

THE KELLER FAMILY FOUNDATION
c/o Equitas Capital Advisors, LLC
365 Canal Street, Suite 3050
New Orleans, LA 70130

GUIDELINES

I. THE PROPOSAL

1. Proposals must be submitted electronically or postmarked before February 1 to be considered by the Trustees at their spring meeting and before September 15 for consideration in the fall. In extraordinary circumstances exceptions may be made, but only at the request of a Trustee.
2. The Keller Family Foundation prefers that all applications be submitted using our on-line grant application system. If you would like to submit your application by mail, please complete the Grant Proposal Summary Form and all information required by the Grant Proposal Guidelines and mail to the Keller Family Foundation c/o Equitas Capital Advisors, LLC, 365 Canal Street, Suite 3050, New Orleans, LA 70130.
3. Limit your proposal narrative to 3 letter size (8 1/2 by 11 inch) pages in a font size not less than 10 point.
4. Your proposal narrative must include:
 - a. The legal name of the organization requesting a grant;
 - b. The name of the officer or other person to be contacted if there are questions concerning the proposal and the telephone number at which the contact person can be reached;
 - c. The mailing address at which the organization can be contacted and any fax number, e-mail address and/or web site used by the organization;
 - d. The address at which the organization carries out the activities for which the grant is sought if different from the mailing address;
 - e. A concise statement of the purpose of the organization, and the purpose of the specific project or program for which the grant is sought;
 - f. The amount of the request;
 - g. The total cost of the project or program, or if the proposal is for a grant of general operating funds, the total amount spent by the organization in the prior year along with the budget for the organization or for the project or program to be funded;
 - h. Other sources of funds, listing proposals to other foundations and their results;
 - i. The names of people, other than those employed by the organization, who will be able to tell us, if they are contacted, of the efficacy of the program.
5. Your proposal narrative should also answer the following questions:

GOALS: What are you going to achieve?

PROGRAM: What actions will you take to achieve these goals?

RATIONALE: What makes you think your program will work?

EVALUATION: How will you know when you have achieved the goals? What changes will you see? How will you measure the changes that have occurred?

LEARNING: What do you expect to learn that will improve your program or your organization?

6. In addition to the 3 page proposal, include 1 copy of each of the following:
 - a. Your tax exempt letter from the IRS;
 - b. The latest audited financial statement of the organization, or a statement that there is none, giving the reason why;
 - c. The first 2 pages of your IRS Form 990; and
 - d. A completed copy of the enclosed checklist of required items.
7. If submitting your application by mail, please do not staple or bind your materials. Please use paper clips, binder clips, or other easily removable means of securing your paper. Send no videos.

II. PURPOSE

1. Although others may be considered, the Keller Family Foundation funds primarily New Orleans area organizations or services to be rendered in New Orleans. Applications from local and regional organizations outside of the New Orleans area will be considered only if at least one of the trustees has extensive knowledge of the organization.
2. Although others may be considered, the Foundation funds primarily organizations devoted to education, civic affairs, and social services.
3. The Foundation does not make grants to be used to finance the education of a particular individual, or for purely religious purposes.

III. PROGRESS

1. In addition to other material required, if the proposer has received a grant from the Keller Family Foundation in the prior year for a specific purpose or project, there shall be attached to the proposal a description no more than 1 page in length describing the progress on the project or program funded.

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REQUIRED ITEMS

Enclosed you will find the following required items:

- Grantmakers Form (Summary Sheet) _____
- Proposal _____
- Program or project cost _____
- Organization or project budget _____
- Actual expenditures in prior year _____
- Tax Exempt Letter _____
- Financial statement _____
- Form 990 _____
- References _____

Organization: _____

Form completed by: _____

Date completed: _____