

Instructions: Read every word below and follow instructions step by step.

1. Take the Eligibility Survey on our website at this [link](#). Do not skip this step.
2. Use a form downloaded from the website no more than 2 months prior to submission date.
3. On our website, use your browser's File menu to "Export as PDF" and save the form on your drive. Close the form that is open in your browser. Open the form on your drive and re-save it with a new name in this format: <JF "Your Organization Name" LOI>. Do not work on the form online. Fill out the form using **Adobe Acrobat** or **Reader**.
4. Do not use any application other than **Adobe Acrobat** or its free version, **Acrobat Reader**. You can download Reader at this [link](#). If you do not use Acrobat, the text you enter may disappear. Do not scan the form. Do not add security or file protection. The form we receive must be editable and extractable. If you have problems, contact info@joannafoundation.org.
5. 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. Make sure they are PDF files. These documents must be sent as PDF files with the completed LOI Form.
6. Email the completed form + 2 attachments to <submit@joannafoundation.org> during a valid submission period. The schedule is posted on our [website](#). The window will close early if we receive the maximum number of LOIs. Sometimes it closes on the first day.

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>.
3. The default font for fillable fields is Helvetica 12. Text fields are set for Rich Text formatting. You may draft your responses separately, then copy and paste into the fields; the formatting and/or spacing may change in the process but you can edit it to optimize it within the constraints. 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 and another deadline.

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 Person Submitting this Application | Primary Contact Email | |
| Primary Contact Title | Primary Contact Phone | |
| Name of Organizational Officer with authority to act and sign on behalf of the applicant | | |
| Officer Name | Officer Email | |
| Officer Title | Officer 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.

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.

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

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

Total revenue for the most recently completed fiscal year

Total expenses for the most recently 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. 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
