# THE NATHANIEL WHEELER TRUST – 1979

**BANK OF AMERICA, N.A., TRUSTEE**

**GRANT APPLICATION GUIDELINES**

# History and Purpose

The Nathaniel Wheeler Trust -1979 of York was established in 1980, for the beautification of York, Maine under the terms of a trust established by the late Nathaniel Wheeler, a long-time York Harbor summer resident. The purpose of the trust is

“to use the income and principal for the beautification of the Town of York, in such a manner as the trustee shall in its discretion determine in consultation with the Old York Improvement Society[[1]](#footnote-1) the Old York Garden Club and the Piscataqua Garden Club.”

The trustee, originally Maine National Bank, has been Bank of America, N.A. for several years. The Old York Improvement Society is now the Old York Historical Society (dba Museums of Old York). The Trust makes grants to nonprofit organizations located within the Town of York for projects that will contribute to the beauty of the town.

Grants are made only to governmental agencies and to private nonprofit organizations that are public charities under Section 501 (c)(3) of the Internal Revenue Code. Grants are reviewed by an Advisory Committee consisting of two members each from the Old York Historical Society (dba Museums of Old York), the Old York Garden Club, and the Piscataqua Garden Club. The Committee’s recommendations are submitted to Bank of America, the trustee, for final review and approval.

# Grants Program

The Wheeler Trust makes grants for substantial projects that will have a lasting impact on the landscape of York. The Trust supports projects that add major landscape elements to areas open to the public and visible to passing traffic and pedestrians. These landscape elements generally include trees, shrubs, and perennials on occasion. The Trust may consider hardscape elements that support the overall landscape project such as walkways, stonewalls, pavers, or cobblestones.

Grants are normally made on a one-time basis; however, consideration will be given to funding phases of a master landscaping project over a period of years. Wheeler Trust funds should primarily be used for site preparation and for the acquisition and planting of plant materials.

# Grant Considerations

Although awards are made for a variety of large and small projects, the Wheeler Trust is particularly interested in proposals that meet one or more of the following criteria:

* The project will have an important and long-lasting effect on the beauty of York.
* The applicant organization has committed itself to an annual maintenance plan or has arranged, in writing, for continued maintenance by others and can show support for the maintenance.
* Funds are available from other sources to match funds from the Wheeler Trust.
* The proposed project is part of a prepared landscape plan.

# How to Apply for a Grant

## ***Application materials are available at the York Public Library,*** ***15 Long Sands Road, York, Maine.*** Electronic materials also will be available on the York Public Library’s website. These materials are intended to be a guide to applicants in writing a proposal and to the Committee during its review. Please review all questions as fully as possible. The applicant should contact the chair of the Advisory Committee. Should the chair need to ask further questions, she will contact the Bank, as trustee, with any questions. (Contact information is listed below.)

Before submitting a proposal, please ensure that the project has been approved by the governing body of the applicant organization. For projects along roads, highways, or other public ways, it is important that any plant material meet all standards set by the Town, if applicable, and by the State, if applicable. A letter of approval should also be included from the Town, the State or the Department of Transportation.

***Application deadlines for the Wheeler Trust are May 1 and October 1***. Proposals will be reviewed at the semi-annual meetings of the Wheeler Trust Advisory Committee. May applicants generally will be notified by July 31 and October applicants generally will be notified of grant decisions by December 31. At the request of the Advisory Committee, an applicant may be given the opportunity to present the grant application in person.

To be considered for a grant, applications must include the Philanthropic Solutions Standard Grant Application Coversheet and the Wheeler Trust Application Form with its attachments.

All proposals will be reviewed carefully and weighed against these guidelines. Please be aware that more proposals may be received than can be supported from the Trust’s available distribution level. The Trust regrets that a number of worthy applications may be denied in any year for lack of funds. The Advisory Committee encourages organizations with projects that were not funded to apply again in subsequent years.

Submissions and pertinent materials should be emailed to the chair of the Advisory Committee and Philanthropic Administrator of the Trust (emails listed below). Should there be oversized materials or those that are helpful to have printed, please contact the Advisory Committee chair.

Only one proposal per year may be submitted by a single organization. We do not make grants to individuals or private foundations.

If awarded a grant, the Grant Terms and Conditions will be provided by Bank of America Private Bank in writing. A grant report will be expected within one year of the dates specified within the award letter.

# Wheeler Trust Advisory Committee as of February 2022

Chair 2022-2024 Susan Meffert (Museums of Old York) email: sdmeffert@gmail.com

Marjory Stewart (Old York Garden Club)

Deneen Barclay (Old York Garden Club)

Lou Baker (Museums of Old York)

Heather Campbell (Piscataqua Garden Club)

Anne Driscoll (Piscataqua Garden Club)

**Trustee: Bank of America (requests should be sent by email to):**

Michealle Larkins

V.P., Philanthropic Administrator

michealle.larkins@bofa.com

617.434.4847

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1. DBA Old York Historical Society [↑](#footnote-ref-1)