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

I. INTRODUCTION

Bank of America, N.A. serves as trustee, co-trustee or agent to numerous private foundations. Many of these foundations are managed by the Private Bank, Philanthropic Solutions group. In the Massachusetts office, the donors of approximately 25 of these foundations have granted discretion to Bank of America to design and execute charitable grantmaking programs to support nonprofit organizations serving vital community needs.

Working with either an internal distribution committee or in conjunction with a co-trustee, family member or external advisor, 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 tool to help the nonprofit community better understand the grantmaking goals and grant application processes for these foundations.

There is a combined annual giving of almost $11 million from these foundations. The majority of grants are awarded in Massachusetts. However, there are a few foundations with geographic focus areas outside the state. Please review Section IV of these guidelines to learn more about the various foundations and their geographic focus areas.

II. PHILANTHROPIC GOALS

Program focus areas
Through our support of charitable organizations, we seek to positively impact the lives of the traditionally underserved within our communities. Please refer to our website (bankofamerica.com/grantmaking) and the respective **foundation details** pages for detailed information about these foundations. Several of the foundations set forth specific charitable giving areas, which include geographic restrictions, or named programmatic foci, for example healthcare or research.

The donors of the remaining foundations have granted broad program discretion to Bank of America, and we currently focus funding in 3 primary areas — education, healthcare and human services.

Education. We fund educational programs for all ages. To that end, we fund academic access, enrichment and remedial programming for children, youth, adults and older adults that focuses on preparing individuals to achieve while in school and beyond.

Healthcare. We fund programming that improves access to primary care and health education initiatives for traditionally underserved individuals. In addition, we manage several foundations engaged in medical research.

Human services. We are committed to serving the community by supporting organizations meeting the basic needs of all individuals. Since the human service needs of communities are broad and evolving, we fund a wide array of programming. Our efforts are focused on — but not limited to — youth development, violence prevention, workforce development, life skills attainment and food programs.

Type of support
To build the capacity of the nonprofit community we serve and to respond to an expressed need by nonprofits to fund their operations, we remain committed to making general operating grants, whenever possible, in addition to program grants. However, we will not provide general operating support for any public school, including public charter schools.

Although we make capital grants in a few of the foundations we manage, capital requests are generally not advised. Additionally, we do not provide support for endowment campaigns.

We will not provide sponsorships of events such as galas or award ceremonies. We also will not sponsor or fund the costs of fundraising events such as sports tournaments.

Please visit bankofamerica.com/grantmaking to review the respective **foundation details** pages for specific guidelines and giving preferences.

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

The Massachusetts office currently manages approximately 30 separate foundations, each with its own mission statement and funding parameters. The first step in our streamlined application process is to select a foundation toward which to apply. This step requires you to determine if there is a match between your organization's work and the funding parameters of the selected foundation.

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:

- An appropriate foundation by entering the **area served** and/or **program type** preference(s) in the search filter

- Whether your organization in fact meets the geographic and/or programmatic parameters of the specific foundation

- 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 brief details about the geographic focus area(s) and proposal due dates of each foundation.

Submitting an application

Please note that the foundations managed by the Massachusetts office have moved to an online application format. Please review each **foundation details** page, the Online Application Help document, and the **Apply now** link for more information. Please note the following important items:

- Email submissions are **not** accepted
- Hand-delivered applications are **not** accepted
- Applications sent via USPS, UPS, FedEx or similar postal services are **not** accepted
- Letters of Inquiry or Intent are **not** accepted
- We request all correspondence to be conducted electronically; however, please do not add our contact email addresses to your organization's general newsletter or annual report mailing lists.

Only 1 application may be submitted per calendar year for requests to any one (1) of the following discretionary foundations: For instance, if you submit a proposal to The Alfred E. Chase Charity Foundation for the May deadline and are declined, you are not eligible to submit another proposal to any of the other foundations listed here until the start of the following calendar year. Similarly, if your organization receives a grant award from a foundation, you are ineligible to re-apply toward any of the remaining foundations again until the end of your grant period.

- Frank W. & Carl S. Adams Memorial Fund
- Lloyd G. Balfour Foundation
- Charles F. Bacon Trust
- The Alfred E. Chase Charity Foundation
- The Mabel A. Horne Fund
- Robert J. Mullen Charitable Trust
- Deborah Munroe Noonan Memorial Fund
- Perpetual Trust for Charitable Giving
- Frank Reed & Margaret Jane Peters Memorial Fund

There are **exceptions** to this rule, however. You may submit a proposal to the following foundations even if a proposal has been submitted within the same year to another Massachusetts foundation from the previous list:

- John W. Boynton Fund
- Harold Brooks Foundation
- Ezra M. Cutting Trust
- Helen Ellis Trust (funds in RI only)
- Charles H. Farnsworth Trust
- Simeon J. Fortin Charitable Foundation
- Charles A. King Trust
- George W. P. Magee Memorial Trust
- McCarthy Family Foundation Charity Fund
- Sarah G. McCarthy Memorial Foundation
- Deborah Munroe Noonan Memorial Research Fund
- Perpetual Benevolent Fund
- Katharine C. Pierce Trust
- Albert W. Rice Charitable Foundation
- Doree Taylor Charitable Foundation

New applications may not be submitted if your organization is in the midst of an active grant from one of the foundations highlighted in this document. A grant is considered active for 1-year grants and multi-year grants from date of the grant award through the final required grant reporting due date.

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 (Mon-Fri, 9 a.m.-5 p.m. ET).

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 submit your application in advance of the due date.

Selecting a foundation
While each of the foundations has its own mission statement and funding parameters, many of our foundations have overlapping interest areas: education, healthcare and human services. When the foundation's interest areas are identical, there is no advantage (or disadvantage) to applying to one foundation over another. Please submit your proposal to the foundation that both matches your organization's focus area and has a deadline date that meets your funding needs.

There is no advantage (or disadvantage) to applying to a foundation within one deadline group over another deadline group.

Philanthropic Solutions contributes to several funder collaboratives. As a result, the following restrictions apply:
- Summer camps or enrichment programs that receive funds through the **Summer Fund at Philanthropy Massachusetts** are not eligible to apply to any of our discretionary foundations, as we provide our summer program funding through the Summer Fund
- English for Speakers of Other Languages (ESOL) programs that receive funds through **English for New Bostonians (ENB)** are not eligible for discretionary foundation funding for ESOL programming

Although each foundation is managed as a separate entity, we try whenever possible to position your proposal within the foundation where it will be the most competitive during the same cycle. Please feel free to contact a team member if you have any questions about preparing an application. Our contact information is listed in Section V.

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.

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 ma.grantmaking@bofa.com, and we can publish an online form to your account.

If you submitted a hard copy application for one of our foundations that does not use an online application process, please use the Philanthropy Massachusetts Common Report Form. Your completed grant report may be emailed to ma.grantmaking@bofa.com. Please include in the subject line of the email the following information: Post-Grant Evaluation for the [Note the Foundation Name] and [Name of your organization].

IV. LIST OF FOUNDATIONS

The following is a list of foundations managed by the Massachusetts office, including geographic focus areas, corresponding application deadlines and decision dates. Please note that all of these foundations are now accepting proposal applications online. For more information, please review the **foundation details** page for each individual foundation at (bankofamerica.com/grantmaking).

Name of foundation	Geographic focus of foundation	Application deadline	Decision date
Ezra M. Cutting Trust*	MA**	January 15	May 31
The Mabel A. Horne Fund	MA	January 15	May 31
Frank W. & Carl S. Adams Memorial Fund	MA	January 15	May 31
Simeon J. Fortin Charitable Foundation*	MA	February	August
Charles A. King Trust*	MA	February	August
Charles F. Bacon Trust	MA	February 1	June 30
John W. Boynton Fund*	MA**	February 1	June 30
Lloyd G. Balfour Foundation*	CT, MA, ME, NH, RI, VT	March 1 (Attleboro, MA); June 1 and November 1 (Post-Secondary Education)	Mar 1 deadline, Jul 31 notification Jun 1 deadline, Sep 30 notification Jun 1 deadline, Sep 30 notification Nov 1 deadline, Feb 28 notification
Perpetual Benevolent Fund*	MA**	March 1, September 1	May 31, November 30
The Charles H. Hall Foundation	Western Massachusetts	March 1	3-4 months
Horace A. Moses Charitable Trust	Springfield, MA	March 1	2-3 months
Frank Reed & Margaret Jane Peters Memorial Fund	MA	March 1	July 31
Doree Taylor Charitable Foundation*	ME	March 1, September 1	July 31, January 31
Deborah Munroe Noonan Memorial Research Fund*	MA**	March	June
McCarthy Family Foundation Charity Fund	MA	March 31, September 30	June 30, December 31
Sarah G. McCarthy Memorial Foundation	MA	March 31, September 30	June 30, December 31
Harold Brooks Foundation	MA**	April 1	June 30
The Alfred E. Chase Charity Foundation	MA	May 1	September 30
Katharine C. Pierce Trust	MA	May 1	August 30
Deborah Munroe Noonan Memorial Fund	MA**	May 1	September 30
Robert J. Mullen Charitable Trust	MA	June 1	November 30
Albert W. Rice Charitable Foundation	MA**	July 1	November 30
Perpetual Trust for Charitable Giving	MA	August 1	November 30
The Lane and Elizabeth C. Dwinell Charitable Trust	NH	August 1	November 30
Sophia Romero Trust	Bristol County, MA**	September 1	January (of the following year)
George W. P. Magee Memorial Trust*	MA	September 15	November 30
Helen E. Ellis Charitable Trust	Westport, Dartmouth, New Bedford, MA**	September 15	December 31
Charles H. Farnsworth Trust*	MA	November 15	March 31
* Indicates a donor-directed charitable giving program area.			
**Indicates a further geographic or issue area restriction.			

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.

V. CONTACTS

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

We use a centralized email inbox and phone number in order to most efficiently respond to your inquiries. Please allow at least 1-2 business days for a response, as we sometimes experience very heavy volumes of requests.

We request all correspondence to be conducted electronically; however, please do not add our contact email addresses to your organization's general newsletter or annual report mailing lists.

To contact us by email: ma.grantmaking@bofa.com

To contact us by phone: 866.778.6859

When sending an email or leaving a voicemail message, please note the foundation for which you have a question so that an appropriate administrator can respond to your inquiry.

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VI. FREQUENTLY ASKED QUESTIONS

The following FAQs provide Massachusetts-specific guidance, but we encourage you to also review the FAQ tab at bankofamerica.com/grantmaking for a complete understanding of the grantmaking process and more nationally oriented information.

Grantmaking process

1. Which foundation should we choose? Do I need to direct my proposal to a particular one?
You will need to select a particular foundation to direct your application. Each of the foundations that our group manages has its own mission statement and funding parameters. If you have already determined the appropriate fit with a foundation given a specific programmatic or geographic match, your foundation selection task is fairly straight-forward.

However, many of our foundations have overlapping interest areas—education, health care, and human services. The funding criteria for these foundations are the same. When the foundations' interest areas are identical, there is no advantage (or disadvantage) to applying to one foundation over another. Please submit your proposal to the foundation that both matches your organization's focus area and has a deadline date that meets your funding needs.

2. Who reviews my proposal and makes the final funding decision?
After the proposal is received, we will conduct a preliminary check to ensure it is complete and meets the funding parameters for the foundation. If it is complete, a Philanthropic Client Manager will take the lead on reviewing the proposal or requesting any additional information and conducting site visits if needed. Please note that we conduct very few site visits. We also may work with a co-trustee or Advisory Committee in conducting this review. Once the due diligence process is complete, the Philanthropic Client Managers and other staff meet to discuss the merits of all proposals and make preliminary staff recommendations in the context of all pending requests. These recommendations are then submitted to a review committee or co-trustees, who make the final funding decisions.

Applying for a Grant

3. How do I identify an appropriate dollar request?
Foundation staff members consider several factors when reviewing a request. These include: the significance of the social need being addressed by the organization/project; how effectively the organization is working toward meeting that need; the number of people served; and the organization and/or project budget size. We also recommend that you look at the Grant History available on each **foundation's details page** on our website.

4. Should I apply for operating, program, or capital support?
We place emphasis on the quality of the work being done and understand that organizations need various forms of support. Therefore, we will consider many types of requests. Given limited dollars, we prefer to provide operating or program support, unless a foundation has a specific focus on providing capital support.

We encourage requests for operating support to help build the capacity and strength of the nonprofit community, and we recognize the expressed need by the nonprofit community for more operating funding. Program requests can be stronger if a particular program fits within the foundation's mission, where the broader work of the organization does not or if the applying organization is very large.

Please note that, in general, we strongly discourage public agencies from requesting general operating support; further, we will not provide general operating support for any public school, including public

charter schools. Applications requesting support for activities, services or programs that go beyond the expected scope of the public agencies' mandates are more likely to be competitive.

Small, program-related capital expenses may be included in general operating or program requests. If you have any questions, please call our office to discuss the specifics of your situation.

5. Should I apply for single or multi-year support?
We provide single and multi-year support. Please review the individual **foundation details** pages on the website for details about which foundations are poised for multi-year commitments.

6. 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. However, we are open to discussing the opportunities with you, so please call our office for further guidance.

7. I applied to a particular foundation, but funding came from a different foundation. Why did this happen?
We will act in your best interest and may redirect the proposal if we believe there is a stronger chance of receiving funding elsewhere within the same cycle. For instance, sometimes there may be a better match in funding interests with another foundation, or the competition for dollars for that particular foundation may be higher than normal, and we want to give a strong proposal a "second chance."

8. What can I do to improve my chances of being funded?
The funding environment is more competitive than ever, and in any given funding cycle, Philanthropic Solutions' Massachusetts office receives $5 - $12 in requests for every $1 we have to grant. There is also a relatively small team of people reviewing a large number of proposals. It is our experience that the following are likely to improve (although not guarantee) the possibility that you will receive funding.

- Read the guidelines carefully. If the guidelines clearly state that the Foundation/Trust does not support capital requests, and you submit an application for building a wheelchair ramp, you will be disqualified without further consideration. If you have any questions about the fit, please send an email to the contact for the foundation to check ahead of time. This step can save you a lot of time and effort if there is not a good fit.

- State *very clearly* a) how many people you serve, b) who those people are (e.g., high-risk youth, low-income seniors), c) what activities are provided (and how often those activities occur, at what level of intensity), and d) what outcomes were achieved.
  - An example of such a clearly stated purpose: Program XX serves 200 low-income middle school youth with tutoring and academic enrichment activities at the XXX community center. The youth attend sessions at the community center 4 afternoons a week from 2 p.m. – 4 p.m. Last year, 85% of our youth had their reading grades improve by YY%.

- Be sure to state the numbers you propose to serve and how they differ from previous years (if they do). Be specific about for how long and at what intensity people receive services from you. If you are offering recurring services (e.g., a meals-on-wheels program), be clear if the "number served" is total service units or an unduplicated count. For example, a meals-on-wheels program might serve 1,000 meals in a year, but that might be to 200 clients.

- Providing details on how often you offer programming or services helps us better understand your work. For example, if you offer out-of-school time programming, is it Monday – Thursday? Alternate Saturdays? Third Fridays? For how many hours each time?

- In the Goals, Outcomes & Acknowledgement section of the application, *do not* merely describe what tools you will use, and/or what goals you hope to achieve. Tell us how well you have done

– to date – in meeting your goals, what you have learned from your evaluation, and what you will do going forward for continuous improvement. If you merely say "we will use x, y, and z instruments to measure progress toward finding and retaining housing," but do not tell us "last year, using x instrument, we found that XX% of our clients were able to attain and keep housing" we may not be as interested.

- Please be sure to spell check (the check mark next to some fields in the online application will allow you to use spell check). We strongly recommend also asking someone to proofread the application, and then spell check it again.

- Be wary of jargon and acronyms. Our grantmaking team is comprised of talented generalists, but we do not know the lingo of every sub-specialty out there.

- If you have run a deficit in the past year, please give us a clean, non-jargony explanation of the amount of the deficit, what happened, and how it will be addressed. Do NOT skip this explanation.

- In general, do not submit proposals where we would be your only funder. We are generally not inclined to fund projects as the sole funder as it raises troubling issues of sustainability.

9.   How do I submit an interim or final report on an awarded grant?

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. Review the Post Grant Report section on page 4.

DOREE TAYLOR CHARITABLE FOUNDATION APPENDIX

The Doree Taylor Foundation's major grantmaking priorities are to support organizations that:

a. Provide relief to people in need in the form of basic needs (including the provision of food, housing, shelter);
b. Promote the humane care of animals;
c. Provide health care services for the underserved;
d. Conduct public radio or television.

From time to time, the Foundation may also make grants to:

a. Organizations that focus on the environment
b. Colleges or universities.

The Foundation makes grants throughout the state of Maine but has a priority for programs/organizations that serve the towns of Brunswick, Southport, or Boothbay Harbor. The following provides specific guidance by priority area for applicants to the Taylor Foundation.

Applicants must be one of the following entity types: 501(c)(3) public charity (but not a Type III non-functionally integrated supporting organization), a municipality or other unit of local government (e.g., a public health department), a federally recognized Tribal government, or a religious organization.

Please note that the Foundation will not fund general K-16 education programs.

Please note that applications to the Taylor Foundation for projects/programs where the Foundation would be the sole funder are not considered competitive. In general, the Foundation does not wish to fund more than 25% of any given project budget, or more than 5% of an organization's budget.

People in Need
Applicants in this area should demonstrate that the program or service they offer clearly meets a basic need of an underserved population, which may include low-income people, youth who are court-involved, homeless families, or homebound seniors. These examples are for illustration purposes only. Please note, however, that the Taylor Foundation does not consider general youth development programs as falling into the category of "people in need." For organizations with annual (cash) revenues of $5 million or less, we encourage general operating support requests.

Humane Care of Animals
The Taylor Foundation has a partnership with the Maine Community Foundation's Belvedere Fund in the area of animal welfare. Animal welfare organizations with annual (cash) revenues of $100,000 or less should apply directly to the Belvedere Fund. The Taylor Foundation will not consider applicants with revenues of less than $100,000. Within the animal welfare priority, we will consider capital requests.

Health Care
Within the area of health care, the Foundation will entertain requests for oral health services, mental health services, or physical health care services. There is a priority for programs that can demonstrate they are effectively serving underserved populations. Small, one-time capital or equipment requests may be included within project budgets.

Public radio or television
There is a strong priority for larger public television or radio organizations. From time to time, the Foundation may make grants to smaller, community-based public access radio or television stations.

Environment

The Foundation's priority is for programs that have both an environmental impact as well as a demonstrably positive impact in one of the Foundation's other priority areas. For example, a river-bed restoration project that also preserves a species and/or improves the quality of water to a low-income area. Please note that the Foundation does not fund general public education programs around environmental awareness, nor does it typically fund land preservation/conservation.

Colleges and universities

The Foundation will not provide general operating support for colleges or universities. Support for colleges and universities will be considered on a case-by-case basis but must include a focus on at least one of the Foundation's other priority areas. Special consideration also will be granted to colleges or universities in the geographic priority areas. Colleges or universities interested in applying are strongly encouraged to contact the Foundation's listed Bank contact before submitting an application.

LLOYD G. BALFOUR FOUNDATION APPENDIX

The Lloyd G. Balfour Foundation (Foundation) was established in 1973 in Mr. Balfour's will. The Foundation's three primary focus areas reflect Mr. Balfour's strong affinity for the employees of the Balfour Company, his commitment to the city of Attleboro, Massachusetts, and his lifelong interest in education. Specifically, the Balfour Foundation supports:

- Educational scholarships to employees of the Balfour Company, as well as to their children and grandchildren
- Organizations serving the people of Attleboro, with special consideration given to those organizations that provide educational, human services, and health care programming for underserved populations
- Organizations that support college readiness, access, and success for residents of New England.

In addition, the following organizations are mentioned in Mr. Balfour's will and receive special consideration by the trustees: Sturdy Hospital (Attleboro, MA), Indiana University, The Inter-Fraternity Conference Foundation, Massachusetts Institute of Technology, Phi Delta Phi Foundation, the Sigma Chi Foundation, and the University of Notre Dame. Organizations so listed are strongly encouraged to contact the staff of the Foundation prior to submitting a proposal.

In the college readiness, access, and success area of work, the Foundation makes grants throughout New England, and will consider applications that fit that priority and serve residents of Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island and/or Vermont. Please see below for a fuller explanation of the priorities and guidelines of the Foundation.

Applicants must be one of the following entity types: 501(c)(3) public charity (but not a Type III non-functionally integrated supporting organization), a municipality or other unit of local government (e.g., a public health department), a federally recognized Tribal government, or a religious organization.

For all applications to the Foundation, please note that applications for projects/programs where the Foundation would be the sole funder are not considered competitive, and in general, the Foundation does not wish to fund more than 25% of any given project budget, or more than 5% of an organization's overall budget.

Educational Scholarships for former employees of the Balfour Company
The Foundation provides scholarship support to employees of the Balfour Company, as well as to their children, grandchildren, and other deserving Attleboro High School students. Balfour scholarships are administered through the Attleboro Scholarship Foundation. For further information, please contact Ms. Wendy Holt, Executive Director of the Attleboro Scholarship Foundation, at 1.508.226.4414.

Organizations Serving the People of Attleboro
Mr. Balfour asked the trustee to make grants to charitable organizations that serve the residents of the City of Attleboro, with a priority for those organizations that "[further] education, hospitalization or medical and surgical research." As such, the Foundation will consider applications for a broad range of human services needs in Attleboro with a priority for education and medical services. General operating support grants are encouraged, and multi-year grant requests are allowed. Organizations located outside Attleboro are permitted to apply so long as the application is clear that any funds received would be restricted to benefitting the residents of Attleboro. Capital grants will be considered on a case-by-case basis. Organizations proposing capital grant projects are encouraged to contact the staff of the Foundation prior to submission.

Education
It is clear that Mr. Balfour was interested in supporting students for successful completion of college. As such, the Foundation focuses its grantmaking in the New England area on programs that support college readiness, access, and success. The Foundation is most interested in programs that support students all the

way into and through post-secondary credential attainment (2- or 4-year credentials). Programs within institutions of higher education aimed at attracting, supporting, and retaining (through successful completion) under-served and under-represented populations are also of interest.   In this area, we will consider applications that request scholarship funds, if those scholarships are part of a broader set of services and supports.

Additional considerations
In the education area, the Foundation does not generally see its role as one of sustaining funding over long periods of time. Priority is given to applications that show how the Foundation's funding would be catalytic at inflection points of replication, growth, and/or deepening. We give considerable weight to the sustainability plan portion of the application. We also will consider applications for research projects that would allow the field to learn important information about achieving stronger post-secondary completion, particularly for under-represented populations such as first generation or low-income students. In rare instances we will consider applications in the pre-K through Grade 12 space that address issues of whole school reform and/or system reform.

Please note that the Foundation will not provide general operating support grants for public schools, including public charter schools. In general, the Foundation also is not interested in providing general operating support for private schools.

The Foundation's review process is rigorous and highly competitive. Applications that are most successful are those that can articulate as many of the following as are applicable:
- Clear, quantitative outcomes of the program, or other compelling outcomes data
- For a proposed new program, the evidence-based information/models on which the program is based
- A clear sustainability plan (we are typically not convinced by sustainability plans that basically amount to "more grants will be written")
- Rigorous evaluation plans
- Clear descriptions of how program participants are identified, recruited, and supported.

In addition, please note that the following programs are not priorities for the Foundation and unlikely to be competitive:
- K-12 out-of-school programming such as traditional after-school or summer programs
- Programs whose major focus is K-12 drop-out prevention
- General community education programs such as community-based arts or dance programs
- General K-12 enrichment or academic tutoring programs
- Programs whose major focus is college matriculation (i.e., success is measured on how many students matriculate at college, rather than how many complete)
- Land acquisition/preservation requests (Attleboro)
- General human services grants in any geographic area other than Attleboro, MA.