

*What You Need to Do: Read every word. Follow instructions step by step. Do not scan or combine the finished product.*

1. Take the Eligibility Survey at this [link](#). Do not skip this step.
2. Download the current LOI form within 60 days of the submission date. Specifically, 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.
3. Fill out the form using **Adobe Acrobat or Reader**. Do not use any other application. You can download Reader at this [link](#). Do not convert the form to other software. Do not scan it. Do not add security or file protection. The form we receive must be editable and extractable. If you have problems, contact [info@joannafoundation.org](mailto:info@joannafoundation.org).
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. Make sure they are PDF files. These documents must be sent as PDF files with the completed LOI Form.
5. Email the completed form + 2 attachments to <[submit@joannafoundation.org](mailto:submit@joannafoundation.org)> during the 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](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, 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 typically 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 and go back to the top of this page.**

# 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; text must fit within box)

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

(limit of 350 characters including punctuation, spaces and returns; text must fit within box)

Summary of Primary Purpose and Anticipated Impact

(limit of 3000 characters including punctuation, spaces and returns; text must fit within box)

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 (enter amounts without \$ or comma)*

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.

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

---

---