



GIFTED POWER

Unlocking the strength of the biggest hearts in the company.



“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 doubters may
have never dreamed for us. Sometimes, we even
surprise ourselves, simply because our presence
inspires possibility.



“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.”

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



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Intellectual Disabilities in the Workplace

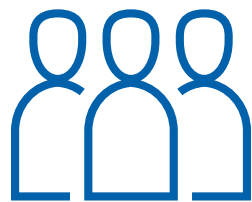
Intellectual Disabilities are the most common developmental disabilities, affecting millions of Americans. Below are some considerations to help us better understand ID, and to successfully integrate employees with ID into the workplace:

Approximately
6.5 million
Americans have
intellectual
disability

1-3%

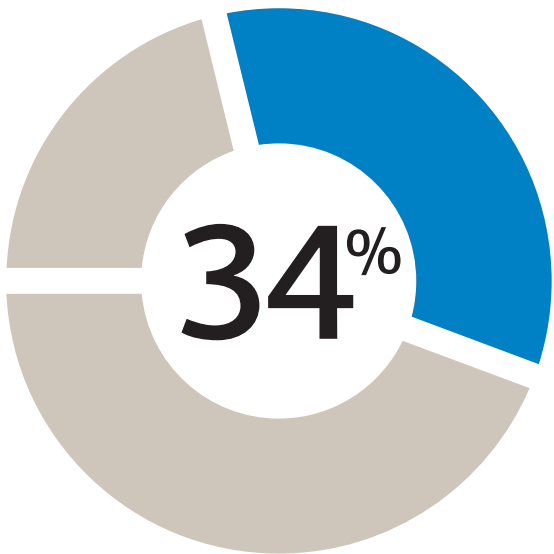
of total U.S.
population

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 an intellectual disability are unemployed or underemployed

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



of adults with an intellectual disability are fully employed

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

People with ID
can successfully
stay employed

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

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 300 employees.

Our employees reflect our values of diversity and inclusion

Our Support Services division has been employing teammates with Intellectual disabilities for over 30 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 have a different talent pool that we draw from.”*

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 "Embrace 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.

This department, which has been in existence for over 30 years, illustrates our company's passion to help people with disabilities achieve career success. We operate in:

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

Maintaining integrated relationships with other Bank of America lines of business, the Support Services team primarily provides fulfillment 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 logistic support.



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

— **Latricia Saucier** / *Support Services Employee*





Mission

Our mission is to provide Bank of America businesses with the product or service they need, while providing meaningful employment to people with disabilities. Employees are provided 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 enhancement to their quality of life. As a Bank of America employee, an expanded social and recreational network is offered, and human resources support is provided, allowing for a reduced dependency upon the government system for health care and Social Security resources.

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

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

Sustainability

Feedback from Bank of America lines of business has always been positive. In utilizing internal partnerships, the company has realized cost savings in a few different ways:

There is often a direct cost savings through centralized supply/inventory management.

There is often an indirect productivity savings with client facing employees gaining time to address core customer relationship responsibilities, while allowing Support Services employees to handle the back office responsibilities.

Our successful partnerships continue to lead to additional project opportunities. As the Support Services team has become more recognized throughout the company, a greater number of leaders have envisioned ways for our teams to connect, and have contacted us to discuss supporting their organizations.

Bank of America has found a very effective method of continuously creating and maintaining work for persons with disabilities. Our process is to determine operational functions that require consistent and repeatable tasks, and ensure they are specifically aligned with a core business function at Bank of America.

In this environment, the corporation realizes significant project savings for its businesses, while supporting a tremendous commitment to diversity and inclusion. Support Services employees are able to provide meaningful contributions to the company, and have long-lasting professional careers.



Corporate Commitment to Support Services

Throughout Bank of America, executive teams have voiced a clear commitment to social responsibility, specifically supporting the employment of people with disabilities. The growth and stability of the Support Services department is a distinct example.

When the Support Services team was originally founded, work was priced at market rates and structured with a standard business model. However, with a unique employee base and working standard business hours, it was difficult to maintain competitive costs, and the team was losing work to external suppliers. The operating model was then changed for the division's overhead expenses to be assumed at the corporate level, while only allocating direct supply costs to our customers.

This change has proven benefits in three areas. First, it has allowed our customers to realize a significant savings by utilizing Support Services while receiving the same product or service. Next, this pricing model has allowed Support Services to maintain a consistent volume of work, and a nicely balanced variety of work. Finally, it not only has brought stability, but also has allowed the department to expand. With original sites located in Maine and Delaware, following the implementation of a new project that provided an increased volume of work, Support Services was able to open a new office in Texas in 2012 and in Boston in 2017.

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:

For the Support Services manager – who can quickly contact someone who is familiar with the employees in our department, and doesn't have to spend time navigating through various HR resources to find an appropriate person to assist, and explain (from the beginning) who our department is and why our needs might be unique.

For the Employee Relations representative – an employee who is familiar with our environment will more quickly understand the issue, and will know how to most appropriately respond to meet the employee's need.

For the employee and potentially their family / caregiver – who will have their challenge addressed much more quickly.

Core Competencies and Alignment with Corporate Initiatives

Support Services core competencies focus on fulfillment, graphic arts/printing, and inventory management services.

Fulfillment

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

Graphic Arts / Printing

- T-shirt and apparel screen printing

Inventory Management

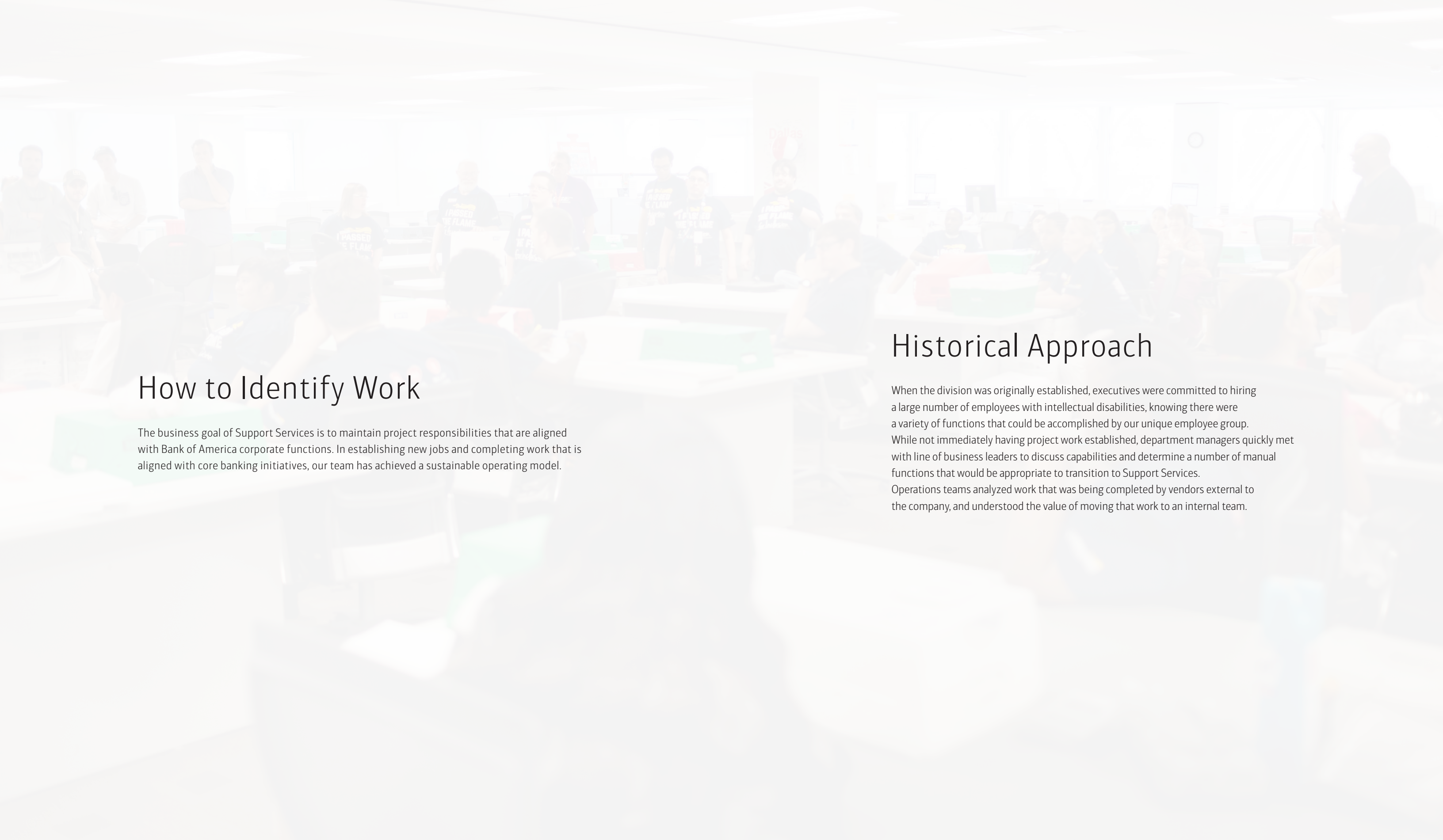
- Warehouse storage
- Distribution services





To ensure sustainability, our goal is to accept responsibility for work that is closely aligned with Bank of America's core business processing. Some examples include:

- Providing disclosure mailings to Consumer banking customers (home loans, auto loans, checking/savings accounts, etc.)
- Providing inventory management and distribution for nationwide marketing events, banking center materials and general customer collateral



How to Identify Work

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.

Historical Approach

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 vendors external to the company, and understood the value of moving that work to an internal team.



Current Approach

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 (but required) tasks from an employee within a banking process role. The line of business employee then has more time to focus on completing a higher level of 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 résumés 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.

Some examples where agency support has provided vital interaction are with:

- Enrolling in health care plans
- Transportation challenges
- Compensation / Retirement / Financial concerns
- Behavior / Corrective action

It is 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 pursuit 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 their family members) on the best course of action to take.

Job Requirements

For each job opening, our managers will analyze the process steps for successfully completing the work, and determine how to break it down into manageable steps for our employees. In doing so, we can then determine the specific skill sets that are required for each step of the process. It is important to note that when looking for an appropriate candidate, we are trying to find a person who not only has the capabilities for completing the task, but who also will 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 barcodes 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 copy and fax documents
- Ability to ensure printers are filled with paper (and refill as necessary)
- Ability to answer phone appropriately and take messages as necessary





Behavior

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 in the Invite the Magic section.



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 ten years ago, a centralized fulfillment process was implemented to remove their manual responsibility of physical printing and mailing, and instead transmit their documents to Support Services for fulfillment. These documents are now printed, assembled and mailed in a consistent manner, and completed in only 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 the Support Services unit, 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.

T-Shirt printing

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 to provide 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 employees.

In working with numerous leaders located 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 corporate brand marketing and volunteer teams to ensure the logos and colors of shirts and ink are exactly as specified, delivering on their requirements.

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.



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.



Key Contacts

In addition to the Support Services management team and the service agency partners who work with our employees on a daily basis, 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

Invite the Magic



“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 Employee*

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 having a service agency able to assist will significantly improve 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 ____ to ____ (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, faxing, 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. 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 co-worker upsets 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 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 co-workers 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 towards 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

Notes:

Notes:

A close-up photograph of a person's arm and hand. The person is wearing a green short-sleeved shirt and a silver metal-link wristwatch. They are holding a red garment, possibly a sweatshirt, which has a white label attached to it. The label contains text about Support Services. The background is slightly blurred, showing a red surface and a blue object.

Expertly created by Support Services
Providing meaningful employment to
people with disabilities since 1990
supportservices.bankofamerica.com

Get to know us.

To learn more about the Support Services division,
please contact: services.support@bofa.com

Proudly printed and assembled by the team at Support Services