The Joanna Foundation

Letter of Intent Form v27-1

What You Need to Do: Follow instructions. Do not scan, convert or combine this file.

1. Take the Eligibility Survey at this link. Do not skip this step.
2. Download the current LOI form no more than 30 days before submission date. Use your browser's File menu to "Export as PDF" and save the form to 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. Complete the form using **Adobe Acrobat** or **Reader**. 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. Do not combine it with other files. 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 or SC Secretary of State form). These documents must be sent as separate PDF files along with the completed LOI Form.
5. Email the completed form + the 2 additional files to <submit@joannafoundation.org> on the designated due date between 9AM and 5 PM. 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 additonal 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 use a different font if you choose. You can draft your responses, then copy and paste but formatting or spacing change 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 confirmed individually as soon as possible. A maximum of 20 applications will be randomly selected for review. Applicants whose applicatons are not selected for review may apply again in the next grant cycle.

Eligibility

Have you completed the on-line eligibility survey to confirm current eligibility or received specific permission from the Foundation? This step is important each time you apply.

Yes ◯
No ◯ **If the answer is "no," stop here and complete the survey our our website.**

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 <u>one</u> 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 a Fiscal Sponsor that will receive the grant on your behalf , complete the boxes below.

Organization Serving as Fiscal Sponsor

Website

Mailing Address, line 1

Mailing Address, line 2

City

State

Zip

Primary Contact Name for Fiscal Sponsor

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 ◯	Capital Campaign ◯	Critical/Emergency Need ◯
Equipment/Facilities ◯	General Operations ◯	Seed Money/Startup Funds ◯
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.
For questions about previous support, send an email to info@joannafoundation.org.

Year
Amount

If received after 2022, did you submit the Grant Report? If the answer is no, be sure to do so before submitting this LOI. No ◯ Yes ◯ NA ◯

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 correct document. State of South Carolina certification of registration as a tax-exempt organization is not the correct document. 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 separate PDF files? Yes ◯ No ◯

Are you attaching them to the email as separate attachments? Yes ◯ No ◯