

# The Joanna Foundation

## Letter of Intent

### *Instructions*

1. Save and re-name the LOI form on your device, using this format for the file name: <JF-LOI-your-organization>. If you try to complete the form without first downloading or exporting it to your device, some of the fields may not format correctly. Please do not convert this form to other software then save it back to PDF. Contact us if you have problems.
2. Check appropriate boxes and provide all requested information.
3. Locate a list of your organizational officers and directors with primary business/professional affiliations and a copy of your IRS letter of determination and save them as PDFs. You must provide these documents in PDF format along with the completed LOI.
4. Email the completed LOI during a valid submission period to <submit@joannafoundation.org>. Please note: The window may close early if the maximum number of LOIs is received. Do not wait until the last minute.

### *What You Need to Know*

- Paper applications will not be accepted. Early or late submissions will not be accepted. More than 25 submissions will not be accepted.
- Organizations may submit one LOI per calendar year.
- Grants typically range from \$1,000 to \$5,000. Smaller amounts may be requested. For larger amounts, a preliminary conversation is advisable. To initiate a dialog, please send an email to info@joannafoundation.org.
- The default font for text boxes is Helvetica 12. You may write your responses in a word processing app, then cut and paste into this form, in which case the font and format of your choice will override the default font – which is fine. Your LOI may contain various fonts but must be within space limits and must be legible.

### *What to Expect*

Your e-submission will be acknowledged by auto-reply and individually confirmed as soon as possible. Decisions normally will be communicated within 3-4 weeks. Applicants invited to submit a Full Proposal will receive further instructions.

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### *Eligibility*

Has eligibility to submit an LOI at this time been confirmed by completing the on-line eligibility survey or by getting permission?

Yes

No

**If the answer is "no," stop here.**

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## *Section 1. Organizational Information*

Organization Name	Web Site	
Mailing Address, line 1	Mailing Address, line 2	
City	State	Zip code
If the above address is a PO Box, provide Street Address, line 1	Street Address, line 2	
City	State	Zip code
Primary Contact Name	Primary Contact Email	
Primary Contact Title	Primary Contact Phone	
Executive Leader Name, if different from Primary Contact	Leader Email	
Leader Title	Leader Phone	

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## *Section 2. Federal Tax Exempt Status: complete a, b or c below*

a. 501(c)(3) Federal Tax Exempt:	Yes	Date Received
b. Other Federal Tax Exempt Statute:	Specify	
c. Using Fiscal Agent or Sponsor:	Yes	Complete the information below.
Name of Organization serving as Fiscal Agent	Website	
Mailing Address	Mailing Address line 2	
City	State	Zip Code
Primary Contact Name	Primary Contact Email	
Primary Contact Position	Primary Contact Phone	

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### *Section 3. Your Request*

Amount Requested

Program Name/Project Title

(limit of 85 characters including punctuation and spaces)

Relevance to Berkeley, Charleston, Dorchester counties and/or Joanna and/or Newberry communities

(limit of 360 characters including punctuation and spaces)

Summary of Primary Purpose and Anticipated Impact

(limit of 3000 characters including punctuation and spaces)



Overall Purpose (select one)	Seed Money	Ongoing Operations
	Special Project	Capital Campaign
	Matching Funds	Other (specify below)

#### *Section 4. Financial Information*

Has the applicant organization previously received support from The Joanna Foundation? Yes  No

If Yes, enter the year and dollar amount of the most recent grant. Year  
Amount

For questions about previous support, send an email to [info@joannafoundation.org](mailto:info@joannafoundation.org).

*With regard to the information requested below: If the applicant organization is part of a large entity or network with multiple chapters, schools, branches, affiliates or other operating units, provide relevant dollar amounts specific to the unit or program for which you are seeking support.*

Enter the dollar amount of the applicant organization's current annual budget approved by the Board.

Enter the dollar value of net assets as of the end of the applicant organization's most recently completed fiscal year.

Enter the dollar value of total revenue for the organization's most recently completed fiscal year.

Enter the dollar value of total expenses for the organization's most recent completed fiscal year.

#### *Section 5. Required Documents*

The following documents must be submitted along with the completed LOI. Please provide them as PDF files.

1. List of organizational officers and directors with primary business/professional affiliations.
2. Copy of the letter of determination from the Internal Revenue Service confirming the organization's federal tax exempt status. State of South Carolina certification of registration as a tax-exempt organization is not a substitute for the IRS letter of determination. Please submit only the federal document.

Thus, your email submission should contain three PDF files: (1) completed LOI; (2) list of officers and directors; and (3) IRS letter.