

PRIVATE BANK
PHILANTHROPIC SOLUTIONS
Grantmaking Procedures – Georgia Office

I. INTRODUCTION

Bank of America, N.A. serves as trustee, co-trustee, or agent to numerous private foundations. The Atlanta, Georgia based Private Bank office manages many 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 specific program and/or geographic funding guidelines.

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 Georgia-based foundations. If you have further questions please contact mark.s.drake@bofa.com.

The majority of grants are awarded in Georgia; 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 on or before the foundation’s next application deadline date. Please see pages 4 and 5 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 Georgia foundations where the donor granted **broad** funding discretion to the 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 Georgia have specific funding guidelines, therefore, we ask that you please refer to our website, www.bankofamerica.com/grantmaking, to learn more about the specific program focus areas. There 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

The foundations primarily fund program or project support. A limited number of foundations also provide operating and/or capital support. We do not 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, and then you can research each respective Foundation Detail page for further details 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 Foundation Center (www.foundationcenter.org) provides interactive *Foundation Maps* as part of their eGrant Reporting Program. When you select the Grant History link on each of our Foundation Details pages, please review the Foundation Center's FAQ section to learn more about how to navigate the Maps.

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

Before you start the application process, 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.

A post-grant evaluation for any prior grant award must be submitted in order to be eligible to apply in a subsequent year. For more detail, refer to Grant Reporting section on page 4.

Submitting an Application

Please note that **all of the foundations utilize an online application process**. Please see each individual Foundation Detail page to access the ‘Apply Now’ link and to review the Online Application Help document for more detail.

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. 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.

Special Requirements:

1. Please note, the foundations listed below have a geographic restriction for which we require a breakdown of number/percentage of people served **by specific counties**. Please include this information on the **online** application in the ‘*Demographics for This Request: Additional Demographics*’ fields.

- The Thomas C. Burke Foundation
- The Allan C. and Lelia J. Garden Foundation
- The Perkins-Ponder Foundation
- J. Knox Gholston Foundation
- J. William Gholston Foundation

The following foundations have moved to an alternative application process and are no longer hosted on the website. For more information, please reach out to mark.s.drake@bofa.com.

- The Florence Hunt Maxwell Foundation
- Mary Wilmer Covey Charitable Trust

Please do not include us on your general mailing list for all publications.

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. We are in the process of moving to online grant reports, 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, please use our post grant evaluation form on pages 4 & 5. Your completed grant report may be emailed to ga.grantmaking@ustrust.com, but 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*]”

Organizations receiving a multi-year award are required to submit reports annually up until the end of the grant term.

Georgia Post Grant Evaluation

Private Bank - Philanthropic Solutions

Agency name/grantee: _____

Name of Foundation: _____

We look forward to receiving a report on the progress of the funded program on or before the foundation's next application deadline date (approximately within 1 year of your grant **award date**).

Please include brief responses to the following questions:

1. How did you fulfill the goals set by your organization in the grant application?
2. What are the lasting benefits of the project?
3. What problems did you encounter during the course of this project?
4. Please provide an itemized income and expense summary for the total project. Please indicate specific sources of all income. *If there is a remaining grant balance, please explain here.*
5. If this project is on-going, please list the sources for future funding.
6. What are the specific plans, if any, for continuing the work started by this project?

Grant Expenditures

Please provide an itemized breakdown of grant expenditures.

Amount Awarded \$ _____ Date of Award: _____

<u>Item/Program/Service</u>	<u>Expenditure Amount</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total Spent: _____ Remaining Balance: _____

Prepared by: _____
Print Name *Signature*

Title: _____ *Date:* _____

IV. LIST OF FOUNDATIONS

Below is a list of the foundations managed by the Georgia office with geographic and program focus areas, corresponding application deadlines, and decision dates. See the individual Foundation Detail pages for more information. www.bankofamerica.com/grantmaking

Foundation Name	Geographic Focus of Foundation	Program Type	Application Deadline	Decision Date
J. Knox Gholston Foundation	Madison County	Education	Jun 1	1-2 months after deadline
Perkins-Ponder Foundation	Bibb County	Human Services	Feb 1	1-2 months after deadline
J. William Gholston Foundation	Madison County	Education	Jun 1	1-2 months after deadline
Allan C. and Lelia J. Garden Foundation	Ben Hill, Irwin & Wilcox Counties	Health; Human Services	Jun 1	3-4 months after deadline
Clark and Ruby Baker Foundation	None	Education; Health; Human Services; Religion-Related	Jun 1	1-2 months after deadline
The Thomas C. Burke Foundation	Bibb County & Surrounding Communities	Health; Human Services	Aug 1	3-4 months after deadline

V. CONTACT

<u>Name</u>	<u>Email Address</u>	<u>Phone Number</u>
Mark S. Drake	mark.s.drake@bofa.com	1.404.264.1377
