

GRANTMAKING

## Sample Letters: Declination, Pending/Request For Additional Information, Award, Agreement

ASF

### SAMPLE LETTERS

#### SAMPLE DECLINATION LETTERS:

#### SAMPLE DECLINATION LETTER (1 OF 7):

Dear,

The (Foundation name) has received your request for a grant application and funding guidelines. Enclosed is information regarding the (Foundation name). Unfortunately, we will not be able to assist you. Because we are a small foundation with limited resources, we restrict our support to organizations and agencies within (geographic area).

We wish you success in obtaining assistance from other sources.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE DECLINATION LETTER (2 OF 7):**

Dear,

The (Foundation name) appreciated the opportunity to consider your proposal to fund (organization name). Unfortunately, we are not able to provide the requested grant.

The Foundation receives a large number of requests for assistance and can only fund a few of them. As a general rule, we fund only in (geographic area). We regretfully have to decline many commendable applications. Our decision in no way indicates a negative assessment of your organization or proposal. It merely speaks to the overwhelming needs of our community and to our desire to respond to them in a balanced and equitable manner. On behalf of our Foundation, we wish you continued success.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE DECLINATION LETTER (3 OF 7):**

Dear,

The (Foundation name) has reviewed your initial request for support dated (date).

We regret to inform you that it was not approved for further consideration as it does not appear to be within the Foundation's giving focus at this time.

Thank you for letting us know about your program.

Yours truly,

(Name)

(Title)

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**GRANTMAKING****SAMPLE DECLINATION LETTER (4 OF 7):**

Dear,

Thank you for your interest in the (Foundation name). Unfortunately, the Foundation does not fund scholarships for individuals or give grants to individuals who are not affiliated with an organization with 501(c)(3) non-profit, tax-exempt status. The non-profit regulations under which the foundation operates limits our allocation of funds to only these types of organizations.

The Foundation exclusively funds projects which meet our guidelines as innovative models of progressive social change in the areas of Children and Families, Disadvantaged Groups, and/or the Environment. We primarily fund small, grassroots organizations that are working to change the underlying conditions that create social problems such as racism, sexism, poverty and environmental destruction, among others.

If you have any questions or would like to receive a copy of our guidelines and application, please do not hesitate to call. I wish you luck with your project.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE DECLINATION LETTER (5 OF 7):**

Dear,

Thank you for providing us with information regarding (organization name).

I regret I cannot be optimistic about potential funding opportunities for your project. It does not fall within our guidelines and priorities make it difficult to respond favorably to all requests.

We appreciate your interest in (Foundation name) and wish you success in meeting your goals.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE DECLINATION LETTER (6 OF 7):**

Dear,

Because your request of (date) met the qualifications for continued review in an initial screening, we asked that you submit a complete proposal for further examination.

Your proposal was considered along with others at a recent review session but was not approved for funding because other applicants more closely met the Foundation's goals.

Thank you for all of your efforts and cooperation in providing the information required by our guidelines for consideration of your request. We wish you success in meeting your objectives.

Yours truly,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE DECLINATION LETTER (7 OF 7):**

(Postcard)

Thank you very much for your recent correspondence to the (Foundation name).

Unfortunately your request does not meet our funding guidelines.

Nonetheless, we wish you success.

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**GRANTMAKING****Review/Pending Request for Additional Requirements Letters:****SAMPLE REVIEW PENDING/REQUEST FOR ADDITIONAL REQUIREMENTS LETTER (1 OF 5):**

Dear,

Thank you for your interest in (Foundation name). We have received your material indicating a request for funding. Enclosed you will find a brochure with a description of the grantmaking guidelines and application procedures that have been established by (Foundation name) for donor-advised funding.

Please review the guidelines carefully to determine if your project meets (Foundation name)'s funding criteria. If after reviewing the criteria, you wish to submit a formal proposal, please complete the attached "**Proposal Summary Sheet**" and the "**New Proposal Check List**" and return them along with your proposal to (Foundation name). Incomplete proposals will not be considered.

When the proposal is received, a decision will be made within 30-60 days. During the review process, you may be contacted by telephone and/or a site visit may be requested. When a decision is reached, you will be notified by mail.

Again, thank you for your interest. We look forward to receiving your completed application.

Peace,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE REVIEW PENDING/REQUEST FOR ADDITIONAL REQUIREMENTS  
LETTER (2 OF 5):**

Dear,

We have received your material indicating a new request for funding. Please complete the attached two forms: the "Proposal Cover Sheet" and the "New Proposal Check List" and return them to (Foundation name).

During the review process, you will be contacted and a site visit may also be requested. When a decision is reached, you will be notified.

Thank you for your interest. We look forward to receiving your completed application.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE REVIEW PENDING/REQUEST FOR ADDITIONAL REQUIREMENTS  
LETTER (3 OF 5):**

Dear,

We have received your request of (date) for (the amount) for (project description).

Your request will be presented to the Foundation Directors at their grant selection meeting in (month). Between now and then, if there are any points needing clarification or additional information required, we will be in touch with you. Likewise, if a site visit is in order, we will contact you about arranging it.

Best wishes for your organization's important work.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE REVIEW PENDING/REQUEST FOR ADDITIONAL REQUIREMENTS  
LETTER (4 OF 5):**

(Postcard)

Dear (name)

We have received your full proposal packet.

The board will be meeting to make our funding decisions at the end of (month).

We will be in contact with you by phone sometime before then with any questions we might have regarding your proposal.

Sincerely,  
(Foundation name)

**GRANTMAKING**

**SAMPLE REVIEW PENDING/REQUEST FOR ADDITIONAL REQUIREMENTS  
LETTER (5 OF 5):**

(Postcard)

Thank you for contacting (Foundation name). Your grant application has been received and is scheduled to be reviewed by the Distribution Committee on (date).

- The grant application is complete
- The grant application is incomplete. Please submit the following:
  - Detailed proposal
  - One-page summary
  - IRS tax-exemption letter
  - Board of Trustees list
  - Current operating budget
  - Most recent annual report or audited financial statement (one copy only)

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**GRANTMAKING****AWARD LETTERS:****SAMPLE AWARD LETTER (1 OF 4):**

Dear,

The Distribution Committee of the (Foundation name) considered your grant request at a meeting held on (date). It is my pleasure to inform you that a grant of \$[dollar amount] was awarded to (organization name) to be used (project description). Enclosed is an official check in the amount of \$[dollar amount].

A report on this grant award is requested. Please complete and return the enclosed Grant Reporting form no later than (date).

It is our understanding that (organization name) has been recognized by the Internal Revenue Service as a tax-exempt organization described in section 501(c)(3) of the Internal Revenue Code and is classified as other than a private foundation. If there is any change in this status and/or classification, please notify us at once. In the event that your tax-exempt status is revoked, expenditure of grant funds should cease, and all unspent funds must be returned to the Foundation.

This grant is subject to the terms set forth in the Attachment to this letter entitled "General Terms of Grant." **Please acknowledge your receipt of this check and your agreement with the terms of this letter by signing and returning the LETTER OF ACCEPTANCE as soon as possible.**

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE AWARD LETTER (2 OF 4):**

Dear,

I am pleased to inform you that the (Foundation name) has approved \$[dollar amount] for your project (project description).

Enclosed is the Letter of Agreement for your review and signature. Once we receive your signed Letter of Agreement, we will remit a check in the amount cited above.

On behalf of the (Foundation name), may I extend our wishes for your success and admiration for your vision, direction and project plans. We look forward to working with you and sharing in the success for those you serve.

Peace,

(Name)

(Title)

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## GRANTMAKING

### SAMPLE AWARD LETTER (3 OF 4):

Dear,

We are pleased to inform you that the Directors of the [Foundation name] Foundation reviewed your recent grant request and have awarded a grant in the amount of \$[dollar amount] (see Grant Agreement for payment schedule). It is the intention of the Board that the grant be used toward the (project description).

Enclosed you will find a grant agreement formalizing our grant relationship. This Grant Agreement explains the responsibilities and expectations of both parties in our grant relationship. **Please sign the Grant Agreement and return the entire original to me within ten (10) days of receipt.** Please keep a copy for your records. Once the Grant Agreement is received in our office, the grant monies will be dispersed.

As the Grant Agreement indicates, the Foundation requests an interim six-month report and a final report when your project is completed. I have included, for your information and guidance, a copy of our "Guidelines for Preparing Progress Reports." Please use this as a reference in preparing your reports. We request that, to the extent possible, you follow the format and questions asked when developing your grant report. We thank you for your cooperation. If you have any questions, please do not hesitate to call.

On behalf of the Board and staff of the Foundation, please know that we are happy to support the important work you are doing. We wish you much success in your efforts as you undertake the responsibilities of this grant.

Sincerely,

(Name)

(Title)

**GRANTMAKING**

**SAMPLE AWARD LETTER (4 OF 4):**

Dear,

Thank you for submitting your report. I am pleased to enclose payment number (of payments) in the amount of \$[dollar amount] to assist the project described in the original grant request from (organization name) for (project description).

If you have any questions or would like to discuss your project with us, we encourage this partnership. You may reach us by phone, fax or e-mail at the numbers on the bottom of this letter.

Peace,

(Name)

(Title)

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## GRANTMAKING

### AGREEMENT/ACCEPTANCE LETTERS:

#### SAMPLE AGREEMENT/ACCEPTANCE LETTER (1 OF 2):

Dear,

In response to your proposal of (date), the trustees of the (Foundation name) have approved a donation in the amount of \$[dollar amount] to (organization name), subject to our receipt of this signed letter of agreement.

Conditions:

- 1) The grant is to be used solely for (project description) as described in your proposal of (date).
- 2) Grantee warrants and represents that its receipt of this grant will not adversely affect grantee's status as other than a private foundation within the meaning of Sec.509(a) of the Internal Revenue Code of 1986.
- 3) Grantee will furnish to (Foundation name) any information concerning a change or a proposed change in grantee's exempt status.
- 4) If grantee's exempt status changes, (Foundation name) reserves the right to have all remaining grant funds immediately returned.
- 5) Any funds not used or committed for the specific purpose of the grant within the specified term [specify length] must be returned to (Foundation name) unless otherwise authorized in writing.
- 6) Grantee must provide a written report as soon as possible after close of the grant period describing conclusions, progress, and/or status of grant objectives including how funds were expended to attain the objectives.
- 7) The Foundation desires that all resources of Grantee be dedicated to accomplishing its charitable purposes. Accordingly, Grantee agrees not to recognize the Foundation, its Board members or staff, or this grant with certificates, plaques, or similar mementos.

**GRANTMAKING**

Please signify your agreement to the foregoing terms and conditions by having a duly authorized officer sign and return a copy of this letter.

Yours truly,

(Name)

(Title)

ACCEPTED:

Organization's Name:

By:

Title:

Date:

**GRANTMAKING**

**SAMPLE AGREEMENT/ACCEPTANCE LETTER (2 OF 2):**

Letter of Acceptance

I have read the grant award letter from the (Foundation name) dated (date) and hereby do agree and accept the terms set forth.

ACCEPTED AND AGREED:

(Signature of Authorized Representative)

(Please print name and title)

Organization Name:

Date: