

# Sample Letters

**T**his appendix contains samples of nine types of letters you may wish to send at some time to nonprofits you're involved with:

- Request for financial information
- Request to reduce mailings
- Request for anonymity
- Notification of withdrawal of support
- Response to \$50,000 request for endowment support
- Response to request for lead gift
- Notification to accompany donation
- Inquiry to make a matching gift
- Letter hiring a professional

## Request for Financial Information

**Langston F. Calloway**

32 Greenup Avenue, #3 • Butte, MT 84569  
(406) 465-8934 (phone & fax) • lcalloway@aol.com

Date

Mr. Anthony Farah  
Development Director  
Western Association for Historic Preservation  
1245 E. 17th St., Suite 19  
Helena, MT 77401

Dear Mr. Farah,

As a [current or potential] donor to your organization [or, As an interested member of the community in which your organization operates], I would like information about the administrative, program, and fundraising expenses of your agency. Would you be kind enough to send me copies of your most recent 990 Forms? I understand that these records are, by law, to be made available to the public upon request. I would appreciate copies of these documents within the next month so that I can consider the Association for my annual charitable contributions. Thank you so much for your time and attention.

Sincerely,

Langston F. Calloway

cc: Parker G. Forbes, Chair of Finance Committee

## Request to Reduce Mailings

**Langston F. Calloway**

32 Greenup Avenue, #3 • Butte, MT 84569  
(406) 465-8934 (phone & fax) • lcalloway@aol.com

Date

Mr. Zev Mendel, Development Director  
Mt. Zion Hospital Foundation  
8925 Clarinda Street, Room 234  
Los Angeles, CA 90047

Dear Mr. Mendel,

I hope you can help me solve a problem. I am concerned about the amount of mail that I receive from your organization, among others. As an environmentalist, I would like to request the following: I would like to be moved from your regular mailing list to an anonymous donor or "special services" list. If I am contacted only once a year, either through a mailing or with an in-person visit, which may include the mailing of one letter and a copy of your annual report, then I will feel that I am being adequately updated about the foundation's work. If you can fulfill this request, I pledge to send the foundation a minimum of \$1,000/year for three years within sixty (60) days of receiving the annual report or the one annual mailing. If after three months I am still receiving regular mailings from the foundation, then I will assume that you are not able to grant my request and I will withdraw my pledge. Thank you very much.

Langston F. Calloway

P. S. Please continue to list me in your donor list by name. If the list is by amount, then simply list me as anonymous, or "a loving former patient."

cc: Barbara Rossman, President, Board of Trustees

## Request for Anonymity

**Langston F. Calloway**

32 Greenup Avenue, #3 • Butte, MT 84569  
(406) 465-8934 (phone & fax) • lcalloway@aol.com

Date

Ms. Joan C. Chin, Development Director  
Asian American Lawyers for the Arts  
1736 W. Magnuson Street, Suite 212  
Minneapolis, MN 46742

Dear Ms. Chin,

I understand that you have just joined AALA as the new development director. It's a wonderful organization, and one that I enthusiastically support. Although I'm sure you've been briefed about the major donors to the organization, I would just like to make sure that you understand the conditions for my continued support. I am an anonymous donor. What this means for me is that I

- Do not wish to be listed by name in any publications or lists, unless it is under an "anonymous" category
- Am happy to receive mailings, but do not want to be solicited by anyone other than you or the executive director
- Do not want my donor history printed out and included in any committee meeting or board discussions
- Do not want to be called for any reason, including invitations to events or requests to volunteer, except by you or the executive director
- Do not want my name discussed with any other staff or board member, or with any other nonprofit director or staff, even in passing.

My anonymity is important to me. I've worked very consciously to create my privacy and I have every expectation that you will respect and help me maintain it. If you would like to talk with me about this further, please don't hesitate. I realize that AALA may not have many anonymous donors who desire this level of detail. So if you have questions, I will do whatever I can to help you fully understand my request and its implications.

Thank you so much for your time.

Sincerely,

Langston F. Calloway

P.S. Please keep this letter permanently in your file.

## Notification of Withdrawal of Support

**Samantha Eldridge**

17487 Elder Drive • Chattanooga, TN 37403  
(421) 465-8934 (phone & fax) • samel@earthlink.net

Date

Mr. Andrew W. Vaughn  
Development Director  
The Martin and Lila Harrison Trust for Children  
245 E. 72nd Street, Suite 547  
New York, New York 10021

Dear Mr. Vaughn,

I have been a donor to the Trust for Children for the last six years. And while I greatly value the important work you do, the priorities for my giving have changed, and I feel that a seven-year commitment is the maximum that I want to make to most organizations. As a result, the enclosed contribution of \$ \_\_\_\_\_ will be my last to the Trust. During the next six months, I will be happy to work with you to identify and solicit a donor who can replace my gift. Please give me a call or write me in February so we can talk about this in more detail.

Sincerely,

Samantha Eldridge

cc: Khiem Thi Truong, Executive Director

## Response to \$50,000 Request for Endowment Support

**Samantha Eldridge**

17487 Elder Drive • Chattanooga, TN 37403  
(421) 465-8934 (phone & fax) • samel@earthlink.net

Date

Ms. Cristina O'Donnell, Executive Director  
The Ligeti Foundation  
5396 Forest Avenue, Suite 23  
Pittsburgh, PA 19403

Dear Ms. O'Donnell,

After many years of supporting your organization, I was recently asked to contribute to the Ligeti Foundation's endowment. In order to help me make a decision, I need to more fully understand your interest in establishing an endowment, and I have some specific questions I would appreciate your answering.

- Does the foundation have a cash reserve fund of at least three months of its annual budget so that income from this endowment would not be used for operating expenses?
- For what activities do you plan to use income from the endowment?
- Do you have an investment committee that includes programmatic experts as well as financial people? Does it include people who are clear about socially responsible investments that are in alignment with the foundation's mission and programs?
- May I have a list of the members of both your board and your investment committee and a copy of the foundation's investment policies and current holdings?

Once I receive the information listed above, I will give the request for endowment support serious consideration. In the event that I do make the \$50,000 gift, a condition of that gift will be that I receive a regular copy of the board minutes, including the financial reports.

Thank you so much for your time and attention.

Sincerely,

Samantha Eldridge

## Response to Request for Lead Gift

**Samantha Eldridge**

17487 Elder Drive • Chattanooga, TN 37403  
(421) 465-8934 (phone & fax) • samel@earthlink.net

Date

Mr. Robert C. Dover, Executive Director  
The Brady School  
5396 Forest Avenue, Suite 23  
Pittsburgh, PA 19403

Dear Mr. Dover,

I am writing in response to your inquiry last month into the possibility of my making a lead gift to the Brady School's "Millennium Campaign." Let me say first how honored I am to have been asked and how initially overwhelming it was to be asked to give ten times as much as I have ever given to the school. But upon reflection, I realize that if change is really going to occur, then creating and maintaining a pool of money for scholarships and to support faculty creativity is absolutely vital. So thank you for asking me. Here are some questions to which I would like your response before I send back my pledge form:

1. I would like to make a lead gift, but not be specifically public about it. It would come from the family foundation. Would that work for you?
2. How could I/we structure my gift so that it leverages more large donations? For example, could we make it a gift that is contingent on the campaign receiving three other gifts at \$250,000 or above?
3. I am not so interested in getting tied up with the public factor of this gift as I am in the gift serving as a catalyst to others. Do you need me to put in writing why I feel so strongly about the needs for the school's growth?

I would be happy to meet privately with other donors who may be willing to consider gifts of \$250,000 or more, but just don't need the public acknowledgment.

Thank you.

Samantha Eldridge

P. S. I want to be sure that my campaign gift goes to provide scholarships for minority students and money for staff. I will add this to my pledge form; this is really important to me and to the future of the school. I also want to be sure that my gift is invested in socially responsible instruments, so please send me a copy of the school's investment policies.

## Notification to Accompany Donation

**Alison Goldberg**  
310 West Frances Street  
Boston, MA 02110

Date

Aneira Puttaswamy  
The Attic Program for Youth  
483 North 6th Street  
Wilmington, NC 28401

Dear Aneira:

In support of the work of The Attic Program for Youth, I have enclosed a \$10,000 contribution to be directed toward general operating expenses. Please send a letter to me at the address above acknowledging this contribution for my taxes.

I have also included a summary of “Engaged Philanthropy,” which is my personal giving plan. I am trying to give order to my personal giving and use it as an example to encourage other young peoples’ giving. If you know of anyone who would benefit from reading my plan and learning why I have chosen to do my personal giving in this way, I would be happy to speak with them.

Hope to talk with you soon.

Best wishes,

Alison Goldberg

## Inquiry to Make a Matching Gift

**Norman Young**  
182 South Street  
Boston, MA 02130

Date

Martha Tai  
Campaign to Protect Chinatown  
5278 Massachusetts Avenue, #6E  
Boston, MA 02111

Dear Ms. Tai,

I am renewing some contributions for this year and have been thinking about strategies to leverage my donations. Would it be helpful to the Campaign to Protect Chinatown if I offered a challenge grant? The organization's work is so important to the community; I would like to see many more individuals supporting it.

I would appreciate an opportunity to discuss this option with you further. I'd be interested in hearing if there are specific fundraising and/or membership goals that the prospect of a matching grant would help you to achieve.

I realize that this kind of gift entails additional work for your office. Please let me know what amount would make a challenge campaign worthwhile for you. My donation will not be contingent on the Campaign raising the full match amount. I also would be willing to sign fundraising letters as well as mail them to some associates of mine.

Sincerely,

Norman Young

## Letter Hiring a Professional

**Jeanette Lloyd and Erin Gibson**

4906 South Ellis Avenue

Chicago, IL 60637

Date

Dear Friends and Associates,

We would like to hire someone to provide administrative and program staffing support for our family foundation. Ideally, this would be someone who shares our commitment to furthering social change. We are seeking the following skills and qualities in candidates. If you know of anyone who may meet these qualifications, we'd be happy to send them a job description and contact them further, or they could contact us directly.

The position will be situated at our home office, ten hours per week. The main tasks will be to assist with filing, grants management, phone calls, some site visits, and bookkeeping.

The key skills and experience we seek in a candidate are

- Excellent organizational skills
- Great written and verbal communication skills
- Experience working with diverse populations in diverse communities
- Broad-based knowledge about community needs and at least x years working within community organizations
- At least two years of management experience
- Experience in negotiating contracts and paying vendors

The highest qualities we seek in the person are integrity, passion for the work of the foundation, a willingness and desire to learn, ability to work independently, and a sense of humor.

We need someone who can be trusted with confidential information, is good at meeting deadlines, and is able to handle pressure from people who want to access or influence us personally.

Salary will be based on experience and reviewed in light of capacity to achieve stated goals.

We appreciate your passing information about this job widely to your friends and associates.

Best wishes,

Jeanette Lloyd and Erin Gibson