

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

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## 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 Washington office, the donors of 6 of these foundations have granted discretion to Bank of America 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 \$1 million 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.

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**Please note that if your organization is awarded a grant, a Post Grant Evaluation Report is sometimes required within 1 year of the grant award date. Please see page 3 for more details.**

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## 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.

Since each foundation has a unique charitable giving area, we ask that you please refer to our website, [www.bankofamerica.com/grantmaking](http://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. 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.

### 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 Washington office currently manages 6 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](http://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**

Proposals for funding must be submitted online. 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. 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.

**Grant Reporting**

A grant report is sometimes 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.

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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 [wa.grantmaking@bofa.com](mailto:wa.grantmaking@bofa.com), and we will publish an online form to your account.

**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.

<b>Name of Foundation</b>	<b>Geographic Focus of Foundation</b>	<b>Application Deadline*</b>	<b>Decision Date</b>
Hubbard Family Foundation	WA*	January 20 April 20 August 20 October 20	3-4 months following proposal submission
Catherine Holmes Wilkins Charitable Foundation	WA*	2nd Monday of March 4th Friday of June 2nd Friday of October	3-4 months following proposal submission
Janson Foundation	WA*	February 28	April 15
Wood Family Charitable Trust	OR*	March 1	May 15
Kawabe Memorial Fund**	WA*	Rolling**	3-4 months following proposal submission
Fred & Gretel Biel Charitable Trust***	WA, King and Snohomish Counties in the Puget Sound region	This foundation is not hosted on the website, and due to limited resources is not accepting unsolicited applications at this time	n/a
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. PT			
*Indicates a further geographic restriction			
**See foundation detail page for specific deadline dates			
***Not hosted on the website			

## 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	<a href="mailto:janet.jacobs@bofa.com">janet.jacobs@bofa.com</a>	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*  
*Fred and Gretel Biel Charitable Trust\**  
*Peter J. Emt Infant Jesus of Prague Trust\**

*\* These foundations are not listed on the website given that they have an alternative application process. Contact [wa.grantmaking@bofa.com](mailto:wa.grantmaking@bofa.com) for more information.*

*\*\*Due to high application volumes and limited resources, The Alfred and Tillie Shemanski Testamentary Trust recently moved to an invitation only application process.*

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Keri Healey Grants Consultant	<a href="mailto:keri@kerihealey.com">keri@kerihealey.com</a>	1.206.604.5374
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*Catherine Holmes Wilkins Charitable Foundation*

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Natalie Lecher Grants Consultant	<a href="mailto:natalie.grantwork@gmail.com">natalie.grantwork@gmail.com</a>	1.206.406.6124
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*Kawabe Memorial Fund*

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## **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](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. 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 6 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 Philanthropic Administrator 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.