

# Sidney Stern Memorial Trust

## Guidelines

### Grant-making Philosophy and Criteria

The Board of Advisors reviews all requests for grants. The Board endeavors to support soundly-managed charitable organizations that give service with a broad scope, have a substantial effect on their target populations, and contribute materially to the general welfare. The Board does not discriminate on the basis of ethnicity, race, gender, sexual orientation or religion.

The Board recognizes that it cannot meet all the demands upon its resources. In allocating its funds, the Board gives priority to the following areas, not necessarily in order of importance: **Charitable, Scientific, Medical and Educational Purposes.**

Under the terms of the Will of S. Sidney Stern, all funds must be used within the United States and grants cannot be made to individuals, political candidates or campaigns, lobbying projects or programs to directly influence legislation. A recipient organization must be exempt from income taxation under Federal law and, where applicable, California law.

The Board makes contributions to organizations that use the funds directly in the furtherance of their charitable and public purposes, not to redistributive agencies.

### Operational Guidelines

The Board accepts, reviews and votes on applications for grants throughout the year. Requests for grants are considered at each regularly-scheduled meeting.

At least once each year, the Board receives and reviews Wells Fargo Bank's reports and projections regarding the financial status of the Trust.

Since the processing of a proposal by the Board entails considerable study, and because a large number of proposals await review during the year, an applicant should allow a considerable period of time for a decision. No personal or email requests for update information will be entertained.

A summary grant proposal Application listing the required items noted, and no additional materials, should be submitted by regular USPS mail to:

**Sidney Stern Memorial Trust**  
**P.O. Box 457**  
**Pacific Palisades, CA 90272**

### Responsibilities of the Grantee

After a grant has been approved, funds are forwarded to the grantee institution for use in accordance with the conditions of the request and with any other conditions that the Board may impose. Subsequent significant changes in the approved purpose of the expenditure may be made only upon written authorization of the Board.

The award of a grant does not imply obligation or commitment by the Board concerning future support.

The Board requests that its permission be obtained before the name of the Trust or names of the members of the Board of Advisors are used in publicity regarding a grant and its results.

*The Sidney Stern Memorial Trust, a California charitable trust, was established in 1974 through the Will of S. Sidney Stern, and funded entirely from his estate.*

*Distribution of grants under the Trust is managed and controlled by a Board of Advisors*

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## Grant Proposal Information

**Please read the Guidelines of the Sidney Stern Memorial Trust before completing an Application for a Grant**

### **An Application must contain the following:**

1. A cover letter on organization letterhead, including date, brief description of purpose population served of the organization, amount requested, and contact information: contact name and title, phone number with extension and email address.
2. The Grant Proposal must contain the current date of application and the name of the organization as listed in *GuideStar Charity Check*, including dba and/or aka. If the organization is requesting funds under the name of an “umbrella” organization, that information should be included as well.
3. A concise description of the purpose and activities of the organization. A grant will be considered for “general operating expenses” unless otherwise specified for a particular project, which would require a description of the project for which the grant is requested.
4. A copy of the most recent IRS tax-exemption letter for a 501(c)(3) organization and/or the umbrella organization.
5. If applicable (doing business in California), a copy of the CA Franchise Board tax-exemption letter, which includes the organization’s 7-digit number as allocated by the Board.
6. A copy of the organization's most recent financial statement, most recent annual budget, as well as the budget for the individual project if applicable, and a list of other sources of funds for the particular project indicated above.
7. A copy of the organization’s latest IRS Form 990.
8. A list of corporations and foundations from which the organization has received funds.
9. The percentage of the organization’s budget which comes from all governmental funds.
10. A list of the members of the Board of Directors and their affiliations.

**When the Application is complete, please send by regular USPS mail to:  
Sidney Stern Memorial Trust  
P.O. Box 457  
Pacific Palisades, CA 90272**