

Support Services



THE POWER TO

deliver together

BANK OF AMERICA 



"We want to be the best place to work for every Bank of America employee. We do that in many ways, including with competitive pay and benefits, the opportunities we offer for teammates to advance their careers through professional development and our culture of inclusion so employees can celebrate their diversity and be themselves at work. No group at Bank of America embodies this more deeply than our Support Services team."

A handwritten signature in black ink that reads "Brian".

Brian T. Moynihan
Chairman of the Board, Chief Executive Officer



Welcome to Support Services

Our mission is to provide Bank of America businesses with the products and services they need, while providing meaningful employment to people with disabilities. Employees earn competitive wages and full company benefits and are expected to meet the same quality standards as in other departments. Each employee has the opportunity to develop professionally and is coached according to their individual level of capabilities.

Being a member of the Support Services team also offers the opportunity to have an overall enhanced quality of life. Bank of America offers employees an expanded social and recreational network and human resources support.

For additional information regarding the Support Services team, please contact services.support@bofa.com.

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Thank you	
Get to know us!	





"At Bank of America, I am not looked down on. I am happy to come to work and I love all the people I come in contact with; they are all my friends, even the managers."

Tommy Fields / Support Services

Intellectual Disability is our gift

It's our strength. Our power. Our pride.

It's what makes us more resourceful. More compassionate. More courageous. More committed. It's our reason for saying, "Define us by our actions. Cherish us for our personalities. Reward us for our accomplishments."

In Support Services, we are more than accepted, we are embraced and promoted. We are supportive of and supported by our peers and when we win, we win together. We build communities together. We finish the job together. We spread enthusiasm together and we improve the bottom line together. We're a team and a family and a crew and a squad.

We pave the way for people to live in a more accepting world, reaching goals that doubters never dreamed for us. We strive to make a lasting impression that makes everyone feel inspired.



The background consists of several overlapping triangles in various shades of red and pink. A large, dark red triangle is at the top, with a lighter pink triangle below it. On the left, a medium red triangle points towards the center. At the bottom, a large dark red triangle points upwards. The text is centered in the white space between the triangles.

Opportunities and inspiration

Intellectual Disabilities in the workplace

Intellectual Disabilities (ID) are the most common developmental disabilities, affecting millions of Americans. Below are some considerations to help us better understand ID and to successfully integrate employees with ID into the workplace:

Approximately 6.5 million Americans have an intellectual disability, which is 1–3% of the total U.S. population.¹

1–3%

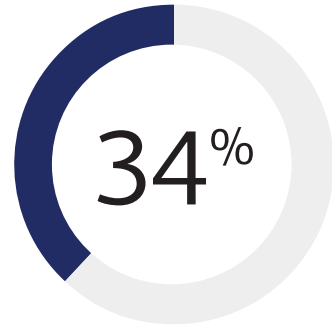
of total U.S. population

¹ Source: Special Olympics. What Is Intellectual Disability? (2017). Specialolympics.org. Retrieved from http://www.specialolympics.org/Sections/Who_We_Are/What_Is_Intellectual_Disability.aspx

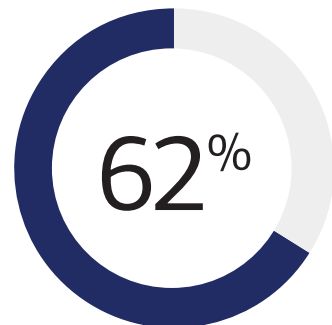


The majority of adults with intellectual disability are unemployed or underemployed.²

² Source: Questions & Answers about Persons with Intellectual Disabilities in the Workplace and the Americans with Disabilities Act (ADA). (2017). Eeoc.gov. Retrieved from https://www.eeoc.gov/laws/types/intellectual_disabilities.cfm#fn7



34% of adults with an intellectual disability are fully employed.³



People with ID can successfully stay employed.

62% of people who work in a competitive setting have been there three years or more.⁴

³ Source: Hananel, S. (2014). Too many intellectually disabled are still excluded from the world of work, study says. The Washington Post. Retrieved from https://www.washingtonpost.com/politics/too-many-intellectually-disabled-are-still-excluded-from-the-world-of-work-study-says/2014/02/17/f21ea34a-97f7-11e3-afce-3e7c922ef31e_story.html?utm_term=.e6fa69be6e4f

⁴ Source: Special Olympics. What Is Intellectual Disability? (2017). Specialolympics.org. Retrieved from http://www.specialolympics.org/Sections/Who_We_Are/What_Is_Intellectual_Disability.aspx





At Bank of America, we embrace diversity and different perspectives to help create a better and more inclusive world for all.

This commitment — reflected in our partnerships with organizations like Special Olympics and the Ad Council's Love Has No Labels campaign — is an integral part of who we are, and an essential part of how we work.

We honor a culture based on inclusion and respect by recognizing the potential of every employee. We're focused on creating an environment where all employees, including those with disabilities, have an opportunity to succeed and achieve their goals. Our Support Services division is an in-house marketing and fulfillment operation with over 300 employees.

Our employees reflect our values of diversity and inclusion

Our Support Services division has been employing teammates with intellectual disabilities for over 25 years.

Our practices make business sense

As Support Services Senior Executive Mark Feinour explains, "We're just like any other business, we just happen to draw from a unique talent pool."

Our efforts help communities thrive

Support Services gives individuals facing barriers to employment the opportunity to achieve financial stability and become successful members of their communities.



One of Bank of America's Core Values is to "Realize the power of our people." With the understanding that diversity and inclusion are good for business and make our company stronger, Bank of America maintains the Support Services division.

For over 25 years, we've helped illustrate our company's passion to help people with disabilities achieve career success. We operate in:

- Newark, Delaware
- Boston, Massachusetts
- Belfast, Maine
- Dallas, Texas

Maintaining integrated relationships with other Bank of America lines of business, the Support Services team primarily provides fulfillment, printing and warehouse distribution functions. The team is a tremendous resource within the bank, utilizing a business model focused on quality, commitment and sustainability.

Since its inception, Support Services has delivered exceptional service on a daily basis while conducting operational and logistical support.





Sustainability and commitment

Supporting Bank of America's core lines of business has created an environment of sustainability by providing services that would otherwise need to be outsourced. The result is:

- Shared goals as teammates to better serve our clients
- Increased control of internal assets and proprietary information
- Easy and direct internal communication, which enhances the customer experience
- Internal efficiencies and cost savings
- Demonstration of our commitment to diversity and inclusion

Because of these direct and indirect advantages, Support Services continues to gain recognition and successful partnerships within the company. More leaders seek our services and envision new ways to help us expand our skill sets and range of capabilities.

The outcome is an environment where Support Services employees are able to provide meaningful contributions to the company and have long-lasting professional careers.



"It shows that there are really no limitations. We can all do things that people never thought we could."

Latricia Saucier/Support Services





Another example of the corporate commitment to Support Services is the dedicated Employee Relations team that assists with issues specific to the department. The Human Resources function has aligned a select few members who are focused on understanding the needs of our unique population.

Having an Employee Relations team dedicated to addressing Support Services challenges creates a win/win/win in the following ways:

1. Direct contact with a Support Services manager

Learn from someone who is directly familiar with Support Services employees who can assist and explain why our needs might be unique.

2. Allows access to an Employee Relations representative

Speak to an employee who is familiar with our environment and who can answer any questions or help respond appropriately to meet the employee's need.

3. Provides quick employee solutions

Having direct contact with a specialized team will help employees and potentially their family/caregivers face any challenges quickly and professionally.



The background consists of several overlapping geometric shapes in two shades of blue. A large, dark blue shape covers most of the lower half and extends towards the top. Overlapping this are several lighter blue shapes, including a large triangle pointing downwards in the upper left, a smaller triangle pointing right in the middle left, and a large triangle pointing upwards in the lower right. The text "What we do" is centered in the dark blue area.

What we do

Core competencies and alignment with corporate initiatives

Support Services focuses on fulfillment, graphic arts/printing and inventory management services.

Fulfillment

- Manual package assembly
- Document printing, envelope mailing
- Data entry capabilities

Graphic arts/printing

- Posters, banners, signs, custom displays
- T-shirt and apparel screen printing
- Digital printing — brochures, invitations, postcards

Inventory management

- Warehouse storage
- Distribution services

Our goal is to accept responsibility for work that is closely aligned with Bank of America's core businesses. Some examples include:

- Document printing and disclosure mailings to Consumer banking customers (home loans, auto loans, checking/savings accounts, etc.)
- Promotional printing, community volunteer efforts and national/corporate campaigns
- Inventory management and distribution for nationwide and internal marketing events, financial center materials and general customer collateral





Our approach

The business goal of Support Services is to maintain project responsibilities that are aligned with Bank of America corporate functions. In establishing new jobs and completing work that is aligned with core banking initiatives, our team has achieved a sustainable operating model.

When the division was originally established, executives were committed to hiring a large number of employees with intellectual disabilities, knowing there were a variety of functions that could be accomplished by our unique employee group. While not immediately having project work established, department managers quickly met with line of business leaders to discuss capabilities and determine

a number of manual functions that would be appropriate to transition to Support Services. Operations teams analyzed work that was being completed by external vendors, and understood the value of moving that work to an internal team.

Letter printing and mailing was the initial type of work transitioned to the department, and in proving success with those endeavors, Support Services grew to establish large-format printing, screen printing and warehouse operations. Data entry projects were later accepted, followed by a light level of engraving work.





“There’s a difference between a job and a career. With a career, you wake up and — ‘Oh man, it’s a good day!’”

— Mark Hogan/Support Services

In a continuous effort to identify new work, we regularly communicate with our corporate Sourcing and Vendor Management teams. We review responsibilities performed by external companies, look at the costs involved and determine if the Support Services team is able to accomplish the same task while meeting all service-level agreements required by the lines of business. If our employees have the abilities, or they can be developed, we work with the business and technical partners to plan and transition the jobs.

In addition to finding work from external vendors, we also look at work completed by internal teams that is very manual in nature, and determine if we can transition those responsibilities to the Support Services team. This philosophy creates a win/win situation by providing work to Support Services while removing time-consuming tasks from employees in banking process roles. The line of business employees then have more time to focus on their core job responsibilities, while Support Services is able to focus on work that is beneficial to our employees.



Support agencies

An important part of the success of the Support Services department is in our partnership with external counseling/assistive agencies. We find a number of agencies in the local markets that are available to support our employees and utilize them as key contacts in several ways.

In the event of a job opening within Support Services, we contact our agency partners to inform them of the position and discuss the tasks and skill sets required. The agency will work to determine their best candidates for the roles and have those individuals forward their resumes to our team for consideration. We work with the agencies to source the right candidate, allow them to provide job support for the employee after hiring, and maintain an ongoing relationship to help address any concerns or issues with the individual throughout employment.

Finally, we work with transitional staff at local schools to help them identify opportunities for their students to develop skills to help them succeed in the workforce based on our platform in Support Services.

Some examples where agency support has provided vital interaction:

- Enrolling in health care plans
- Transportation challenges
- Compensation/retirement/financial concerns
- Behavior/corrective action

It's important to note that each state has varying degrees of long-term job support, so not all employees continue to have agency support past gaining initial employment. As a rule, Bank of America does not usually interact with an employee's family—we try to keep all communications directly between the company and the employee. However, while not desired, at times it is necessary to communicate directly with the employee's family members for assistance with mitigating issues.

With our unique employee base, the goal is always to find mutual success for the individual and for our company. We will communicate with the most appropriate support member for each employee to discuss and understand a situation, and work together in advising the employee (and/or family members) on the best course of action to take.



The background consists of several overlapping, semi-transparent blue geometric shapes, primarily triangles and polygons, creating a layered, mountain-like effect. The colors range from a deep navy blue to a lighter, medium blue.

Bringing our work to life

Our Support Services team is involved with a wide variety of projects for numerous lines of business. Some projects are completed daily, some are monthly or annually, while others we complete on an ad hoc basis whenever requested by our partners. Here are a few examples of projects that we have found to be a significant success for our team and for Bank of America.





Mortgage document fulfillment

This project involves a partnership between Support Services and the Bank of America Home Loans teams. Previously, Home Loans employees prepared and mailed out customer mortgage-related documents from over 130 locations nationwide. Over eight years ago, a centralized fulfillment process was implemented to remove the manual responsibility of physical printing and mailing, and instead transmit documents to Support Services for fulfillment. These documents are now printed, assembled and mailed in a consistent manner, and completed in three Support Services locations.

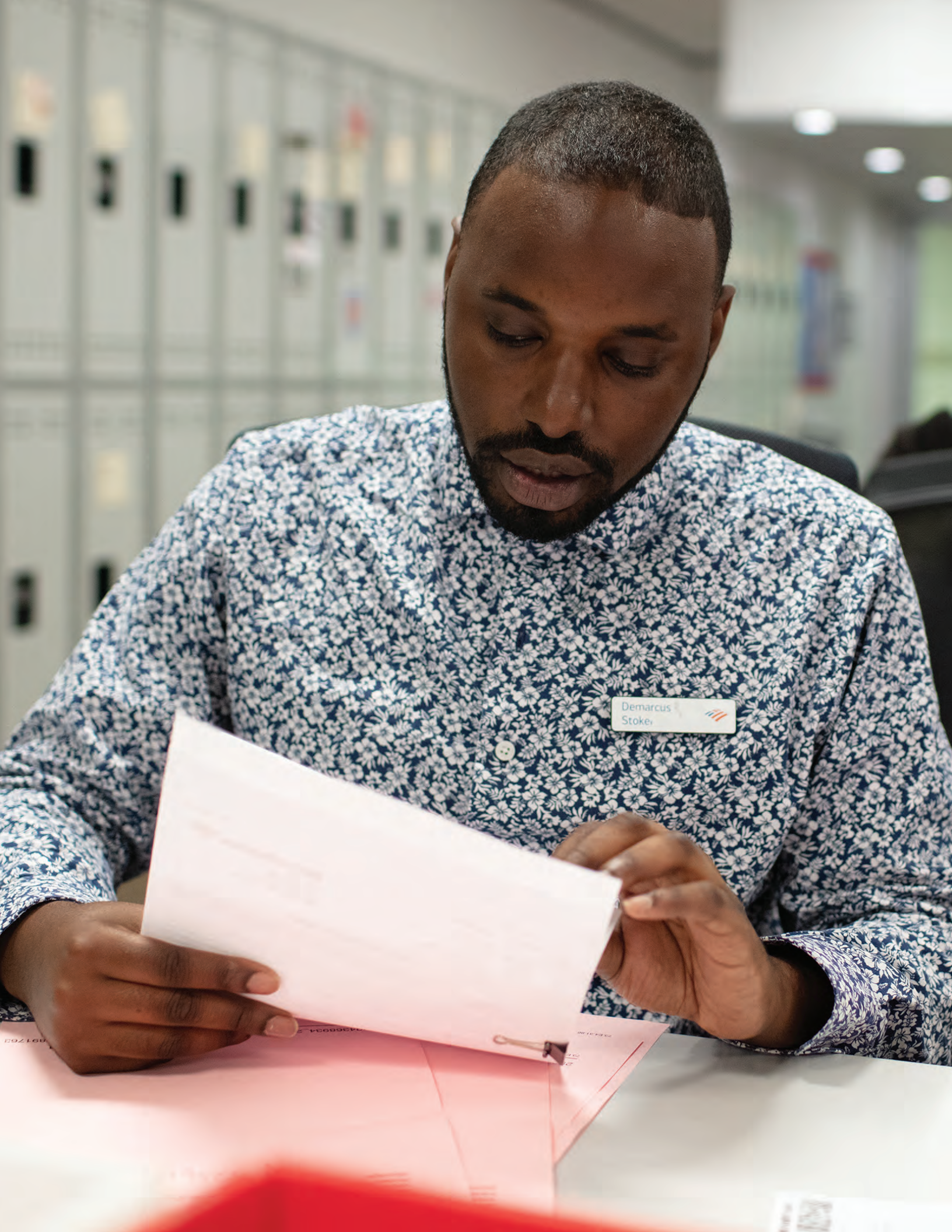
For the Home Loans team, the implementation of this process provided enhanced quality control, supply cost savings and a reduction in the risk of customer privacy issues. For Support Services, it allowed us to provide additional work for current staff, and open a new facility in Dallas, Texas.

With the notable benefits and overall success of this initiative, Home Loans has increased the number of documents that are being transmitted to Support Services. A larger variety of documents are now sent, and other executives have transitioned their work to our team as well.

To mitigate any privacy (and reputation) risks, strict validation controls have been put in place, and even with the higher volumes realized, the level of accuracy has been maintained. To serve the needs of audit and compliance partners, detailed reporting is provided on a daily basis, and historical reporting is available on demand.

While growing our employment of people with disabilities, this project has proven to be a great success for all of the Bank of America teams involved. Perhaps more importantly, the bank has continued to provide an excellent experience in serving our customers.








Electronic document indexing

To fulfill compliance requirements, Bank of America must maintain customer-related documents for many years after new accounts are opened and bank transactions are completed. The Enterprise Document Processing (EDP) team is responsible for electronically capturing and housing over 900 types of documents in a repository where they can be retrieved and viewed as necessary. Since 2017, in partnership with the EDP team, Support Services has been helping to process the documents by categorizing and indexing them into the bank's document management portal.

The opportunity for Support Services to handle a segment of this responsibility, which was previously managed by outside vendors, has been very rewarding. Performing this work has provided an opportunity for the team to branch out into a new operational function, and has required the use of more computer-based skills by our associates. This project provides a wonderful opportunity to further develop employee skills for teams at each of our geographic locations, provides a value-added contribution for our business partners, and provides work for our teammates that will further help us be sustainable for many years to come. We certainly enjoy the challenge, and are glad to assist in providing a significant annual cost savings to the bank.

It remains a priority for Support Services to consistently look for new work where our employee capabilities are well utilized, and we're grateful for the opportunity to contribute to the indexing effort. As our individual abilities advance, we hope to take on additional volume and deliver even greater savings for Bank of America.





T-shirt printing

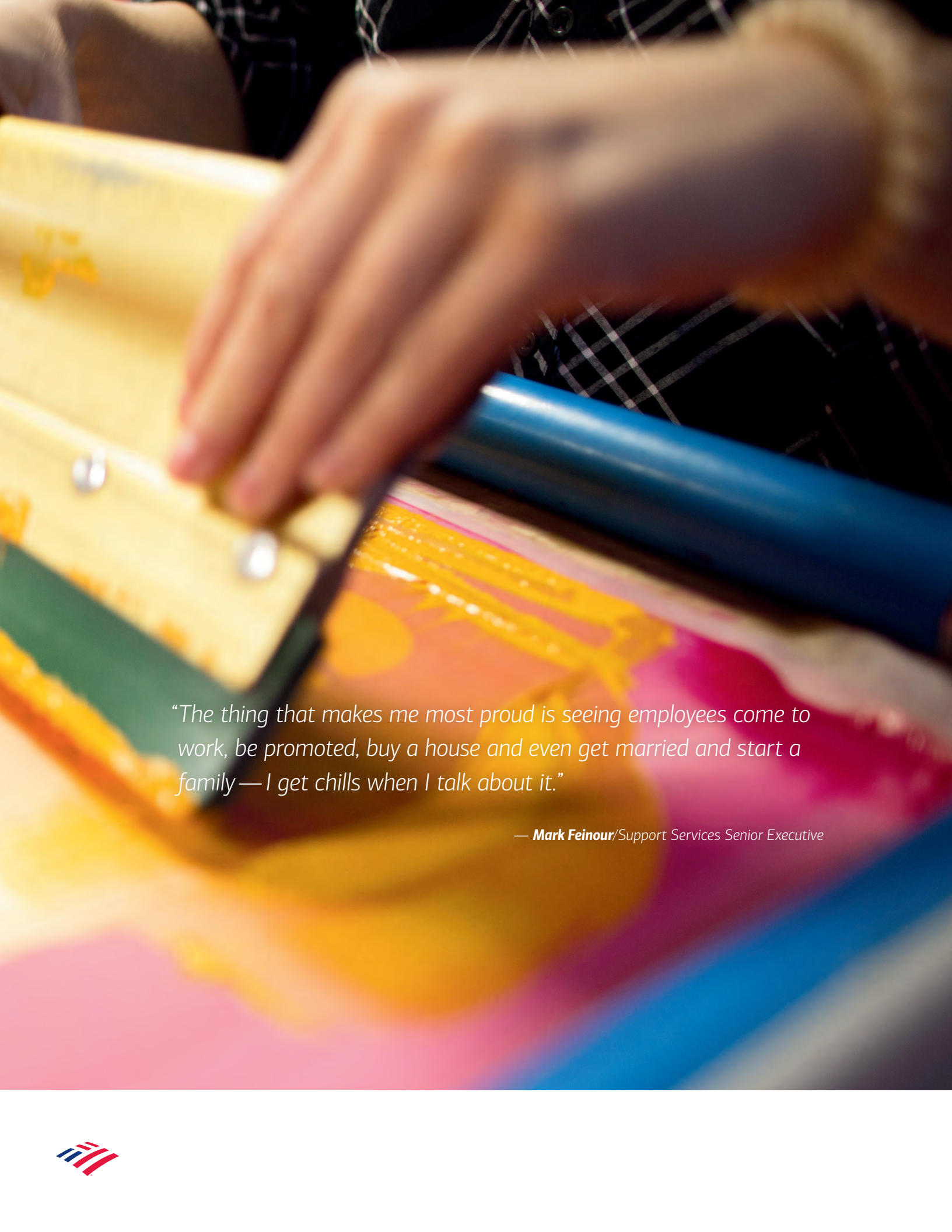
T-shirt printing is another example of sustainable work that is added for the company. It is a straightforward process that is accomplished in house, provides a significant cost savings to Bank of America, and is great work for the Support Services team.

As a company of over 200,000 employees, Bank of America has an extremely dedicated volunteer force that engages in community work throughout the country, and throughout the year. The Support Services team prints approximately 80,000 new T-shirts each year for the various volunteer events.

Despite all the advancement in technology, the process for screen printing shirts remains highly manual. Correctly positioning shirts on machinery, setting the ink, running through dryers, counting, folding and packaging by size can all be successfully accomplished by Support Services.

In working with numerous leaders in markets across the nation and internationally, Support Services always ensures that the correct sizes and quantities requested are printed and delivered on time, as expected. As logos have changed throughout the years, we have partnered closely with the brand marketing and volunteer teams to ensure the logos and colors of shirts and ink are exactly as specified, delivering on their requirements.





“The thing that makes me most proud is seeing employees come to work, be promoted, buy a house and even get married and start a family—I get chills when I talk about it.”

— **Mark Feinour**/Support Services Senior Executive



Key contacts

In addition to the Support Services management team and the service agency partners who work with our employees, here is a list of other key contacts throughout the corporation who regularly assist us. It is important to have a direct point of contact within each of these functions to help maintain a successful operation.

- **Employee Relations**
 - Human Resources partner
 - Benefits
 - Recruiting
 - Health & Wellness
 - Accommodations
- **Learning/Compliance**
- **Communications**
- **Corporate Real Estate**
- **Corporate Workplace**
- **Risk**
- **Finance**
- **Technology**





Referral process



Job requirements

For each job opening, our managers will analyze the process for successfully completing the work, and determine how to break it down into manageable steps for our employees. In doing so, we can determine the specific skill sets that are required for each step of the process. It's important to note that when looking for an appropriate candidate, we are trying to find a person who not only has the capabilities to complete the task, but who will also be a good teammate.

Capabilities for completing an assignment

When determining a process flow, we utilize a “begin with the end in mind” approach. We think through what the end product or result needs to be, and break the process down into a step-by-step flow of basic, individual tasks, ensuring that each step is easily manageable.

We look at our current employee capabilities and the skill sets they employ to complete the work. When we document the process, we always include a checklist of items that are required to ensure an appropriate “quality control” for the process. We can then list the skill sets and/or capabilities that are required for someone we would like to hire into a role for that job.



Here are some of the functional requirements we look for:

Required skills

- Ability to comprehend verbal instructions
- Ability to manage time — arriving to work, returning from lunch and breaks on time
- Ability to sit and stay focused on a single task for long periods of time in a noisy environment
- Ability to count
- Ability to sort documents
- Ability to insert documents into an envelope
- Ability to work well with others in a close environment in an open floor plan
- Ability to complete tasks in a timely manner while maintaining accuracy
- Ability to identify and elevate issues to a manager

Desired skills

- Ability to work on a team as well as individually
- Ability to scan bar codes into a computer system, and navigate through computer screens
- Basic computer skills to include data entry and knowledge of Microsoft Office
- Ability to perform routine clerical/administrative duties (that do not typically require independent judgment)
- Ability to photocopy
- Ability to ensure printers are filled with paper (and refill as necessary)
- Ability to answer phone appropriately and take messages as necessary





Behavior

As previously noted, a candidate's functional capabilities are certainly important, but throughout the interview process, we also will try to understand their behavior patterns and determine if the person will be a good fit within the team. Given our unique employee base, adequate integration with other teammates and how an individual performs their work function are equally important.

In trying to ensure success in the workplace, it certainly isn't easy to gauge one's behavior in only a few interview sessions. A list of questions to assist with the interview process can be found on the following pages of the referral process section.



Candidate/Agency Referral Questionnaire

For any new employee we bring onto the team, we try to ensure that the individual is partnered with a service agency to provide support when needed. This is very important to us, as there are a number of issues that arise throughout a person's employment that are difficult to navigate. We have found that using a service agency to assist significantly improves the professional and personal experience.

A service agency partner may often be better able to communicate (or further clarify) a candidate's job history, functional capabilities, behavior patterns or transportation challenges. This intermediary can help us better understand the candidate, complementing any information we may have gathered from the direct interview process. The following questionnaire is often provided to an agency partner to help gather information.

1. Referral agency:
2. Counselor:
3. Counselor phone number:
4. Candidate name:
5. Date referred:
6. Last position candidate held:
7. Dates of last position held:
8. What was the candidate's reason for leaving his/her last job?
9. Was the candidate on any form of disciplinary action?
10. What was the candidate's last performance rating?

Unsatisfactory, Satisfactory, Good, Excellent, Superior, N/A



11. What is this candidate's ability to respond to change?
12. Has the candidate worked non-traditional work hours in past positions?
13. Describe how the candidate resolves interpersonal conflict.
14. How does this candidate respond to feedback?
15. Are you aware of any anger control issues? If yes, please explain.
16. Provide an example of the candidate's ability to get along with others and work in a group setting.
17. How long has this candidate been working with your agency?
18. How long has this candidate worked with this counselor?
19. Is there anything that would prevent this candidate from performing the essential functions of the job? If yes, please explain.
20. Are there any accommodations required for this candidate to perform the essential functions of the job? If yes, please explain.
21. Is this candidate able to respond to direction? If not, please explain.
22. Could this candidate bring risk of harm to themselves and/or others? If yes, please explain.
23. Does this candidate have the ability to work independently?
24. Are you aware of any other issues that would impact this candidate's ability to work at Bank of America? If yes, please explain.
25. What do you think are the candidate's greatest strengths?



Support Services sample interview questions

(Remember to only ask questions that directly relate to the job)

Bank of America knowledge

1. Why are you interested in working for Bank of America?
2. What do you know about Bank of America?
3. The hours required for the job are from X to Y (Monday through Friday).
Are you able to work that schedule?

Work experience

1. What are your reasons for leaving your last position?
2. What were your responsibilities in your last job?
3. Did you interact directly with customers/people?
4. What skills and experiences from your past employment would relate to this position?
5. Think of a time when you had many things to do.
How did you organize them and manage your time to get things done?
6. What did you enjoy most/least about your previous position(s)?
7. What did you find to be most challenging about your last position?
8. Have you been evaluated in your previous positions?
What areas were good and what areas were identified as needing improvement?
9. What are you most proud of relating to previous jobs you have had?
10. What would you like to accomplish working at Bank of America?
11. Have you ever been on any type of disciplinary action at previous employers?



Office skills

1. What types of clerical functions (filing, copying and collating, keying/data entry) have you performed?
2. What type of office machinery have you operated and how proficient are you at operating them?
3. What type of computer skills or software programs do you know how to use? (Microsoft Word, Excel, email or other)
4. If you were asked to deliver mail from one location to another, do you think you would be able to do so? If not, why?

Interaction skills

1. How do you respond if your manager asks you to do something that you would rather not do?
2. Do you enjoy working alone? Do you enjoy working with others? Which do you prefer?
3. How would you respond if a coworker upset you or made you angry?
4. What would you do if you were unsure of directions in fulfilling a project?
5. What do/did you find most frustrating in your current/last position? How do/did you deal with it?
6. If you did not like the work you were asked to do because you found it boring, what would you do?
7. If you do not agree with your manager, what do you do/say?
8. You make a mistake in your job. Your manager talks to you about the mistake. How do you respond to the feedback?
9. You enjoy sitting next to one of your coworkers and you are happy with the team you are on. However, a change is made and now you have a new manager and a new seat. How do you respond?
10. If you saw someone in this department acting inappropriately, would you let a manager know? Would you let your peer know that he/she was behaving inappropriately?



11. What would you do if you felt someone was staring at you?
12. If you were asked to change teams or managers with short notice, how would you react?

Analytical/functional skills

1. In your current job, what types of decisions do you make?
2. What is your reading/writing ability?
3. Can you tell time?
4. Do you prefer to focus on one task or can you work on several things at one time?
5. If you ride public transportation to work and you are late for work, how do you handle the situation?
6. If you forgot your lunch and did not have any money with you, what would you do?
7. What would you do if someone called you an inappropriate name?
8. If you started to feel stressed out over a job that you were asked to complete, what would you do?
9. What would you do if you had completed a project and were asked to wait until additional work became available?
10. If someone on your team were talking in an unprofessional manner, how would you handle the situation?



Support Services representative performance review items

Quality

- Maintains high standards of quality by utilizing strong attention to detail
- Identifies job materials of questionable quality and advises managers
- Remains focused when quality checking
- Maintains an organized work space
- Completes projects with consistent quality

Communication/interpersonal effectiveness

- Communicates effectively with peers and managers
- Uses appropriate verbal and non-verbal communication techniques
- Uses appropriate resources to manage frustrations and conflicts
- Listens carefully when instructions are being given and carries out tasks in a cooperative manner
- Accepts feedback positively and utilizes the feedback to improve

Performance results

- Completes tasks to the best of ability
- Meets deadlines while not affecting quality



- Adheres to all policies and procedures
- Consistently meets productivity expectations
- Maintains an even and steady work pace

Leadership/flexibility/problem solving

- Demonstrates ability to be a team player
- Effectively motivates self and others to work toward meeting and exceeding goals
- Utilizes knowledge to proactively assist peers
- Easily and willingly transitions from one task to another
- Positively impacts work environment on a daily basis

Time management

- Effectively communicates time away from work
- Effectively manages time away from the work area
- Returns from lunch and breaks in a timely fashion
- Receives and carries out tasks in a timely manner
- Identifies optimal time periods to approach managers with updates and questions





"By recognizing the magic in each other, we're helping to break down barriers."

Anne Finucane
Vice Chairman





What would you
like the power to do?®

THE POWER TO

succeed together

For additional information regarding the Support Services team, please contact services.support@bofa.com.