

# Bank of America Private Bank Philanthropic Solutions Grantmaking Procedures – California Office

---

## I. INTRODUCTION

Bank of America, N.A. serves as trustee, co-trustee or agent to numerous private foundations. In the California office, one donor has granted discretion to Bank of America Private Bank to design and execute a charitable grantmaking program to support nonprofit organizations serving vital community needs.

We have prepared these grantmaking guidelines as a tool to help the nonprofit community better understand the grantmaking goals and grant application process for these foundations.

In California, the Frends Foundation distributes approximately \$275,000 annually. All grants are awarded in the Counties of Los Angeles, Ventura, Santa Barbara, San Luis Obispo, Orange, Riverside, San Bernardino, and San Diego.

---

**For information on submitting progress reports or final reports, please see page 2.**

---

## II. PHILANTHROPIC GOALS

### Program Focus Areas

The **Ethel Frends Foundation** supports and promotes canine care and/or canine education.

### Type of Support

Grants from the Frends Foundation are 1 year in duration. Grant requests for general operating support are strongly encouraged. Program support will also be considered. Small, program-related capital expenses may be included in general operating or program requests.

## III. APPLICATION PROCEDURES

The California office currently manages 1 discretionary foundation. The first step in the application process is to determine if there is a match in your organization's work with the funding parameters of the Frends Foundation.

### Before You Apply

Before you start the application process, we recommend that you thoroughly research the information provided at [www.bankofamerica.com/grantmaking](http://www.bankofamerica.com/grantmaking). The website provides detailed information about the Frends Foundation. Specifically, we recommend that you thoroughly read the **Foundation Overview** page, which is a 1-page summary on the foundation, and the **Frequently Asked Questions (FAQ)** tab which provides helpful overview information.

After exploring our website, you should be able to determine:

1. If your organization in fact meets the geographic and/or programmatic parameters of the foundation.
2. The proposal deadline of the foundation, ensuring that your proposal is submitted at the appropriate time of the year.

### **Grantee Lists**

You may review each foundation's most recent list of grantees in the 'Grant History' section of each **foundation detail** page. The interactive *Foundation Maps* tool is part of Candid-The Foundation Center's eGrant Reporting Program. To learn more about navigating the Maps, visit Candid-The Foundation Center's tour of *Foundation Maps*. (<https://maps.foundationcenter.org/tour.php>)

### **Submitting an Application**

**Please note that the Ethel Friends Trust uses an online application process.** Please review the Ethel Friends **foundation detail** page on our website: [www.bankofamerica.com/grantmaking](http://www.bankofamerica.com/grantmaking) to access the 'Apply Now' link and review the Online Application Help document.

Please submit online applications by 11:59 p.m. on the day of the foundation's deadline date. If the application deadline date falls on a weekend or a federally recognized holiday, we do not extend the deadline, therefore applications must be submitted on the prior business day by 11:59 p.m.

Online grant applications will be accepted 24-hours a day, 7 days a week, generally on, or prior to the proposal due date. However, applicant inquiries can only be answered during normal business hours, Monday through Friday, 9 a.m. – 5 p.m. PT. Please be advised that technical support is **NOT** provided on weekends for password resets or general technical inquiries. Therefore, it is best to start your application early, seek technical support during business hours, and to submit your application in advance of the due date.

### **Post Grant Reporting**

A grant report is required within 1 year of the grant application date, regardless of whether all of the funds have been spent. You will be ineligible for future grant funding if this report is not received within a year of the grant award. Organizations receiving a multi-year award are required to submit reports annually until the end of the grant term.

We are in the process of moving to online grant reports for approved grant applications submitted online, so check your [MyAccount](#) portal to see if there is a **Requirement** tab visible. Open the **Requirement** tab to see if there is a published grant report form specific to your last grant award, if applicable. If the online grant report form is not yet visible, let us know via email, [ca.grantmaking@bofa.com](mailto:ca.grantmaking@bofa.com), and we can publish an online form to your account.

## V. CONTACTS

Please feel free to email or call us to discuss your grant request before preparing a formal proposal.

| <u>Name</u>  | <u>Email Address</u>   | <u>Phone Number</u> |
|--|--|---------------------|
| <b>Mitzy Cabrera</b><br>AVP, Philanthropic Administrator | <a href="mailto:mitzy.cabrera@bofa.com">mitzy.cabrera@bofa.com</a>           | 1.213.861.5117      |
| <b>John Ostler</b><br>SVP, Philanthropic Client Director | <a href="mailto:john.w.ostler@bofa.com">john.w.ostler@bofa.com</a>           | 1.213.861.5183      |
| <b>Hector Santillan</b><br>VP, Philanthropic Officer     | <a href="mailto:hector.m.santillan@bofa.com">hector.m.santillan@bofa.com</a> | 1.213.861.5183      |

## VI. FREQUENTLY ASKED QUESTIONS (FAQs)

The following FAQs provide California-specific guidance, but we encourage you to also review the FAQ tab at [www.bankofamerica.com/grantmaking](http://www.bankofamerica.com/grantmaking) for a complete understanding of the grantmaking process. On the FAQ tab, we provide more nationally oriented FAQs.

### **Grantmaking Process**

#### **1. Who reviews my proposal and makes the final funding decision?**

After the proposal is received, the Trust Officer will conduct a preliminary check to ensure it is complete and meets with the funding parameters for the foundation. If it is complete, additional staff may review the proposal, conduct site visits, and request any additional information if needed. Recommendations are then made in the context of all pending requests. These recommendations are then submitted to a review committee for final approval.

### **Applying for a Grant**

#### **1. How do I identify an appropriate dollar request?**

In general, foundations consider several factors when reviewing a request, including the significance of the social need being addressed by the organization/project; how effectively the organization is working toward meeting that need; and the organization and/or project budget size.

#### **2. Are there other California-focused funding opportunities available from foundations beyond the 1 described in this document and on the website?**

Yes. There are many private foundations managed at the Private Bank and the California Philanthropic Solutions Team. We have provided background and application information for 1 foundation located in California where Private Bank associates are involved in the discretionary grantmaking aspect of managing the foundation. For information regarding other foundations administered by the California office, please contact [hector.m.santillan@bofa.com](mailto:hector.m.santillan@bofa.com).

#### **3. Should I apply for single or multi-year support?**

Grants awarded by the Friends Foundation are 1 year in duration.

#### **4. Do you invest in start-up nonprofits or in programs that are not yet off the ground?**

We typically do not provide support for start-ups.