Bank of America Sponsorship Request Reference Guide

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Getting started

Document checklist

Information and documents that will be needed to complete your request:

- Organization’s Tax ID number
- Organization’s board members
- Sponsorship package (document describing program, funding levels, benefits)
- If sponsorship is for an extended period or multiple events, dates and locations of all programs included in sponsorship
- Other companies/organizations who are also sponsors of the program/event
- Logo and/or images that will be used

Creating an account

If you have not logged in to Bank of America’s Sponsorship Request System since June 1, 2013, you will need to create an account. Simply enter your email address, compose a unique password (6-8 letters and/or numbers), and click Create Account. You will then need to log in as a “Returning User.”

Returning users

After June 1, 2013, returning users may log in using their pre-established credentials.

Please note: Only one proposal per account may be “in process” at the same time. Once a proposal is completed and submitted, you may begin another one as needed.
My Desktop

Once your account has been created you may login. You will be directed to **My Desktop**, where you can kick off the proposal submission process. Click **Create Proposal** to begin.

Eligibility

The questions in this section are to help you determine if you are eligible to submit a sponsorship proposal. Please refer to text above the questions for more detailed information.

TIP: When choosing the primary city or geographic location from the list provided, look for your state, then the closest city listed, especially if you are in a metropolitan area. Or, choose the state and “other.”
Eligibility – Agreement to terms

After the Eligibility questions, you will be asked to review the terms of potentially accepting sponsorship funds from Bank of America. Please read carefully, and click on the appropriate option.

By clicking “I Agree” below, you are certifying that your organization agrees to the terms stated below regarding the prohibition against using sponsorship funds for political purposes.

Bank of America is regulated under federal rules that prohibit national banks and corporations from making a contribution in connection with any election to any political office, or other political activities. This prohibition precludes Bank of America from funding:

- Any organization that is registered or acting as a political committee under federal election law or any state or local election law.
- Any effort to support or oppose any candidates for U.S. federal, state or local office.
- Any bond initiatives or ballot initiatives, either directly or through transferring to any political action committee.

If we approve your sponsorship proposal, you must only use the sponsorship funds for their intended purpose, and in a manner that is consistent with these restrictions. Specifically, these funds may not be used for any direct or indirect political activities. Please understand that by depositing or receiving these funds, or any additional funds that you may receive from Bank of America this year, you are agreeing to these requirements.

Preparing and Submitting a Sponsorship Proposal

General navigation tips

- You may click Save at any time. Your draft proposal will be accessible in your My Desktop space for editing, up until the final step of Submit Proposal.
- All questions marked with an asterisk * are required. You will not be able to proceed to the next step/page until all required fields are completed. (“None”, “N/A” or “0” zero can be used if the information requested is not applicable or available.)
- You may correct entries at any time up until you finish Step 4 and click on Submit Proposal. After your proposal has been submitted, changes cannot be made.
- For technical issues, please use the Sponsorship Technical Help System. You may also find it helpful to refer to the FAQ document posted on the tool bar.
Step 1: Property Overview

If you are eligible to submit a sponsorship proposal, you will be directed to the first page of the proposal form, the **Property Overview**. The Property Overview asks for basic information about the organization or property, including address, contact information, and board members/owners.

The left-hand navigation of the form provides a clear view into the proposal path.

You may click **Save** at any time to save the proposal as a draft that will be accessible in your **My Desktop** space.

Once the **Property Overview** is complete, click **Next Step**.
Step 2: Sponsorship Details

Once you have completed the Property Overview, you will move to Sponsorship Details. Here you will enter additional information about the sponsorship opportunity, including event name and location, funding amount requested, and estimated attendance.

- **Locations & Dates** – click on Insert New to enter information about each event or location included in the sponsorship package.

- **Sponsorship Amount Requested** – If you have multiple funding options, please enter the single, most appropriate level. We will see and review the other options in the Sponsorship Package(s) you upload, and contact you if we have questions or want to discuss further.

Once the Sponsorship Details page is complete, click Next Step.
Step 3: Description & Images

Description & Images is the final section of the sponsorship request form. Provide a short description of why Bank of America should consider this opportunity. Also, please upload the logo(s) and any additional images/artwork being used for this sponsorship and related events (files can be up to 4 MB, and most standard formats are accepted).

Once complete, click Next Step. (Your entries will automatically be saved when you click Next Step.)
Step 4: Preview Proposal & Submit

Preview Proposal allows you to verify all information entered throughout the request form is correct. If you need to make changes, navigate to the applicable section, either by clicking Previous Step or one of the buttons on the left side for Step 1, 2, or 3. Click on Step 4 to review the proposal.

Once validated, click Submit Proposal to formally kick off the review process.

Note: Once you click Submit Proposal, no further changes can be made.
Post-Submission

Proposal status

Once your proposal has been submitted, click **Back to My Desktop**.

The status of your proposal request is now **In Process**. We normally review proposals and respond within 45 days of receipt, unless the event date is several months in the future.

Thank you for your sponsorship proposal. You may begin a new proposal for a different program once your status is "**In Process**".