

# TheJoanna 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 from the browser, some of the fields may not format correctly.
2. Check appropriate boxes and provide all requested information.
3. Include the required documents in the order listed on page 4. If you would like help or advice, email <info@joannafoundation.org>.
4. Email the completed LOI during a valid submission period to <submit@joannafoundation.org>.

### *What You Need to Know*

- Multiple files will not be accepted. Paper applications will not be accepted. Early or late submissions will not be accepted (see submission dates on Applications Procedures page).
- 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 data fields is Helvetica 12. If you cut and paste, the format of your original text will override the default font. Your completed LOI may use various fonts but must observe the field limits and boundaries, and the overall document must be legible.

### *What to Expect*

Your submission will be acknowledged by auto-reply and confirmed as soon as possible. Decisions normally will be communicated within 3-4 weeks. Applicants who are invited to submit a full proposal will receive further instructions.

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### *Section 1. 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 2. Organizational Information*

Organization Name	Website	
Mailing Address	Mailing Address line 2	
City	State	Zip code
If above is PO Box, provide street address.		
Street Address	Street Address line 2	
City	State	Zip code
Primary Contact	Primary Contact Email	
Primary Contact Title	Primary Contact Phone	
Leader of Organization/Local Chapter if different		
Leader Name	Leader Email	
Leader Title	Leader Phone	

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*Section 3. 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	

## *Section 4. Your Request*

Amount Requested

Program Name/Project Title

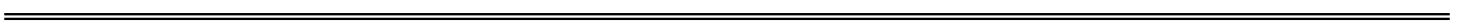
(limit of 85 characters including punctuation and spaces)

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)



## *Section 5. 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 a component of a large entity or network that comprises multiple chapters, schools, branches 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.

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## *Section 6. Required Documents*

The following documents must be included in the LOI submission. Add them in the order listed below. Documents can be added by using Adobe Acrobat's "Organize Pages" tool to insert a pdf file or by using the File>Create>Combine Files... command to combine multiple pdf files.

Alternatively, you can print the completed LOI form, add the documents, and scan the package as a single pdf file. Scanning may create a suboptimal image.

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.
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