



LETTER OF CONNECTION (LOC) SAMPLE 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). 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 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	
1. Organization Name:	Organization Z
2. Mission Statement:	Advance quality of life and civil rights in County Z.
3. Federal Tax ID Number: <i>(List fiscal sponsor's name & tax ID number, if relevant.)</i>	123456789
4. Mailing Address of Primary Office:	123 Main Street Zville, Georgia 12345
5. Mailing Address of Other Office(s) in Georgia:	
6. Main Phone Number:	123-456-7890
7. Website:	www.organizationz.org



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8. Executive Director/Leader, Name:	John Doe
9. Executive Director/Leader, Website for Online Bio: <i>(Leave blank if it is not available. Do not write text.)</i>	www.organizationz.org/staffbios/johndoe
10. Primary Contact, Name & Title:	John Doe, Executive Director
11. Primary Contact, Direct Phone Number:	123-456-7890 extension 1
12. Primary Contact, Email:	john@organizationz.org
13. Number of Paid Full-Time Staff:	5
14. Number of Paid Part-Time Staff:	1
15. Number of Board Members:	10
16. Gender Identification of Board Members: <i>(List as ratios, e.g., 5 of 10 Female, 5 of 10 Male.)</i>	5 of 10 Female, 5 of 10 Male
17. Race Identification of Board Members: <i>(List as ratios, e.g., 5 of 10 White, 5 of 10 Latino.)</i>	5 of 10 White, 5 of 10 Latino
18. Strategy: Does your organization have a strategic plan? If so, in what year did your board approve it?	Yes, Year X
19. Finance: 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?	Yes, Year Y
20. Revenue – Current Fiscal Year’s Projected Budget: What is your organization’s total revenue for your current fiscal year’s projected budget?	\$750,000
21. Expenses – Current Fiscal Year’s Projected Budget: What is your organization’s total expenses for your current fiscal year’s projected budget?	\$700,000
22. Revenue – Previous Fiscal Year’s Actual Budget: 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>	\$805,000
23. Expenses – Previous Fiscal Year’s Actual Budget: 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>	\$762,000
24. Reserve Fund: Does your organization have a reserve fund of any kind? If so, list its current amount.	Yes, \$90,000
25. Type: Select the applicant type for your LOC. <i>(Check one type for an initial LOC submission.)</i>	<input checked="" type="checkbox"/> Type 1: Organization – LOC is submitted for your own organization. <input type="checkbox"/> Type 2: Formal Network – LOC is submitted for a formal network of two or more organizations. <input type="checkbox"/> Type 3: Less-Formal Collaboration – LOC is submitted for a less-formal collaboration of two or more organizations.
26. Name of Network or Collaboration: What is the name of the network or collaboration, if relevant?	



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27. Focus: Select the focus of your LOC. <i>(Check one focus for an initial LOC submission.)</i>	<input checked="" type="checkbox"/> Focus 1: General Work <input type="checkbox"/> Focus 2: Project(s)
28. Stage: Select the lifecycle stage of your LOC. <i>(Check all that apply.)</i>	<input type="checkbox"/> Stage 1: Start-up <input type="checkbox"/> Stage 2: Growth <input checked="" type="checkbox"/> Stage 3: Maturity <input type="checkbox"/> Stage 4: Renewal
29. Did You Review our Strategic Direction Summary?	Yes
30. Grant Amount Requested <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	
1A. Grant Portfolio: Which grant portfolio fits your LOC? <i>(Check all that apply, 0 words)</i>	<input type="checkbox"/> Grant Portfolio I: Environmental Justice & Protection <input checked="" type="checkbox"/> Grant Portfolio II: Social Justice
1B. Objectives: What is the objective(s) of your LOC? <i>(150 words max.)</i>	Advance our three programs (housing rights, economic mobility, and election integrity); internal operations; networks; commitment to racial, social, and economic equity; and pursuit of multi-issue advocacy and civic engagement strategies. Top objectives for each of our programs: (1) Housing Rights – Scale-up implementation of our successful, community-led model for housing policy, in partnership with many networks. It was adopted in three counties and is expanding statewide. (2) Economic Mobility – Launch our three-part strategy (advocacy effort, voter education campaign, and cross-sector network) for our economic mobility agenda: policy reform for living wages, healthcare, childcare, and senior care. (3) Election Integrity – Register and turnout 15,000 new voters in our tri-county region and work with our network partners to implement our watchdog agenda.
1C. Justice & Equity, Today: At present, identify where you are on your justice and equity journey that explicitly includes racial justice and equity. (a) Check all that apply to the organization, network, or collaboration for this LOC. (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: Feeling new to this space and ready to learn <input checked="" type="checkbox"/> Option 2: Seeking advice, trainings, TA, best practices, and wisdom <input type="checkbox"/> Option 3: Having discussions and taking early steps with staff <input type="checkbox"/> Option 4: Having discussions and taking early steps with board <input checked="" type="checkbox"/> Option 5: Committing publicly to explicit values with staff and board <input checked="" type="checkbox"/> Option 6: Setting explicit goals or benchmarks with staff and board <input checked="" type="checkbox"/> Option 7: Assessing/developing practices across internal operations <input checked="" type="checkbox"/> Option 8: Assessing/developing practices across external programs <input checked="" type="checkbox"/> Option 9: Implementing/changing practices for internal operations <input type="checkbox"/> Option 10: Implementing/changing practices for external programs <input checked="" type="checkbox"/> Option 11: Evaluating implemented practices across internal operations <input type="checkbox"/> Option 12: Evaluating implemented practices across external programs <input type="checkbox"/> Option 13: Advocating/championing externally with staff and board <input type="checkbox"/> Option 14: Baking it into our cultural DNA holistically and intentionally <input checked="" type="checkbox"/> Option 15: Other: Let's discuss it
1D. Justice & Equity, Goals: 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>	Four years ago, Racial Equity Institute trained our board, staff, and coalition. As part of orientation, all new staff and board members receive REI's training, too. The trainings gave us language/tools to apply racial justice and equity across all our work. Two years ago, we added justice and equity discussions to agendas for board and staff meetings, and we began "racial justice and equity audits" for our programs. Based on those discussions and audits, this year, we will complete institutional policies and/or early implementation rooted in justice and equity (explicitly including racial justice and equity): HR and governance recruitment, membership, communications, data collection, and decision-making processes for programs. We view this work as a value, practice, and responsibility, not a separate activity. It is essential to our mission, goals, and relevance – professionally and personally. We know current movements, challenges, and disparities are not new; current situations have only exacerbated them.



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Grant Criterion #2 – Primary Strategies

2A. Primary Strategies:

What is the primary strategy for your LOC?

(Check all that apply, 0 words.)

- ☒ Option 1: **Policy Advocacy**
☒ Option 2: **Civic Engagement**
☐ Option 3: **Grassroots Community Organizing**

2B. Success:

Share a past success that:

(a) Used the primary strategy you selected in 2A to help advance just systemic change.

(b) Was led by members of the organization, network, or coalition in this LOC.

(150 words max.)

Two years ago, Organization Z chaired Coalition A (community-led, cross-sector, and data-informed effort), which was instrumental in winning the passage and implementation of a tenants' rights policy that:

- (1) Empowered 1,200 families (A% families of color) to affordably remain in their homes.
- (2) Created and enforced four legal protections for tenants.
- (3) Prevented rent increases over B%.
- (4) Created standards for energy efficiency that lowered power bills by C%.
- (5) Resulted in our success last year: passage/implementation for identical efforts in Counties X and Y (last year).
- (6) Resulted in our present work: scale effort statewide (this year).

Grant Criterion #3 – Marginalized Communities

3A. Communities:

Who do you serve/empower for your LOC?

(25 words max.)

Residents and families in County Z, especially low-income families, single-parents, and families of color.

3B. Demographics:

Share data about who you serve/empower. This may include racial, social, environmental, and/or economic data about marginalized communities.

(150 words max.)

County Z: A% white. B% African American. C% Latinx. D% live below the poverty line (E% for African Americans, F% for Latinx). \$G is the average household income (\$H for African Americans, \$I for Latinx). \$J is the average household wealth (\$K for African Americans, \$L for Latinx). M% with high school degree or higher (\$N for African Americans, \$O for Latinx). P% are unemployed/underemployed (Q% for African Americans, \$R for Latinx). S% are uninsured (T% for African Americans, \$U for Latinx). V% of students are on free/reduced lunch (W% for African Americans, \$X for Latinx). \$Y is average monthly rent for a 2-bedroom apartment. Residents name housing and healthcare as top concerns and schools as top asset.

Grant Criterion #4 – Place Focus

4A. Place Focus:

Where is the primary place focus of your LOC?

(Check all that apply, 0 words.)

- ☒ Option 1: **Statewide Effort** 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.)
☒ Option 2: **Local or Regional Effort** outside metro Atlanta's 13 counties.

4B. Local or Regional:

If you selected local or regional, list cities, counties, or regions where you currently work.

(100 words max.)

Cites A, B, and C in County Z. Expansion into neighboring Counties X and Y.



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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:
(1) policy advocacy, (2) civic engagement, and (3) research.

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

- If so, list up to five examples of those communities:
(1) low-income communities living at 200% or more below the poverty line, (2) formerly incarcerated community, (3) black community, (4) Latinx community, and (5) faith community.

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

- If so, list up to five examples of those places:
(1) County Z, (2) County Y, (3) County X, and (4) statewide.

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

- If so, list up to five examples of those issues:
(1) low-housing and tenants' rights, (2) affordable and efficient utilities and energy, (3) social determinants of health, (4) intergenerational economic mobility, and (5) voting rights.

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

- If so, list up to five examples of those sectors:
(1) nonprofit sector with organizations and networks, (2) public sector with local and statewide agency allies, (3) business/finance with small business partnerships, (4) media/press with media campaign, and (5) academia with research partnership with a local university.

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

- If so, list up to five examples of those movements:
(1) civil and voting rights, (2) living wage, (3) women's rights, (4) immigrant rights, and (5) movement for black lives.

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.)

[Note: Answer either 6A or 6B.]

- (1) Local Coalition A – Zville, GA
- (2) Nonprofit Organization B – Zville, GA and Yville, GA
- (3) Place of Worship C – Zville, GA
- (4) Local Agency D – Zville, GA
- (5) Statewide Agency E – Aville, GA
- (6) Statewide Network F – Bville, GA

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.)

- (1) Foundation A
- (2) Foundation B
- (3) Foundation C
- (4) Foundation D



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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.)

[Responses will vary]