



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) specify other

Mailing address (including city, state and ZIP code):

Telephone number:

Fax number:

Email address:

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

Name:

Title:

Telephone number:

Fax number:

Email address:

Organization's contact person for this proposal:

Name:

Title:

Telephone number:

Fax number:

Email address:



KeyBank Foundation

Proposal Development Guidelines

Project title:

Total amount requested:

Annual payments 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:



Background

KeyBank Foundation is a nonprofit charitable foundation, funded by KeyCorp, KeyBank National Association (“KeyBank”), and their affiliates. KeyBank Foundation, through its civic programs, corporate contributions, and volunteerism supports organizations and programs 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 systemic change and signature projects that could be replicated to serve other communities.

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.

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.

How to apply

Overview

- KeyBank Foundation primarily funds programs where KeyBank has community banking 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 following information about your organization and the program for which funding is requested: name, address, telephone number, IRS tax-exempt classification, tax ID #, program description, goals you hope to achieve, and amount requested.
- Please include the grant proposal summary as cover pages or as a letter of intent for each proposal.
- Each proposal must respond to the questions and include the attachments 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 is it 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?
9. Does the agency or project proposed focus on low and moderate income clients or neighborhoods?
10. Briefly describe your agency's environmental sustainability program.
11. Identify proposed results of each program grant objective.

Objective (anticipated changes)	Activities (actions, services)	Quantifiable results (completion rates)	Impact (changes)
Example: Increase employment of 20-24 year old inner city residents	Assess skills and interests Deliver training	# of program graduates	# and percent of the graduates employed for one year

Attachments

- Provide a list of principal staff and members of the board of directors. Please note the diversity of the board and the frequency of board meetings. Also, identify any employees affiliated with Key who are associated with the organization.
- Include a copy of the organization's IRS tax-exemption ruling or determination letter.
- Provide the agency's most recent audited financial statement or signed 990 tax return.
- If your agency is an affiliate of another organization (e.g. United Way, Urban League), please indicate.

Recipients

KeyBank Foundation cannot support every worthwhile endeavor. Our charter and board provide restrictions and guidance on what we may fund:

- We may only fund nonprofit organizations for whom contributions are tax-deductible
- We may fund organizations in the following states in which KeyBank has retail operations: Alaska, Colorado, Idaho, Indiana, Kentucky, Maine, Michigan, New York, Ohio, Oregon, Utah, Vermont, and Washington.
- We may only fund organizations inside the United States; we are prohibited from making grants to organizations whose base of operations is outside the U.S.
- We may not fund individuals directly although our grants may benefit individuals through scholarships for example.
- The organizations we fund must have practices that are consistent with U.S. equal opportunity policies



KeyBank Foundation

Proposal Development Guidelines

Review process

The KeyBank Foundation typically reviews and decides upon requests quarterly. There are no deadlines. Proposals are reviewed by committees comprised of officers within the organization. Proposals may be submitted via postal mail or e-mail KeyBank_Foundation@keybank.com, 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.