PHILANTHROPIC SOLUTIONS
STANDARD GRANT APPLICATION FORMAT

Important Note: Each foundation has **maximum page limit requirements or suggestions**, so please refer to the state-specific application procedures for detailed guidance.

1. **Standard Grant Application Coversheet** *(found on page 3)*

2. **Organization Summary**
   Provide a brief description of the mission, history, goals, services/programs, organizational structure, and key achievements of the organization.

3. **Description of Specific Request**
   Please describe the services for which you are seeking support. If project support is requested, tailor your responses to that particular project; if operating support is requested, tailor your responses to address the organization. Please focus on the following components:
   • Describe the need your organization is addressing
   • State the connection between your organization and/or project work and the mission of the specific foundation toward which you are applying
   • Provide information about the constituents who benefit from your organization's work (age, gender, race/ethnicity, income levels, geographic representation, any disabilities, language(s) spoken, or other criteria relevant to the work)
   • State the goals and expected outcomes of this work, and include a timeline for meeting these goals and outcomes
   • Describe the program design, giving detailed information about **how** program activities will occur
   • Describe the challenges to the success of the proposed activities and how these factors could be overcome
   • Describe how the amount requested was determined, how it will be applied, and sources of future funding

4. **Monitoring and Evaluation**
   Please address the following:
   • Include details of how your organization defines and monitors success for the organization, or if program support is requested, for the specific program
   • Identify the short-term and long-term indicators of success
   • Describe how you have used evaluation results (qualitative or quantitative) to make changes and improve your organization's and/or program's performance and impact

   Please include a summary of any evaluation results, if available. If seed funding is requested, please detail the evaluation plans to include the components listed above.

Attachments:

1. **Organizational Budget**
   Include a budget for the organization for the current fiscal year. Please provide budget projections if multi-year support is requested.

2. **Project Budget** *(Not applicable for general operating requests)*
   If the requested funds are to be used for anything other than the general operating expenses of the organization, include a detailed line-item budget for the project. Please provide budget projections if multi-year support is requested.

3. **Sources of Funding**
   Provide a list of foundation, corporate and/or government grants secured over the past 2 years. Please state the source, dollar amount, grant time period, and the date received or requested. Also include any pending requests still outstanding.

   If operating support is requested, provide this information for the organization; if project support is requested, also provide any additional funding earmarked for the project. If multi-year support is requested, please provide information on any multi-year pledges.

4. **List of Board Members**
   Provide a list of the members of the current Board of Directors and their professional affiliations.

5. **Copy of Tax Status Letter**
   Provide a copy of the organization's most recent IRS Tax-Exempt Ruling Letter, verifying that the organization is a qualified charity under section 501(c)(3) of the Internal Revenue Code and not a private foundation.

6. **Audited Financial Statements**
   Provide a copy of the organization's financial statements for the most recently completed fiscal year (audited if available).

Additional Notes:

1. Please do not send any materials or attachments other than what is requested by the specific foundation. Additional materials will not be reviewed.

2. Please do not add the foundation or any of its representatives to general mailing or electronic lists, unless specifically requested.

3. Make sure you have responded to any specific requirements of the foundation. These requirements have been stated in the respective Foundation detail pages and Application Procedures documents on our website, www.bankofamerica.com/grantmaking.

PHILANTHROPIC SOLUTIONS
STANDARD GRANT APPLICATION COVERSHEET

*This coversheet **must** be included with all requests.* Please limit your responses to the space provided here and make additional comments in the proposal submitted with this coversheet. You can download and save this file, and type your responses directly in the saved document; or you can print this coversheet and clearly handwrite or type your responses.

Proposal Management Information

If you are unclear how to complete this section, please refer to the Frequently Asked Questions section of our website.

Foundation Name to which you are applying:

Organizational Information

Legal Name of Organization:

Address:

City:	**State**:	**Zip Code**:

Website:

Phone:	**Fax**:

Executive Director Name: Mr. ☐   Ms. ☐   Dr. ☐

Contact Name (if different from above): Mr. ☐   Ms. ☐   Dr. ☐

Contact Title:	**Contact Email**:

Contact Phone:	**Ext.**:	**Fax**:

Fiscal Agent Name (FA) (if applicable):

FA Address:

FA City:	**FA State**:	**FA Zip Code**:

IRS Determination Ruling Date: / /	**Federal Tax I.D. #**:

Brief Overview of Organization (60 words or less):

# of Full-time Employees:	**# Part-time**:	**# Volunteers**:

Fiscal Year Dates: Beginning (Month/Day):   Ending (Month/Day):

***Most Recent Completed* Fiscal Year:**   Revenue: $ Expenses: $

***Current* Fiscal Year Projections:**   Revenue: $ Expenses: $

Sources of organizational revenue from the *most recent completed* fiscal year (list % of total revenue):

Federal	%	In-kind	%
State	%	Individuals	%
City	%	Endowment	%
Fees	%	United Way	%
Foundations	%	Other (Explain)	%
Corporations	%		

Request Information

Funds Requested: $ over   year(s)

Type of Support Requested: Capital ☐   General Operating ☐   Program/Project ☐   Other ☐

Please note: Not all types of support are provided by every foundation, so please check the website for specific guidelines.

Brief Overview of Request: (60 words or less)

Approximate Geographic Location, Demographics, and Description of Population Served: (60 words or less) *If the foundation to which you are applying has specific geographic restrictions, please provide a breakdown of number or percentage of people served by the respective towns.*

*If you are requesting general operating funds, you do **not** need to complete the section below.*

Project Title (if applicable):

Project Budget (if applicable):

Most Recent Completed **Fiscal Year:** Project Revenue: $ Project Expenses: $

Current **Fiscal Year Projections:**   Project Revenue: $ Project Expenses: $

Sources of project revenue from the *most recent completed* fiscal year (use projections if project is new):

Federal	%	In-kind	%
State	%	Individuals	%
City	%	Endowment	%
Fees	%	United Way	%
Foundations	%	Other (Explain)	%
Corporations	%		

We have read the Application Procedures and respective Foundation detail page and understand any specific requirements of the foundation toward which we applied.

We agree to report to the Trustee on the expenditure of funds received.

Signed: Title: Date: