

Helping Children, Families and Communities Succeed

The Bank of America Foundation directs charitable giving on behalf of Bank of America. The Foundation provides grants to nonprofit partners who use creativity and imagination to help America's children succeed in life, neighborhoods flourish and communities prosper.

The Foundation is a strong supporter of education. The funding priorities for helping children succeed are:

- Early childhood development
- Financial literacy
- Professional development for teachers

Community revitalization is another focus for funding nonprofit organizations that meet the basic needs for:

- Affordable housing
- Workforce development

Application Process

Due to the large volume of requests, the Foundation is unable to grant every proposal. Unsolicited requests and proposals not aligned with our focus or are not in areas where the company conducts its business will not receive funding.

Please review the list of ineligible funding categories that follows. Qualified organizations interested in applying for a Bank of America Foundation grant should complete this official Web application form and send it to Bank of America Foundation (see contact list at the end of this application).

NOTE: It is necessary to submit a separate application for each funding request, and each applicant is limited to one request per calendar year.

Ineligible categories for funding:

- | | |
|-------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| ⊗ Organizations located outside Bank of America's service area | ⊗ Individual pre-K–12 schools (public or private) |
| ⊗ Individuals, including those seeking scholarships or fellowship assistance | ⊗ Colleges and universities — unless the request supports giving focus |
| ⊗ Organizations without 501(c)(3) tax-exempt status | ⊗ Sports, athletic events or athletic programs |
| ⊗ Organizations/agencies that receive 5% or more of their funding from the United Way | ⊗ Travel-related events, including student trips or tours |
| ⊗ National health organizations (or their local affiliates) or research/disease advocacy groups | ⊗ General support for medical centers/hospitals |
| ⊗ Fund-raising events | ⊗ Development or production of books, films, videos or television programs |
| ⊗ Advertising or marketing activities | ⊗ Endowment campaigns |
| ⊗ Political, labor, fraternal organizations or civic clubs | ⊗ Memorial campaigns |
| ⊗ Religious organizations for sectarian purposes | ⊗ Organizations less than two years old |
| | ⊗ Multi-year requests are discouraged |

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- ⊗ Capital campaign requests are discouraged

Please complete all fields and questions. Attach separate sheets as necessary.
Application must be completed by an authorized officer of the nonprofit organization.

What to enclose with your application:

- ☐ Copy of your organization's IRS 501(c)(3) notification letter
- ☐ Current list of board members, with affiliations
- ☐ Your organization's overall project and operating budget
- ☐ Financial information for the previous two years, with an audited financial statement, if available

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Does your grant application fall within Bank of America Foundation's funding focus areas listed below?

- ☐ Yes ☐ No

If yes, please check the focus area(s) that are most closely associated with this grant:

Educational Opportunities

- ☐ Early childhood education/school readiness ☐ Financial literacy
☐ Teacher enhancement/preparation

Community Revitalization

- ☐ Affordable housing ☐ Workforce development

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Date submitted:

Name of your organization:

Date organization was founded:

Street Address:

City State Zip:

Mailing Address (if different):

Agency contact, with title:

Contact telephone number:

Contact e-mail address:

Tax ID number (EIN number):

Dollar amount your organization is requesting: \$

What percentage of your organization's overall annual budget would this grant fulfill? %

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Please provide your organization's mission statement, and a brief summary of your organization's key initiatives and accomplishments as related to this grant request.

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What is the purpose for which this grant is being requested?

Please be specific, detailing the ways that the project will be innovative and will fit the criteria outlined in the Bank of America Foundation's funding focus areas.

5

What are the specific outcomes your organization hopes to achieve with this grant?

Please describe **a)** how your organization will evaluate and measure these outcomes, **b)** how and when the organization will track and report results back to the Bank of America Foundation, and **c)** who will be responsible for reporting those results.

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How will your organization publicize the grant and its results?

7

Please list the sources and amounts of all other funding obtained, pledged or requested **a)** for this project and **b)** for overall support of your organization.

8

Has your organization received funding from the Bank of America Foundation in the past five years?

☐ Yes

☐ No

If yes, **a)** please list by date, and **b)** detail the impact of your organization's previously funded activities, **c)** the sustainability of those activities, and **d)** if applicable, how a new grant would expand those activities.

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Has your organization received other financial support from Bank of America in the past, i.e. sponsorships, events, etc?

☐ Yes ☐ No

If yes, please summarize.

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Does your organization receive funding from United Way?

☐ Yes ☐ No

If yes, what percentage of your annual funding is received from United Way? %

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What age group(s) will be served by the project for which you are requesting funding?

(Select more than one age group if applicable.)

☐ Pre-K ☐ Grades K-5 ☐ Grades 6-12 ☐ College
☐ Adult ☐ Elderly ☐ All

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What geographic area will be served by the project for which you are requesting funding?

Please be specific in detailing how far the project or program for which funding is being requested extends throughout a given area, such as a state, region or city.

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What ethnic groups will be served by the project for which you are requesting funding?

(Please provide complete breakdown.)

African American	%	Caucasian	%
Hispanic	%	Native American	%
Asian	%	Multi-racial/Ethnic	%

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What is the primary population served by the project for which you are requesting funding?

(Select more than one if applicable.)

- | | | |
|----------------------------------------|-----------------------------------|-----------------------------------------|
| <input type="checkbox"/> Women/Girls | <input type="checkbox"/> Men/Boys | |
| <input type="checkbox"/> Gays/Lesbians | <input type="checkbox"/> HIV AIDS | <input type="checkbox"/> General Public |
| <input type="checkbox"/> Disabled | <input type="checkbox"/> Rural | <input type="checkbox"/> Other |

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Are 51% or more of those to be served by this grant low-to-moderate income (annual earnings at 80% of median income or less)?

- ☐ Yes ☐ No

Please check the area that best describes the purposes of this grant:

- ☐ Affordable Housing — organization's activities promote affordable housing for low-to-moderate income individuals or families (including multi-family rental housing).
- ☐ Community Services — organization's community service (i.e. provides free child care, job training, tutoring programs) targeted to low-to-moderate income individuals or families.
- ☐ Economic Development — organization's efforts promote economic development by financing businesses or small farms that meet the size eligibility standards or have gross annual revenues of \$1 million or less.
- ☐ Revitalize/Stabilize — organization's activities to revitalize or stabilize low-to-moderate income neighborhoods or geographies.

Please describe organization's clients (i.e., low-to-moderate income children).

For internal Community Development Bank use

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Name and title of person completing this application (please print):

Name

Title

Signature

For further information, please visit our Website at
www.bankofamerica.com/foundation.

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Contacts

Organizations located in the 22 states and the District of Columbia service areas should send completed application to the appropriate contact below.

Arizona, Nevada, New Mexico, and Texas

Jane Tracy
Bank of America Foundation
AZ1-200-24-44
201 E. Washington Street
Phoenix, AZ 85004-2343

California/Northern

Sandra Cohen
Bank of America Foundation
CA5-704-08-03
315 Montgomery Street, 8th Floor
San Francisco, CA 94104-1866

California/Southern

Dannielle Campos
Bank of America Foundation
CA9-706-50-30
555 S. Flower Street, 50th Floor
Los Angeles, CA 90071-2385

Florida

Michelle Braun
Bank of America Foundation
FL9-001-23-15
50 N. Laura Street
Jacksonville, FL 32202-3664

Georgia and Tennessee

Sallie Daniel
Bank of America Foundation
GA1-006-55-07
600 Peachtree Street, NE
Atlanta, GA 30308-2265

Idaho, Oregon, and Washington

Julie Ziegler
Bank of America Foundation
WA1-501-33-45
800 Fifth Avenue, 33rd Floor
Seattle, WA 98104

Arkansas, Oklahoma, Illinois, Iowa, Kansas, and Missouri

Julie Chavez
Bank of America Foundation
IL1-231-08-20
231 S. LaSalle Street
Chicago, IL 60604

Maryland, Virginia, and Washington D.C.

Jeannan Peterson
Bank of America Foundation
DC1-701-05-08
730 15th Street, NW
Washington, DC 20005-1012

North Carolina, South Carolina, New York, and other states

Rai Glover
Bank of America Foundation
NC1-007-18-01
100 North Tryon Street
Charlotte, NC 28255-0001

General information line:
1.888.488.9802

