

J

The Jeffress Trust Awards Program in Research Advancing Health Equity (the "Program") provide grants to qualifying academic and nonprofit research organizations devoted to supporting research that addresses health inequities within the state of Virginia, thereby improving the health of the people of Virginia. Bank of America, Private Bank, acts as trustee ("Trustee") of the Thomas F. and Kate Miller Jeffress Memorial Trust (the "Funder") and has contracted with Health Resources in Action, Inc. ("HRiA") to mutually administer the Program. HRiA will serve as a primary point of contact for all awardees.

: Partnership/Collaborative Establishment Two-Year Awards totaling \$150,000 will be awarded for the funding period of June 30, 2025 – June 29, 2027. Research Three-Year Awards totaling \$600,000 will be awarded for the funding period June 30, 2025 – June 29, 2028. Award Recipients may postpone the start date for up to three months without approval, but the revised date must be noted either on the Award Agreement signature page or by an email notification to the Program Officer. Longer delays must be approved by the administrator. A delayed start date will not reduce the total Award Period (e.g.

Funds may not be used for new construction, the renovation of existing facilities, fundraising projects or endowments. Funds may not be used for any political activity, accumulated deficits, or for any other purpose prohibited by the Internal Revenue Service Code. Research-related expenses not directly related to the work and pre-award charges are not allowable expenses.

Awards are made to non-profit organizations within the United States on behalf of the Trust. The Awardee is responsible for the administrative and financial management of the award, including any subcontracts, and maintaining adequate supporting records and receipts of expenditures.

The Awardee agrees that the grant funds will not be expended, transferred, or used for any purpose or in any fashion that is prohibited by an applicable law of the United States or of any domestic or foreign jurisdiction, including without limitation, applicable laws proscribing the support of terrorism or terrorist organizations. Awardee shall not use any portion of the funds granted herein to carry on lobbying or otherwise to attempt to influence specific legislation, either by direct or grassroots lobbying, nor to carry on directly or indirectly a voter registration drive, nor to make grants to individuals on a non-objective basis, nor to use the funds for any non-charitable purpose.

Award funds may be used only for the scope of work and budget as submitted in the Awardee's application and according to the Terms of the Award. The Awardee must exercise proper stewardship over award funds and ensure that costs charged to the award are allowable, allocable, reasonable, necessary, and consistently applied in line with the accepted proposal and budget or as outlined in the Terms of the Award. Funds may not be expended for any other purpose without the prior written approval of HRIa. All requests for re-budgeting or reallocation of funds over \$10,000 must be clearly justified in the annual financial report or conveyed to HRIa a minimum of thirty (30) days in writing.

Should any of the following events occur, the HRiA, on behalf of the Trust, may demand repayment of all unexpended portions of the award; moreover, all unpaid installments may be cancelled. The Awardee is also required to give written notice if there is a change in the Awardee's status as noted below.

- A determination, preliminary or otherwise, is made by the United States Internal Revenue Service that the award does not constitute a qualifying distribution.
- The Awardee fails to perform any of its duties, in the judgment of the Trust, Trustee, and/or HRiA, or its Review Panel, required by the Award Agreement. In such cases, HRiA shall provide no less than thirty (30) days termination notice in writing to the Awardee, upon which the Awardee shall have an additional thirty (30) days following receipt of such notice within which to cure any deemed failures.
- The Awardee ceases to be exempt from income taxes under the Internal Revenue Service Code or becomes a private foundation.
- There is a material change in the purpose, character, or method of operation of the Awardee such as to jeopardize its tax status.

HRiA reserves the right to terminate the Award Agreement with immediate effect should the Program's funding be reduced or eliminated by the Trustfi the f he A warF

Any changes to the work funded by the award including changes to/omission of objectives described in the Awardee's accepted proposal require a formal request and prior approval by HRIA before implementation. Changing of plans without prior approval may result in the suspension of payments, early termination of the award, and/or reimbursement to the Trust of any expended or

any determinations that any member of the Recipient's research team has violated its applicable anti-harassment or antidiscrimination policy(ies).

The Administrator will review the finding/determination and/or administrative action, and

Felicia Chen, Grants Officer
Lindsey Carver, M.A., Senior Grants Officer
Kim Lezak, Ph.D., Managing Director