**LETTER OF CONNECTION (LOC)**

# INSTRUCTIONS

**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**](https://sapelofoundation.org/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)** – 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).

**Priorities:** In 2021, our trustees approved two long-term priorities for each of our main grant portfolios.

* **Grant Portfolio I: Environmental Justice & Protection** – (1) water and (2) climate/energy.
* **Grant Portfolio II: Social Justice** – (1) voting rights and (2) criminal justice.

**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: January 15.

* **Grant Portfolio II: Social Justice** – LOCs due: **July 15.**

## LOC Submission:

* Please type answers in the response fields (right side), double click on a box to check that box, and please note word limits.
* After completing this form, please save this form as a **Word document**.
* Email **info@sapelofoundation.org**with the completed LOC as a **Word** 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.

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| **Basic Information about the Organization Submitting the LOC** |
| **1. Organization Name:** |  |
| **2. Mission Statement:** |  |
| **3. Federal Tax ID Number:**(List fiscal sponsor’s name & tax ID number, if relevant.) |  |
| **4. Mailing Address of Primary Office:** |  |
| **5. Mailing Address of Other Office(s) in Georgia:** |  |
| **6. Main Phone Number:** |  |
| **7. Website:** |  |
| **8. Executive Director/Leader, Name:** |  |
| **9. Executive Director/Leader, Website for Online Bio:**(Leave blank if it is not available. Do not write text.) |  |
| **10. Primary Contact, Name & Title:** |  |
| **11. Primary Contact, Direct Phone Number:** |  |
| **12. Primary Contact, Email:** |  |
| **13. Number of Paid Full-Time Staff:** |  |
| **14. Number of Paid Part-Time Staff:** |  |
| **15. Number of Board Members:** |  |
| **16. Gender Identification of Board Members:**(List as ratios, e.g., 5 of 10 Female, 5 of 10 Male.) |  |
| **17. Race Identification of Board Members:**(List as ratios, e.g., 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? |  |
| **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? |  |
| **20. Revenue – Current Fiscal Year’s Projected Budget:** What is your organization’s total revenue for your current fiscal year’s projected budget? |  |
| **21. Expenses – Current Fiscal Year’s Projected Budget:** What is your organization’s total expenses for your current fiscal year’s projected budget? |  |
| **22. Revenue – Previous Fiscal Year’s Actual Budget:**What was your organization’s total revenue for your previous fiscal year’s actual budget?(Note dollar amount from Form 990, part 1, line 12.) |  |
| **23. Expenses – Previous Fiscal Year’s Actual Budget:**What was your organization’s total expenses for your previous fiscal year’s actual budget?(Note dollar amount from Form 990, part 1, line 18). |  |
| **24. Reserve Fund:** Does your organization have a reserve fund of any kind? If so, list its current amount. |  |
| **25. Type: Select the applicant type for your LOC.**(Check one type for an initial LOC submission.) | [ ] Type 1: **Organization** – LOC is submitted for your own organization.[ ] Type 2: **Formal Network** – LOC is submitted for a formal network of two or more organizations. [ ] 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? |  |
| **27. Focus: Select the focus of your LOC.**(Check one focus for an initial LOC submission.) | [ ] Focus 1: **General Work** [ ] Focus 2: **Project(s)** |
| **28. Stage: Select the lifecycle stage of your LOC.**(Check all that apply.) | [ ] Stage 1: **Start-up** [ ] Stage 2: **Growth**[ ] Stage 3: **Maturity** [ ] Stage 4: **Renewal** |
| **29. Did You Review our Strategic Direction Summary?** |  |
| **30. Grant Amount Requested**(Leave blank for an initial LOC submission.) | [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.

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| **Grant Criterion #1 – Mission, Values, & Portfolio Alignment** |
| **1A. Grant Portfolio:**Which grant portfolio fits your LOC?(Check all that apply, 0 words) | **Grant Portfolio I:** **Environmental Justice & Protection** [ ] Option 1: **Water** [ ] Option 1: **Climate/Energy****Grant Portfolio II: Social Justice**[ ] Option 1: **Voting Rights**[ ] Option 2: **Criminal Justice** |
| **1B. Objectives (Goals for Work):**What is the objective(s) of your LOC?(150 words max.) |  |
| **1C. Justice & Equity, Today:**At present, identify where you are on your justice and equity journey that explicitly includes racial justice and equity.1. Check all that apply to the organization, network, or collaboration for this LOC.
2. If your LOC is for a network or collaboration, respond based on how active members would answer on average.

(Check all that apply, 0 words.) |  [ ] Option 1: **Feeling new to this space and ready to learn** [ ] Option 2: **Seeking advice, trainings, TA, best practices, and wisdom**[ ] Option 3: **Having discussions and taking early steps with staff**[ ] Option 4: **Having discussions and taking early steps with board**[ ] Option 5: **Committing publicly to explicit values with staff and board**[ ] Option 6: **Setting explicit goals or benchmarks with staff and board**[ ] Option 7: **Assessing/developing practices across internal operations**[ ] Option 8: **Assessing/developing practices across external programs**[ ] Option 9: **Implementing/changing practices for internal operations**[ ] Option 10: **Implementing/changing practices for external programs**[ ] Option 11: **Evaluating implemented practices across internal operations**[ ] Option 12: **Evaluating implemented practices across external programs**[ ] Option 13: **Advocating/championing externally with staff and board**[ ] Option 14: **Baking it into our cultural DNA holistically and intentionally**[ ] Option 15: **Other: Let’s discuss it** |
| **1D. Justice & Equity, Goals:**In the next year, how will you pursue your justice and equity journey? (150 words max.) |  |

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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:1. Used the primary strategy you selected in 2A to help advance just systemic change.
2. Was led by members of the organization, network, or coalition in this LOC.

(150 words max.) |  |

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| **Grant Criterion #3 – Marginalized Communities** |
| **3A. Communities:**Who do you serve/empower for your LOC?(25 words max.) |  |
| **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.) |  |

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| **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.) |  |
| **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** – 1: [ ] Option 2: **Secondary Office(s)** – 1: [ ] , 2 or More: [ ] Option 3: **Active Chapter(s)** – 1: [ ] , 2 or More: [ ] Option 4: **Full-Time, Paid Staff Member(s)** – 1: [ ] , 2 or More: [ ]  Option 5: **Part-Time, Paid Staff Member(s)** – 1: [ ] , 2 or More: [ ]  Option 6: **Consultant(s)** – 1: [ ] , 2 or More: [ ] Option 7: **Board Member(s)** – 1: [ ] , 2 or More: [ ] Option 8: **Advisory Committee Member(s)** – 1: [ ] , 2 or More: [ ]  Option 9: **Individual Donor(s) or Foundation(s**) – 1: [ ] , 2 or More: [ ] Option 10: **Active, Dues-Paying Member(s)** – 10%: [ ] , 25% or More: [ ] **Events & Projects**Option 1**: [Pre-COVID] Event(s) with 50+ People** – 1: [ ] , 2 or More: [ ]  Option 2: **[Pre-COVID] Stakeholder Meeting(s)** – 1: [ ] , 2 or More: [ ]  Option 3: **Project(s) or Initiative(s)** – 1: [ ] , 2 or More: [ ] Option 4: **Focus Group(s) or Polling Effort(s)** – 1: [ ] , 2 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:1. Check all that apply.
2. 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 (example: advocacy & research):

[ ] Option 2: **Success connecting agendas across two or more communities.*** + If so, list up to five examples of those communities (example: women, faith community, Latino community):

[ ] Option 3: **Success connecting agendas across two or more places.*** + If so, list up to five examples of those places (example: Albany, Savannah, & Macon):

[ ] Option 4: **Success connecting agendas across two or more issues.*** + If so, list up to five examples of those issues (example: voting, health, & housing):

[ ] Option 5: **Success connecting agendas across two or more sectors.*** + If so, list up to five examples of those sectors (example: public, private, nonprofit, & media):

[ ] Option 6: **Success connecting agendas across two or more movements.*** + If so, list up to five examples of those movements (example: climate change, civil rights, & women’s rights):
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| **Grant Criterion #6 – Collaborative Approaches** |
| **6A. Collaborators:**Please list your top collaborators. Include:1. Organization names.
2. Cities or towns where their offices/full-time staff are based year- round.

(100 words max.) |  |
|  **6B. Foundations:**List foundations that funded your organization, network, or collaboration in the last year. (100 words max.) |  |

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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.

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| **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.) |
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