

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 no more than 45 days before the submission date. 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 and open the newly re-named file that you saved to your drive.
3. Fill out the form using **Adobe Acrobat or Reader**. Do not use another application. You can download Reader for free 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 (**NOT** the Employee Identification Number letter). 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> on the due date. The schedule is posted on our [website](#).

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. Organizations may have one LOI per year reviewed per calendar year. Please review the Application Procedures guidance on our website for additional information about the submission process.
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 is Helvetica 10. You can draft your responses separately to copy and paste into the fields. Formatting or spacing may change in the process. You can edit to optimize the text within the space 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 confirmed as soon as possible. Review results 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? THIS STEP IS CRUCIAL.

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)

Admin/Technical support

Equipment/Facilities

Program-specific/Special

project (title or descriptive phrase)

Capital Campaign

General Operations

Critical Need

Seed Money/Startup Funds

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 board-approved **current annual budget for expenses**

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
