

### *Instructions*

1. Take the Eligibility Survey on our website at this [link](#). Do not skip this step.
2. Use your browser's File menu to "Export as PDF" onto your own device. Open the form file and re-save it with a new name in the following format: <JF Your Organization Name LOI>. Complete it on your device. Do not work on this form on-line.
3. Use **Adobe Acrobat** or its free version, **Acrobat Reader**, to complete the form. You can download Reader at this [link](#). If you do not use Acrobat to complete the form, the text you enter may seem to disappear. Do not scan into PDF. Do not add security to your file. If you have problems, contact [info@joannafoundation.org](mailto:info@joannafoundation.org). We want to help!
4. Locate: (1) a list of your organizational officers and directors with primary business or professional affiliations, and (2) a copy of your IRS letter of determination. Save them as PDF files. These documents must be sent in PDF format along with the completed LOI Form.
5. Provide all requested information and click all appropriate buttons.
6. Email the completed LOI to <[submit@joannafoundation.org](mailto:submit@joannafoundation.org)> during a valid submission period. The schedule is posted on our [website](#). The window may close early if we receive the maximum number of LOIs. Waiting until the end of the submission period may be risky.

### *What You Need to Know*

1. Paper applications will not be accepted. Early or late submissions will not be accepted. Incomplete applications will not be accepted. More than 25 submissions will not be accepted. Organizations may submit only one LOI per calendar year.
2. 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](mailto:info@joannafoundation.org)>.
3. The default font for fillable fields is Helvetica 12. Text fields are set for Rich Text formatting. You may draft your responses separately to copy and paste into the fields, but do not be surprised if the formatting is altered in the process. All text must fit within the boxes and be easy to read.
4. Questions are encouraged!

### *What to Expect*

Your 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.

### *Eligibility*

Have you confirmed eligibility at this time by completing the on-line eligibility survey or by receiving permission from the Foundation?

Yes

No

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

# The Joanna Foundation LOI Form

## Section 1. Organizational Information

Organization Name	Website	
Mailing Address, line 1	Mailing Address, line 2	
City	State	Zip
If the primary mailing address above is a PO Box, provide street address below.		
Street Address, line 1	Street Address, line 2	
City	State	Zip
Primary Contact for Questions	Primary Contact Email	
Primary Contact Title	Primary Contact Phone	
Name of Organization Leader, if not the same as Primary Contact		
Leader Name	Leader Email	
Leader Title	Leader Phone	

---

---

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

- a. 501(c)(3) Federal Tax Exempt:                      No              Yes              Date Received
- b. If other Federal Tax Exempt Statute, specify:
- c. If using Fiscal Agent, complete the information below.

Organization Serving as Fiscal Agent	Website	
Mailing Address, line 1	Mailing Address, line 2	
City	State	Zip
Primary Contact Name for Fiscal Agent	Primary Contact Email	
Primary Contact Title	Primary Contact Phone	

---

---

### *Section 3. Your Request*

Amount Requested

*enter amount without \$ or comma*

Program Name/Project Title

(limit of 85 characters including punctuation, spaces and returns)

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

(limit of 350 characters including punctuation, spaces and returns)

Summary of Primary Purpose and Anticipated Impact

(limit of 3000 characters including punctuation, spaces and returns)

Overall Purpose (select one)

Operating support

Facilities/equipment

Matching funds

Admin/technical support

Seed money/startup funds

Capital campaign

Program-specific/Special project (title or descriptive phrase)

---

---

#### Section 4. Financial Information

Has the applicant organization previously received support from The Joanna Foundation?

No

Yes

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

Year

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

Amount

*With regard to financial data: If your organization is part of a large entity or network comprising various chapters, schools, branches or other operating units, provide relevant dollar amounts specific to the unit or program for which you are seeking support.*

Enter dollar amounts with no currency symbol or comma.

Organization's **current annual budget** approved by the Board

Value of **net assets** as of the end of the most recently completed fiscal year

**Total revenue** for the most recently completed fiscal year

**Total expenses** for the most recent completed fiscal year

**Net income** for the most recently completed fiscal year

---

---

#### Section 5. Required Documents

The following documents must be submitted as individual PDF files with the completed LOI Form.

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. PLEASE NOTE: The letter for the federal Employee Identification Number is not the correct document and 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 IRS letter of determination.

**Your submission should contain three individual PDF files:** (1) completed LOI Form, (2) list of officers and directors, and (3) IRS letter of determination.

Have you saved and the list and letter as PDF files?

Yes

No

Are they ready to add as email attachments to your submission?

Yes

No

---

---