

## **Mission**

The Kerr Foundation, Inc. is a nonprofit charitable and educational Oklahoma corporation, established to identify and support programs, organizations and institutions that provide new or enhanced opportunities for those within the granting areas, particularly the young.

## **Policy Statement**

It is the policy of The Kerr Foundation, Inc. to identify and support programs, organizations and institutions that provide new or enhanced opportunity to those within the granting areas, particularly the young. We believe that this is best accomplished in the areas of education, health, cultural development and community service. While preference is given to Oklahoma organizations and institutions, we recognize that such located outside the state and region can also have a beneficial impact on the economic, social and cultural growth and development of Oklahoma. Therefore, we will entertain grant requests from the Southwest, i.e. **Arkansas, Colorado, Kansas, Missouri, New Mexico and Texas**. In addition, recognizing the significant and continuing influence of the Federal government on our state and region, we will also accept proposals from the **Washington, D.C.** area. Oklahoma organizations will receive first priority for available funds.

ONLY 501(c)3 organizations may apply.

Favorable consideration of a proposal will normally be in the form of a challenge grant. This mean that the organization/institution approved for a grant must first, in order to receive payment of the amount of the grant from The Kerr Foundation, Inc., raise or secure grants, donations and pledges in a total amount equal to that specified in the Kerr grant. The Challenge amount is usually dollar for dollar, and normally must be secured within twelve months from the date of the award.

## **Guidelines**

Proposals should be received by January 21, 2011 for the March 2011 Foundation grant allocation meeting. Please note our office hours are 9:00 a.m. – 4:30 p.m. Necessary information will be determined by the individual nature of each request, but should include:

1. Cover letter with summary of request \*
2. Institutional Profile form completed \*
3. Proposal Summary form completed \*
4. Proposal narrative \*
5. Documentation as appropriate to the request \*
6. Internal Revenue Service 501(c)(3) letter

\*Please send an original and two duplicates

Upon acceptance of a proposal, the applicant will be informed as to when action by the Trustees may be anticipated. Grant awards will be made contingent upon signing a grant contract which includes provision for a project evaluation. Foundation Trustees and/or staff often conduct site visits to organizations being considered for a grant award.

Proposals should be addressed to:

Mrs. Robert S. Kerr, Jr.  
President & Chair, The Kerr Foundation, Inc.  
12501 N. May Avenue  
Oklahoma City, OK 73120

## Institutional Profile

Name of Institution/Organization:	
Phone:	
Date Application Completed:	
Mailing Address:	
Physical Address (required):	
Person Completing Profile (name/title):	
Chief Executive Officer (name/title):	
Chief Source of Primary Institutional Support:	
Governing Board Members (name and city of residence):	
Purpose of Institution/Organization:	
Short Historical Sketch:	
Institutional Objectives for Future (next 3-5 years):	

## Summary of Proposal

Organization:	
Mailing Address	
Physical Address (required)	
Phone #	
Contact Person	
Title	
Date Proposal Prepared	
Funds Requested	
Purpose of Funds Requested	

**Proposal Narrative**

Is a copy of IRS Tax-Exempt 501(c)3 Status Letter Attached?  Yes  No

ID Number: \_\_\_\_\_

Is your request for Tax-Exempt 501(C)3 Status Still in Process?  Yes  No

Has your organization previously applied to the Kerr Foundation?  Yes  No

If Yes, when and what was the disposition?

### Sources of Private Gift Income

	Previous Year	Current Year	Projected Coming Year
Sources*			
TOTAL			

\*for example: governing board, individuals, corporations, foundation, other

### Details of Gifts, Grants & Bequests from Governing Boards

From Present Members**		From Past Members	
Year	Amount	Year	Amount

\*\* Do not list by name; only date and amount. Include family gifts and personal business-related gifts. Show receipts only; do not include pledges or commitments.

**Summary of Operational Activities**

Expenses	Previous Year	Current Year	Projected Coming Year
Administration			
Programs			
Maintenance & Operations			
<b>Total</b>			

Income	Previous Year	Current Year	Projected Coming Year
<b>Total</b>			


**THE KERR FOUNDATION, INC.**

Amount of Endowment (if applicable)	Market Value	\$
	Book Value	\$
Total Annual Return to Institution on Endowment	Previous Year	\$
	Current Year	\$
	Coming Year	\$
Value of Plant and Equipment	Book Value	\$
	Replacement Value	\$

Do you conduct a review or evaluation of your Executive Director or the person in charge of directing the administration process?	
If yes, how frequently is the review or evaluation done?	
What method of evaluation is used?	