

PRIVATE BANK
PHILANTHROPIC SOLUTIONS
Grantmaking Procedures – Washington 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 Private Bank. In the Washington office, the donors of 7 of these foundations have granted fairly broad discretion to Private Bank to design and execute a charitable grantmaking program to support nonprofit organizations serving vital community needs.

Working with either an internal distribution committee or in conjunction with a co-trustee, family member, advisory committee, 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 process for these foundations.

There is a combined annual giving of over \$800,000 from these foundations. All of the grants are awarded in Washington and Oregon. 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.

Because each foundation has a unique charitable giving area, we ask that you please refer to our website, www.bankofamerica.com/grantmaking, to learn more about the program focus areas. 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 of the foundations.

Type of Support

The majority of grants are 1 year in duration. As each foundation has unique giving preferences for the type of support provided (program, operating, capital, etc.), we ask that you please refer to our website to learn more about the giving preferences and restrictions. As mentioned above, please visit our website to review the respective foundation detail pages for further details and giving preferences of the various foundations.

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

The Washington office currently manages 7 foundations, each with its own mission statement and funding parameters. However, we have streamlined the application process. The first step in the application process is to select a foundation toward which to apply. This requires that you determine if there is a match in your organization's work with the funding parameters of any of the foundations.

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 in fact 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 brief detail about the geographic focus area(s) and proposal due dates of each foundation.

Submitting an Application

Please note that **all** 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.

Please also note the following important submission information:

- Please do **not** include any additional attachments other than those specifically requested by the foundation's application
- 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.

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 the grant evaluation form sent to you with the grant award letter. The hard copy completed grant report may be emailed to wa.grantmaking@ustrust.com, but please 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.

IV. LIST OF FOUNDATIONS

Below is a full list of the foundations managed by the Washington office with geographic focus areas, corresponding application deadlines, and decision dates. Please note that all of the foundations have moved to an online application process. Please see the individual foundation detail page for more information.

Name of Foundation	Geographic Focus of Foundation	Application Deadline*	Decision Date
Hubbard Family Foundation	WA**	Rolling***	3-4 months following proposal submission
Catherine Holmes Wilkins Charitable Foundation	WA**	2nd Monday of March 2nd Friday of October 4th Friday of June	3-4 months following proposal submission
Janson Foundation	WA**	February 28	April 15
Wood Family Charitable Trust	OR**	March 1	May 15
Fred and Gretel Biel Charitable Trust	WA**	May 1	June 30
Alfred and Tillie Shemanski Testamentary Trust	WA**	September 15	November 30
Kawabe Memorial Fund***	WA**	Rolling***	3-4 months following proposal submission
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.			
**Indicates a further geographic restriction			
***See foundation detail page for specific deadline dates			

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>
Jan Aldrich Jacobs	janet.jacobs@ustrust.com	1.206.358.0912

*Fred and Gretel Biel Charitable Trust
Hubbard Family Foundation
Janson Foundation
Alfred and Tillie Shemanski Testamentary Trust
Wood Family Charitable Trust*

Keri Healey Grants Consultant	keri@kerihealey.com	1.206.604.5374
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Catherine Holmes Wilkins Charitable Foundation

Ryan Brun Philanthropic Administrator	ryan.brun@ustrust.com	1.206.358.3079
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Natalie Lecher Grants Consultant	natalie.grantwork@gmail.com	1.206.406.6124
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Kawabe Memorial Fund

VI. FREQUENTLY ASKED QUESTIONS (FAQs)

The following FAQs provide Washington-specific guidance, but we encourage you to also review the FAQ tab at 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. 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 7 foundations that our group manages has its own mission statement and funding parameters. Please research these foundations on our website first, and if you have further questions, please feel free to contact us.

2. Who reviews my proposal and makes the final funding decision?

After the proposal is received, the receiving 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 and a consultant will take the lead on reviewing the proposal, conducting site visits, and requesting any additional information if needed. Recommendations are then made in the context of all pending requests. These recommendations are then submitted to a Private Bank committee for final approval.

Applying for a Grant

3. How do I identify an appropriate dollar request?

Foundations 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; and the organization and/or project budget size.

4. Should I apply for single or multi-year support?

The Janson Foundation and the Wood Family Charitable Trust will occasionally award multi-year grants. All other foundations typically award one year grants.