



## From investor to organization:

*An easy way for a donor to proactively engage organizations in this important conversation. You can provide a personalized version of this letter to the organizations that you support. The delivery of this letter is ideal when you make a significant gift towards their mission.*

**Below is a DRAFT letter to foster engagement & Awareness Accord conversations with the organizations you support. In yellow are fields that can be customized with your individual information.**

### **DATE**

Dear XYZ Organization

We are delighted to be a part of your organization's community. Our most sincere wish is that this financial support accelerate the momentum of your organization's mission. As investors committed to maximizing the impact of our donation, we are using the concepts outlined in the Awareness Accord to guide our engagement with your organization.

In the spirit of partnership, we are providing you with this letter to create a relationship of honest communication and trust between us and organization. We appreciate how tricky this can be in the donor-organization relationship, but we want to let you know that we strive to steer into some of the difficult power dynamics that can impede our relationship. This letter serves as evidence that we wish to engage in a new way.

First, we want to share some of our guiding values that drive our engagement with organization.

### **Examples- personalize and/or add your own:**

- **Gratitude-** We have been very fortunate, and this new relationship further evidences this. Your organization affords us the opportunity to engage our philanthropy in a cause that is meaningful to us. We are entering this relationship feeling fortunate to be a partner to you.
- **Curiosity-** We are eager to learn more about this cause from you and your organization. We know that your work is difficult and we hope you can feel safe sharing both the achievements and the struggles with us.
- **Innovation-** We want to quicken the pace of positive change in the world, which means we should try new things. We understand that your organization is juggling a lot of variables and that testing new ideas is an important way of improving services.
- **Trust and integrity-** We want to be an asset to your mission, not an obstacle. We understand that it can be difficult to juggle the different pressures to communicate with



donors. To mitigate this potential confusion, we would like to let you know that we prefer to hear about your organization's progress in the following way:

- *Specify email, call, in-person meeting, physical letter, other*
  - *Specify frequency*
- **Making generosity contagious-** We strive to make philanthropy a part of our family's values. Through making gifts like this, we aspire to engage other generations to be a part of this journey. We may reach out to you for guidance on best ways to do this while continuing to support the mission of your organization. We welcome your honest feedback on this process and goal.

#### **Other value and description**

We are providing your organization with a gift of XYZ to support your efforts during insert period of time. In the spirit of trust and fostering your organization's ability to innovate and respond to emerging challenges, these funds are unrestricted.

We are honored to be a part of your important efforts.

**Signature**