



# KEYBANK FOUNDATION

## GRANT PROPOSAL SUMMARY

Please include this document as the cover sheet to your grant proposal. If you wish to submit a letter of intent, complete this summary and submit it for review.

### WHERE TO SEND REQUESTS

Requests for funding from organizations within Northeast Ohio are reviewed by the KeyBank Foundation headquarters offices in Cleveland. Other proposals are evaluated by funding committees in our district offices throughout the United States. Contact the closest Key district office from the list of offices. Requests sent to the KeyBank Foundation headquarters that are more appropriate for district review, will be forwarded to the appropriate district office.

---

#### **Please provide the following information:**

Organization's Legal Name:

Organization's Employer Identification Number (EIN):

Organization's Tax Exempt Status:  501(c)(3)  501(c)(4) specify other \_\_\_\_\_

Mailing Address (including city, state and zip code):

Telephone and Fax Numbers:

Web Address:

Organization's Lead Executive (Executive Director, CEO, or President):

Name:

Title:

Telephone and Fax Numbers:

Email Address:

Organization's Contact Person for This Proposal:

Name:

Title:

Telephone and Fax Numbers:

Email Address:



# KEYBANK FOUNDATION

## GRANT PROPOSAL SUMMARY

Project Title:

Amount Requested:

Type of Support Requested: Program \_\_\_\_\_ Capital \_\_\_\_\_ Other (specify) \_\_\_\_\_

Strategic Focus: \_\_\_\_\_ Financial Education \_\_\_\_\_ Workforce Development \_\_\_\_\_ Diversity

Geographic Area(s) Served by Grant Request:

Brief Project Description:



# KEYBANK FOUNDATION

## PROPOSAL DEVELOPMENT GUIDELINES

KeyBank Foundation is a nonprofit charitable foundation, funded by Key Corporation. KeyBank Foundation, through its civic programs, corporate contributions, and volunteerism supports organizations that foster economic self-sufficiency, principally in locations where the company operates. Our grants primarily fund programs that enhance *economic self-sufficiency* within our strategic priorities of financial education, workforce development, and diversity.

### FUNDING PRIORITIES

**1. Financial Education**

We fund programs that increase economic self-sufficiency by fostering effective financial management and understanding of financial services and tools, which create stronger and more productive populations. We have a keen interest in signature projects that could be replicated to serve other communities. Examples include:

- Programs that educate and prepare people to access and manage financial resources effectively
- Programs that foster savings and investments for low and moderate income people

**2. Workforce Development**

We fund programs that increase economic self-sufficiency by providing training and placement for people to access job opportunities for a stronger and better prepared workforce. Examples include:

- Career exploration, training, and placement programs
- Programs that encourage the growth and development of small businesses

**3. Diversity**

We fund programs that promote inclusive environments by employing systemic changes to improve the access of individuals of diverse backgrounds and encourage them to realize their full potential. Examples include:

- Vocational training and job placement for people with disabilities
- School to work readiness programs for underrepresented college students

## HOW TO APPLY

### Overview

- The KeyBank Foundation contributes to programs in the states in which we have retail operations: Alaska, Colorado, Idaho, Indiana, Kentucky, Maine, Michigan, New York, Ohio, Oregon, Utah, Vermont, and Washington.
- Preliminary inquiries are accepted by telephone or in writing. Please provide the name, address, telephone number and IRS tax-exempt classification of your organization; a description of the program for which you seek funding; the goals you hope to achieve; and, the amount requested.
- Each proposal must include the grant proposal summary that serves as your cover pages or a letter of intent regarding each proposal.
- Each proposal must include the attachments listed below.
- Each proposal must respond to the questions listed below.

### Objectives

1. What is the purpose of this project or request? What significance will this project have to recipients and the total community?
2. Provide demographic information that describes the population served by this program
3. Provide a brief history of the organization, its mission, and activities. Why it is the logical organization to carry out the project?
4. How will this project be implemented? Where will it take place? Who is responsible for its implementation? What is the timetable for completing it?
5. What is the proposed budget of this project? (Indicate all other sources of financial support.)
6. What organizations or corporations have committed funding for this project, and in what amounts? What additional organizations or corporations will be approached for funding of this project? What amount of support will be requested from each?
7. How will the project be sustained once foundation support is completed?
8. What review and evaluation procedures will determine the success of this project?

### Attachments

- Provide a list of principal staff, members of the board of directors, and the frequency of board meetings. Please identify any employees affiliated with Key who are associated with your organization.
- Include a copy of the organization's 501(c)(3) IRS tax-exemption ruling or determination letter.
- Provide the agency budget for the past two years including current amounts, percentages and sources of income (i.e., business and corporations, foundation, government, individual contributions, etc.).
- Indicate the amounts and percentages of total income expended over the past two years in the following categories: program services, fund-raising and administration.
- If your agency is an affiliate of another organization (e.g. United Way, Urban League), please indicate.

## **Restrictions**

We cannot fund every worthwhile endeavor. We do not make the following types of grants:

- Grants are primarily made within the following states in which we have retail operations: Alaska, Colorado, Idaho, Indiana, Kentucky, Maine, Michigan, New York, Ohio, Oregon, Utah, Vermont, and Washington.
- Grants for individuals
- Grants for memberships
- Grants for lobbying or political activities
- Grants for veteran or fraternal organizations
- Grants for advertisements
- Grants for athletic teams
- Grants for organizations outside the United States
- Grants for organizations that are inconsistent with U.S. equal opportunity policies
- Grants for selected organizations with Internal Revenue 509(a) III - status
- Grant proposals that are incomplete or do not adhere to the stated requirements.

## **REVIEW PROCESS**

The KeyBank Foundation typically reviews and decides upon requests quarterly. There are no deadlines by which you need to submit your proposal. Proposals are reviewed by contributions committees comprised of officers within the corporation. Proposals may be submitted via postal mail or e-mail, but not by fax.

## **WHERE TO SEND REQUESTS**

Requests for funding from organizations within Northeast Ohio are reviewed by the KeyBank Foundation headquarters offices in Cleveland. Other proposals are evaluated by funding committees in our district offices throughout the United States. Contact the closest Key district office from the list of offices. Requests sent to the KeyBank Foundation headquarters that are more appropriate for district review, will be forwarded to the appropriate district office