

What You Need to Do: Follow instructions step by step. Do not scan, convert or combine the form file.

1. Take the Eligibility Survey at this [link](#). Do not skip this step.
2. Download the current LOI form within 30 days of the submission date. Specifically, use your browser's File menu to "Export as PDF" and save the form on your drive. Re-name the file on your drive in this format: <JF "Your Organization Name" LOI>. Close the form that is open in your browser.
3. Fill out the form using **Adobe Acrobat or Reader**. Do not use another 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.
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 non-profit status determination. These documents must be sent as PDF files with the completed LOI Form.
5. Email the completed form + the 2 additional files to <submit@joannafoundation.org> during on the due date. The schedule is posted on our [website](#). The window will close early if we receive the maximum number of LOIs. Sometimes it closes within minutes.

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 20 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 start a dialog, please send an email to <info@joannafoundation.org>.
3. The default font for fillable fields is Helvetica 10. 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 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 complete the survey online.

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

Organizational Category (select one that fits best)

Arts & Humanities

Education

Environment

Health

Human Services

Public Benefit/Society

Religion

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

a. 501(c)(3) Federal Tax Exempt: No Yes Effective Date

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.

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 separate 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 federal tax exempt status. PLEASE NOTE: The letter for the Federal Employee Identification Number (EIN) is not the right document. State of South Carolina certification of registration as a tax-exempt organization is not the right document. Please submit the IRS letter of determination.

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

Have you saved the list and letter as PDF files?

Yes

No

Are they ready to be sent as email attachments?

Yes

No