



# LETTER OF CONNECTION (LOC) BLANK FORM

**We are on a mission for a just Georgia.** Will you join us as a grantee partner? As a grantmaking partner, we believe grants for just systemic change begin with partnerships... and partnerships begin with connections. So, we welcome Letters of Connection (LOC) from current, potential, and former grantee partners. Before connecting, please see our website ([www.sapelofoundation.org](http://www.sapelofoundation.org)). It includes our "[Become a Grantee Partner](#)" page, where you can download our:

- **Strategic Direction Summary** – Learn how we work, review our eight grant criteria, and consider a partnership with us.
- **Letter of Connection (LOC) - Blank Form** – Submit this form if your work aligns with ours.
- **Letter of Connection (LOC) - Sample Form** – See this example before starting your LOC.
- **FAQs & Glossary** – Find helpful answers and definitions.
- **Planning Matrix** – Use some or all of this tool if it will help advance your work (available in PDF and Word).

**LOC Process:** LOCs are the first of two phases in our grantmaking process. They help us start conversations. Based on our eight grant criteria, LOCs include three parts: **(a)** overview, **(b)** questionnaire, and **(c)** summary. We value each LOC shared with us, yet given our finite resources, we anticipate more eligible and promising LOCs than we can fund. Therefore, we review every LOC, contact some to learn more, and invite few to submit grant applications (phase two). Annually, anyone can submit one or more LOCs for either grant portfolio, and the same LOC form applies to both of our main grant portfolios.

- **Grant Portfolio I: Environmental Justice & Protection** – LOCs due: **August 15.**
- **Grant Portfolio II: Social Justice** – LOCs due: **February 15.**

**LOC Submission:**

- Scroll up or down to view your entire answer in some response fields (right side), and please note word limits.
- Email [info@sapelofoundation.org](mailto:info@sapelofoundation.org) with the completed LOC as an attachment.
- Title both the subject line of the email and the attachment: "**LOC - [Organization Name].**"
- If submitting multiple LOCs before the annual deadline of a given grant portfolio, add number(s) at the end of the titles for both the subject line of the email and the attachment. Example: "**LOC - [Organization Name] #2.**"

## PART A: OVERVIEW

**Directions:** Please answer questions on behalf of the organization submitting this LOC. If there is a fiscal sponsor, use the fiscal sponsor's information to answer entries as needed (e.g., entry #3); and be sure to write "fiscal sponsor" beside your answers for those entries. If an entry is not relevant, leave it blank.

Basic Information about the Organization Submitting the LOC	
<b>1. Organization Name:</b>	
<b>2. Mission Statement:</b>	
<b>3. Federal Tax ID Number:</b> <i>(List fiscal sponsor's name &amp; tax ID number, if relevant.)</i>	
<b>4. Mailing Address of Primary Office:</b>	
<b>5. Mailing Address of Other Office(s) in Georgia:</b>	
<b>6. Main Phone Number:</b>	
<b>7. Website:</b>	



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<b>8. Executive Director/Leader, Name:</b>	
<b>9. Executive Director/Leader, Website for Online Bio:</b> <i>(Leave blank if it is not available. Do not write text.)</i>	
<b>10. Primary Contact, Name &amp; Title:</b>	
<b>11. Primary Contact, Direct Phone Number:</b>	
<b>12. Primary Contact, Email:</b>	
<b>13. Number of Paid Full-Time Staff:</b>	
<b>14. Number of Paid Part-Time Staff:</b>	
<b>15. Number of Board Members:</b>	
<b>16. Gender Identification of Board Members:</b> <i>(List as ratios, e.g., 5 of 10 Female, 5 of 10 Male.)</i>	
<b>17. Race Identification of Board Members:</b> <i>(List as ratios, e.g., 5 of 10 White, 5 of 10 Latino.)</i>	
<b>18. Strategy:</b> Does your organization have a strategic plan? If so, in what year did your board approve it?	
<b>19. Finance:</b> Does your organization (or fiscal sponsor) complete regular audits or financial reviews? If so, in what year did your board approve the most recent one?	
<b>20. Revenue – Current Fiscal Year’s Projected Budget:</b> What is your organization’s total revenue for your current fiscal year’s projected budget?	
<b>21. Expenses – Current Fiscal Year’s Projected Budget:</b> What is your organization’s total expenses for your current fiscal year’s projected budget?	
<b>22. Revenue – Previous Fiscal Year’s Actual Budget:</b> What was your organization’s total revenue for your previous fiscal year’s actual budget? <i>(Note dollar amount from Form 990, part 1, line 12.)</i>	
<b>23. Expenses – Previous Fiscal Year’s Actual Budget:</b> What was your organization’s total expenses for your previous fiscal year’s actual budget? <i>(Note dollar amount from Form 990, part 1, line 18).</i>	
<b>24. Reserve Fund:</b> Does your organization have a reserve fund of any kind? If so, list its current amount.	
<b>25. Type: Select the applicant type for your LOC.</b> <i>(Check one type for an initial LOC submission.)</i>	<input type="checkbox"/> Type 1: <b>Organization</b> – LOC is submitted for your own organization. <input type="checkbox"/> Type 2: <b>Formal Network</b> – LOC is submitted for a formal network of two or more organizations. <input type="checkbox"/> Type 3: <b>Less-Formal Collaboration</b> – LOC is submitted for a less-formal collaboration of two or more organizations.
<b>26. Name of Network or Collaboration:</b> What is the name of the network or collaboration, if relevant?	



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<b>27. Focus: Select the focus of your LOC.</b> <i>(Check one focus for an initial LOC submission.)</i>	<input type="checkbox"/> Focus 1: <b>General Work</b> <input type="checkbox"/> Focus 2: <b>Project(s)</b>
<b>28. Stage: Select the lifecycle stage of your LOC.</b> <i>(Check all that apply.)</i>	<input type="checkbox"/> Stage 1: <b>Start-up</b> <input type="checkbox"/> Stage 2: <b>Growth</b> <input type="checkbox"/> Stage 3: <b>Maturity</b> <input type="checkbox"/> Stage 4: <b>Renewal</b>
<b>29. Did You Review our Strategic Direction Summary?</b>	
<b>30. Grant Amount Requested</b> <i>(Leave blank for an initial LOC submission.)</i>	[Leave blank. This will be completed if there is an invitation to apply for phase two: grant application.]

## PART B: QUESTIONNAIRE

**Directions:** Please answers questions on behalf of the LOC applicant type, focus, and lifecycle stage you selected in Part A. If an entry is not relevant, leave it blank.

Grant Criterion #1 – Mission, Values, & Portfolio Alignment	
<b>1A. Grant Portfolio:</b> Which grant portfolio fits your LOC? <i>(Check all that apply, 0 words)</i>	<input type="checkbox"/> Grant Portfolio I: <b>Environmental Justice &amp; Protection</b> <input type="checkbox"/> Grant Portfolio II: <b>Social Justice</b>
<b>1B. Objectives:</b> What is the objective(s) of your LOC? <i>(150 words max.)</i>	
<b>1C. Justice &amp; Equity, Today:</b> At present, identify where you are on your justice and equity journey that explicitly includes racial justice and equity. <b>(a)</b> Check all that apply to the organization, network, or collaboration for this LOC. <b>(b)</b> If your LOC is for a network or collaboration, respond based on how active members would answer on average. <i>(Check all that apply, 0 words.)</i>	<input type="checkbox"/> Option 1: <b>Feeling new to this space and ready to learn</b> <input type="checkbox"/> Option 2: <b>Seeking advice, trainings, TA, best practices, and wisdom</b> <input type="checkbox"/> Option 3: <b>Having discussions and taking early steps with staff</b> <input type="checkbox"/> Option 4: <b>Having discussions and taking early steps with board</b> <input type="checkbox"/> Option 5: <b>Committing publicly to explicit values with staff and board</b> <input type="checkbox"/> Option 6: <b>Setting explicit goals or benchmarks with staff and board</b> <input type="checkbox"/> Option 7: <b>Assessing/developing practices across internal operations</b> <input type="checkbox"/> Option 8: <b>Assessing/developing practices across external programs</b> <input type="checkbox"/> Option 9: <b>Implementing/changing practices for internal operations</b> <input type="checkbox"/> Option 10: <b>Implementing/changing practices for external programs</b> <input type="checkbox"/> Option 11: <b>Evaluating implemented practices across internal operations</b> <input type="checkbox"/> Option 12: <b>Evaluating implemented practices across external programs</b> <input type="checkbox"/> Option 13: <b>Advocating/championing externally with staff and board</b> <input type="checkbox"/> Option 14: <b>Baking it into our cultural DNA holistically and intentionally</b> <input type="checkbox"/> Option 15: <b>Other: Let’s discuss it</b>
<b>1D. Justice &amp; Equity, Goals:</b> In the next year, what goals will you set and assess to advance your justice and equity journey? If helpful, share history or context. <i>(150 words max.)</i>	



**Grant Criterion #2 – Primary Strategies**

<p><b>2A. Primary Strategies:</b>          What is the primary strategy for your LOC?  <i>(Check all that apply, 0 words.)</i></p>	<p><input type="checkbox"/> Option 1: <b>Policy Advocacy</b></p> <p><input type="checkbox"/> Option 2: <b>Civic Engagement</b></p> <p><input type="checkbox"/> Option 3: <b>Grassroots Community Organizing</b></p>
<p><b>2B. Success:</b>          Share a past success that:  <b>(a)</b> Used the primary strategy you selected in 2A to help advance just systemic change.  <b>(b)</b> Was led by members of the organization, network, or coalition in this LOC.  <i>(150 words max.)</i></p>	

**Grant Criterion #3 – Marginalized Communities**

<p><b>3A. Communities:</b>          Who do you serve/empower for your LOC?  <i>(25 words max.)</i></p>	
<p><b>3B. Demographics:</b>          Share data about who you serve/empower. This may include racial, social, environmental, and/or economic data about marginalized communities.  <i>(150 words max.)</i></p>	

**Grant Criterion #4 – Place Focus**

<p><b>4A. Place Focus:</b>          Where is the primary place focus of your LOC?  <i>(Check all that apply, 0 words.)</i></p>	<p><input type="checkbox"/> Option 1: <b>Statewide Effort</b> with meaningful inclusion and perspectives of those living in more rural communities and smaller cities outside metro Atlanta’s 13 counties. (We use the United Way’s 13-county definition for metro Atlanta: Butts, Cherokee, Clayton, Cobb, Coweta, Dekalb, Douglas, Fayette, Fulton, Gwinnett, Henry, Paulding, and Rockdale.)</p> <p><input type="checkbox"/> Option 2: <b>Local or Regional Effort</b> outside metro Atlanta’s 13 counties.</p>
<p><b>4B. Local or Regional:</b>          If you selected local or regional, list cities, counties, or regions where you currently work.  <i>(100 words max.)</i></p>	



**4C. Statewide:**

If you selected statewide, check aspects of your current work that are based outside metro Atlanta's 13 counties.

*(Check all that apply, 0 words.)*

**Offices & People**

- Option 1: **Primary Office** – One:
- Option 2: **Secondary Office(s)** – One: , Two or More:
- Option 3: **Active Chapter(s)** – One: , Two or More:
- Option 4: **Full-Time, Paid Staff Member(s)** – One: , Two or More:
- Option 5: **Part-Time, Paid Staff Member(s)** – One: , Two or More:
- Option 6: **Consultant(s)** – One: , Two or More:
- Option 7: **Board Member(s)** – One: , Two or More:
- Option 8: **Advisory Committee Member(s)** – One: , Two or More:
- Option 9: **Individual Donor(s) or Foundation(s)** – One: , Two or More:
- Option 10: **Active, Dues-Paying Member(s)** – 10%: , 25% or More:

**Events & Projects**

- Option 1: **[Pre-COVID] Event(s) with 50+ People** – One: , Two or More:
- Option 2: **[Pre-COVID] Stakeholder Meeting(s)** – One: , Two or More:
- Option 3: **Project(s) or Initiative(s)** – One: , Two or More:
- Option 4: **Focus Group(s) or Polling Effort(s)** – One: , Two or More:

**Collaborations & Networks**

- Option 1: **Regrant to a partner outside metro Atlanta**
- Option 2: **Regrants to two or more partners outside metro Atlanta**
- Option 3: **MOU with a partner outside metro Atlanta**
- Option 4: **MOUs with two or more partners outside metro Atlanta**
- Option 5: **Member of a local or regional network outside metro Atlanta**
- Option 6: **Member of two or more local or regional networks outside metro Atlanta**
- Option 7: **Member of a statewide network that includes leadership from an organization outside metro Atlanta**
- Option 8: **Member of a statewide network that includes leadership from two or more organizations outside metro Atlanta**



**Grant Criterion #5 – Interconnected Agendas**

**5A. Interconnected Agendas:**

Have you helped advance just systemic change by successfully connecting two or more agendas? If so:

**(a)** Check all that apply.

**(b)** List up to five examples for each option that applies.

*(Check all that apply & 150 words max for all options combined.)*

Option 1: **Success connecting agendas across two or more strategies.**

- If so, list up to five examples of those strategies:

Option 2: **Success connecting agendas across two or more communities.**

- If so, list up to five examples of those communities:

Option 3: **Success connecting agendas across two or more places.**

- If so, list up to five examples of those places:

Option 4: **Success connecting agendas across two or more issues.**

- If so, list up to five examples of those issues:

Option 5: **Success connecting agendas across two or more sectors.**

- If so, list up to five examples of those sectors:

Option 6: **Success connecting agendas across two or more movements.**

- If so, list up to five examples of those movements:

**Grant Criterion #6 – Collaborative Approaches**

**6A. Organization:**

If your LOC is for your own organization, list your top collaborators. Include:

**(a)** Organization names.

**(b)** Cities or towns where their offices/full-time staff are based year-round.

*(100 words max.)*

**6B. Network or Collaboration:**

If your LOC is for a network or collaboration, list active members and leaders. Include:

**(a)** Organization names.

**(b)** Cities or towns where their offices/full-time staff are based year-round.

*(Word count will vary.)*

**6C. Foundations:**

List foundations that funded your organization, network, or collaboration in the last year.

*(100 words max.)*



### Grant Criterion #7 – Organization or Network Health

**7A. Previously Completed:**

[Leave blank, because you already completed organizational and network health questions in “Part A: Overview.”]

## PART C: SUMMARY

**Directions:** Share a summary about the work of your LOC, given the applicant type, focus, and lifecycle stage you selected in “Part A: Overview.”

### Grant Criterion #8 – Promising Efforts

**8A. Summary:**

In any format you choose, share a summary for your LOC that includes information about your plans for objectives/goals and assessment/evaluation. We encourage you to use all or part of a previously written summary.

*(750 words max for an initial LOC submission.)*