

Bank of America Private Bank Philanthropic Solutions Grantmaking Procedures – Connecticut Office

I. INTRODUCTION

Bank of America, N.A. serves as trustee, co-trustee, or agent to numerous private foundations. The Connecticut-based Philanthropic Solutions office manages many of these discretionary foundations which support nonprofit organizations serving vital community needs. The majority of these foundations were created and structured by donors to provide focused grantmaking based on a specific program and/or geographic area.

Working with internal or external distribution committees, co-trustees, family members, or external advisors, we carefully evaluate grant proposals to ensure that meaningful grants are awarded in accordance with the philanthropic mission of each foundation. We have prepared these grantmaking guidelines as a general overview to help the nonprofit community better understand the grantmaking goals and process for Connecticut-based foundations.

Section IV provides a summary of many of the major foundations administered in Connecticut, their application deadlines and other key information. There are additional discretionary foundations in Connecticut that are not currently listed in this document or on our website. After researching foundations on our website, if you have not identified a potential funding match, please contact us at ct.grantmaking@bofa.com. We will advise you if there are other potential funding matches among other foundations that are not currently listed.

The majority of grants from these foundations are awarded in Connecticut; however, there are a few foundations with geographic focus areas reaching outside the state. Please review Section IV of these guidelines to learn more about the various foundations and their geographic focus areas.

Please note that if your organization is awarded a grant, a Post Grant Evaluation Report is required within 1 year of the grant application date. Please see pages 10 and 11 for more details.

II. PHILANTHROPIC GOALS

Program Focus Areas

We seek to positively impact the lives of the traditionally underserved within our communities through our support of charitable organizations. There are a limited number of Connecticut foundations where the donor granted **broad** funding discretion to Bank of America, Private Bank. These foundations generally fund the areas of human services, education, health care, the arts, and the environment.

The majority of foundations administered in Connecticut have specific funding guidelines; therefore, we ask that you please refer to our website, www.bankofamerica.com/grantmaking, to learn more about the individual foundations and the specific program focus areas. You may research the various foundations using the Find a Foundation Search feature which will provide you with further details and giving preferences of the foundations.

Type of Support

Several of the foundations have limitations and will only provide support for programs and/or projects. The majority of the foundations will provide general operating support in addition to program and project support. Please be sure to check the guidelines of each of the respective foundations. None of the foundations provide support for endowment campaigns.

Please refer to our website to learn more about the giving preferences and restrictions. You can navigate to all of these foundations using the 'Find a Foundation' search feature. This will allow you to research each respective **foundation detail** page for further clarification on the types of grants and giving preferences.

Other

We typically do not provide support for start-up nonprofits or programs that are not yet established. However, we are open to discussing possible opportunities with you.

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>)

III. APPLICATION PROCEDURES

Each foundation has its own mission statement, funding parameters, and application deadlines. The first step in the application process is to determine if there is a match between your organization's work and the funding parameters of any of the foundations. Based on these results, you will select a particular foundation(s) to direct your application.

*Due to the high volume of inquiries, we ask that you visit our website to research the most appropriate funding matches **before** contacting us with questions and clarifications.*

Before You Apply

We recommend that you thoroughly research the information provided at www.bankofamerica.com/grantmaking. The website provides detailed information about each foundation, and the Find a Foundation search feature may assist you further in selecting the various foundations. Specifically, we recommend that you thoroughly read the **foundation detail** pages, which are 1-page summaries on each foundation, and the **Frequently Asked Questions** (FAQ) tab which provides helpful overview information. After exploring our website, you should be able to determine:

1. An appropriate foundation by entering the *Area Served* and/or *Program Type* preference(s) in the search filter
2. If your organization meets the geographic and/or programmatic parameters of the specific foundation
3. The proposal deadline of the specific foundation, ensuring that your proposal is submitted at the appropriate time of the year

Please refer to Section IV for details about the geographic focus area(s) and proposal due dates of each foundation.

Submitting an Application

Please note that the majority of **the foundations have moved to an online application process**. Please see the individual **foundation detail** page to access the ‘Apply Now’ link and to review the Online Application Help document for more detail. For your convenience, only the foundations **not** currently accepting online applications are in **bold** type in section IV.

Special Requirements:

The foundations listed below require online applications and have a geographic restriction for which we require a breakdown of number/percentage of people served **by specific towns**. **Please note the breakdown of number/percentage of people served by specific towns in the online application in the ‘Demographics for This Request section: Additional Demographics’ field.**

- The Anna Fitch Ardenghi Trust
- The Thomas J. Atkins Memorial Trust
- The Lena Benas Memorial Fund
- The Bodenwein Foundation
- The Marion Isabell Coe Fund
- The George Ensworth Memorial Fund
- Mr. & Mrs. William Foulds Family Foundation
- The David Lane Trust
- The Frank Loomis Palmer Fund
- The Katherine Matthies Foundation
- Frederick McDonald Trust
- The Marjorie Moore Charitable Foundation
- The Linford & Mildred White Fund

Please submit online applications by 11:59 p.m. on the day of the foundation’s deadline date. If the deadline falls on a weekend or a federally recognized holiday, applications are due on the next 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. EST. 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.

Exceptions:

The foundations noted below are no longer hosted on the website. Please email ct.grantmaking@bofa.com for more information regarding the new application process.

- Eugene G. & Margaret M. Blackford Memorial Fund
- Frederick W. Marzahl Memorial Fund

IV. LIST OF FOUNDATIONS

Below is a list of the major foundations managed by the Connecticut office with geographic and program focus areas, corresponding application deadlines, and decision dates. Please note that the foundation names in **bold** type below have **not** moved to the online proposal process. See the individual **foundation detail** pages for more information.

| Foundation Name | Geographic Focus | Program Type | Application Deadline | Decision Time Frame | # of Copies |
|---|---|---|-----------------------------|----------------------------|--------------------------|
| Ensworth Charitable Foundation | Hartford & Surrounding Communities | Arts, Culture, & Humanities; Education; Health; Human Services | January 15 | 3-4 months | N/A – Online Application |
| The Lucy Downing Nisbet Charitable Fund | Organizations operating in VT | Animal-Related; Arts, Culture, & Humanities; Education; Environment; Health; Human Services | January 15 | 2-3 months | N/A – Online Application |
| Lily Palmer Fry Memorial Trust | New York City & Westchester County, NY; Fairfield & Hartford Counties, CT | Human Services | February 1 | 2-3 months | N/A – Online Application |
| Charles Nelson Robinson Fund | Hartford, CT | Education; Health; Human Services | February 15 | 2 -3 months | N/A – Online Application |
| Evelyn W. Preston Memorial Fund | Hartford, Connecticut | Arts, Culture, & Humanities | February 28 | 2-3 months | N/A – Online Application |
| The Charles H. Hall Foundation | Western Massachusetts | Arts, Culture, & Humanities; Education; Health; Human Services; Religion-Related | March 1 | 3-4 months | N/A – Online Application |
| Horace A. Moses Charitable Trust | Springfield and surrounding communities | Education, Health & Human Services | March 1 | 2-3 months | N/A – Online Application |

| Foundation Name | Geographic Focus | Program Type | Application Deadline | Decision Time Frame | # of Copies, if applicable |
|---|---|---|-----------------------------|----------------------------|-----------------------------------|
| George A. & Grace L. Long Foundation | Connecticut | Arts, Culture, & Humanities; Education; Health; Human Services | April 1 | 2-3 months | N/A – Online Application |
| Mr. & Mrs. William Foulds Family Foundation | Manchester, CT | Arts, Culture, & Humanities; Education; Human Services | April 30 | 2-3 months | N/A - Online Application |
| Katharine Matthies Foundation | Lower Naugatuck Valley, CT * | Education; Health; Human Services | May 1 | 3-4 months | N/A - Online Application |
| Mary Mulligan Charitable Trust | NY | Arts, Culture, & Humanities Education Health Human Services | May 1 | 3-4 months | N/A - Online Application |
| George H.C. Ensworth Memorial Fund | Glastonbury, CT | Arts, Culture, & Humanities; Education; Environment; Health; Human Services; Religion-related | May 15 | 2 months | N/A - Online Application |
| The Kendrick Foundation* | National | Religion-Related | June 1 | 2-3 months | N/A – Online Application |
| William T. Sloper Trust for Andrew J. Sloper Musical Fund | New Britain, CT | Arts, Culture, & Humanities | June 1 | 2-3 months | N/A – Online Application |
| George W. Wells Foundation | Southbridge & Surrounding Communities, MA** | Education, Health, Human Services | June 1 | 2-3 months | N/A - Online Application |
| Anna Fitch Ardenghi Trust | New Haven, CT | Arts, Culture, & Humanities; Education; Health; Human Services | June 15 | 2-3 months | N/A – Online Application |
| Linford & Mildred White Charitable Fund | Waterbury, CT & Surrounding Communities | Education; Health; Human Services | June 15 | 2-3 months | N/A - Online Application |
| David N. Lane Trust for Aged & Indigent Women | Fairfield & New Haven Counties, CT | Health; Human Services | June 15 | 2-3 months | N/A - Online Application |

| Foundation Name | Geographic Focus | Program Type | Application Deadline | Decision Time Frame | # of Copies |
|--|---|--|---|---------------------------------|---|
| Mabel F. Hoffman Charitable Trust | Hartford, CT & Surrounding Towns | Education; Health; Human Services | June 23 | 2-3 months | N/A – Online Application |
| Frederick McDonald Trust | Albany, NY* | Education, Health, Human Services | June 30 | 2-3 months | N/A – Online Application |
| Robert E. Leet & Clara Guthrie Patterson Trust | Connecticut | Health | July Deadline date published on HRiA website. | 5-6 months | Visit https://hria.org/tmf/patterson/ |
| Swindells Charitable Foundation | Connecticut | Health; Human Services | August 1 | 2-3 months | N/A – Online Application |
| Elizabeth Carse Foundation | Connecticut | Education; Human Services | August 15 | 2-3 months | N/A - Online Application |
| R.S. Gernon Trust | Norwich, CT | Education; Health; Human Services | August 15 | 2-3 months | N/A - Online Application |
| The Charles Parker Trust/ Public Music Fund | New Britain, CT | Arts, Culture, & Humanities | September 1 | 2-3 months | N/A – Online Application |
| Sophia Romero Trust | Bristol County, MA** | Health Human Services | September 1 | January (of the following year) | N/A – Online Application |
| Thomas J. Atkins Memorial Trust Fund | Middlesex County, CT | Education; Health; Human Services | October 1 | 2-3 months | N/A – Online Application |
| Lena Benas Memorial Fund | Litchfield, CT and Surrounding Communities* | Health; Human Services | November 1 | 2 months | N/A - Online Application |
| Marion Isabell Coe Fund | Litchfield County, CT * | Human Services | November 1 | 2 months | N/A - Online Application |
| Olga Sipolin Children’s Fund | Connecticut | Education; Health; Human Services | November 1 | 2-3 months | N/A - Online Application |
| Frank Loomis Palmer Fund | New London, CT | Arts, Culture, & Humanities; Education; Health; Human Services | November 15 | 3-4 months | N/A - Online Application |

| Foundation Name | Geographic Focus | Program Type | Application Deadline | Decision Time Frame | # of Copies |
|--|-------------------------|---|-----------------------------|----------------------------|--------------------------|
| Bodenwein Public Benevolent Foundation | New London County, CT * | Arts, Culture, & Humanities; Education; Health; Human Services | November 15 | 3-4 months | N/A - Online Application |
| Marjorie Moore Charitable Foundation | Kensington, CT* | Arts, Culture, & Humanities; Education Environment; Health; Human Services | December 1 | 2-3 months | N/A - Online Application |
| Frank B. Hazard General Charity Fund | Providence, RI* | Health; Human Services | December 1 | 3-4 months | N/A – Online Application |

* Please see foundation detail pages for further geographic restriction. Indicates a donor-directed charitable giving program area.

**Indicates a further geographic or issue area restriction.

V. CONTACTS

For general inquiries, please contact us at ct.grantmaking@bofa.com. After you have visited the website and conducted preliminary research, you may contact one of the foundation contacts. Our staff contact information is also listed below for your convenience.

| <u>Name</u> | <u>Email Address</u> | <u>Phone Number</u> |
|--|---|----------------------------|
| Amy R. Lynch SVP, Philanthropic Client Manager | amy.r.lynch@bofa.com | 1.860.244.4870 |
| <i>Anna Fitch Ardenghi Trust</i> <i>Thomas J. Atkins Memorial Trust Fund</i> <i>Lena Benas Memorial Fund</i> <i>Eugene G. & Margaret M. Blackford Memorial Fund</i> <i>Bodenwein Public Benevolent Foundation</i> <i>Elizabeth Carse Foundation</i> <i>Marion Isabell Coe Fund</i> <i>George H.C. Ensworth Memorial Fund</i> <i>Ensworth Charitable Foundation</i> <i>Mr. & Mrs. William Foulds Family Foundation</i> <i>Lily Palmer Fry Memorial Trust</i> <i>R.S. Gernon Trust</i> <i>Harold & Rebecca H. Gross Foundation</i> <i>Mabel F. Hoffman Charitable Trust</i> | <i>David N. Lane Trust for Aged & Indigent Women</i> <i>Frederick W. Marzahl Memorial Fund</i> <i>Katharine Matthies Foundation</i> <i>Marjorie Moore Charitable Foundation</i> <i>Frank Loomis Palmer Fund</i> <i>The Lucy Downing Nisbet Foundation</i> <i>The Charles Parker Trust for Public Music Fund</i> <i>Robert E. Leet & Clara Guthrie Patterson Trust</i> <i>Charles Nelson Robinson Fund</i> <i>Olga Sipolin Children's Fund</i> <i>William T. Sloper Trust for Andrew J. Sloper Musical Fund</i> <i>Joseph S. Stackpole Charitable Trust</i> <i>Swindells Charitable Foundation</i> <i>Linford & Mildred White Charitable Fund</i> | |

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|---------------------------------------|--|----------------|
| Janneth Achury AVP, Officer | janneth.achury@bofa.com | 1.860.244.4861 |
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Frederick McDonald Trust
Mary Mulligan Charitable Trust

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| Robyn Peters VP, Philanthropic Officer | robyn.peters@bofa.com | 860.244.4878 |
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Charles H. Hall Foundation
Horace A. Moses Charitable Trust

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|--|--|----------------|
| Chelsea Craig VP, Philanthropic Client Manager | chelsea.craig@bofa.com | 1.860.244.4871 |
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The Kendrick Foundation
Sophia Romero Trust
George W. Wells Foundation

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|--|--|----------------|
| Sean Dagesse SVP, Private Client Manager | sean.dagesse@bofa.com | 1.401-278-6010 |
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Frank B. Hazard General Charity Fund

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 multi-year awards are required to submit reports annually until the end of the grant term.

Online grant report forms for approved requests submitted online, will be published in your [MyAccount](#) portal in the Requirement tab. If the online grant report form is not yet visible, please let us know via email ct.grantmaking@bofa.com and we will publish an online grant report form to your account.

If you submitted a hard copy application for one of our foundations that does not use the online application process, please use our post grant evaluation form on **pages 10 and 11**. We will also accept the Connecticut Council of Philanthropy Common Report Form, which may be downloaded from <http://www.ctphilanthropy.org>. Your completed grant report may be emailed to ct.grantmaking@bofa.com. Be sure to include in the subject line the following information: “Post Grant Evaluation for the [*Note the Foundation Name*] and [*Name of your organization*]”

