

# S. MARK TAPER FOUNDATION

## GUIDELINES – 2017 GRANT CYCLE

The first step in applying for funding from the S. Mark Taper Foundation is to submit a Letter of Inquiry (LOI) adhering to the Guidelines below.

**LOIs are accepted during the period from December 1, 2016 through February 28, 2017. A hard copy of the LOI with all attachments must be at the Foundation's office by 12pm (noon) on Tuesday, February 28, 2017. LOIs submitted by e-mail or fax are not accepted.**

**All attachments must be included for the LOI to be complete. Incomplete LOIs will NOT be considered for review.**

The LOI should be a maximum of three pages, not including the requested attachments listed below. In the first paragraph of the LOI, please state the specific amount of funding being requested and its purpose. The LOI should be signed by the organization's highest ranking paid staff member. The LOI should include basic organizational, brief historical, and any relevant program information. Please clearly state how or why an S. Mark Taper Foundation grant would benefit your organization. Each LOI should indicate the number of unduplicated individuals served by the organization, the primary age group being served and the geographic area served. For program/project requests this demographic information should be provided for both the overall organization and the specific program/project.

**In the LOI, identify the primary contact person at your organization and include his/her name, title, mailing address, e-mail address and telephone number (direct dial or extension number), as well as the organization's website address.**

**For ALL LOIs, the following attachments must be included:**

1. List of current board members, including affiliations;
2. IRS Determination Letter indicating 501 (c)(3) status;
3. Organizational budget (including both revenue and expense) for the current fiscal year;
4. Income Statement/Statement of Activities (including both revenue and expense) for the most recently completed fiscal year.
5. Balance Sheet/Statement of Financial Position for the most recently completed fiscal year.

**For GENERAL OPERATING SUPPORT requests, the following attachments must be included:**

1. A list of grants received in cash for the past three fiscal years specifically for general operating support. *(Please refer to the required format on page 3.)*
2. A list of grants received in cash for the past three years for all other purposes. *(Please refer to the required format on page 3.)*

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GUIDELINES – 2017 GRANT CYCLE (CONT'D)

**For PROGRAM/PROJECT SUPPORT requests, the following attachments must be included:**

1. In the LOI, explain the specific purpose, duration and intended results of the program/project.
2. Attach a copy of the program/project budget (including both revenue and expense);
3. A list of grants received in cash for the past three years for this specific program/project.  
*(Please refer to the required format on page 3.)*
4. A list of grants received in cash for the past three years for other program/project support.  
*(Please refer to the required format on page 3.)*
5. A list of grants received in cash for the past three years for general operating support.  
*(Please refer to the required format on page 3.)*

Foundation staff will review the LOI and notify the organization if the Foundation requires additional information. Please **do not** send additional information or items with the LOI (this includes brochures, annual reports, Forms 990, DVDs, etc.)

Due to the high volume of LOIs received by the Foundation, you are encouraged to submit the LOI as early as possible. There may be a significant period of time (six to nine months) before an organization is notified regarding the Foundation's final decision. While your LOI is in process, please notify the Foundation of any significant program/project changes, address changes or key staffing changes – including changes for the contact persons listed in your LOI.

An LOI that does not include all required attachments is incomplete and will NOT be considered for review.

Letters of inquiry and related correspondence should be addressed to:

Adrienne Wittenberg, Executive Director  
S. Mark Taper Foundation  
12011 San Vicente Blvd, Suite 400  
Los Angeles, CA 90049

PLEASE NOTE: In **2018**, the LOI acceptance period will be shortened to  
December 1, 2017 through February 15, 2018.

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GUIDELINES – 2017 GRANT CYCLE (CONT'D)

**Required Format for Grants Lists**

The following is the required format for the grants lists referred to in the Guidelines.

Please provide separate pages for foundation grants, corporate grants and government grants. For each required grants list, be sure to include the specific funder, specific amounts received and the fiscal year during which each amount was given. If necessary, each list may be more than one page. If your organization receives significantly large grants from individual, you may add an “Individual” list.

**SAMPLE**

<b>ORGANIZATION NAME</b>			
Grants received during the last three full fiscal years for:			
_____			
(operating support/program support)			
Fiscal Year ends: _____			
Month/Day			
<b>Funder</b>	<b>(Year)</b>	<b>(Year)</b>	<b>(Year)</b>
<b>Foundation</b>			
ABC Foundation	\$	\$	\$
PQR Foundation	\$	\$	\$
The STUV Foundation	\$	\$	\$
WXY Foundation	\$	\$	\$
... etc.	\$	\$	\$
<b>Corporation</b>			
IJK Corporation	\$	\$	\$
MNO, Inc.	\$	\$	\$
... etc.	\$	\$	\$
<b>Government</b>			
City Department of BCD	\$	\$	\$
QRS State Agency	\$	\$	\$
County ZXW Department	\$	\$	\$
... etc.	\$	\$	\$

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### FREQUENTLY ASKED QUESTIONS

- **Who may submit a request to the S. Mark Taper Foundation?**

The S. Mark Taper Foundation will consider a Letter of Inquiry for any non-profit program or organization in Southern California. An applicant must be certified as a tax-exempt organization under Section 501(c)(3) of the Internal Revenue Code. During the Foundation's review process, equal consideration and due diligence will be given to all organizations – both those that are past grant recipients and those that have never received a grant from the S. Mark Taper Foundation.

- **I recently received a grant from the S. Mark Taper Foundation. When may I submit another Letter of Inquiry?**

For past grant recipients, there is a three-grant-cycle ineligibility period. As the S. Mark Taper Foundation has one grant cycle annually, this is a three-year period of ineligibility. For example, an organization that received a grant payment in December 2014 is eligible to compete for a grant beginning with the Foundation's 2018 grant cycle. The Letter of Inquiry process is the same for new organizations and past grantees. All eligible Letters of Inquiry compete on an equal footing. Please refer to our most recent set of guidelines before submitting a Letter of Inquiry.

- **What amount should I request in my Letter of Inquiry?**

The S. Mark Taper Foundation has three size categories as follows:

<b>Category</b>	<b>Grant Size</b>
Small	Up to \$50,000
Medium	\$50,001 - \$249,999
Large	\$250,000 and above

These categories are meant as a guide to assist organizations in determining how much to request. Due to limited resources, Foundation staff members are not available to discuss individual situations.

- **Does the S. Mark Taper Foundation fund general operating support?**

Yes, the S. Mark Taper Foundation does fund general operating support, in addition to program and capital support. Due to limited resources, Foundation staff members are not available to discuss individual situations.

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FREQUENTLY ASKED QUESTIONS (CONT'D)

- **I sent my Letter of Inquiry during a time period other than December – February. Will it be considered for funding in a later grant cycle?**

Letters of Inquiry are only accepted from December – February. Letters of Inquiry received at any other time are not considered for funding. Please submit a new Letter of Inquiry during the next December – February time period.

**Thank you.**