

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. Locate a list of your organizational officers and directors with primary business/professional affiliations and a copy of your IRS letter of determination. You must provide these documents along with the completed LOI.
- 4. Email the completed LOI during a valid submission period to <submit@joannafoundation.org>.

What You Need to Know

- 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.

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.

Section 2. Organizational Information

Organization Name Website

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

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 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)

Overall Purpose (select one) Seed Money

Special Project Capital Campaign

Matching Funds Other (specify)

Section 5. Financial Information

Has the applicant organization previously received support from Yes No

The Joanna Foundation?

Year

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

Amount

General Operations

For questions about previous support, send an email to 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.

Section 6. 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.