds institutions working with doctorate-level investigators in disciplines such as economics, history, philosophy, political science, and organizational behavior.

**Program Area(s)**  
The grantmaker has identified the following area(s) of interest:   
**Koch Associated Program**  
This program is a challenging job opportunity for professionals who are passionate about free-market ideas, and want to become more effective at advancing liberty throughout their careers. The foundation's aim is to develop the capabilities of each Associate through the program by providing management training, professional development, and the knowledge and skills necessary to achieve their career potential. The year-long program begins in June and ends in May. While in the program, each Associate works four days a week in a full-time position at a reputable non-profit organization. Job opportunities are as diverse as Associates, and range from policy research to communication and public relations. Each position gives Associates valuable professional experience pursuing their talents and interests, with the opportunity to earn greater responsibility and expand their roles by performing well. Visit the foundations web site for application guild lines. For any questions contact the foundation via e-mail: recruiting@cgkfoundation.org.  
**Koch Internship**  
The foundation internship program was established to develop the next generation of liberty-minded leaders and entrepreneurs. Over the course of the program, interns engage in key foundation projects while learning and applying Market-Based Management Interns work at non-profit 501 (c)(3) organizations in fascinating roles including policy research, leadership and talent development, grassroots education, marketing, and network development. This hands-on experience gives interns the chance to explore the non-profit sector while applying the management philosophy they are learning from the foundation, and allows them to build a network of like-minded friends and associates. Each intern is assigned a foundation mentor for the duration of the program. The mentor will guide the interns through assignments, assist them in learning the management framework and applying it to their non-profit work, and encourage them to become effective entrepreneurs for social change. For more information on the program e-mail the foundation at: recruiting@cgkfoundation.org.

**Fields of Interest**  
**Subjects**  
Economics  
Environment  
Legal services  
Public policy, research

**Geographic Focus**  
District of Columbia  
Virginia

**Types of Support**  
Conferences/seminars  
General/operating support  
Program development  
Program evaluation  
Research  
Seed money

**Publications**  
Application guidelines

**Application Information**  
See foundation web site for application guidelines and procedures. Application form not required. Applicants should submit the following:

1. Copy of IRS Determination Letter
2. Copy of most recent annual report/audited financial statement/990
3. Detailed description of project and amount of funding requested
4. Contact person
5. Copy of current year's organizational budget and/or project budget
6. Listing of additional sources and amount of support
7. Additional materials/documentation

Initial approach: Online grant proposal  
Copies of proposal: 1  
Deadline(s): None  
Final notification: 3 months

**Officers and Directors**  
*Note: An asterisk (\*) following an individual's name indicates an officer who is also a trustee or director.*  
**Charles G. Koch**,\* Chairperson  
  Affiliation(s):  *Koch Industries, Chairperson and Chief Executive Officer  
  Intrust Bank, N.A., Director  
  Institute for Humane Studies, Chairperson  
  Claude R. Lambe Foundation, Chairperson  
  Mercatus Center at George Mason University, Board Member  
  Mont Pelerin Society, Member*  
**Richard Fink**,\* President  
**Kevin L. Gentry**, Vice President  
**Brian Menkes**, Secretary and General Counsel  
**Vonda Holliman**, Treasurer  
**Charles Chase Koch**  
**Elizabeth B. Koch**  
**Elizabeth Robinson Koch**

**Financial Data**  
**Year ended 12/31/10:**  
Assets: $242,332,070 (market value)  
Gifts received: $42,034,259  
Expenditures: $19,516,343  
Total giving: $11,192,922  
Qualifying distributions: $18,957,391  
Giving activities include:   
$11,192,922 for 175 grants (high: $3,667,144; low: $800)  
$3,182,445 for 2 foundation-administered programs

**Additional Location Information**  
County: Arlington  
Metropolitan area: Washington-Arlington-Alexandria, DC-VA-MD-WV  
Congressional district: Virginia District 8

**Selected Grants**  
The following grants are a representative sample of this grantmaker's funding activity:  
$3,667,144 to George Mason University Foundation, Fairfax, VA, in 2010. For general operating support and educational programs, payable over 1 year.  
$2,159,500 to Institute for Humane Studies, Arlington, VA, in 2010. For general operating support, payable over 1 year.  
$512,445 to University of Arizona Foundation, Tucson, AZ, in 2010. For educational programs, payable over 1 year.  
$350,544 to Florida State University, Tallahassee, FL, in 2010. For educational programs, payable over 1 year.  
$272,100 to West Virginia University Foundation, Morgantown, WV, in 2010. For educational programs, payable over 1 year.  
$250,000 to Clemson University, Clemson, SC, in 2010. For educational programs, payable over 1 year.  
$250,000 to Jack Miller Center for Teaching Americas Founding Principles and History, Bala Cynwyd, PA, in 2010. For educational programs, payable over 1 year.  
$80,000 to Fund for American Studies, Washington, DC, in 2010. For educational programs, payable over 1 year.  
$25,000 to Acton Institute for the Study of Religion and Liberty, Grand Rapids, MI, in 2010. For educational programs, payable over 1 year.  
$9,317 to University of San Diego, San Diego, CA, in 2010. For educational programs, payable over 1 year.